

TECH TALKS

With Frontier
Customer Support

Your Topics

For Your Success

Today's Topic: PCM Workbench Promote

LISA APPLGATE | FRIEDMAN INTERNAL SUPPORT CONSULTANT

The Details

- All participants are muted.
- Please post your questions in Chat or use the Q&A tab. We will answer them at the end of the presentation.
- This session is being recorded. The replay link will be sent to all registered customers.
- Presenter: Lisa Applegate, Internal Support Consultant at Friedman Corp.
 - In her third year at the company
 - Completed a year-long model consolidation project using PCM Workbench

What is PCM Promote?

- Allows configuration development to be moved from one environment to another
- Can copy an entire model, particular perspectives of a model or pre-marked details from the option, pricing, data layer, rule, matrix and manufacturing perspectives.
- Allows an edit run before running an update
- Allows running at a specified time
- Provides a listing of the items that are processed in the promotion process

Overview of Topics

- Security Settings for Using Promote
- Setup and what will be copied
- How Promote works with caching
- Promoting between LPARs
- Working with Condition as Models
- How to read Promote Data
- How pricing works
- Q&A

Security Settings Workbench and Promote

- Standard Security Roles
 - PCMWB full access
 - PCMWBR inquiry only access
 - NO access to Add, Save Changes, Save as New and Delete Buttons
 - WBPRM access to Promote Functionality

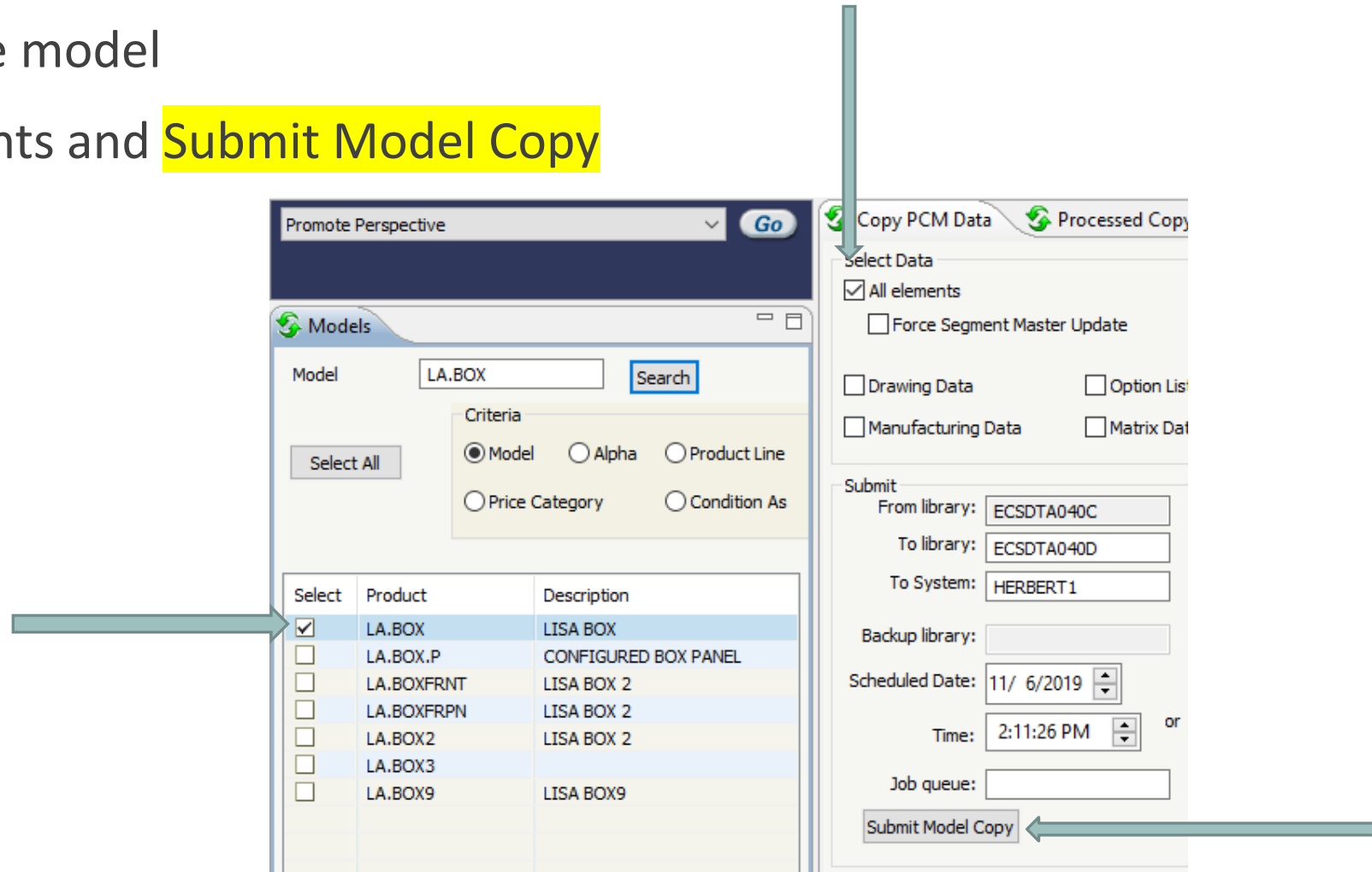
If Frontier Security is active and no Workbench roles exist for the user profile or associated security group, the user will not have authority to use Workbench and/or the Promote

Promote Setup

- Must be logged into the environment you are copying data from
- Should only promote into an inactive environment with the target environment's asyncs down
- If working in a group, can promote individual elements—communication is key
- Can copy one, multiple or all of the following types of data:

Complete Model copy

- Select the whole model
- Select all elements and **Submit Model Copy**



The screenshot shows a software interface for copying model data. On the left, a 'Models' pane displays a table of models. The 'LA.BOX' model is selected, and a 'Select All' button is visible. The 'Copy PCM Data' dialog box is open, showing options for selecting data and submitting the copy. The 'All elements' checkbox is checked, and the 'Submit Model Copy' button is highlighted.

Select	Product	Description
<input checked="" type="checkbox"/>	LA.BOX	LISA BOX
<input type="checkbox"/>	LA.BOX.P	CONFIGURED BOX PANEL
<input type="checkbox"/>	LA.BOXFRNT	LISA BOX 2
<input type="checkbox"/>	LA.BOXFRPN	LISA BOX 2
<input type="checkbox"/>	LA.BOX2	LISA BOX 2
<input type="checkbox"/>	LA.BOX3	LISA BOX 2
<input type="checkbox"/>	LA.BOX9	LISA BOX9

Copy PCM Data | Processed Copy

Select Data

All elements

Force Segment Master Update

Drawing Data Option List

Manufacturing Data Matrix Data

Submit

From library: ECSDTA040C

To library: ECSDTA040D

To System: HERBERT1

Backup library: _____

Scheduled Date: 11/ 6/2019

Time: 2:11:26 PM or

Job queue: _____

Submit Model Copy

What gets copied with a Promote?

- Drawing Variables:
 - CAD_CROSS

- Manufacturing:
 - Product Structure (PSP)
 - Routings (R1P)
 - Routing Comments (R2P)
 - Work Center Definition (WCP)
 - Resource usage by Product (RRP)
 - Optimizer Configuration Segments (CGOP)

What gets copied (cont.)

- Segment
 - Segment Master (CG1P)
 - Segment by Model (CGP)
- Option List
 - Conditions (EDP)
 - Option to Condition Linking (OCP)
 - Omitted Options (OPP)
 - Model to Option List Linking (PIP)
 - Extended Option Description (SSEP)
 - Option List Entries (SSP)

What gets copied (cont.)

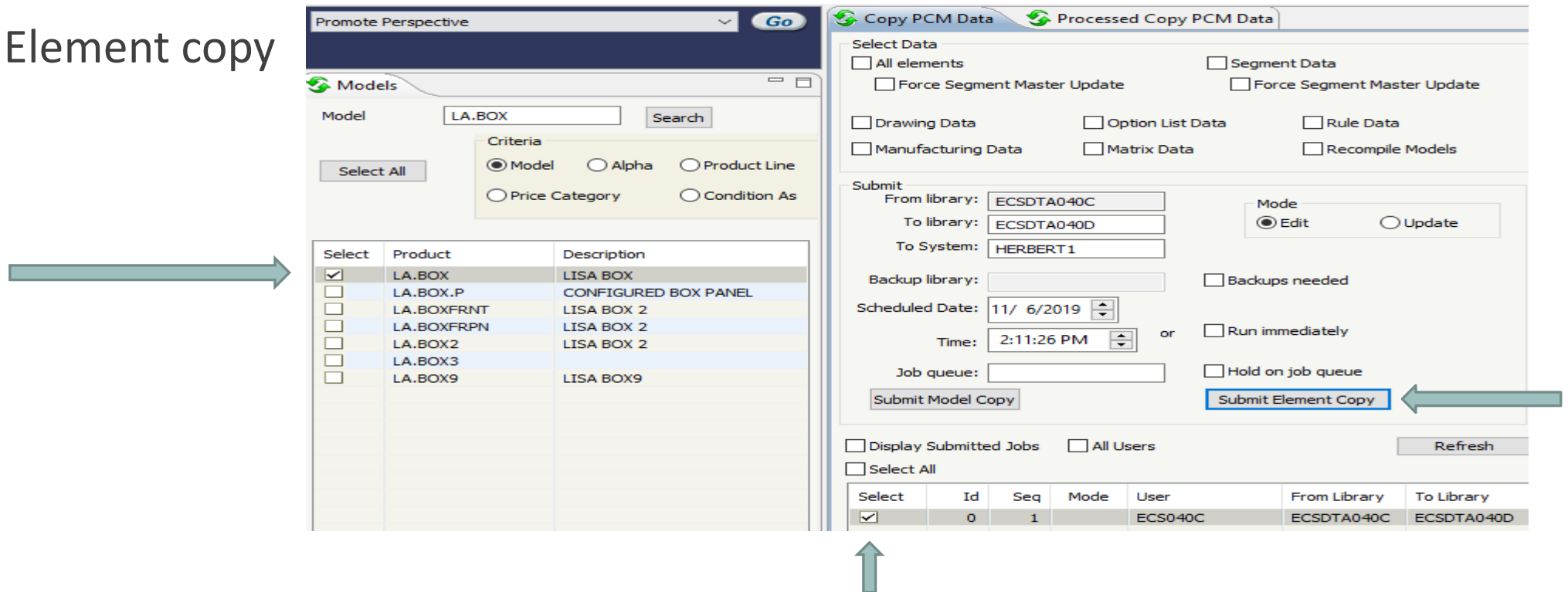
- Matrix
 - Formula (Header (FXP), Formula (FRP))
 - Inventory Segment (ISP)
 - Matrices (Header (MKP), Detail (MJP))
 - Product Master (PMP)
 - Segment Groups (SGP)
- Pricing Data:
 - Price Matrices (PAP)
 - Price Lists(PCP)
 - Customer Catalogue (CCP TPP)
- PCM Keyword:
 - PCMKWFP
 - PCMKWUP

What gets copied (cont.)

