

# **Agile Product Lifecycle Management for Process**

Getting Started Guide

Release 5.2

**Part No. E10997-01**

February 2008

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**February 15, 2008**

# DOCUMENT CONTROL

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## Change Record

Date	Author	Revision	Change Reference
Sept-07	Agile/Oracle	1.0	Initial release, Part No. TPPR-0055-5.1A
Feb-08	Oracle	2.0	Second release, Part No. E10997-01



# CONTENTS

## About This Manual

Agile Product Lifecycle Management for Process Documentation	vii
Audience	vii
Variability of Installations	vii
Where to Find Information	viii
Readme	viii
Agile Training	viii
Document Conventions	ix

## Chapter 1 Using Agile Product Lifecycle Management for Process

Overview	1-1
Agile Product Lifecycle Management for Process Applications	1-2
Understanding the User Interface	1-4
Resizing the Screen	1-4
Navigating the Page	1-4
Accessing an Application	1-4
Hiding and Showing the Left Navigation Panel	1-6
Collapsing and Expanding the Header	1-6
Working with a Page	1-6
Buttons, Tabs, and Sections	1-6
System-Generated Messages	1-7
History Drop-Down Menu	1-8
Buttons Within a Page	1-8
Tables	1-9
Selection Lists	1-10
Keystroke Shortcuts	1-11
Finding Data	1-12
Understanding the Search Page	1-12
Search Field Definitions	1-13
Action Links	1-13
More Criteria	1-14
Less Criteria	1-14
Additional Attributes	1-14
Searching Custom Data	1-15
Extended Attributes	1-15
Custom Sections	1-15
Search Results	1-16
Saving Search Criteria	1-17
Exporting Search Results	1-19
Sorting Search Results	1-21
Understanding the Taxonomy Tab	1-21
Defining Your Profile and Preferences	1-22
Contact Information	1-24
Business Unit(s)	1-24
User Groups	1-24
Preferences	1-24
Change Password	1-24



# ABOUT THIS MANUAL

## Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes user guides, an administrator's guide, and release notes, all in Adobe® Acrobat™ PDF format. The Oracle Documentation Web site contains the latest versions of the Agile PLM for Process PDF files. You can view or download these manuals from the Web site, or you can ask your administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the documentation (PDF) files. Visit the Oracle documentation Web site at:

<http://www.oracle.com/technology/documentation/index.html>

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**Note** The minimum software requirement for reading the PDF files is Adobe Reader™ version 6.0. You can download this free program from [www.adobe.com](http://www.adobe.com).

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If you need additional assistance or information, please contact [support@agile.com](mailto:support@agile.com) or phone (408) 284-3900 for assistance.

Before calling Agile Support about a problem with an Agile PLM for Process manual, please have ready the full part number, which is located on the cover.
---

## Audience

This user guide is intended for end users who are responsible for creating and managing information in Agile 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

## Where to Find Information

Consult the table below to find specific information from the relevant Agile PLM for Process information source.

Table 1: Agile PLM for Process documentation topics, by source

Information type	Getting Started Guide	Admin. User Guide	Readme file	Agile training	Agile Help Desk	Agile sales rep
<b>Administering Agile PLM for Process</b>		●		●		
<b>Cache management</b>		●				
<b>Core data management</b>		●				
<b>Custom data management</b>		●				
<b>Feature requests</b>					●	●
<b>Group management</b>		●				
<b>Installing Agile PLM for Process</b>				●		●
<b>Known issues</b>			●			
<b>Last-minute changes</b>			●			
<b>Profiles and preferences</b>	●					
<b>Resolved issues</b>			●			
<b>Searching for data</b>	●					
<b>System-based roles</b>		●				
<b>System requirements</b>			●			
<b>Technical support</b>					●	
<b>Understanding the user interface</b>	●					
<b>Using Agile PLM for Process</b>	●			●		

## Readme

Any last-minute information about Agile PLM for Process can be found in the Readme file on the Oracle documentation Web site (<http://www.oracle.com/technology/documentation/index.html>).

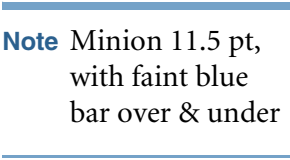
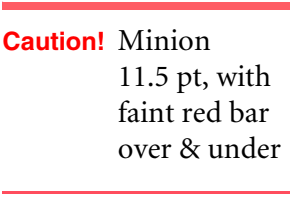
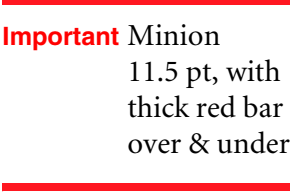
## Agile Training

Agile offers end user, administrator, developer, and implementation training courses. For more information, contact your Agile project manager or sales representative.



## Document Conventions

The following formatting elements appear in Agile PLM for Process documentation.

Element	Meaning
<b>Helvetica Condensed, 9 pt. bold type</b>	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
9 pt. monospace font	Code samples
10 pt. monospace font	File names or directory names
<i>Blue italic font</i>	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
 <b>Note</b> Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
 <b>Caution!</b> Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
 <b>Important</b> Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.



## Using Agile Product Lifecycle Management for Process

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*This chapter provides an overview of the Agile Product Lifecycle Management for Process software. It includes the following topics:*

- ❑ *Overview*
  - ❑ *Understanding the User Interface*
  - ❑ *Working with a Page*
  - ❑ *Finding Data*
  - ❑ *Defining Your Profile and Preferences*
- 

### Overview

The Agile Product Lifecycle Management (PLM) for Process solution is a fully integrated and comprehensive suite of software and services for collaborative product lifecycle management.

The solution is broken into several solution areas (which can be purchased and implemented separately). The top-level breakdown is as follows:

- 1** Product Data Management
- 2** Formulation and Compliance
- 3** Product Supplier Collaboration
- 4** New Product Introduction and Development

## Agile Product Lifecycle Management for Process Applications

The Agile PLM for Process solution offers a number of applications, which each customer can enable or disable. The set of applications licensed and installed in your environment is unique to the needs of your organization and may not utilize all of the applications listed below. As of this release, the Agile PLM for Process solution consists of the following applications, shown in table 1-1 below.

