

# **Agile Product Lifecycle Management for Process**

Global Specification Management User Guide

Release 5.2

**Part No. E11004-01**

February 2008

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**February 15, 2008**

# DOCUMENT CONTROL

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## Change Record

Date	Author	Version	Change Reference
Sept-07	Agile/Oracle	1.0	Initial release, Part No. TPPR-0019-5.1A
Feb-08	Oracle	2.0	2nd release, Part No. E11004-01



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# ABOUT THIS MANUAL

## Agile Product Lifecycle for Process Documentation

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 version 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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Before calling Oracle Support about a problem with an Agile PLM manual, please have ready the full part number, which is located on the cover.
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## Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle 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	GSM User Guide	Admin. User Guide	Readme	Agile training	Agile Help Desk	Agile sales rep
<b>Administering Agile PLM for Process</b>		●		●		
<b>Cache management</b>		●				
<b>Compliance</b>	●					
<b>Core data management</b>		●				
<b>Creating specifications</b>	●			●		
<b>Custom data management</b>		●				
<b>Custom sections</b>	●	●		●		
<b>Extended attributes</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>Managing specifications</b>	●			●		
<b>New in this release</b>			●	●		●
<b>Printing</b>	●			●		
<b>Resolved issues</b>			●			
<b>System-based roles</b>		●				
<b>Technical support</b>					●	
<b>User management</b>		●				
<b>Using the GSM application</b>	●			●		
<b>Workflow management</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 Product Lifecycle Management 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
<a href="#">Blue italic font</a>	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.
<div><div></div><b>Note</b> Minion 11.5 pt, with faint blue bar over &amp; under</div>	Alerts you to supplemental information.
<div><div></div><b>Caution!</b> Minion 11.5 pt, with faint red bar over &amp; under</div>	Alerts you to possible data loss, breaches of security, or other more serious problems.
<div><div></div><b>Important</b> Minion 11.5 pt, with thick red bar over &amp; under</div>	Alerts you to supplementary information that is essential to the completion of a task.

# CHAPTER 1

## Introduction

---

*This chapter presents an overview of Agile Product Lifecycle Management for Process and describes a few basic features.*

*Topics in this chapter include:*

- ❑ *The Global Specification Management Application*
  - ❑ *Touch Points with Other Applications*
  - ❑ *Finding Agile Data*
- 

### **The Global Specification Management Application**

Global Specifications Management (GSM) provides your company with a collaborative business process for managing data creation, localization, taxonomy, and workflow for all levels included in the product genealogy—across the enterprise and with value chain partners

#### **Overview**

GSM is the solution:

- In which your company's products are created and modified
- From which the product data are syndicated to other enterprise systems

GSM enables your company to create “one version of the truth” of your entire product record, from finished products and manufacturing processes to your ingredients and packaging materials. The entire product genealogy is connected, enabling your company to build an integrated view of the interrelationships among all specifications.

GSM is a critical part of the larger Agile Product Lifecycle Management for Process suite. For general information about the Agile PLM for Process suite, please see the *Agile Product Lifecycle Management for Process Getting Started Guide*

## Key Agile Product Lifecycle Management for Process Capabilities

- ❑ **Trade specifications** — Contain all the attributes required to describe the finished products sold by your company.
- ❑ **Process specifications** — Describe the manufacturing and packaging processes that your company uses to produce the trade specifications
- ❑ **Nutrient profiles** — Contain the nutrient data related to process and trade specifications.
- ❑ **Printed packaging specifications** — Describe the printed packaging to be used in trade specifications.
- ❑ **Packaging material specifications** — Contain the data related to the packaging materials used to package trade specifications.
- ❑ **Ingredient specifications** — Enable your company to manage all attributes related to ingredients that it purchases for use in the bill of materials contained in the process specifications.
- ❑ **Packing configuration specifications** — Describe the inbound packing configurations required by your company for incoming goods (ingredients and packaging materials).
- ❑ **Delivered material packing specifications** — Contain the data related to the inbound packing materials specified for incoming goods (ingredients and packaging materials). GSM then pulls these specifications together into packing configuration specifications, which fully describe the conditioning of incoming goods.
- ❑ **Labeling specifications** — Contain the labeling and coding requirements that suppliers need to affix on delivered material packing specifications for incoming goods (ingredients and packaging materials).
- ❑ **Master specifications** — Represent generic specifications, such as general terms and conditions, company programs and directions, regulatory guidelines, and so on. You can use such a specification to capture high-level organizational standards for related traded products, processes, ingredients, or packaging. Using master specifications can increase flexibility and improve document control.