- Data Layer Definition (DWP)
- PB04 Promote eQuote Grid/Global Changes Data
- Rules
 - Conditions (EDP)
 - Formula (Header (FXP), Formula (FRP))
 - Rule Definition (MCP)
 - Matrices (Header (MKP), Detail (MJP))
 - Segment Groups (SGP)
 - Text Builders (Header (FXP), Formula (FRP))

Selective copy

- You can limit copy to a data element preselected from another perspective (i.e. matrix or option list)
- Saves processing time and system resources
- Submit Element copy



The screenshot shows two windows from a software application. The left window, titled 'Promote Perspective', has a search bar with 'LA.BOX' and a 'Go' button. Below it are radio buttons for 'Criteria': Model (selected), Alpha, Product Line, Price Category, and Condition As. A table below lists products and descriptions:

Select	Product	Description
<input checked="" type="checkbox"/>	LA.BOX	LISA BOX
<input type="checkbox"/>	LA.BOX.P	CONFIGURED BOX PANEL
<input type="checkbox"/>	LA.BOXFRNT	LISA BOX 2
<input type="checkbox"/>	LA.BOXFRPN	LISA BOX 2
<input type="checkbox"/>	LA.BOX2	LISA BOX 2
<input type="checkbox"/>	LA.BOX3	LISA BOX 2
<input type="checkbox"/>	LA.BOX9	LISA BOX9

The right window, titled 'Copy PCM Data', has tabs for 'Copy PCM Data' and 'Processed Copy PCM Data'. It contains several checkboxes for data types: All elements, Segment Data, Drawing Data, Option List Data, Rule Data, Manufacturing Data, Matrix Data, and Recompile Models. Below these are 'Submit' options: From library (ECSDTA040C), To library (ECSDTA040D), To System (HERBERT1), Backup library, Scheduled Date (11/ 6/2019), Time (2:11:26 PM), and Job queue. There are radio buttons for 'Mode': Edit (selected) and Update. At the bottom, there are checkboxes for 'Display Submitted Jobs' and 'All Users', and a 'Refresh' button. A table at the bottom shows a single row with a checked 'Select' box:

Select	Id	Seq	Mode	User	From Library	To Library
<input checked="" type="checkbox"/>	0	1		ECS040C	ECSDTA040C	ECSDTA040D

Promote with Caching

- If caching is turned on the to environment, you will need to clear the cache for any promoted models
- You may need to clear the model as well as clear any matrices.

Promote with Caching

- Caching is found under PCM (version 4.0 or 3.3)
- PCM Cache Management

Friedman Corporation ECS040C | [Logout](#)

PCM Cache Management

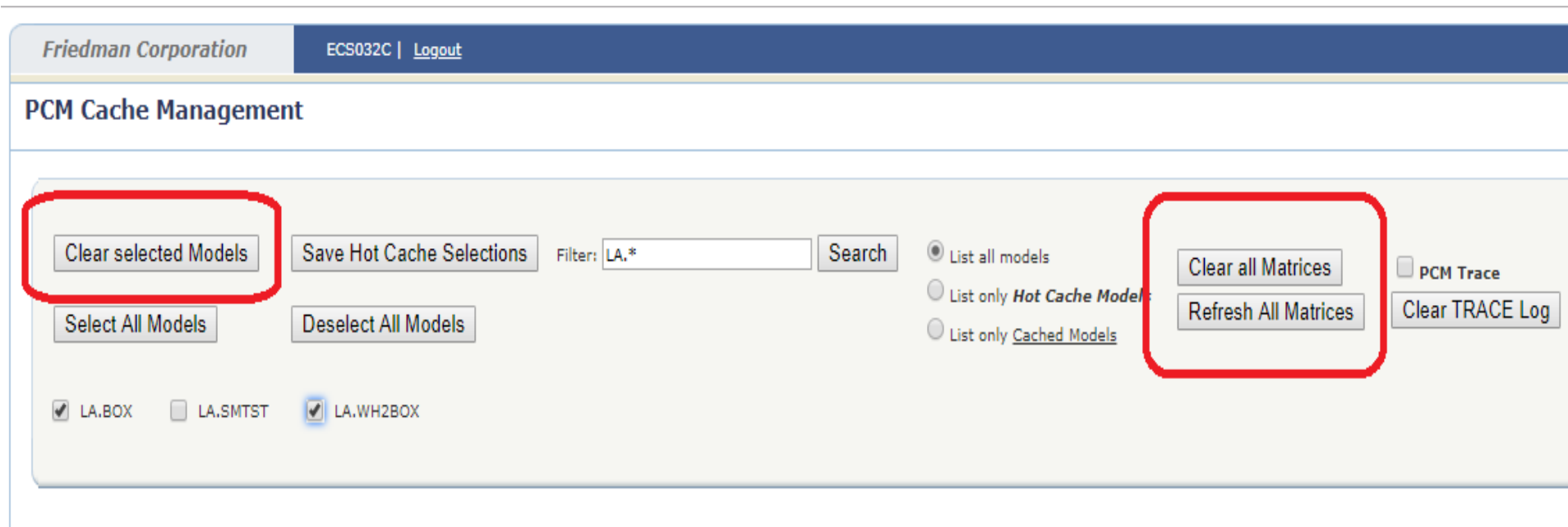
Filter:

List all
 List only *Hot Cache Models*
 List only Cached Models
 List auto-recompile models

<input type="checkbox"/>	Model	Compiled
<input type="checkbox"/>	CARCASS	2019-09-09 08:38:09
<input type="checkbox"/>	CHECKER	2019-08-26 11:44:45
<input type="checkbox"/>	CR.MODEL	2019-10-09 09:42:28
<input type="checkbox"/>	DT.PIC	2019-09-17 16:21:07
<input type="checkbox"/>	FA.BED.U	2019-10-14 16:23:00
<input type="checkbox"/>	FA.GLOPM	2019-10-02 11:17:00
<input type="checkbox"/>	FA.MODELSET	2019-10-08 15:20:04
<input type="checkbox"/>	FA.OPTMATRX	2019-09-13 10:07:09
<input type="checkbox"/>	FA.PCM	2019-10-08 15:20:18
<input checked="" type="checkbox"/>	FA.PCM2	2019-09-09 13:38:17
<input checked="" type="checkbox"/>	FA.WAGON	2019-09-30 12:23:27
<input checked="" type="checkbox"/>	FARMERTABLE	2019-08-27 08:13:59
<input type="checkbox"/>	FRONTSET	2019-09-09 08:38:24
<input type="checkbox"/>	HC	2019-10-24 13:22:02
<input type="checkbox"/>	HC-CLONE	2019-08-26 12:35:15
<input type="checkbox"/>	HC-COLORCHARGE	2019-09-16 16:58:11
<input type="checkbox"/>	HC-PULLSCHG	2019-09-16 16:58:11

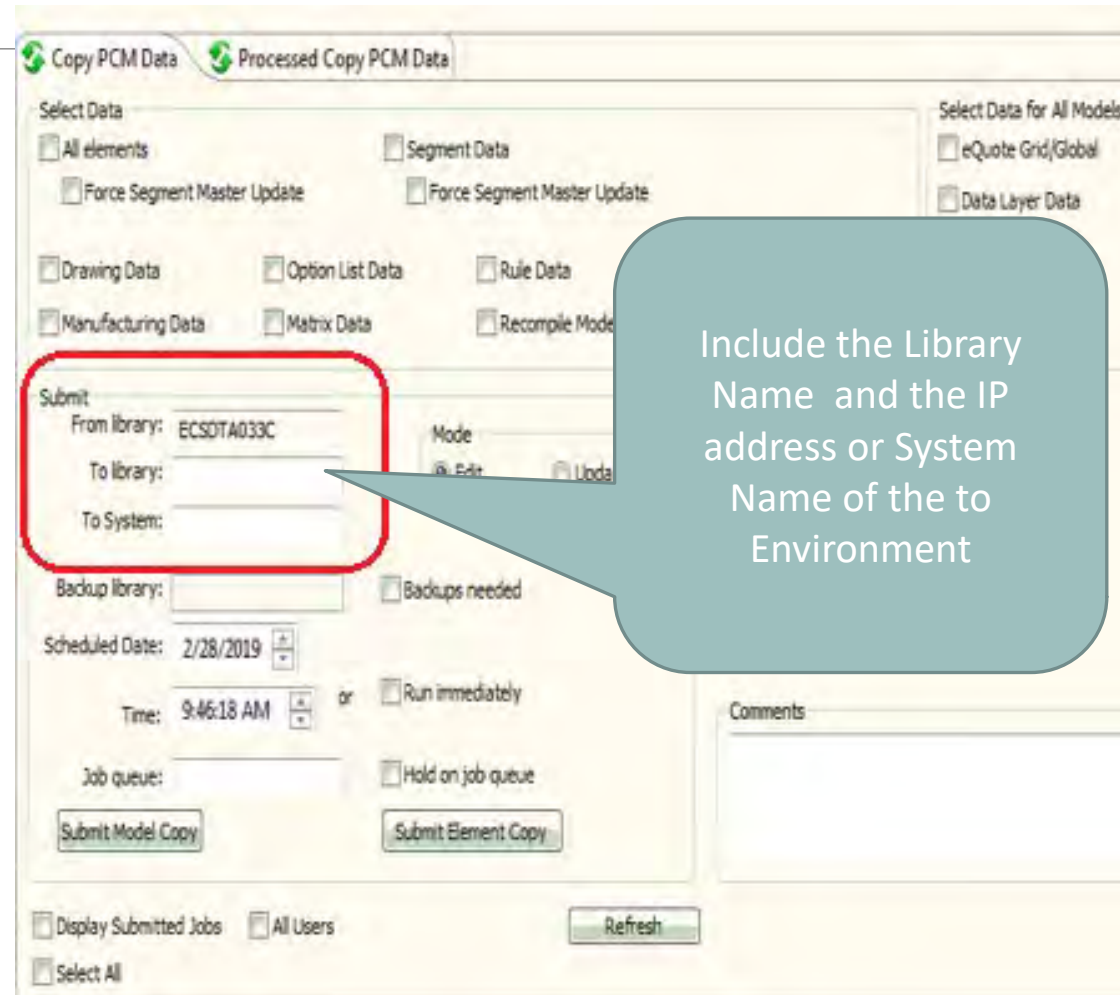
Promote with Caching

Version 3.2 or earlier
Found under System Admin



The screenshot shows the 'PCM Cache Management' interface. At the top, there is a header with 'Friedman Corporation' and 'ECS032C | Logout'. Below the header, the title 'PCM Cache Management' is displayed. The main content area contains several controls: a 'Clear selected Models' button (highlighted with a red box), a 'Save Hot Cache Selections' button, a filter input field with 'LA.*' and a 'Search' button, a 'Select All Models' button, a 'Deselect All Models' button, a list of radio buttons for 'List all models' (selected), 'List only Hot Cache Models', and 'List only Cached Models', a 'Clear all Matrices' button (highlighted with a red box), a 'Refresh All Matrices' button, a 'PCM Trace' checkbox, and a 'Clear TRACE Log' button. At the bottom, there are three checkboxes for 'LA.BOX' (checked), 'LA.SMTST', and 'LA.WH2BOX' (checked).