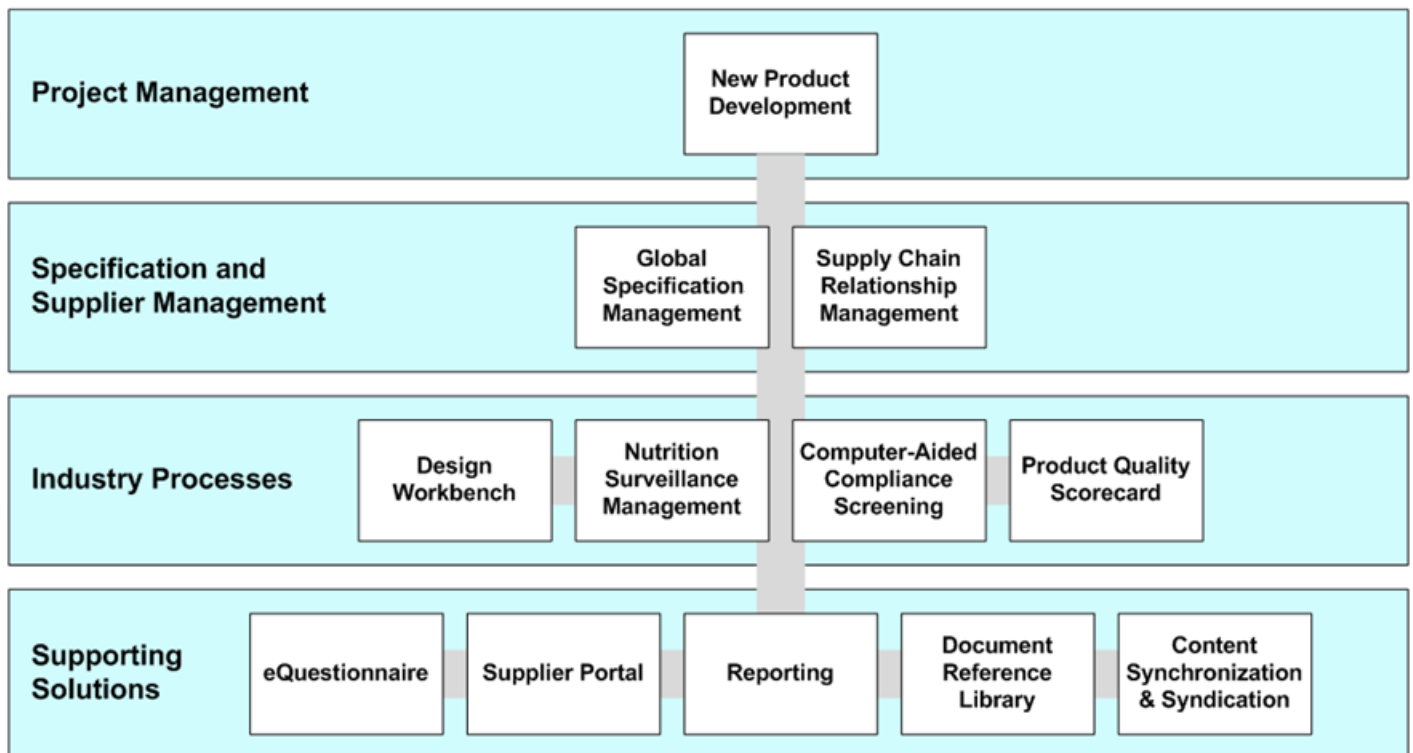
Table 1-1: Agile PLM for Process applications

Application	Abbreviation	Description
<b>Product Data Management Applications</b>		
<b>Global Specification Management</b>	GSM	Captures the entire product genealogy from ingredients and packaging to finished products, in multiple languages and cultures.
<b>Supply Chain Relationship Management</b>	SCRM	Enables technical, quality, and sourcing approval management of suppliers, companies, and facilities.
<b>Reporting</b>	RPT	Provides reporting capabilities on products and suppliers, based on user-defined criteria and reporting templates.
<b>Content Synchronization and Syndication</b>	CSS	Enables data synchronization to other internal systems and external trading partners and data pools.
<b>Document Reference Library</b>	DRL	Provides a central location for storing, cataloging, and publishing documents used in the solution. These documents can be exposed to internal users or external users via the Supplier Portal.
<b>Formulation and Compliance Applications</b>		
<b>Design Workbench</b>	DWB	Enables the prototyping and design optimization of formulations.
<b>Computer Aided Compliance Screening</b>	CACS	Provides the ability to analyze and screen products through rules and regulations to ensure their compliance with customer, market, and regulatory constraints.
<b>Product Quality Scorecard</b>	PQS	Allows management of samples and scorecards to ensure that raw materials and finished good are conforming to specification.
<b>Nutrition Surveillance Management</b>	NSM	Enables users to capture and manage nutrition surveillance results and compare results to nutrition data at the specification level.
<b>Product Supplier Collaboration Applications</b>		
<b>eQuestionnaire</b>	eQ	Provides users with a tool to obtain specification data from suppliers and manage their disposition in GSM.

Table 1-1: Agile PLM for Process applications (continued)

Application	Abbreviation	Description
<b>Supplier Portal</b>	SP	Enables suppliers to participate in the process of managing product and vendor data.
<b>New Product Introduction and Development Applications</b>		
<b>New Product Development</b>	NPD	Enables cross-functional, cross-location management of new product and packaging development projects from ideation to post-launch.

Figure 1-1: Agile PLM for Process solutions, by category and application



## Understanding the User Interface

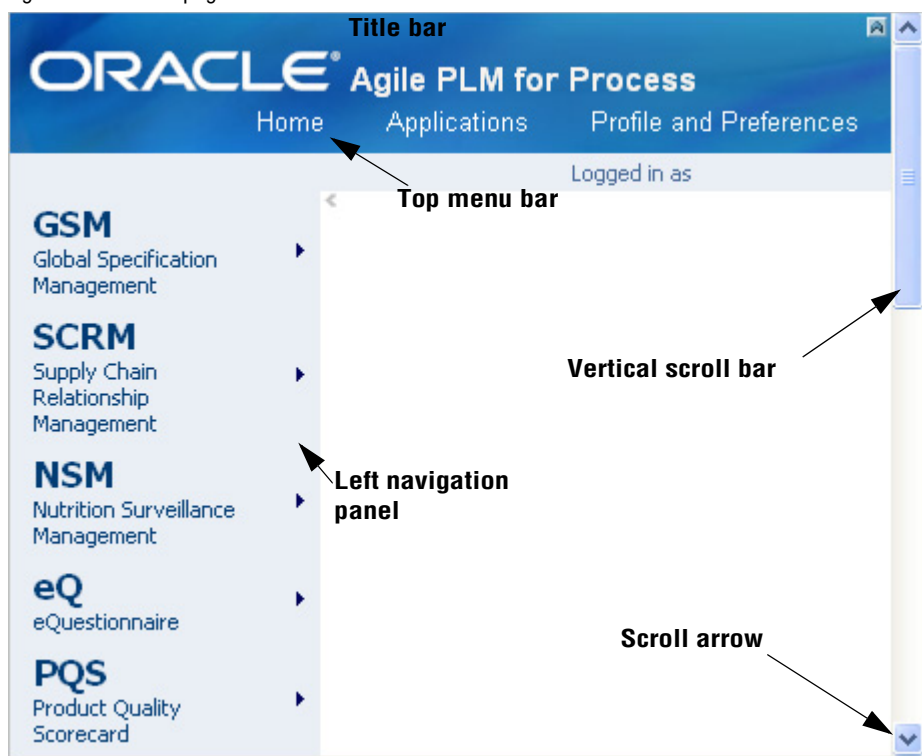
### Resizing the Screen

When you first log in, the Agile PLM for Process application displays in an Internet Explorer screen. You can view the application in full screen mode by pressing the **F11** key. Depending on your settings, this action hides the toolbars and options at the top of the screen, while keeping the standard buttons displayed. Press **F11** again to restore the screen to the original size.