## Touch Points with Other Applications

### Design Workbench

GSM is tightly integrated with Design Workbench (DWB) to enable you to quickly build DWB specifications using ingredient and process specifications. Additionally, DWB and GSM are designed to enable publishing of specification data to GSM once the design specification has been completed in DWB.

You can maintain lineage between GSM specifications and Design Workbench (DWB) specifications as specifications are copied back and forth between GSM and DWB. This feature applies to the following:

- ❑ Process specifications
- ❑ Trade specifications
- ❑ Nutrient profiles

Because of this feature, you can:

- ❑ Identify the source of a GSM specification (process/trade/nutrient profiles)
- ❑ Identify DWB specifications created from a GSM specification
- ❑ Identify the source of a DWB specification
- ❑ Identify GSM specifications created from a DWB specification

For more information on DWB, refer to the *Agile Product Lifecycle Management for Process Design Workbench User Guide*.

### Computer Aided Compliance Screening

Computer Aided Compliance Screening (CACS) enables you to screen products through rules and regulations to ensure their compliance with customer, market, nutritional, and regulatory constraints. For more information, refer to the *Agile Product Lifecycle Management for Process Computer Aided Compliance Screening User Guide*.

### eQuestionnaire

eQuestionnaire (eQ) is a tool that you can use to obtain specification data from suppliers and manage their disposition in GSM. For more information, refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*.

### New Product Development

Use the activities feature in New Product Development (NPD) to tie specifications created in GSM to projects. For more information, refer to the *Agile Product Lifecycle Management for Process New Product Development User Guide*.

## Document Reference Library

You can associate Document Reference Library (DRL) documents to many Agile business objects within Agile PLM for Process applications, such as GSM specifications, New Product Development projects, and eQuestionnaire questionnaires. For more information, refer to the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

## Product Quality Scorecard

You can syndicate GSM core data to other Agile Product Lifecycle for Process applications as well as to other systems in your company. Product Quality Scorecard (PQS) uses testing protocols, which must be configured in GSM. For more information, see the *Agile Product Lifecycle Management for Process Product Quality Scorecard User Guide*.

## Reporting

The Reporting application provides reporting capability for data in GSM. For more information, see the *Agile Product Lifecycle Management for Process Reporting User Guide*.

## Supply Chain Relationship Management

GSM specifications are syndicated to Supply Chain Relationship Management (SCRM), where sourcing approvals are created. Refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more information.

## Supplier Portal

Suppliers can view specifications created in GSM using Supplier Portal. For more information, see the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.

## Finding Agile Data

There are two basic ways of locating information in Agile Product Lifecycle Management for Process:

- ❑ By searching
- ❑ By taxonomy

This section explores the first method. For guidance on using the taxonomy method, see [Understanding the Taxonomy Tab](#) on page 1-25.

## Understanding the Search Form

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

Figure 1-1: The basic GSM search form

The screenshot shows a web-based search interface. At the top, there are two tabs: 'Taxonomy' and 'Search', with 'Search' being the active tab. A 'Create New' button is in the top right. Below the tabs is a section titled 'Search Criteria'. It contains three main input fields: a dropdown menu labeled 'Spec Name' (annotated as 'Key field to search in'), a dropdown menu labeled 'Contains' (annotated as 'Operator'), and a text input field (annotated as 'Search term'). To the right of these fields are links for 'more criteria...' and 'additional attributes...'. Below the input fields are four buttons: 'Search', 'Reset', 'Save Search', and 'Load Search'. At the bottom, there is a 'Search Results' section with a 'Results Per Page' dropdown set to '10'.