Promote between LPARS



Copy PCM Data Processed Copy PCM Data

Select Data

All elements Segment Data

Force Segment Master Update Force Segment Master Update

Drawing Data Option List Data Rule Data

Manufacturing Data Matrix Data Recompile Model

Select Data for All Models

eQuote Grid/Global

Data Layer Data

Submit

From library: ECSOTA033C

To library: _____

To System: _____

Mode

Edit Update

Backup library: _____ Backups needed

Scheduled Date: 2/28/2019

Time: 9:46:18 AM or Run immediately

Job queue: _____ Hold on job queue

Submit Model Copy Submit Element Copy

Comments

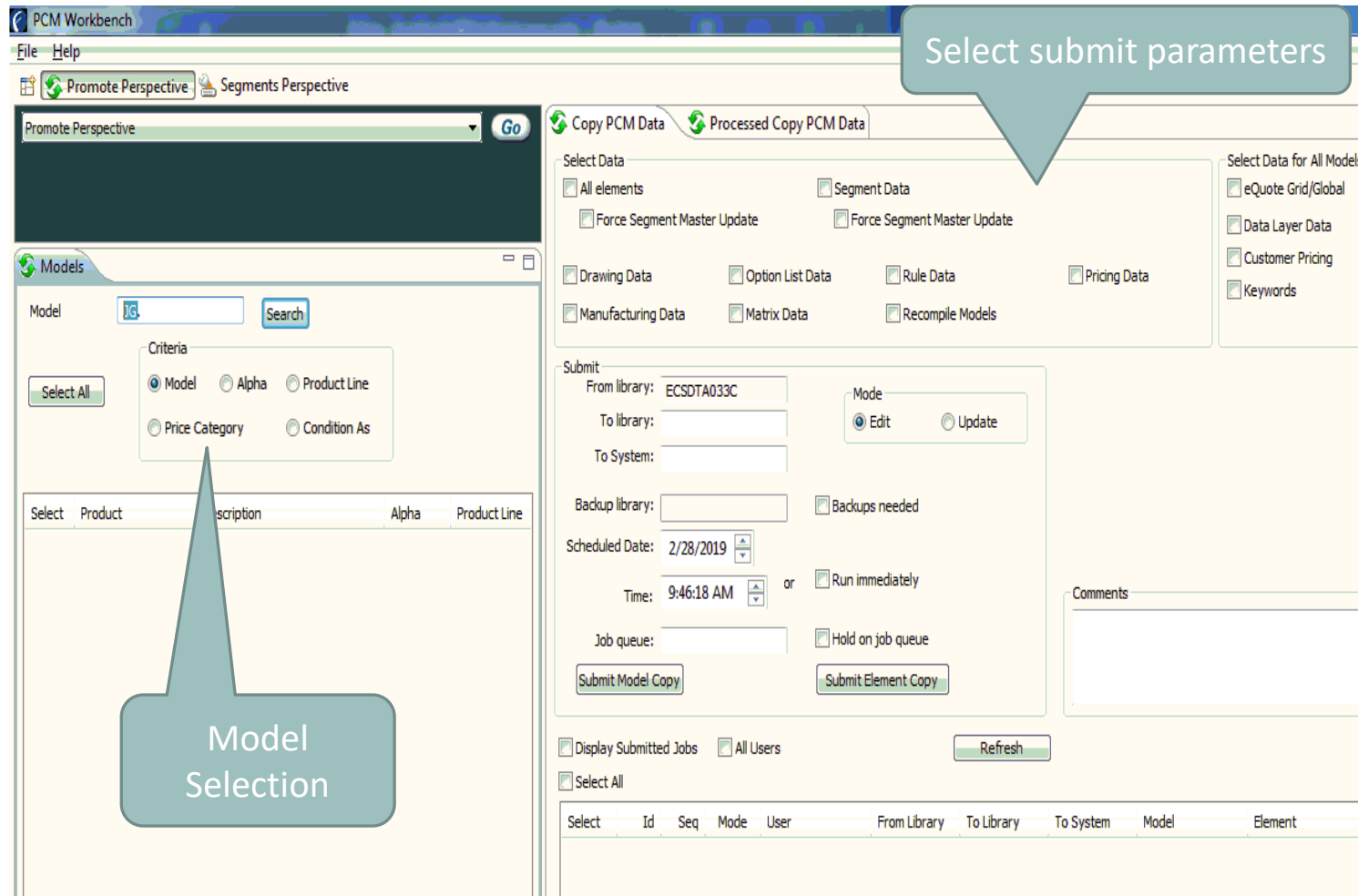
Display Submitted Jobs All Users Refresh

Select All

Include the Library Name and the IP address or System Name of the to Environment

Must have same user account on to Environment

Promote perspective



Model Selection

Select submit parameters

PCM Workbench
File Help
Promote Perspective Segments Perspective
Promote Perspective Go
Models
Model [input] Search
Criteria
Select All
 Model Alpha Product Line
 Price Category Condition As

Select	Product	Description	Alpha	Product Line

Select submit parameters

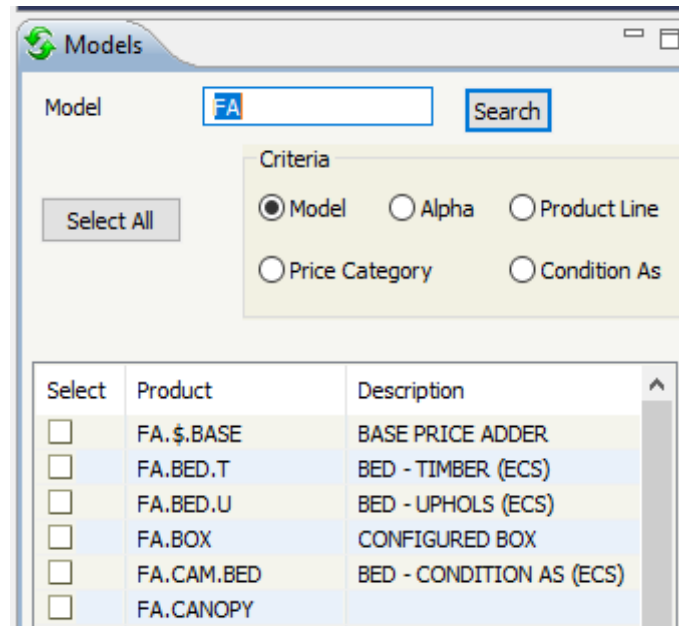
Copy PCM Data Processed Copy PCM Data
 Select Data
 All elements Segment Data
 Force Segment Master Update Force Segment Master Update
 Drawing Data Option List Data Rule Data Pricing Data
 Manufacturing Data Matrix Data Recompile Models
 Select Data for All Models
 eQuote Grid/Global
 Data Layer Data
 Customer Pricing
 Keywords
 Submit
 From library: ECSDTA033C Mode Edit Update
 To library: [input]
 To System: [input]
 Backup library: [input] Backups needed
 Scheduled Date: 2/28/2019 or Run immediately
 Time: 9:46:18 AM Hold on job queue

 Display Submitted Jobs All Users
 Select All

Select	Id	Seq	Mode	User	From Library	To Library	To System	Model	Element

Selecting a model

- Product number



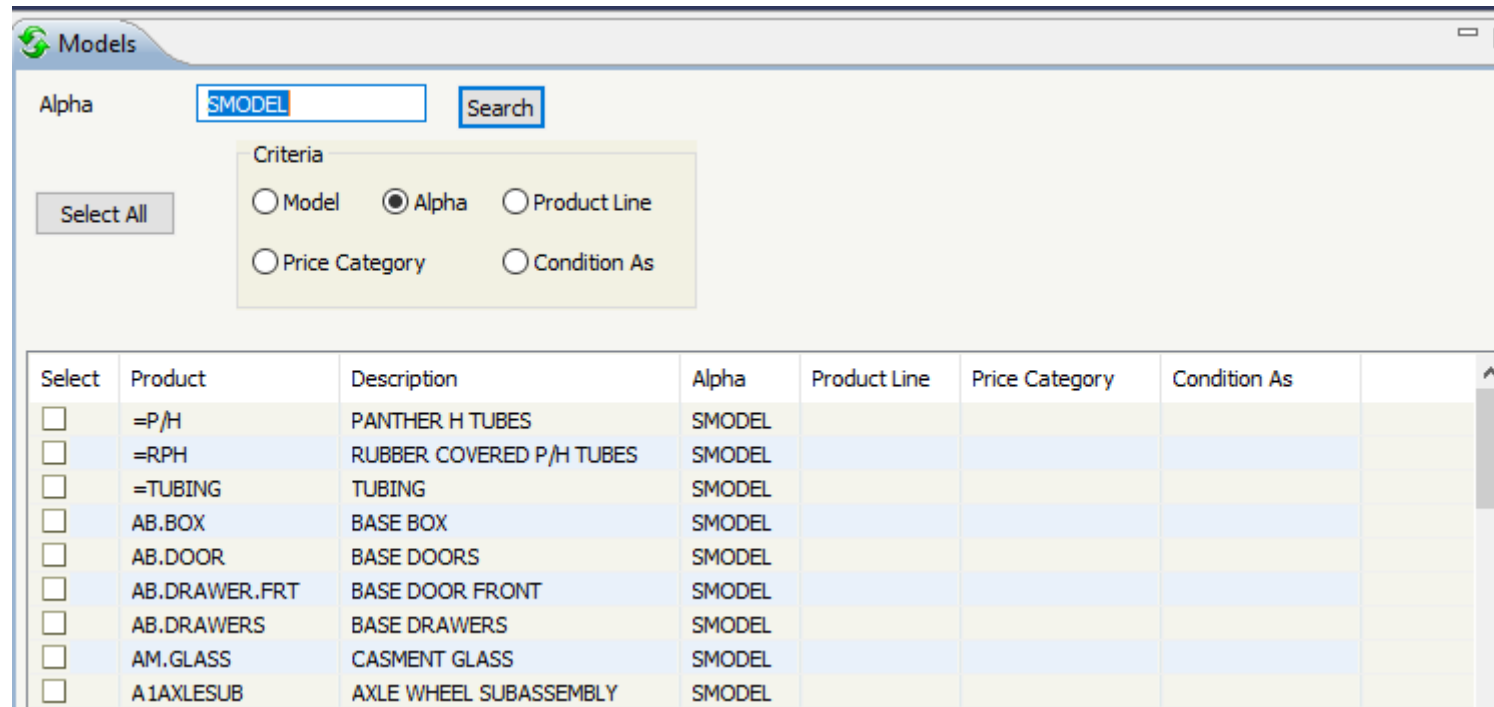
The screenshot shows a window titled 'Models' with a search bar containing 'FA' and a 'Search' button. Below the search bar is a 'Criteria' section with radio buttons for 'Model' (selected), 'Alpha', 'Product Line', 'Price Category', and 'Condition As'. A 'Select All' button is also present. Below the criteria is a table with columns 'Select', 'Product', and 'Description'.