### Navigating the Page

The basic page consists of many elements, as figure 1-2 shows below. Use the left navigation panel to help you navigate within and across applications. Use the top menu bar to return to the home page, access applications and view or manage your user profile and preferences. Use the scroll bar or scroll arrows to scroll the page. Clicking your company logo displays the Home page.

Figure 1-2: Home page



Refer to [Defining Your Profile and Preferences](#) on page 1-22 for more information on managing your profile and preferences.

### Accessing an Application

You can access an application and its features using the left navigation panel or the Applications choice on the top menu bar. Use submenus, represented by the expand menu icon (▶), to view and access features within the applications, as shown in figure 1-3 and figure 1-4 below.

For example, to work with product specifications in the Global Specification Management (GSM) application, click **GSM > Product Specifications** from either location.

Figure 1-3: Left navigation panel, GSM application, submenu options

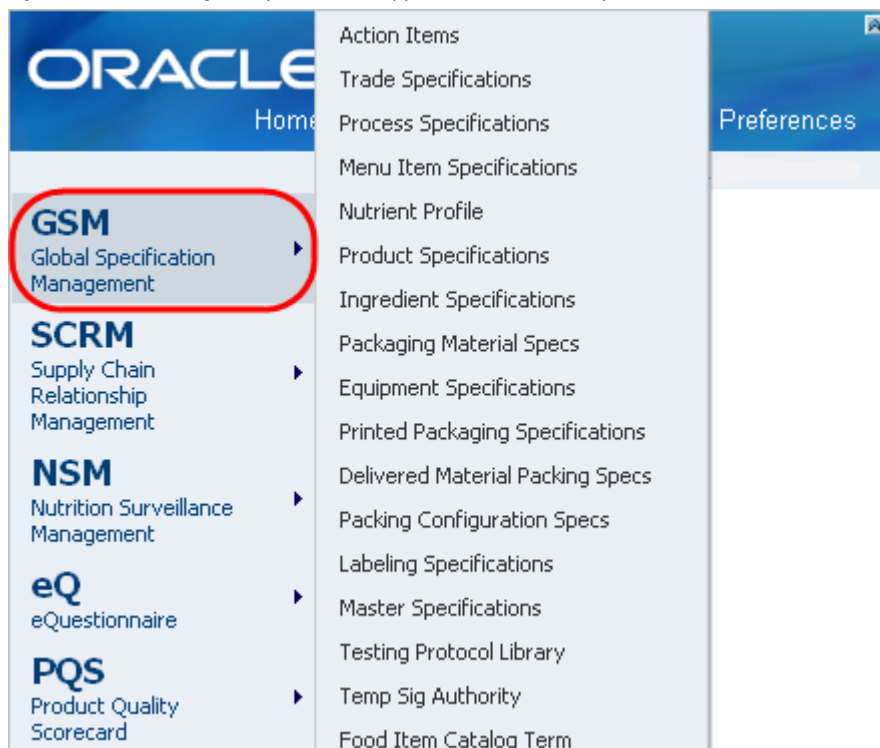


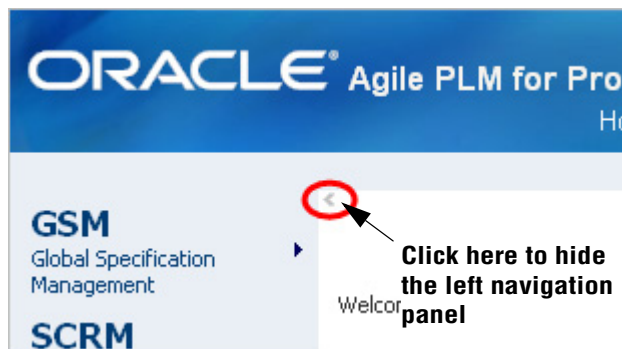
Figure 1-4: Top menu bar, GSM application, submenu options



## Hiding and Showing the Left Navigation Panel

To maximize your view of data on your screen, you can hide the left navigation panel by clicking the hide navigation panel icon (◀), shown in figure 1-5 below. Click it again to show the navigation panel.

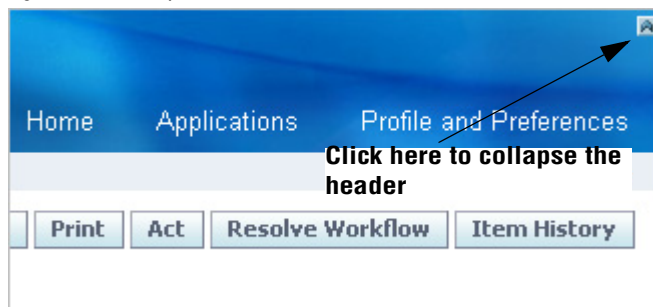
Figure 1-5: Hide navigation panel icon



## Collapsing and Expanding the Header

To collapse the header area at the top of the screen, click the collapse icon (⌵), shown in figure 1-6 below. Click it again to expand the header area.

Figure 1-6: Collapse header icon



## Working with a Page

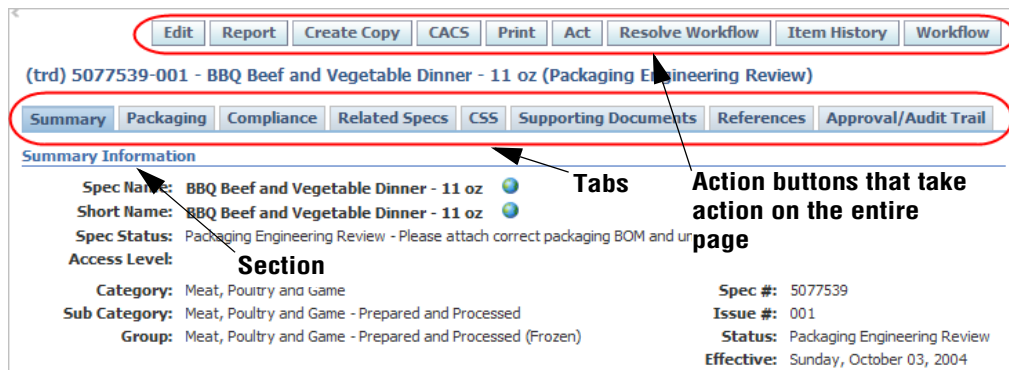
When you select a menu option, often the first page you see is a basic search page. Refer to [History Drop-Down Menu](#) on page 1-8 for more information on performing searches.

## Buttons, Tabs, and Sections

Once you have selected an item to work with, such as a trade specification, the page consists of several elements that are common across all applications, as figure 1-7 shows below.