The search form resides on the Search tab, one of two tabs on the initial screen, the other being Taxonomy (see [Understanding the Taxonomy Tab](#) on page 1-25). To find a specification using the search form, set search criteria using a combination of three basic fields in the Search Criteria section. As shown in figure 1-1, these fields are:

- Key field
- Operator
- Search term

The main search form includes the following buttons, as shown in figure 1-1 above:

**Search**—Displays your search results

**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 1-20).

**Load Search**—Loads a saved search (see [To retrieve a saved search:](#) on page 1-23).

In Agile Product Lifecycle Management for Process the first two search criteria fields contain a default value, in the case of a trade specification, Spec Name (as shown in figure 1-1, on page 1-5). The top few choices in the drop-down list are the most frequently used fields.

## Search Field Definitions

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

Table 1-1: Fields on the main search form

Field	Description
<b>Key field list</b>	Select from a list of search criteria based on the GSM 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.
<b>Results per page</b>	Sets the number of search results to display at one time.

## Key Field List

The first drop-down list in the search form, the Key Field list, consists of field names that specifications can include. See figure 1-2 below for a list of field names in this drop-down list (for a trade specification).

Figure 1-2: Choices in the key field drop-down list (for a trade specification search)

--	Business Unit (Hierarchical)
Spec Name	Complies With
Spec #	Concept (Exact Match)
Equivalent	Concept (Hierarchical)
GTIN/UPC/EAN	Concept(+Children)
Brand	Country Of Origin
--	Created
Additives	Effective
Additives (does NOT contain)	Inactive
Additives(may contain)	Ingredient Statement (nut)
Allergens	Intolerances
Allergens (does NOT contain)	Intolerances (does NOT contain)
Allergens(may contain)	Intolerances(may contain)
Analytical Properties	Last Edit
Analytical Properties - Spec Limit	Originator
Approved for Use In - Country	Packaging Materials
Attachment Filename	Short Name
Breakdown Component	Status
Breakdown Component COO	Supersedes
Breakdown Component FCL	System Equivalent
Breakdown Component FIC Term	System Name
Breakdown Component Ing. Spec	Taxonomy
Breakdown Component Text	UDEX Classification
Business Unit (+Children)	Workflow
Business Unit (Exact Match)	

Most of these field names are self-explanatory. See table A-1, *Key field names of note in the search criteria key field list, described*, on page A-1 for descriptions of search fields of note.

### Key Field Lists by Specification Type

Table 1-2 on page 1-7 is a partial list of possible fields. Note that the lists of key fields varies by specification type to some degree.

## Operator List

The delimiter in the Operator field changes depending on which Key Field you have selected. These logical, or Boolean, operators dynamically adjust to a set of choices that make sense for the possible values of fields in the Key Field drop-down list. See table 1-2 on page 1-7 for a sample list of the possible logical operator sets.

Table 1-2: Sample list of search tool fields, by field type and operator sets

Field type	Field(s)	Operator set
<b>Free text</b>	<ul style="list-style-type: none"> <li>Spec name</li> <li>Brand</li> <li>Equivalent</li> <li>Attachment Filename</li> <li>Breakdown Component</li> <li>Breakdown Component FCL (full container load)</li> <li>Breakdown Component FIC Term</li> <li>Breakdown Component Ingredient. Spec</li> <li>Breakdown Component Text</li> <li>Combined Statement</li> <li>Complies With</li> <li>Description</li> <li>Short Name</li> <li>Status</li> <li>Supersedes</li> </ul>	Contains Equals Starts With
<b>Multiple-select</b> (+)*	<ul style="list-style-type: none"> <li>Additives</li> <li>Additives (does NOT contain)</li> <li>Additives (may contain)</li> <li>Allergens</li> <li>Allergens (does NOT contain)</li> <li>Allergens (may contain)</li> <li>Breakdown Component COO (country of origin)</li> <li>Classification</li> <li>Country of Origin</li> <li>Intolerances</li> <li>Intolerances (does NOT contain)</li> <li>Intolerances (may contain)</li> </ul>	Contains All Contains One
	<ul style="list-style-type: none"> <li>Approved for Use In - Country</li> </ul>	Contains One Equals
<b>Number</b>	<ul style="list-style-type: none"> <li>Spec #</li> <li>GTIN/UPC/EAN,</li> </ul>	Equals Starts With