Select	Product	Description
<input type="checkbox"/>	FA.\$.BASE	BASE PRICE ADDER
<input type="checkbox"/>	FA.BED.T	BED - TIMBER (ECS)
<input type="checkbox"/>	FA.BED.U	BED - UPHOLS (ECS)
<input type="checkbox"/>	FA.BOX	CONFIGURED BOX
<input type="checkbox"/>	FA.CAM.BED	BED - CONDITION AS (ECS)
<input type="checkbox"/>	FA.CANOPY	

- Can use single character (i.e. J will return all models that begin with J)
- Cannot use * wildcard

Selecting a model

- Alpha Code (Generic Field of PM70)

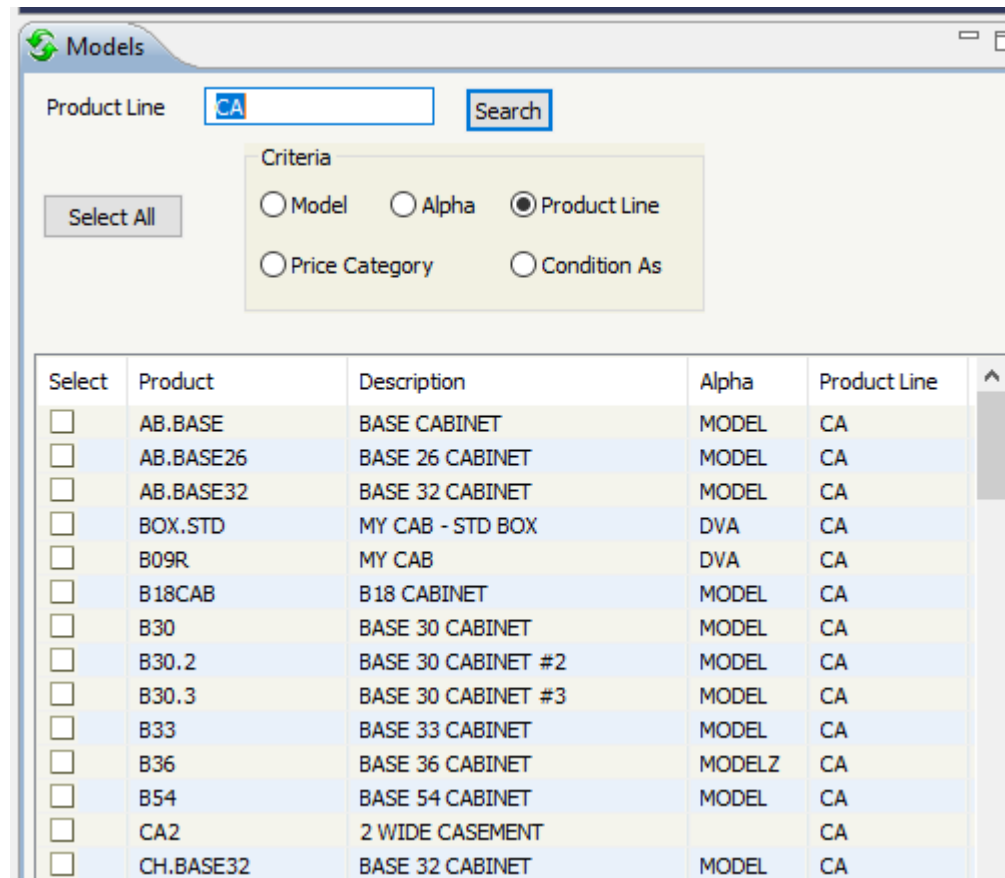


The screenshot shows a software window titled "Models" with a search bar containing "SMODEL" and a "Search" button. Below the search bar is a "Criteria" section with radio buttons for "Model", "Alpha", "Product Line", "Price Category", and "Condition As". The "Alpha" radio button is selected. A "Select All" button is also present. Below the criteria is a table with the following data:

Select	Product	Description	Alpha	Product Line	Price Category	Condition As
<input type="checkbox"/>	=P/H	PANTHER H TUBES	SMODEL			
<input type="checkbox"/>	=RPH	RUBBER COVERED P/H TUBES	SMODEL			
<input type="checkbox"/>	=TUBING	TUBING	SMODEL			
<input type="checkbox"/>	AB.BOX	BASE BOX	SMODEL			
<input type="checkbox"/>	AB.DOOR	BASE DOORS	SMODEL			
<input type="checkbox"/>	AB.DRAWER.FRT	BASE DOOR FRONT	SMODEL			
<input type="checkbox"/>	AB.DRAWERS	BASE DRAWERS	SMODEL			
<input type="checkbox"/>	AM.GLASS	CASMENT GLASS	SMODEL			
<input type="checkbox"/>	A1AXLESUB	AXLE WHEEL SUBASSEMBLY	SMODEL			

Selecting a model

- Product Line (Prod Line PM70)

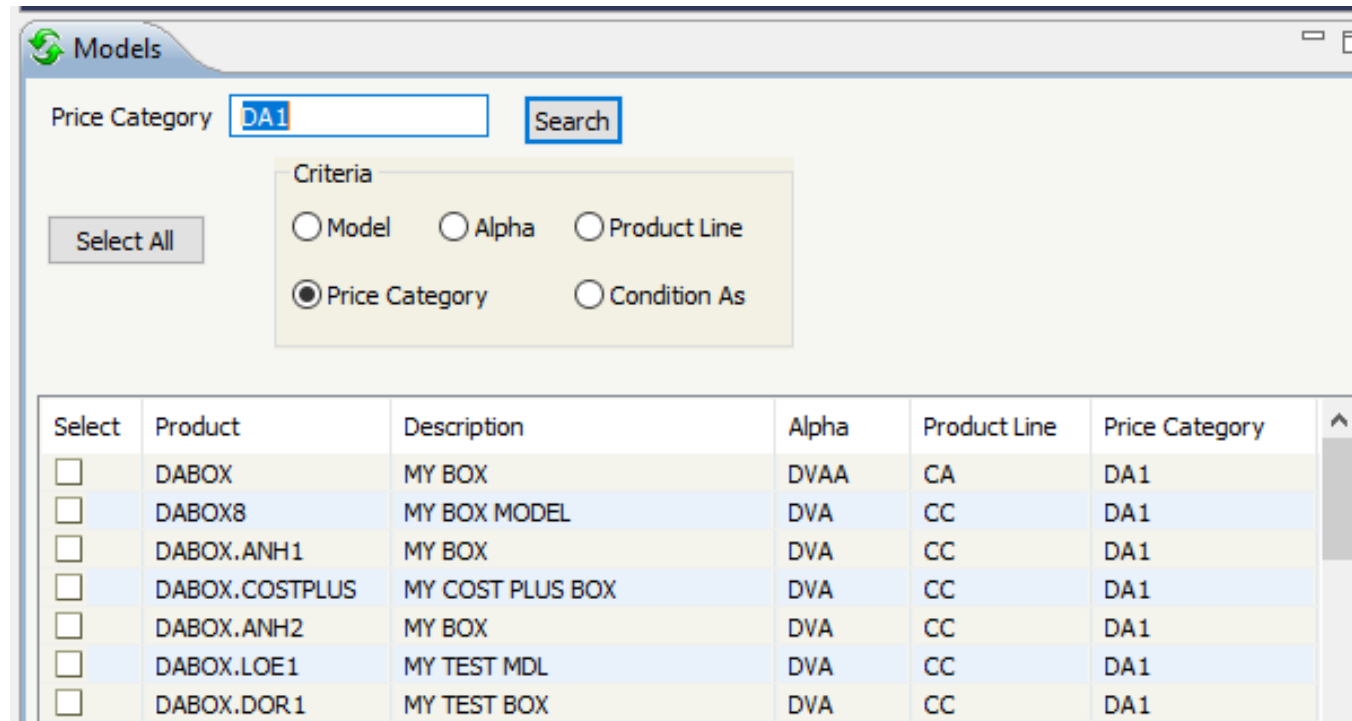


The screenshot shows a software window titled 'Models'. At the top, there is a 'Product Line' search box containing the text 'CA' and a 'Search' button. Below this is a 'Criteria' section with five radio button options: 'Model', 'Alpha', 'Product Line' (which is selected), 'Price Category', and 'Condition As'. A 'Select All' button is located to the left of the criteria section. Below the criteria is a table with the following columns: 'Select', 'Product', 'Description', 'Alpha', and 'Product Line'. The table contains 15 rows of data, each with an unchecked checkbox in the 'Select' column.

Select	Product	Description	Alpha	Product Line
<input type="checkbox"/>	AB.BASE	BASE CABINET	MODEL	CA
<input type="checkbox"/>	AB.BASE26	BASE 26 CABINET	MODEL	CA
<input type="checkbox"/>	AB.BASE32	BASE 32 CABINET	MODEL	CA
<input type="checkbox"/>	BOX.STD	MY CAB - STD BOX	DVA	CA
<input type="checkbox"/>	B09R	MY CAB	DVA	CA
<input type="checkbox"/>	B18CAB	B18 CABINET	MODEL	CA
<input type="checkbox"/>	B30	BASE 30 CABINET	MODEL	CA
<input type="checkbox"/>	B30.2	BASE 30 CABINET #2	MODEL	CA
<input type="checkbox"/>	B30.3	BASE 30 CABINET #3	MODEL	CA
<input type="checkbox"/>	B33	BASE 33 CABINET	MODEL	CA
<input type="checkbox"/>	B36	BASE 36 CABINET	MODELZ	CA
<input type="checkbox"/>	B54	BASE 54 CABINET	MODEL	CA
<input type="checkbox"/>	CA2	2 WIDE CASEMENT		CA
<input type="checkbox"/>	CH.BASE32	BASE 32 CABINET	MODEL	CA

Selecting a model

- Price Category (Price cat PM70)