Figure 1-7: Tabs, buttons, linked fields

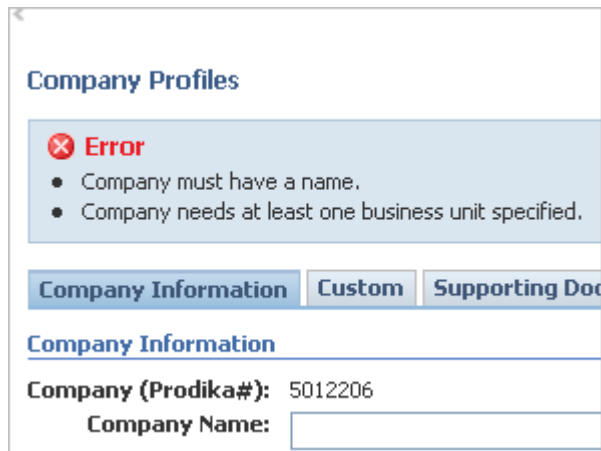


- **Action Buttons**—Use buttons in the upper right corner of the page to take actions that affect the entire page, such as save, edit, and create new. The buttons that are displayed vary based on such things as your assigned role and permissions and the current state of the item. See [Buttons Within a Page](#) on page 1-8 for information on buttons used within the page.
- **Tabs**—The tabs represent logical groupings of data for the item you are working with. Click a tab to work with data on that page. The tabs that are displayed vary based on such things as your company's installed applications and the current state of the item that you are working with.
- **Sections**—Each page consists of sections, which group related information.

## System-Generated Messages

System generated messages appear either at the top of the page, as figure 1-8 shows below, or at the top of a section. Messages include such information as required fields, system responses to queries, and prompts for missing information.

Figure 1-8: System-generated messages



## History Drop-Down Menu

The history drop-down list is a feature that exists in the Global Specification Management (GSM) application. Click it to view a list of recently viewed specifications, as figure 1-9 shows below.

Figure 1-9: GSM history drop-down list



## Buttons Within a Page


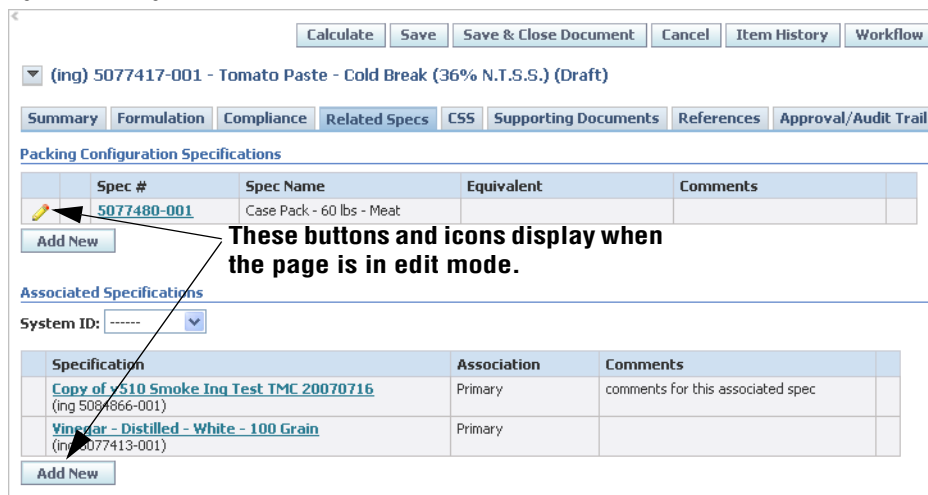
When you click **Edit** at the top right corner of a page, the page redisplay in edit mode. Note that the action buttons change, and additional buttons and icons may display on the page. Use these additional buttons to perform tasks in the appropriate section. Figure 1-10 below shows the Related Specs tab of an ingredient specification in edit mode. Note that the **Edit** action button has been replaced by the **Save** and **Save & Close Document** buttons. Within the page, the **Add New** button displays below tables, indicating that you can add information, and the edit icon (  ) displays to the left of rows that you can edit. For more information on modifying data in a table, see [Tables](#) on page 1-9.

Figure 1-10: Page in edit mode



## Tables

Tables group related data and are used on most pages in the Agile PLM for Process suite. You can modify the tables by editing existing rows or adding new rows.

### To edit a table row:


- 1 Click **Edit**. The page redisplay in edit mode.
- 2 Click the edit icon (  ) in the row that you want to modify. Additional icons indicate that the row is in edit mode, as figure 1-11 shows below.

Figure 1-11: Row in edit mode











Packing Configuration Specifications					
		Spec #	Spec Name	Equivalent	Comments
			<a href="#">5077480-001</a>	Case Pack - 60 lbs - Meat	
					
					


Table 1-2 defines icons that are commonly used in tables:


Table 1-2: Common icons

Icon and Name	Description
(  ) Apply changes icon	Applies the changes that you have made.
(  ) Undo icon	Cancels the changes that you have made.
(  ) Add data icon	Displays a pop-up window, dialog box, or search page, which you can use to make a selection. Your selection populates the associated fields.
(  ) Delete icon	Deletes the entire row.

- 3 Enter data in the appropriate fields and click the apply changes icon (  ) to save changes, or use the other icons listed above to make modifications.
- 4 Click **Save** at the top of the page.

### To add a table row:

- 1 If needed, click **Edit** to place the page in edit mode.
- 2 Click **Add New**. A pop-up window, dialog box, or search page displays.
- 3 Make a selection, and then click **Done**. (In some cases, you are not required to select **Done**.)
- 4 If needed, provide additional information in the fields on the row.
- 5 Click the apply changes icon (  ) to save the row.
- 6 Click **Save**.

On some tables, you can also edit columns by clicking the edit icon (  ) displayed in the column heading, as figure 1-12 shows below. Agile PLM for Process displays each field in the column in editable mode.


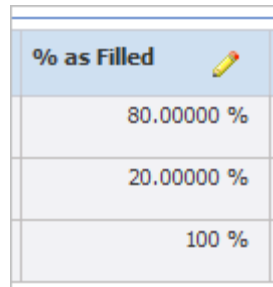

On other tables, you can edit the entire table at once by clicking the edit icon (  ) displayed in the upper left corner of the table. The page refreshes and all fields in the table display in editable mode. Use this feature to quickly modify several fields in a table.

Figure 1-12: Edit icon in column heading



<b>% as Filled</b> 
80.00000 %
20.00000 %
100 %

## Selection Lists

As mentioned previously, to populate some fields, you must make a selection from a pop-up window or dialog box containing a list. Some selection lists limit you to a single selection; others allow multiple selections. Several examples are shown below.