Table 1-2: Sample list of search tool fields, by field type and operator sets (continued)

Field type	Field(s) (continued)	Operator set
<b>Single option (+)</b>	<ul style="list-style-type: none"> <li>• Business Unit (+Children)</li> <li>• Business Unit (Exact Match)</li> <li>• Business Unit (Hierarchical)</li> <li>• Concept (Exact Match)</li> <li>• Concept (Hierarchical)</li> <li>• Concept (+Children)</li> <li>• Originator</li> <li>• System Name</li> <li>• Taxonomy</li> </ul>	Equals
<b>Date (+)</b>	<ul style="list-style-type: none"> <li>• Effective</li> <li>• Inactive</li> <li>• Last Edit</li> <li>• Created</li> <li>• Effective</li> <li>• Inactive</li> <li>• Last Edit</li> </ul>	Equals Greater Than Less Than
<b>Subsearch list [search- within- search dialog box] (+)</b>	<ul style="list-style-type: none"> <li>• Workflow</li> <li>• Receiving Facilities</li> <li>• Source Facility</li> </ul>	Contains One
<b>Exists</b>	Sourcing Approval	Is NULL
<b>True or False</b>	Supplier signed spec	Is FALSE Is TRUE

\*Add data icon (+) opens a dialog box to further refine field entry

## Search Term Field

The third main field is for entry of search terms. Depending on the type of field selected in the first drop-down list, the Key Field list, the search term field:

- Accepts data entry that you type
- Accepts data entry that you select from prepopulated forms
- Does not accept data

### Entering Search Terms by Typing

You can type your search term directly into the search term field when searching for data in the following two field types:

- Free text fields
- Number fields

See table 1-2, [Sample list of search tool fields, by field type and operator sets](#), on page 1-7 for a list of fields of this type.

### *Entering Search Terms by Prepopulated List*

Several field types require that you choose your terms from prepopulated lists, as indicated by the add data icon (+). Field types that require entry from a prepopulated list include:

- Multiple-select
- Single option
- Date
- Subsearch list (search within search field)

For a sample list of fields of these types, see table 1-2 on page 1-7.

The type of dialog box from which you select a search term can vary by field type and by individual key field. There are a large number of fields for every specification type. Because there are too many combinations to illustrate each one, see the following section for a sampling of dialog boxes.