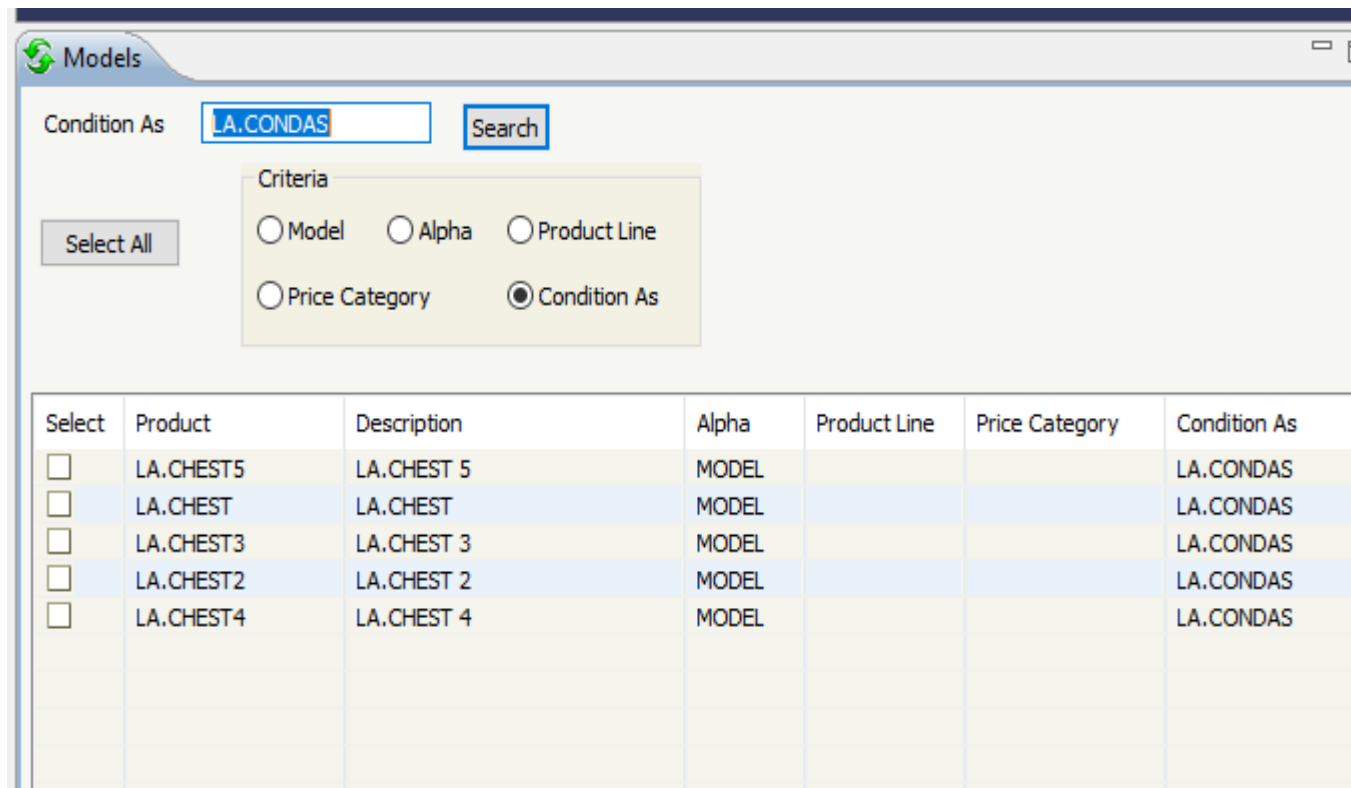


The screenshot shows a software window titled "Models". At the top, there is a "Price Category" input field containing "DA1" and a "Search" button. Below this is a "Criteria" section with five radio button options: "Model", "Alpha", "Product Line", "Price Category" (which is selected), and "Condition As". To the left of the criteria is a "Select All" button. Below the criteria is a table with the following columns: "Select", "Product", "Description", "Alpha", "Product Line", and "Price Category".

Select	Product	Description	Alpha	Product Line	Price Category
<input type="checkbox"/>	DABOX	MY BOX	DVAA	CA	DA1
<input type="checkbox"/>	DABOX8	MY BOX MODEL	DVA	CC	DA1
<input type="checkbox"/>	DABOX.ANH1	MY BOX	DVA	CC	DA1
<input type="checkbox"/>	DABOX.COSTPLUS	MY COST PLUS BOX	DVA	CC	DA1
<input type="checkbox"/>	DABOX.ANH2	MY BOX	DVA	CC	DA1
<input type="checkbox"/>	DABOX.LOE1	MY TEST MDL	DVA	CC	DA1
<input type="checkbox"/>	DABOX.DOR1	MY TEST BOX	DVA	CC	DA1

Selecting a model

- Condition as Model (PCM condition model PM70)

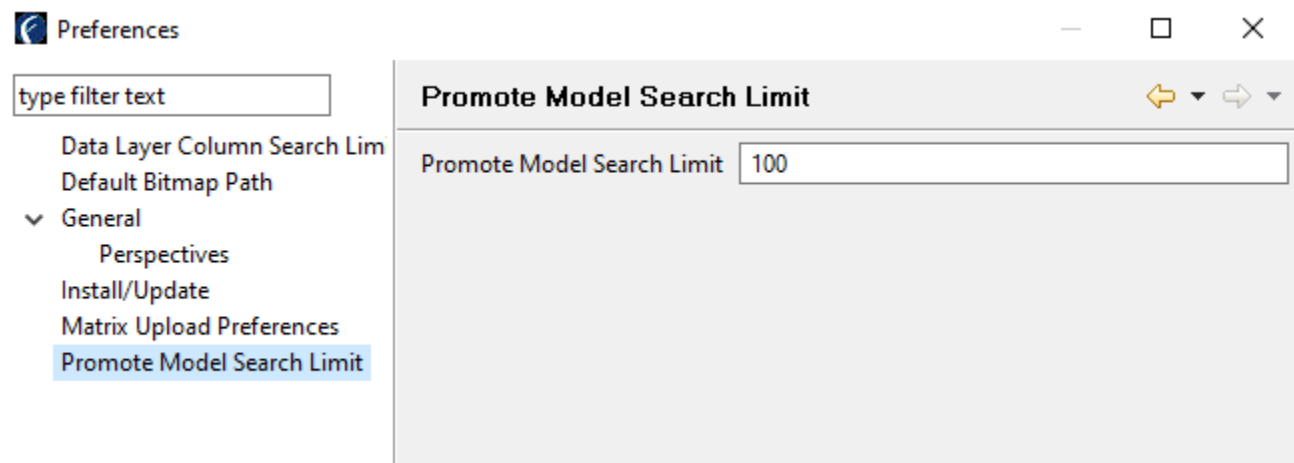


The screenshot shows a software window titled "Models". At the top, there is a search bar with the text "LA.CONDAS" and a "Search" button. Below the search bar is a "Criteria" section with five radio button options: "Model", "Alpha", "Product Line", "Price Category", and "Condition As". The "Condition As" option is selected. To the left of the criteria is a "Select All" button. Below the criteria is a table with the following data:

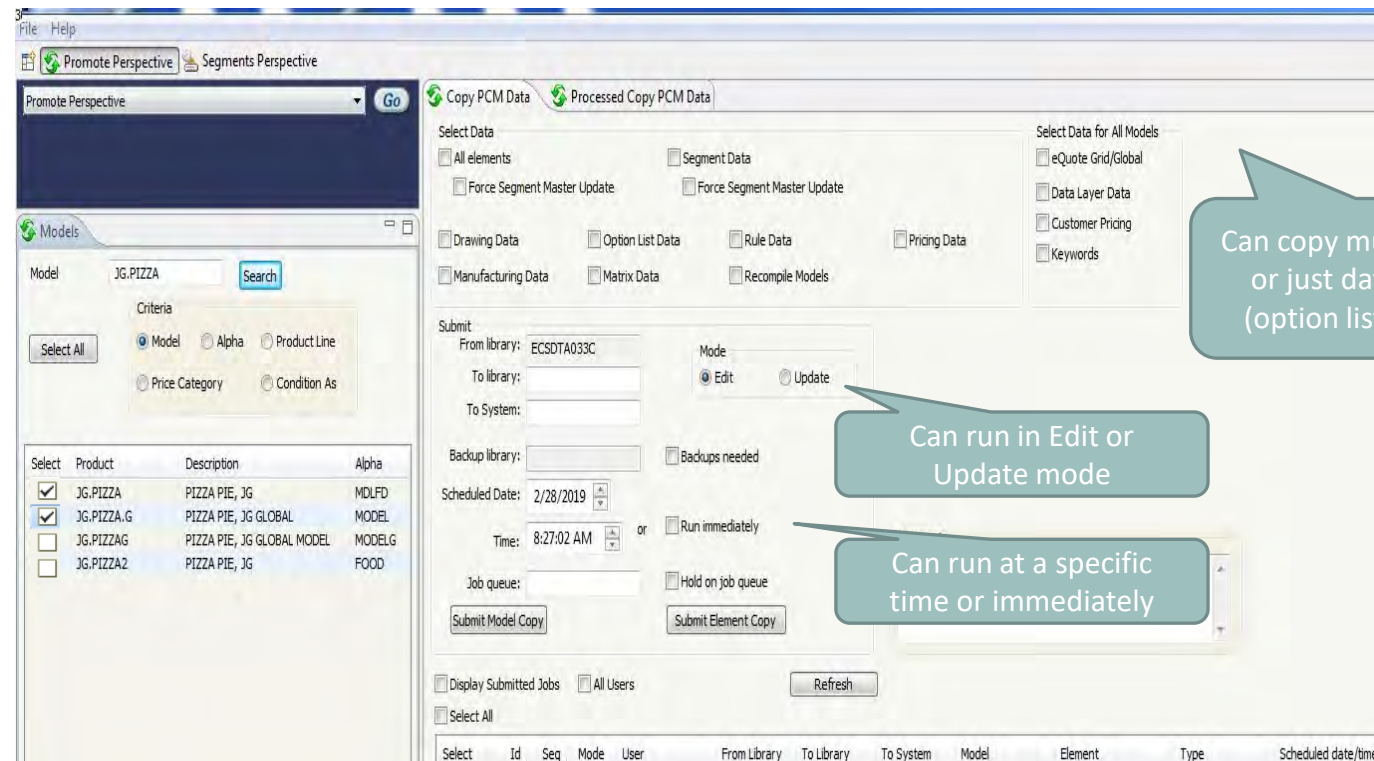
Select	Product	Description	Alpha	Product Line	Price Category	Condition As
<input type="checkbox"/>	LA.CHEST5	LA.CHEST 5	MODEL			LA.CONDAS
<input type="checkbox"/>	LA.CHEST	LA.CHEST	MODEL			LA.CONDAS
<input type="checkbox"/>	LA.CHEST3	LA.CHEST 3	MODEL			LA.CONDAS
<input type="checkbox"/>	LA.CHEST2	LA.CHEST 2	MODEL			LA.CONDAS
<input type="checkbox"/>	LA.CHEST4	LA.CHEST 4	MODEL			LA.CONDAS

Model Search Limit

- Can limit the number of models returned from a search.
- You can set the model display search limit up to 9999 models
- Setting found under Help/Preferences/General



Promote Perspective



The screenshot shows the 'Promote Perspective' window with a 'Models' list on the left and a 'Copy PCM Data' configuration panel on the right. The 'Models' list includes:

Select	Product	Description	Alpha
<input checked="" type="checkbox"/>	JG.PIZZA	PIZZA PIE, JG	MDLFD
<input checked="" type="checkbox"/>	JG.PIZZA.G	PIZZA PIE, JG GLOBAL	MODEL
<input type="checkbox"/>	JG.PIZZAG	PIZZA PIE, JG GLOBAL MODEL	MODELG
<input type="checkbox"/>	JG.PIZZA2	PIZZA PIE, JG	FOOD

The 'Copy PCM Data' panel includes sections for 'Select Data' (with checkboxes for All elements, Segment Data, Drawing Data, etc.), 'Submit' (with fields for From library, To library, To System, and Mode), and 'Scheduled Date' (with a time field and 'Run immediately' checkbox). Callouts highlight that data can be copied in 'Edit or Update mode' and can be scheduled to run at a specific time or immediately.