Figure 1-13: Dialog box showing radio buttons (single selection)

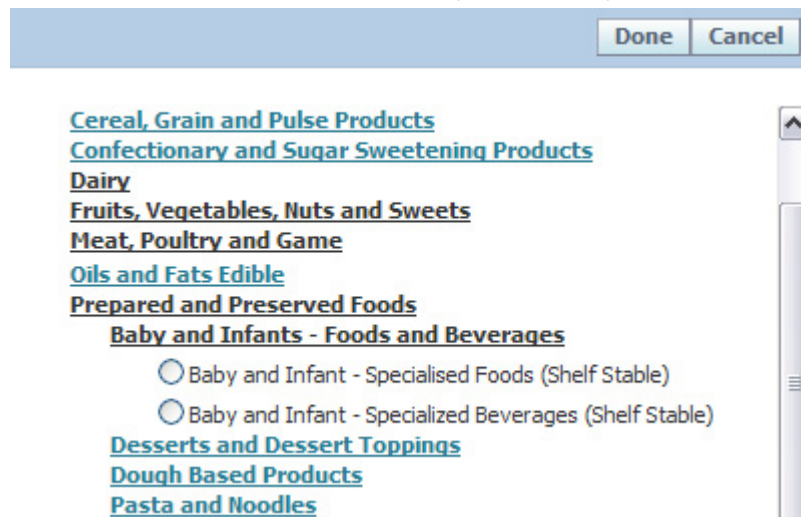
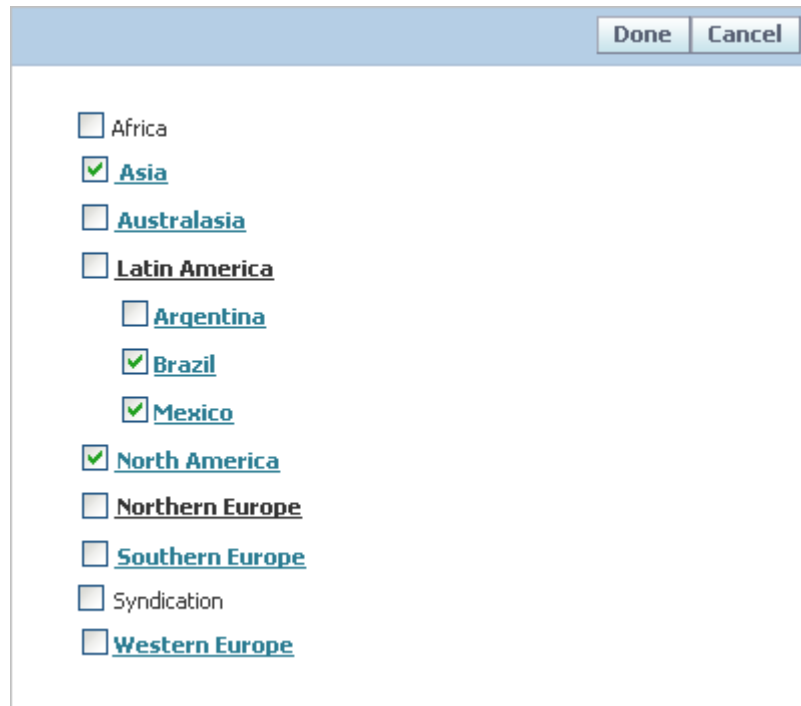


Figure 1-14: Dialog box showing check boxes (multiple selections)



## Keystroke Shortcuts

In any of the drop-down lists throughout the application, you can use keystrokes to speed up a search instead of using your mouse to make a selection. Click in or tab to the drop-down list, then type the first letter of the item that you would like to use.

For example, the menu item specification search page shows “Spec Name” as the default search criteria in the key field. If you would like to search by “Spec #”, click the field, then press the **S** key two times to get to that option, as figure 1-15 shows below. You can then press the **Tab** key to move to the next field. You can also use the arrow keys to scroll through options in drop-down lists.

Figure 1-15: Spec # selected using keystroke shortcut

**Menu Item Specifications** Create New

**Taxonomy** **Search**

**Search Criteria**

Spec #  Contains  [more criteria...](#) [additional attributes...](#)

Spec Name  
Status  
**Spec #**  
Taxonomy  
Originator  
--  
Additives  
Additives (does NOT contain)  
Additives(may contain)  
Allergens  
Allergens (does NOT contain)

Save Search Load Search

## Finding Data

There are two basic ways of locating information in Agile PLM for Process:

- ❑ Searching
- ❑ Browsing by taxonomy

This section explores the first method. For guidance on using the browsing method, see [Understanding the Taxonomy Tab](#) on page 1-21.

## Understanding the Search Page

The initial screen in most applications of Agile PLM for Process consists of a search page. The search page (or query tool) has a basic structure but can vary greatly based on application or other factors. See figure 1-16 for an illustration of the basic search page:

Figure 1-16: The basic GSM search page

**Trade Specifications** Create New

**Taxonomy** **Search**

**Search Criteria**

Spec Name  Contains  [more criteria...](#) [additional attributes...](#)

**Key Field** **Operator** **Search Term**

Search Reset Save Search Load Search

**Search Results**

Results Per Page 10

The search page resides on the Search tab, one of two tabs on most initial screens, the other being Taxonomy (see [Understanding the Taxonomy Tab](#) on page 1-21). To find a specification using the search page, set search criteria using a combination of three basic fields in the Search Criteria section. As shown in figure 1-16, these fields are:

- Key field
- Operator
- Search term

The main search page includes the following buttons, as shown in figure 1-16:

**Search**—Displays your search results in the Search Results section

**Reset**—Clears all search criteria fields

**Save Search**—Saves search criteria in a reusable library. Use this option if you use certain search criteria often (see [Saving Search Criteria](#) on page 1-17).


**Load Search**—Loads a saved search (see [To retrieve a saved search:](#) on page 1-19).

In most search pages, the first two search criteria fields contain a default value. In the case of a trade specification, “Spec Name” (as shown in figure 1-16, on page 1-12) is the default value. The top few choices in the drop-down list are those fields that are most frequently used.

## Search Field Definitions

See table 1-3 for a description of search fields that appear on the main search page.

Table 1-3: Fields on the main search page

Field	Description
<b>Key field list</b>	Select from a list of fields to search in. This list varies based on the application menu search option that you chose.
<b>Operator</b>	Select from a list of operators based on the criteria that you chose in the key field list. A few examples include Equals, Not Equals, Contains, and Starts With.
<b>Search term</b>	The actual word or words that you are looking for. If this field is preceded by an add data icon (  ), click it to view a dialog box with available choices. You can also enter a percent sign (%) to perform a wildcard search on a single character.
<b>Results per page</b>	Sets the number of search results to display at one time.

## Action Links

In addition to the basic entry fields on the search page—key field list, operator, and search term—three action links may appear, as shown in figure 1-17. Like other linked fields, action links perform an action.

Figure 1-17: Additional action links on the main search page

The screenshot shows a web interface for 'Trade Specifications'. At the top, there are tabs for 'Taxonomy' and 'Search'. Below this is a 'Search Criteria' section with two rows of search fields. The first row has 'Spec Name' (dropdown), 'Contains' (dropdown), and 'Milk' (text input). The second row has 'Status' (dropdown), 'Equals' (dropdown), and 'Approved' (text input). To the right of the second row, three links are visible: 'more criteria...', 'less criteria...', and 'additional attributes...'. These links are circled in red. At the bottom, there are buttons for 'Search', 'Reset', 'Save Search', and 'Load Search'.