#### **To select data from a filtered prepopulated field:**

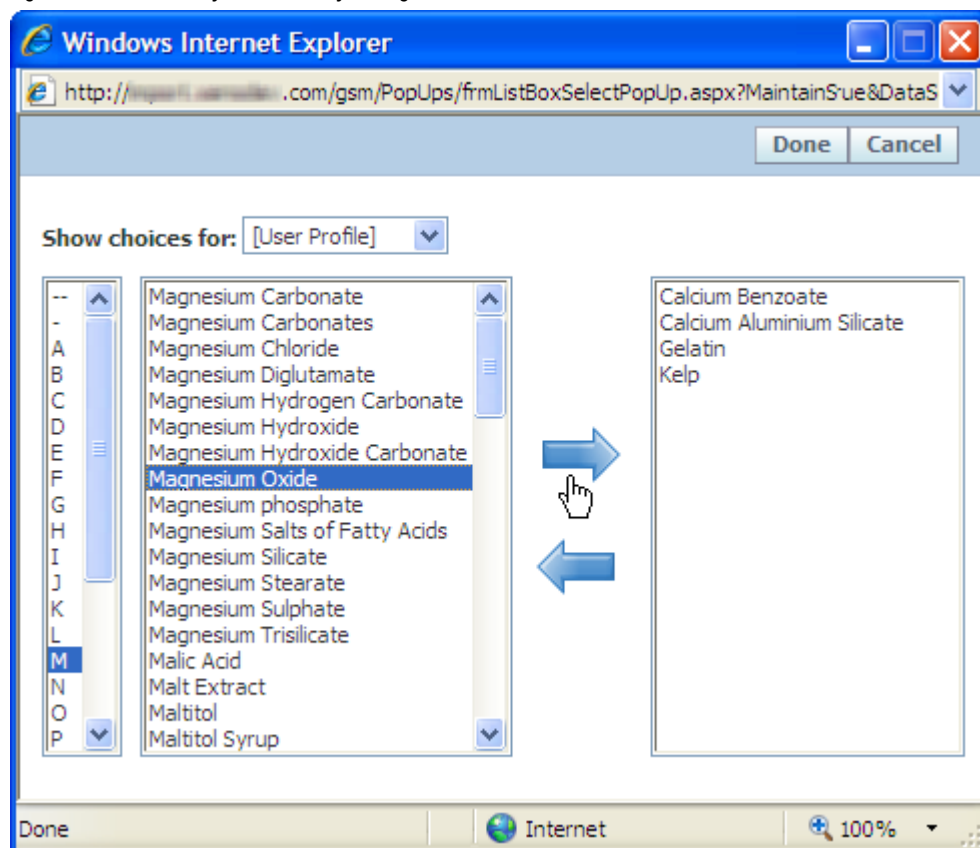
- 1 Click the add data icon (+) to the left of the search term field, as shown in figure 1-3, below.

Figure 1-3: Add data icon, magnified view

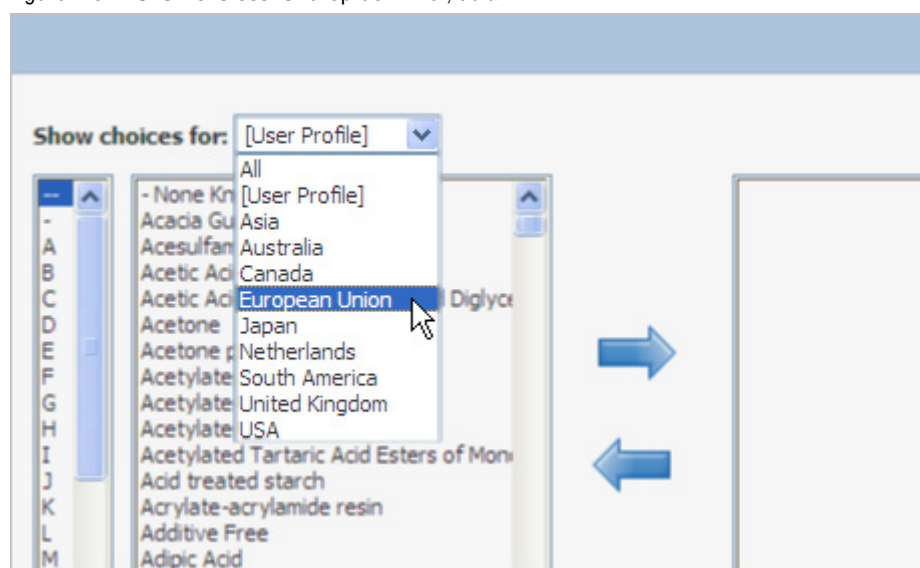
The screenshot shows a web interface for 'Ingredient Specifications'. At the top right is a 'Create New' button. Below the title are two tabs: 'Taxonomy' and 'Search'. The 'Search Criteria' section contains a dropdown menu for 'Allergens' and a 'Contains All' dropdown. A magnified view of the green plus icon (+) is shown over the 'Contains All' dropdown. To the right of the dropdowns are links for 'more criteria...' and 'additional attributes...'. Below the search criteria are buttons for 'Search', 'Reset', 'Save Search', and 'Load Search'. The 'Search Results' section shows a 'Results Per Page' dropdown set to 10.