Important: You need to be signed in the environment that you are copying data from

Timing the Promote

Scheduled

- Set a specific date and time to run the promote.
- Avoid conflicts with users being in the system

Hold on Job Queue

- Set Allows you to schedule the job to be run at night or on the weekend when users are off the system.
(You will need to manually release the job).

Run immediately

- If the copy to library represents a Frontier environment currently being used by users, running the job immediately is not recommended since files might be locked.

Backups Needed

- Must specify the library where backups will be stored.

Comments

- This is a free form text box. Can be used for recording why the promote was done
- Visible in Processed Copy PCM Data tab for later reference
- Also visible in the Processing information while promote is being processed.

Processing Information

- Submitted promotes remain in this section until the job is done processing

Display Submitted Jobs
 All Users

Select All

Select	Id	Seq	Mo	User	From Library	To Library	To System	Model	Element	Type	Scheduled date/time	Selection date/time	Comment
<input type="checkbox"/>	0	1		ECSD040D	ECSDTA040D			SS.PCM.OPT	*OPTION LIST *	*IND OPTION	0001-01-01 00:00:00	2019-01-10 15:50:00	
<input type="checkbox"/>	0	1		ECSD040D	ECSDTA040D			SS.PCM.OPT	ALTPRICE	*IND OPTION	0001-01-01 00:00:00	2019-01-10 16:00:00	

Shows all jobs submitted by current user that are still processing

Shows all jobs submitted by all users that are still processing

Hitting refresh and seeing the line disappear means the job is done processing

Removing Scheduled Entries

Display Submitted Jobs All Users

Select All

Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Scheduled date/time	Selection date/time	Comment
533	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*ALL (F)		2019-06-24 23:0...	2019-06-24 12:1...	
540	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PROM.2	*MATRIX DATA		2019-06-24 23:0...	2019-06-24 12:3...	
540	2	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PROMOTE	*MATRIX DATA		2019-06-24 23:0...	2019-06-24 12:3...	
548	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	HC	*ALL		2019-07-11 08:4...	2019-07-11 08:4...	
574	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HFRFBRT1	HC	*ALL (F)		2019-10-23 11:1...	2019-10-23 11:1...	
574	2	Update	ECS040C	ECSDTA040C	ECSDT		HC2	*ALL (F)		2019-10-23 11:1...	2019-10-23 11:1...	

- Right click to select a Scheduled promote that you want to remove from this section

Actions taken by the Promote

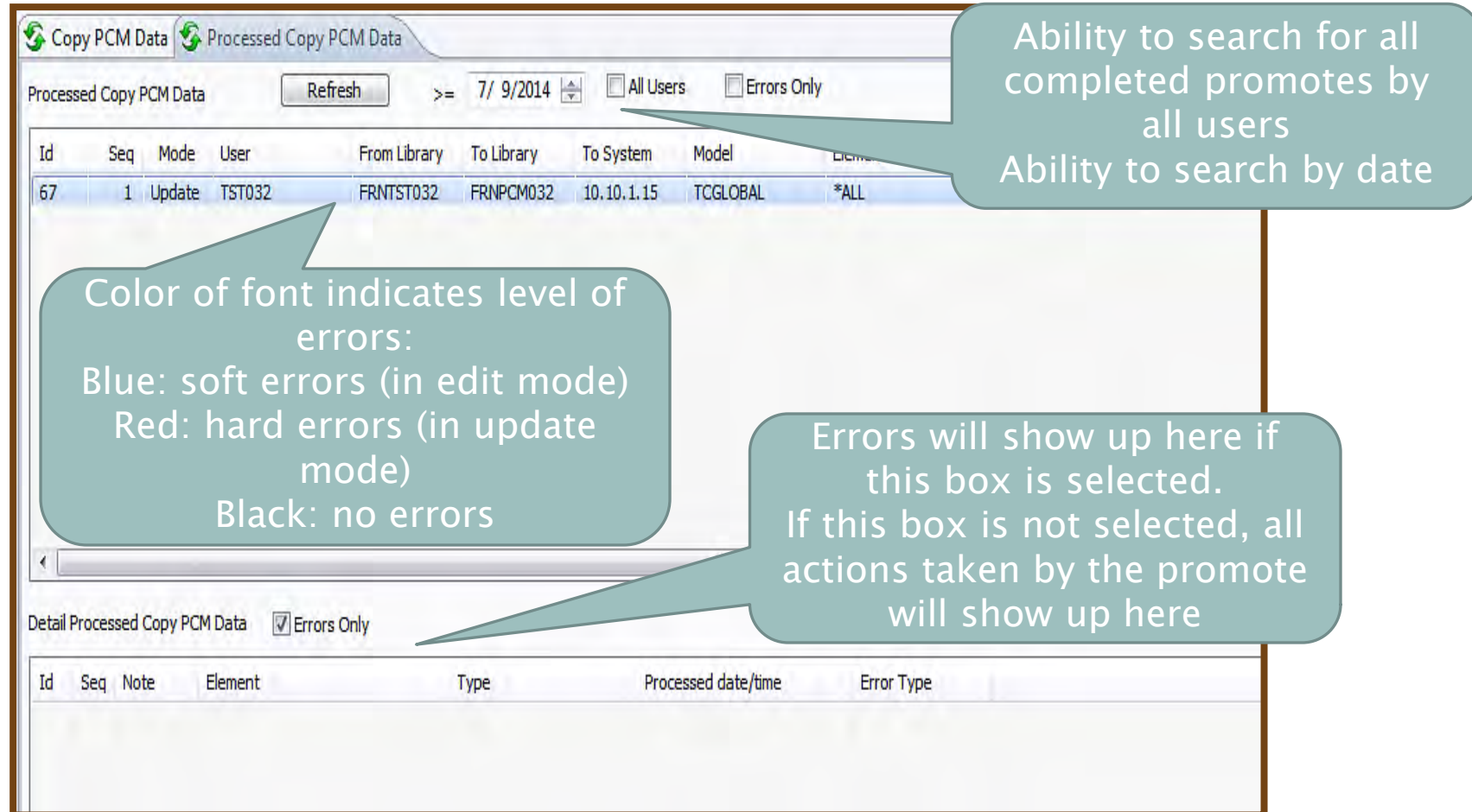
Id	Seq	Note	Element	Type	Processed date/time
67	1	ADDED	BRKTSTL.E	MODEL MATRIX	2014-07-09 08:56:54.242...
67	1	ADDED	NSL.E	MODEL MATRIX	2014-07-09 08:56:54.472...
67	1	ADDED	OERESST	MODEL MATRIX	2014-07-09 08:56:54.535...
67	1	ADDED	OESTDQTY	MODEL MATRIX	2014-07-09 08:56:54.296...

Id	Seq	Note	Element	Type	Processed date/time
67	1	ADDED	**OVR2** OMIT OVR1 OPTS	OMITTED OPTION CO...	2014-07-09 08:56:53.904...
67	1	DELETED	**OVR3** OMIT OVR1 OPTS	OMITTED OPTION CO...	2014-07-09 08:56:45.030...
67	1	ADDED	**OVR3** OMIT OVR1 OPTS	OMITTED OPTION CO...	2014-07-09 08:56:53.908...
67	1	DELETED	**OVR4** OMIT OVR1 OPTS	OMITTED OPTION CO...	2014-07-09 08:56:45.030...

Id	Seq	Note	Element	Type	Processed date/time
67	1	DELETED	HDWKITPIL1	SEGMENT	2014-07-09 08:56:41.897...
67	1	ADDED	HDWKITPIL1	SEGMENT	2014-07-09 08:56:41.979...
67	1	DELETED	HDWKITPIL1CST	SEGMENT	2014-07-09 08:56:41.903...
67	1	ADDED	HDWKITPIL1CST	SEGMENT	2014-07-09 08:56:41.987...

Processed Copy PCM Data Tab

- Completed jobs will appear on this tab



Ability to search for all completed promotes by all users
Ability to search by date

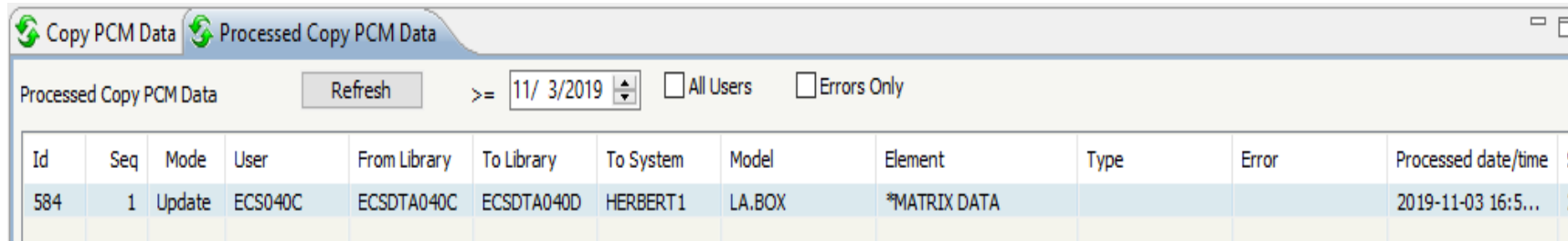
Color of font indicates level of errors:
Blue: soft errors (in edit mode)
Red: hard errors (in update mode)
Black: no errors

Errors will show up here if this box is selected.
If this box is not selected, all actions taken by the promote will show up here

Id	Seq	Mode	User	From Library	To Library	To System	Model	Element
67	1	Update	TST032	FRNTST032	FRNPCM032	10.10.1.15	TCGLOBAL	*ALL

Id	Seq	Note	Element	Type	Processed date/time	Error Type
----	-----	------	---------	------	---------------------	------------

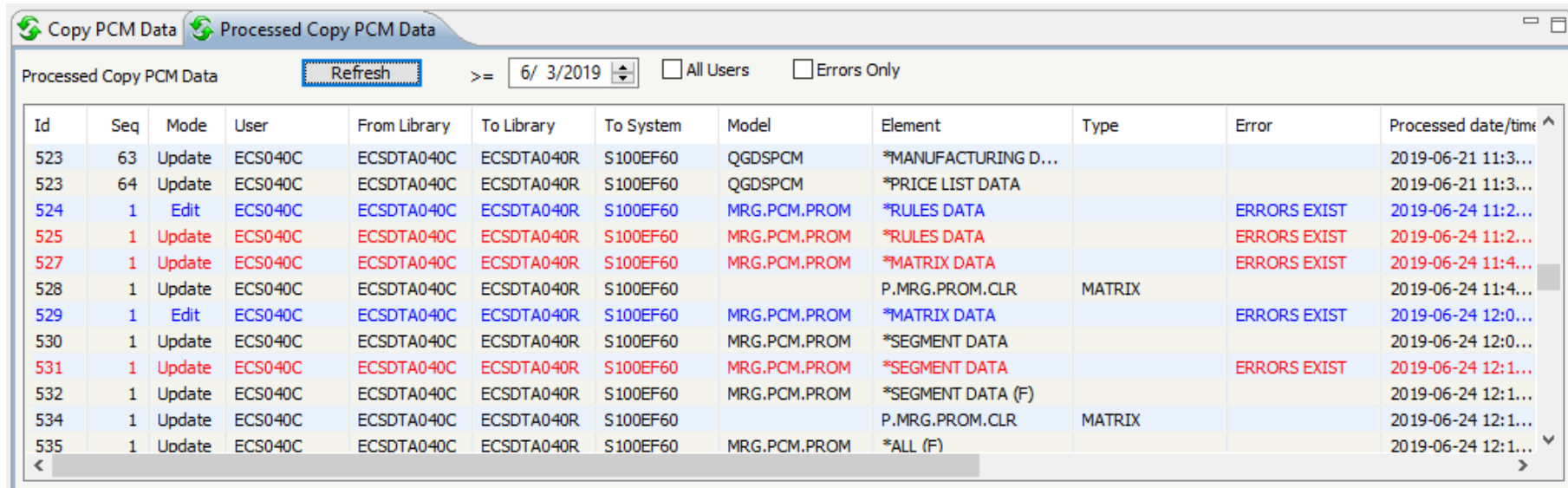
Processed Copy PCM Data



Processed Copy PCM Data Refresh >= 11/ 3/2019 All Users Errors Only

Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Error	Processed date/time
584	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*MATRIX DATA			2019-11-03 16:5...