**More Criteria**

When clicked, **more criteria** creates another row of the main three search fields. You can use additional rows to enter additional search parameters. For example, you can search for all specification names that contain “Milk” that are in the “Approved” status.

**Less Criteria**

This link appears when additional search rows are added using the **more criteria** link. Click **less criteria** to remove each added row.

**Additional Attributes**

Where available, a third action link, **additional attributes**, opens the additional attributes dialog box, allowing you to search for custom data. The dialog box contains two main sections: Extended Attributes and Custom Section, as shown in figure 1-18.

Figure 1-18: The additional attributes dialog box, showing Extended Attributes and Custom Section sections

The screenshot shows a dialog box titled 'Additional Attributes'. It has a 'Done' button in the top right corner. The dialog is divided into two main sections: 'Extended Attributes' and 'Custom Section'. The 'Extended Attributes' section contains a table with three columns: 'Extended Attributes', 'Condition', and 'Target'. Below the table is an 'Add New' button. The 'Custom Section' section contains a table with five columns: 'Custom Section', 'Row', 'Column', 'Condition', and 'Target'. Below this table is also an 'Add New' button.



## Searching Custom Data

### Extended Attributes

Extended attributes are data attributes that your organization has defined. They are one method of extending the functionality of the application. You can build these attributes to meet specific needs.

#### To search for extended attribute values:


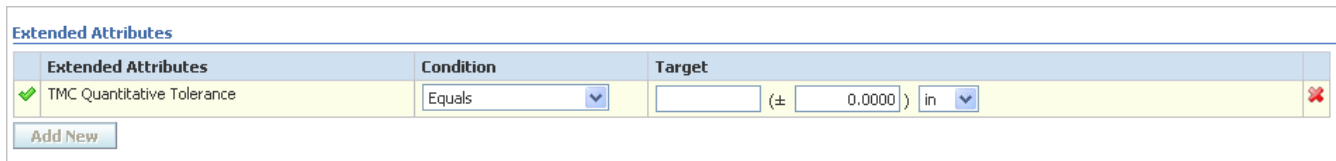

- 1 In the Extended Attributes section, click **Add New**. A multiple-select popup window appears.
- 2 Select the extended attributes you want to search for, then click **Done**. Your selections display in the Extended Attributes table.
- 3 Click the edit icon (  ), shown in figure 1-19, to display the row in edit mode and further define the attribute you added. The target fields vary based on the extended attribute selected.

Figure 1-19: Defining the attribute



Extended Attributes	Condition	Target
✓ TMC Quantitative Tolerance	Equals	(± 0.0000) in

Add New

- 4 Click the apply changes icon (  ).
- 5 Click **Done**. The extended attribute is added to the search page.

You can add multiple extended attributes as search criteria.

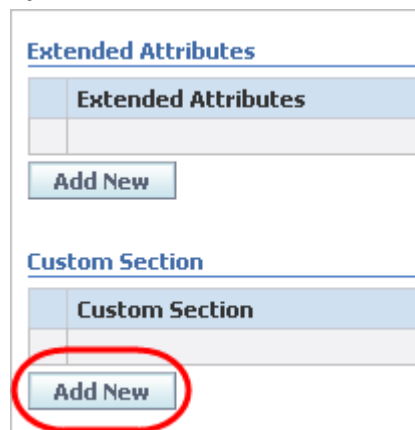
### Custom Sections

Custom sections are configurable *sets* of extended attributes.

#### To search for values in a custom section:

- 1 In the Custom Section section, click **Add New**, as shown in figure 1-20 below.

Figure 1-20: Add New button



Custom Section
Add New

A multiple-select popup window appears.



- 2 Select the custom section to search in, then click **Done**. Your selections display in the Custom Section table.
- 3 Click the edit icon (  ) displayed to the left of the added row. The row displays in edit mode, as figure 1-21 shows below.

Figure 1-21: Defining the custom section value

Custom Section				
Custom Section	Row	Column	Condition	Target
✓ Adhesives - Time / Temperature	Expiration	Target	Equals	Wednesday, November 28, 2007
<div>Add New</div>				

- 4 To further define the custom section value, you must select the **Row** and **Column** where the value may exist. Once the row and column are selected, you can define the **Condition** and **Target** values. Target fields will vary based on the section + row + column combination that you have selected.
- 5 Click the apply changes icon (  ).
- 6 Click **Done**. The custom section search criteria are added to the search page.

## Search Results

When you click **Search**, search results matching your criteria display in the Search Results section. If search results exceed the number defined in the **Results Per Page** field, additional pages are generated. Click the linked page numbers to view the additional pages. You can also click any linked field to view the associated item.

Figure 1-22: Search results

**Search Results**

Results Per Page 10 Export

<u>Spec #</u>	<u>Spec Name</u>	<u>Item Type</u>	<u>Status</u>	<u>GTIN/UPC/EAN</u>
<a href="#">5077539-001</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit (co-pack)	Spec Group Review	00000000000123
<a href="#">5077539-002</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit (not pack)	Draft	
<a href="#">5077539-003</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit	Data Admin Review	12345678909871
<a href="#">5077539-004</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit	Approved	12345678909871
<a href="#">5077539-005</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit (co-pack)	Draft	00000000000123
<a href="#">5077539-006</a>	BBQ Beef and Vegetable Dinner - 11 oz	Traded Unit (co-pack)	Review	00000000000123
<a href="#">5077539-007</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit	Approved	130
<a href="#">5077539-008</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit	Draft	
<a href="#">5077539-009</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit	Draft	130
<a href="#">5077542-001</a>	BBQ Beef and Vegetable Dinner - 11 oz - 12x Case	Traded Unit	Draft	

1 2 3 4

## Saving Search Criteria

Once you have entered your search criteria, you can save those criteria for later use. This feature can be a great help when search criteria become very complex.

---

**Caution!** Search criteria added using the additional attribute link cannot be saved.

---

### To save search criteria:

- 1 Enter your search criteria as described in *Understanding the Search Page* on page 1-12.
- 2 Click **Save Search**, as shown in figure 1-23. A Save Search Criteria As dialog box displays, as shown in figure 1-24.

Figure 1-23: Search page showing Save Search button

The screenshot shows a web interface for 'Trade Specifications'. At the top right is a 'Create New' button. Below the header are tabs for 'Taxonomy' and 'Search'. The 'Search Criteria' section includes a dropdown for 'Spec Name', a dropdown for 'Contains', and a text input field containing 'beef'. There are links for 'more criteria...' and 'additional attributes...'. Below these are 'Search' and 'Reset' buttons. The 'Save Search' button is circled in red, with a 'Load Search' button next to it. The 'Search Results' section shows 'Results Per Page' set to 10. A table displays search results with columns: Spec #, Spec Name, Item Type, Status, GTIN/UPC/EAN, Supersedes, and Equivalent.

Spec #	Spec Name	Item Type	Status	GTIN/UPC/EAN	Supersedes	Equivalent
<a href="#">5077539-001</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit (co-pack)	Spec Group Review	00000000000123	New Item	5010040800AA

Figure 1-24: The Save Search Criteria As dialog box

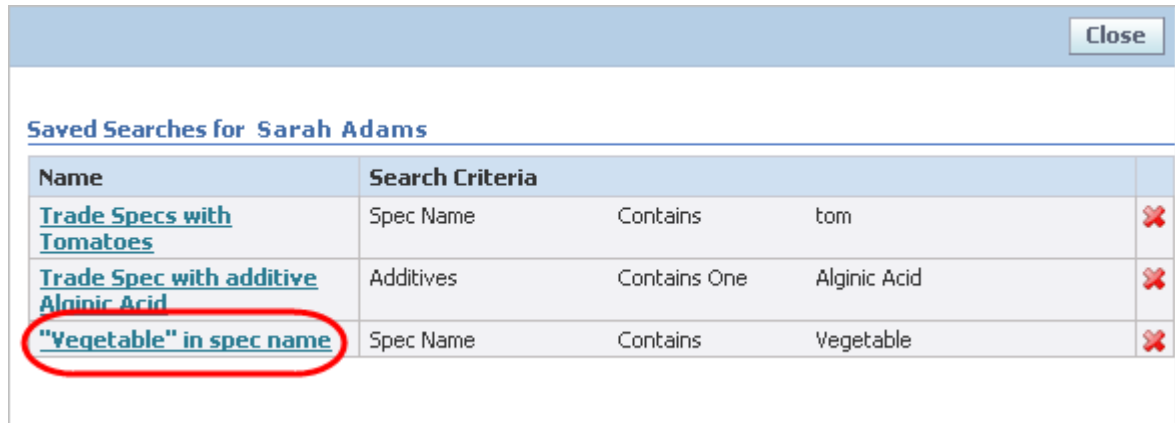
The dialog box has a title bar with a 'Cancel' button. The main area is titled 'Save Search Criteria As' and contains a text input field for naming the search criteria. A 'Save' button is located below the input field.

- 3 Type a descriptive name for the search criteria to save and click **Save**. The dialog box closes, and the search criteria are saved with the name that you provided.

### To retrieve a saved search:

- 1 On any search page, click **Load Search**. A dialog box displays, showing a list of all of the searches that you have saved for a particular business object (specification, company, etc.), as shown in figure 1-25.

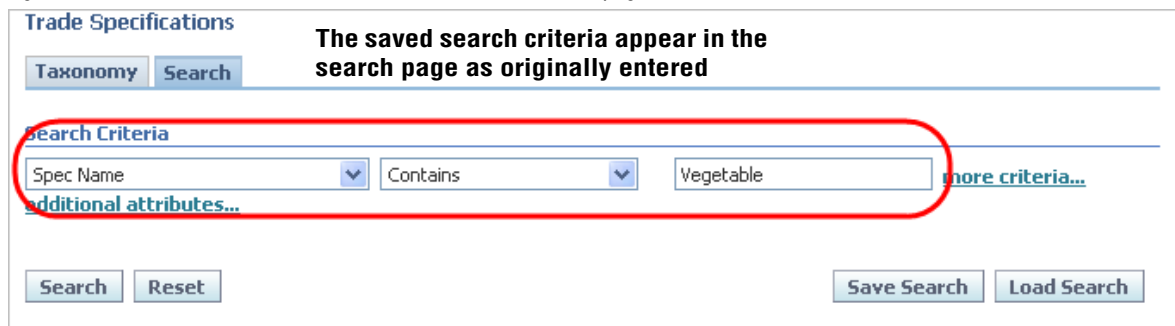
Figure 1-25: Saved Searches for [Your Name] dialog box



Name	Search Criteria	
<a href="#">Trade Specs with Tomatoes</a>	Spec Name Contains tom	✖
<a href="#">Trade Spec with additive Alginic Acid</a>	Additives Contains One Alginic Acid	✖
<a href="#">"Vegetable" in spec name</a>	Spec Name Contains Vegetable	✖

- 2 Click the hyperlinked name of the saved search to load as shown in figure 1-26 below.

Figure 1-26: Saved search criteria, loaded into the main search page



**Trade Specifications**

**The saved search criteria appear in the search page as originally entered**

**Search Criteria**

Spec Name Contains Vegetable [more criteria...](#)

[additional attributes...](#)

Search Reset Save Search Load Search

## Exporting Search Results

Once you have performed your search, where supported, you can export the search results in Microsoft Excel (.XLS) format.

**To export search results to a local Excel file:**

- 1 Perform a search. The system displays the search results, as shown in figure 1-27.

Figure 1-27: Search results list

**Trade Specifications**

**Taxonomy Search**

---

**Search Criteria**

Spec Name  Contains  [more criteria...](#)

[additional attributes...](#)

---

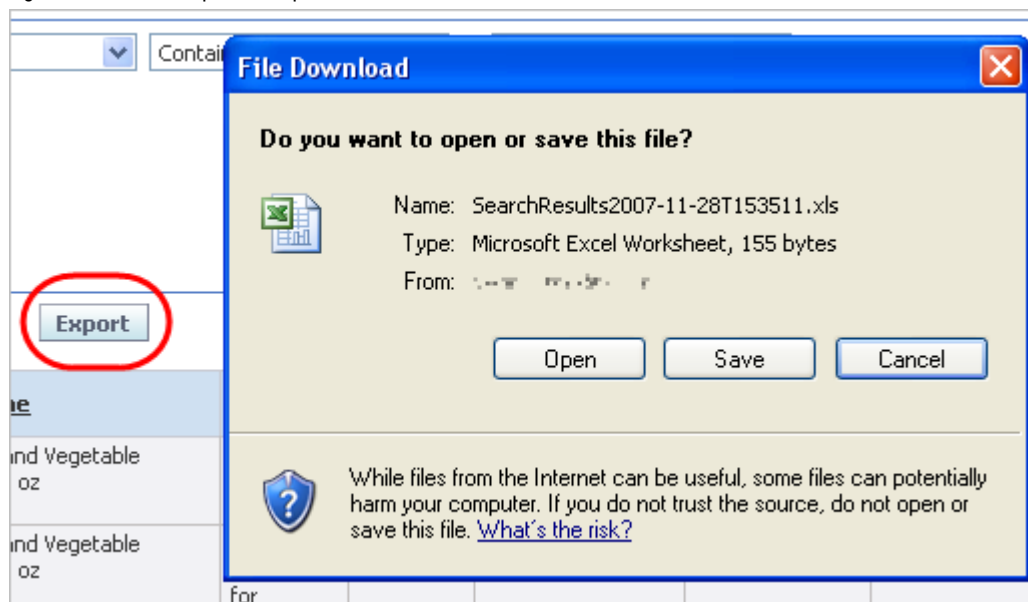
**Search Results**

Results Per Page

<u>Spec #</u>	<u>Spec Name</u>	<u>Item Type</u>	<u>Status</u>	<u>GTIN/UPC/EAN</u>	<u>Supercedes</u>	<u>Equivalent</u>
<a href="#">5077539-001</a>	BBQ Beef and Vegetable Dinner - 11 oz	Consumer Unit (co-	Spec Group	000000000000123	New Item	5010040800AA

- 2 Click **Export**. PLM writes the search results to an Excel file and displays a dialog box for downloading or viewing the exported file.