Processed Copy PCM Data



Processed Copy PCM Data >= 6/ 3/2019 All Users Errors Only

Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Error	Processed date/time
523	63	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	QGDSPCM	*MANUFACTURING D...			2019-06-21 11:3...
523	64	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	QGDSPCM	*PRICE LIST DATA			2019-06-21 11:3...
524	1	Edit	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*RULES DATA		ERRORS EXIST	2019-06-24 11:2...
525	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*RULES DATA		ERRORS EXIST	2019-06-24 11:2...
527	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*MATRIX DATA		ERRORS EXIST	2019-06-24 11:4...
528	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60		P,MRG.PROM.CLR	MATRIX		2019-06-24 11:4...
529	1	Edit	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*MATRIX DATA		ERRORS EXIST	2019-06-24 12:0...
530	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*SEGMENT DATA			2019-06-24 12:0...
531	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*SEGMENT DATA		ERRORS EXIST	2019-06-24 12:1...
532	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*SEGMENT DATA (F)			2019-06-24 12:1...
534	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60		P,MRG.PROM.CLR	MATRIX		2019-06-24 12:1...
535	1	Update	ECS040C	ECSDTA040C	ECSDTA040R	S100EF60	MRG.PCM.PROM	*ALL (F)			2019-06-24 12:1...

Black—no errors

Blue—errors with Edit

Red—errors with Update

The Element column indicates whether the job was submitted for a specific data element, one type of data, or all types of data (*ALL)

Segment Copy with New Segments

Segments Perspective Go

Copy PCM Data Processed Copy PCM Data

Models

Model: LA.BOX Search

Criteria

Model Alpha Product Line

Price Category Condition As

Select	Product	Description
<input checked="" type="checkbox"/>	LA.BOX	LISA BOX
<input type="checkbox"/>	LA.BOX.P	CONFIGURED BOX PANEL
<input type="checkbox"/>	LA.BOXFRNT	LISA BOX 2
<input type="checkbox"/>	LA.BOXFRPN	LISA BOX 2
<input type="checkbox"/>	LA.BOX2	LISA BOX 2

Select Data

All elements Segment Data

Force Segment Master Update Force Segment Master Update

Drawing Data Option List Data Rule Data Pricing Data

Manufacturing Data Matrix Data Recompile Models

Select Data for All Models

eQuote Grid/Global

Data Layer Data

Customer Pricing

Keywords

Submit

From library: ECSDTA040C Mode Edit Update

To library: ECSDTA040D

To System: HERBERT1

Backup library: Backups needed

Scheduled Date: 11/ 3/2019 or Run immediately

Time: 8:00:38 PM

Comments

Promote Element Copy

Promote Perspective Go

Models

Model: LA.BOX Search

Criteria: Model Alpha Product Line
 Price Category Condition As

Select	Product	Description
<input checked="" type="checkbox"/>	LA.BOX	LISA BOX
<input type="checkbox"/>	LA.BOXFR	CONFIGURED BOX PANEL
<input type="checkbox"/>	LA.BOXFRNT	LISA BOX 2
<input type="checkbox"/>	LA.BOXFRPN	LISA BOX 2
<input type="checkbox"/>	LA.BOX2	LISA BOX 2
<input type="checkbox"/>	LA.BOX3	LISA BOX 2
<input type="checkbox"/>	LA.BOX9	LISA BOX9

Copy PCM Data | **Processed Copy PCM Data**

Select Data

All elements Segment Data
 Force Segment Master Update Force Segment Master Update

Drawing Data Option List Data Rule Data
 Manufacturing Data Matrix Data Recompile Models

Submit

From library: ECSDTA040C Mode: Edit Update
To library: ECSDTA040D
To System: HERBERT1

Backup library: Backups needed
Scheduled Date: 11/ 3/2019
Time: 4:34:10 PM or Run immediately
Job queue: Hold on job queue

Submit Model Copy Submit Element Copy

Display Submitted Jobs All Users Refresh

Select All

Select line to see error detail

Promote Perspective Go

Copy PCM Data Processed Copy PCM Data

Processed Copy PCM Data Refresh >= 11/ 3/2019 All Users Errors Only

Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Error	Processed date/time
584	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*MATRIX DATA			2019-11-03 16:5...
585	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.CLR.OPT	RED	*IND OPTION		2019-11-03 17:0...
585	2	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1		E.LA.WTHD	MATRIX		2019-11-03 17:0...
586	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX2.OPT	LA.SERIES.OPT	*IND OPTION		2019-11-03 17:0...
586	2	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1		NMAHTEST	MATRIX		2019-11-03 17:0...
586	3	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1		V.LAPRMULT	MATRIX		2019-11-03 17:0...
587	1	Edit	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	FA.CAM.BED	*PRICE LIST DATA			2019-11-03 19:0...
588	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*SEGMENT DATA		ERRORS EXIST	2019-11-03 19:2...
588	2	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*PRICE LIST DATA			2019-11-03 19:2...
589	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*PRICE LIST DATA			2019-11-03 19:2...
590	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*SEGMENT DATA (F)			2019-11-03 19:3...

Model: Search

Criteria: Model Alpha Product Line Price Category Condition As

Select All

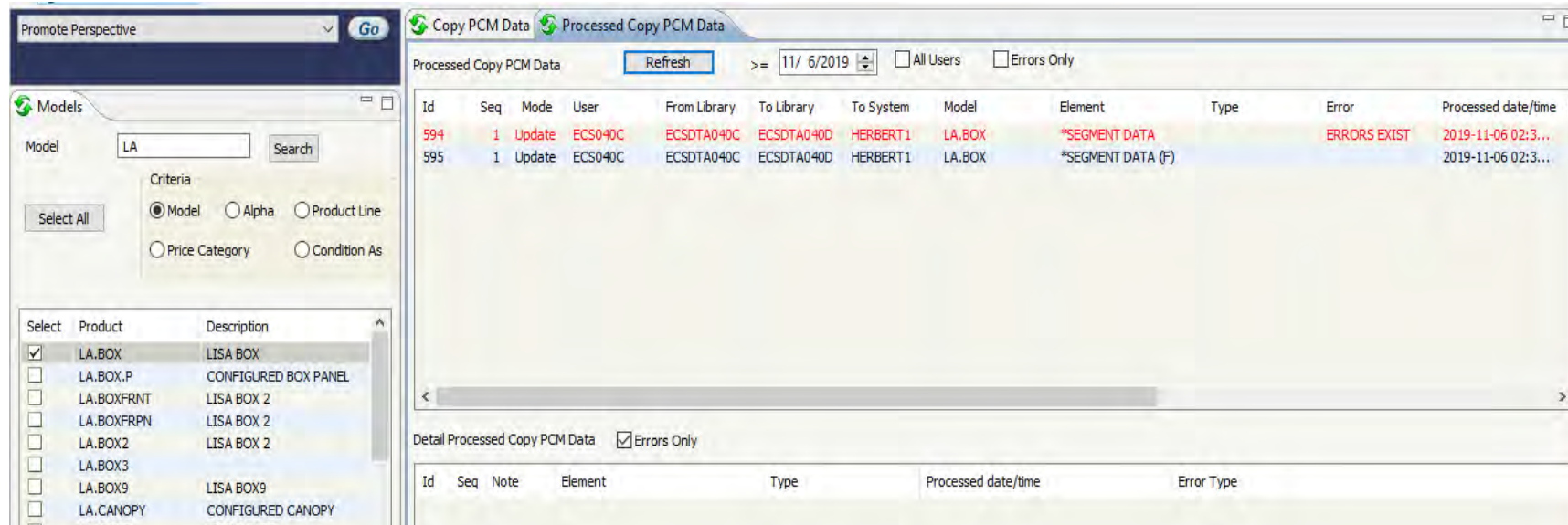
Select	Product	Description

Detail Processed Copy PCM Data Errors Only

Id	Seq	Note	Element	Type	Processed date/time	Error Type
588	1	ADDED	LA.DEC	SEGMENT	2019-11-03 19:23:36.346...	ERRORS EXIST
588	1	ADDED	LA.QTY.SCREW.W	SEGMENT	2019-11-03 19:23:36.346...	ERRORS EXIST

With Force Segment Master Update SM40 is updated

The Force segment Master Update will copy over the segment master if it exists in the target environment



The screenshot shows a software interface with a 'Models' panel on the left and a 'Processed Copy PCM Data' table on the right. The 'Models' panel includes a search box with 'LA' entered, a 'Select All' button, and a list of models with checkboxes. The 'Processed Copy PCM Data' table has columns for Id, Seq, Mode, User, From Library, To Library, To System, Model, Element, Type, Error, and Processed date/time. Two rows are visible, both with 'Update' mode and 'ERRORS EXIST' in the Error column.

Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Error	Processed date/time
594	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*SEGMENT DATA		ERRORS EXIST	2019-11-06 02:3...
595	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*SEGMENT DATA (F)			2019-11-06 02:3...

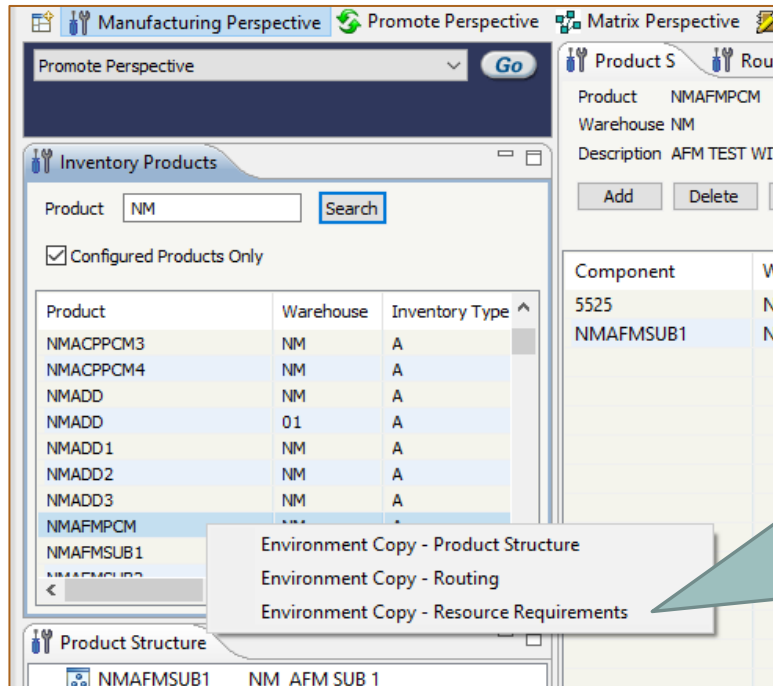
Below the main table, there is a 'Detail Processed Copy PCM Data' section with a 'Errors Only' checkbox checked. It has columns for Id, Seq, Note, Element, Type, Processed date/time, and Error Type.

Data Elements Copy

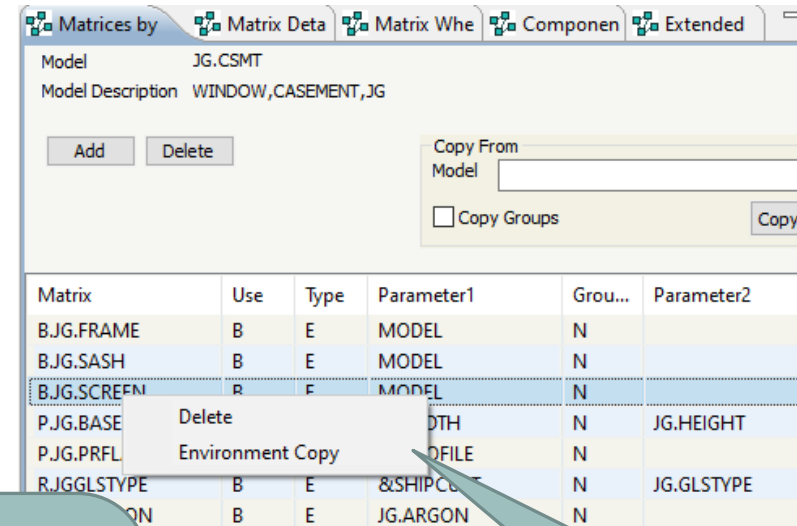
- The data elements copy functionality allows you to promote specific records instead of entire models or parts of a model
- You can copy a matrix, a matrix detail record, a product structure, a routing or resource requirements
- Select the element by right clicking on it in the applicable perspective

Selecting records for Environment Copy

- Right click on the specific records to get a pop-up box where you can select Environment copy



Product structure, routing and resources Pop-up (Manufacturing Perspective)



Pop-up for matrices and single matrix records (Matrix Perspective)

Routing Copy

Promote Perspective Go

Copy PCM Data **Processed Copy PCM Data**

Models

Model:

Criteria: Model Alpha Product Line
 Price Category Condition As

Select	Product	Description
<input checked="" type="checkbox"/>	NMAFMPCM	AFM TEST WITH DYNAMICS

Select Data

All elements Segment Data
 Force Segment Master Update Force Segment Master Update
 Drawing Data Option List Data Rule Data Pricing Data
 Manufacturing Data Matrix Data Recompile Models

Select Data for All Models

eQuote Grid/Global
 Data Layer Data
 Customer Pricing
 Keywords

Submit

From library: Mode: Edit Update
 To library:
 To System:

Backup library: Backups needed

Scheduled Date: or Run immediately
 Time: Hold on job queue

Job queue:

Display Submitted Jobs All Users

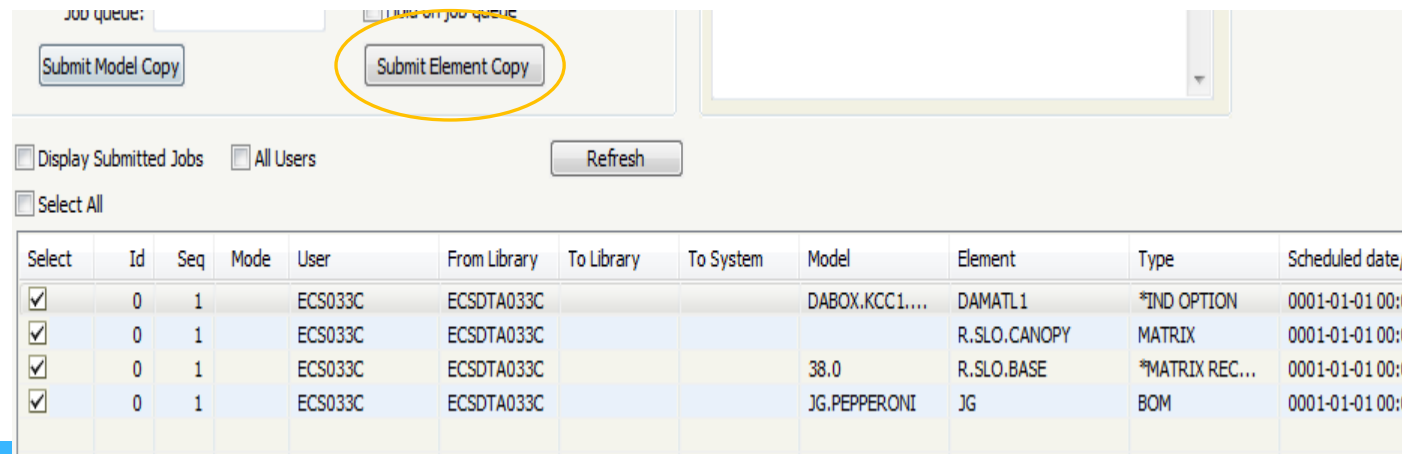
Select All

Comments:

Select	Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Scheduled date/time	Selection
<input checked="" type="checkbox"/>	0	1		ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	NMAFMPCM	NM	ROUTING	0001-01-01 00:00:00	2019-1

Environment Copy

- Go to the Promote Perspective
- A list of the items you have selected will display in the bottom section of the Copy PCM Data tab
- Click to select the elements you want to promote
- Make sure the Submit specifications are correct and press the Submit Element Copy button.



The screenshot shows a software interface with a 'Job queue:' section at the top. It contains two buttons: 'Submit Model Copy' and 'Submit Element Copy'. The 'Submit Element Copy' button is circled in yellow. Below these buttons are checkboxes for 'Display Submitted Jobs', 'All Users', and 'Select All', along with a 'Refresh' button. A table below displays a list of job items with columns for 'Select', 'Id', 'Seq', 'Mode', 'User', 'From Library', 'To Library', 'To System', 'Model', 'Element', 'Type', and 'Scheduled date/'. A green arrow points to the 'Select' column of the table.

Select	Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Scheduled date/
<input checked="" type="checkbox"/>	0	1		ECS033C	ECSDTA033C			DABOX.KCC1...	DAMATL1	*IND OPTION	0001-01-01 00:00
<input checked="" type="checkbox"/>	0	1		ECS033C	ECSDTA033C				R.SLO.CANOPY	MATRIX	0001-01-01 00:00
<input checked="" type="checkbox"/>	0	1		ECS033C	ECSDTA033C			38.0	R.SLO.BASE	*MATRIX REC...	0001-01-01 00:00
<input checked="" type="checkbox"/>	0	1		ECS033C	ECSDTA033C			JG.PEPPERONI	JG	BOM	0001-01-01 00:00

Condition as Models

- Rules and matrices are not on the dependent models using a Condition as Model
- Option lists are on dependent models
- Update before promote
- Promote condition as model at the same time as dependent models—this is safest
- Can promote independently if you are aware of what is being changed
 - i.e. if only changing a rule, only promote the condition as model and the refresh to apply to all dependent models

Pricing with Promote

- To successfully promote pricing data, the same price list and price book must exist in both environments.

Promote Perspective Go

Models

Model: Search

Criteria

Model Alpha Product Line

Price Category Condition As

Select All

Select	Product	Description
<input checked="" type="checkbox"/>	FA.CAM.BED	BED - CONDITION AS (ECS)

Copy PCM Data **Processed Copy PCM Data**

Select Data

All elements Segment Data

Force Segment Master Update Force Segment Master Update

Drawing Data Option List Data Rule Data Pricing Data

Manufacturing Data Matrix Data Recompile Models

Select Data for All Models

eQuote Grid/Global

Data Layer Data

Customer Pricing

Keywords

Submit

From library:

To library:

To System:

Mode

Edit Update

Backup library:

Backups needed

Result of Pricing Promote

Segments Perspective Go

Models

Model: LA.BOX Search

Criteria

Model Alpha Product Line

Price Category Condition As

Select	Product	Description
<input checked="" type="checkbox"/>	LA.BOX	LISA BOX
<input type="checkbox"/>	LA.BOX.P	CONFIGURED BOX PANEL
<input type="checkbox"/>	LA.BOXFRNT	LISA BOX 2
<input type="checkbox"/>	LA.BOXFRPN	LISA BOX 2
<input type="checkbox"/>	LA.BOX2	LISA BOX 2
<input type="checkbox"/>	LA.BOX3	
<input type="checkbox"/>	LA.BOX9	LISA BOX9

Copy PCM Data Processed Copy PCM Data

Processed Copy PCM Data Refresh >= 11/ 3/2019 All Users Errors Only

Id	Seq	Mode	User	From Library	To Library	To System	Model	Element	Type	Error	Processed date/time
584	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX	*MATRIX DATA			2019-11-03 16:5...
585	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.CLR.OPT	RED	*IND OPTION		2019-11-03 17:0...
585	2	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1		E.LA.WTHD	MATRIX		2019-11-03 17:0...
586	1	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	LA.BOX2.OPT	LA.SERIES.OPT	*IND OPTION		2019-11-03 17:0...
586	2	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1		NMAHTEST	MATRIX		2019-11-03 17:0...
586	3	Update	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1		V.LAPRMULT	MATRIX		2019-11-03 17:0...
587	1	Edit	ECS040C	ECSDTA040C	ECSDTA040D	HERBERT1	FA.CAM.BED	*PRICE LIST DATA			2019-11-03 19:0...

Detail Processed Copy PCM Data Errors Only

Id	Seq	Note	Element	Type	Processed date/time	Error Type
587	1	ADDED	FA.CAM.BED/01	INVENTORY SEGMENT	2019-11-03 19:05:21.486...	
587	1	ADDED	FA.LIST	MODEL PRICE	2019-11-03 19:05:21.486...	
587	1	ADDED	FA.CAM.BED	PART	2019-11-03 19:05:21.486...	
587	1	DELETED		PRICE CATL DESC	2019-11-03 19:05:21.485...	
587	1	DELETED	FA.LIST	PRICE CATL DESC	2019-11-03 19:05:21.486...	

Reminders

- Sign in to the environment you want to be promoting FROM
- The asyncs in the environment you are transferring to should be down when promoting
- Username and Password must be valid on the “to” environment

Questions and Answers