Figure 1-28: Click Export to export search results to a file



- 3 Click **Open** to view the file in Excel or click **Save** to save the file to a local drive.

**Note** When you export search results to an Excel file, all the returned data is exported to the Excel file. You can also manually copy data from a table into Excel by using Window's Copy and Paste features, but only the data on the current search results page can be copied.

Figure 1-29: Exported search results in Excel

Spec #	Spec Name	Status	Taxonomy	Supersedes	Equivalent
5077400.001	Tomato Paste - Grade A Fancy	Draft	* No Category Available + * No Category Available	34381 - 05/05/2001	
5077425.001	Soybean (Refined, Bleached, Deodorized)	Admin Review	* No Category Available + * No Category Available	34590 - 05/05/1997	
5077617.001	test	Draft	* No Category Available + * No Category Available		
5077618.001	test	Draft	* No Category Available + * No Category Available		
5079977.001	URL, attached	Draft	* No Category Available + * No Category Available		
5080262.001	Green On	Draft	* No Category Available + * No Category Available		
5080263.001	Red On	Draft	* No Category Available + * No Category Available		
5080305.001	SeedAnd	Review	* No Category Available + * No Category Available		
5080562.001	igs 4.8 20080810 1257 (legacy w/for)	Developing	* No Category Available + * No Category Available		
5080600.001	u680 ing Testing Extended Attributes TMC 20080810	Review	* No Category Available + * No Category Available		
5080652.001	inc test sac workflow	Draft	* No Category Available + * No Category Available		
5080747.001	inc ing A	Draft	* No Category Available + * No Category Available		
5080764.001	igs compliance rollup test 20080823 100	Draft	* No Category Available + * No Category Available		
5080824.001	Pure "G" Water	Draft	* No Category Available + * No Category Available		
5080827.001	advised	Draft	* No Category Available + * No Category Available		
5080830.001	carrots	Review	* No Category Available + * No Category Available		

4 You can now format the data in Excel.

## Sorting Search Results

In Agile PLM for Process, search results display in ascending order by default. To re-sort results, click any column head and the data redisplay sorted on that column. Click any column head a second time to reverse the sort order.

## Understanding the Taxonomy Tab

The second method of finding data within Agile PLM for Process uses the Taxonomy tab, which resides on the same screen as the main search page for certain applications (see figure 1-30). The Taxonomy tab allows you to navigate through a set of business objects based on their categorization. Visibility of items in the taxonomy search may be limited based on user privileges.

Figure 1-30: Taxonomy tab, as seen from the main search page tab



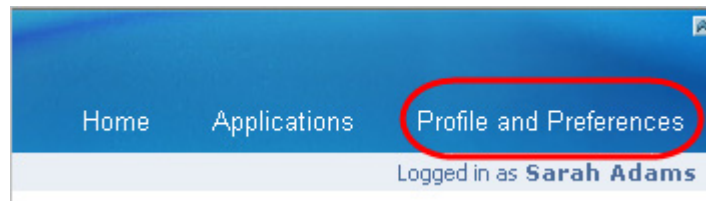
## Defining Your Profile and Preferences

Use Profile and Preferences to edit and view your settings that span across select applications.

In user preferences dialog box, you can change your password (if available), update your contact information, change your language, and set key default values used across select applications.

To access this dialog box, click **Profile and Preferences** on the top menu, as shown in figure 1-31 below.

Figure 1-31: Location of the Profile and Preferences menu item





The user preferences dialog box displays, as shown in figure 1-32 below.

Figure 1-32: The User Preferences dialog box

The User Preferences dialog box is shown with a blue header bar containing 'Save & Close' and 'Cancel' buttons. The 'Basic Information' tab is selected. The form contains the following fields:

- First Name:** Sarah
- Last Name:** Adams
- Job Title:** VP2
- Business Phone:** 555-111-2222
- Fax:** 555-111-3333
- Email:** sadams@yourcompany.com
- Street Address:** 100 Main
- City:** Dallas
- State/Province:** TX
- Postal Code:** 55555
- Country:** USA (dropdown)
- Business Unit(s):** Africa, Asia, Latin America
- User Groups:** SuperAdmin;07122007;0844, Global, GLOBAL\_SPEC\_ADMINS, GLOBAL\_SPEC\_USER, Developers, ComplianceReviewer, Global TIP Admin, FIC Admin, Testing Protocol Admin, Failed Tip Admin, NPDSARReader, HiddenSpecViewer, CSS-Prodika, Spec Editor, Cache Flush, Data Admin, SAC Developer, CSS CSA, Month
- UI Language:** English (United States) (dropdown)
- Free Text Language:** ENGLISH (dropdown)
- Global Spec UOM:** kg (dropdown)
- System Code (GSM):** SAP System (with a red X icon)
- System Code (SCRM):** SAP System (with a red X icon)
- Change Password** (link)

**Legend:**

UI User interface  
UOM Unit of measure

### *Contact Information*

You can update your contact information using the fields below:

- First Name
- Last Name
- Job Title
- Business Phone
- Fax
- Email
- Street Address
- Street Address (2)
- City
- State/Province
- Postal Code
- Country

### *Business Unit(s)*

This is a read only view of the business units you have access to. You can view only those objects (specifications, companies, etc.) that have the business unit listed here. Your system administrator assigns business units.

### *User Groups*

This is a read only view of the user groups you are a member of. User groups are simply collections of users and roles. Your system administrator creates and assigns user groups according to functional area, business unit, geographical area, and so on.

### *Preferences*

**UI Language**—This field is used to denote your preferred user interface language. This field includes a variety of items, such as navigation controls, tab labels, and attribute labels.

**Free Text Language**—This field is used to denote your preferred language for data you enter into the system.

**Global Spec UOM**—This field is the default unit of measure selected when adding steps to a process or to a Design Workbench (DWB) specification.

**System Code (GSM)**—This field designates which cross references system equivalent to use for searching. This field will be the equivalent number that displays in the GSM search results.

**System Code (SCRM)**—This field designates which cross references system equivalent to use for searching. This field will be the equivalent number that displays in the SCRM search results.

### *Change Password*

If password management is enabled by the administrator, the last link in the user preferences dialog box is Change Password.

#### **To change your password:**

- 1** Click the **Change Password** link at the bottom of the user preferences dialog box. A small Change User Password dialog box opens.
- 2** Type your **Old Password** and type your new password in the **New Password** and **Confirm Password** fields.
- 3** Click **Submit**. The new password takes effect after you have saved the revised user profile.