A multiple-select dialog box appears.

Figure 1-4: One variety of data entry dialog box




- 2 If desired, narrow down your choices by filtering them using the **Show choices for** drop-down list by selecting a grouping.

Figure 1-5: A **Show choices for** drop-down list, detail

The dialog box refreshes with a list of choices filtered based on your selected criteria.






- 3 To filter choices alphabetically, click a letter in the leftmost box. The contents of the second box reload with only those choices beginning with the letter that you have selected
- 4 To add an item listed in the second box, select the item and then click the add selected data icon (). The selected item moves over to the rightmost box.

---

**Note** This screen supports multiple select (Control + mouse in Windows).

---

- 5 To remove one or more items from the rightmost box, select one or more items in the rightmost box and click the remove selected data icon (). The selected item(s) move to the leftmost box.
- 6 At the top right of the dialog box, click **Done**. The dialog box closes, and your revised set of fields appears listed in the search term field to the right of the add data icon () in the search form.

There is a lot of variety in the dialog boxes that display when you click the add data icon (). The basic types of dialog boxes are:

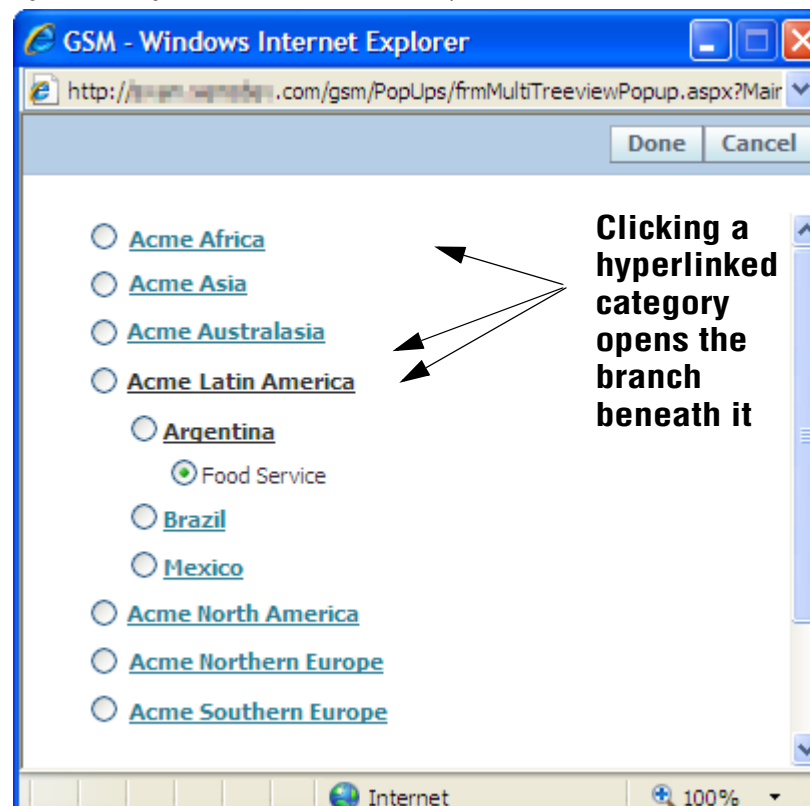
- Alphabetically filtered prefilled list dialog box, as shown in figure 20-5, [Group Filter dialog box](#), on page 20-7
- Geographically and alphabetically filtered prefilled list dialog box, as shown in figure 1-4, [One variety of data entry dialog box](#), on page 1-10
- Single-select tree of hyperlinked choices, as shown in figure 1-6 below

Figure 1-6: Single-select tree of hyperlinked choices



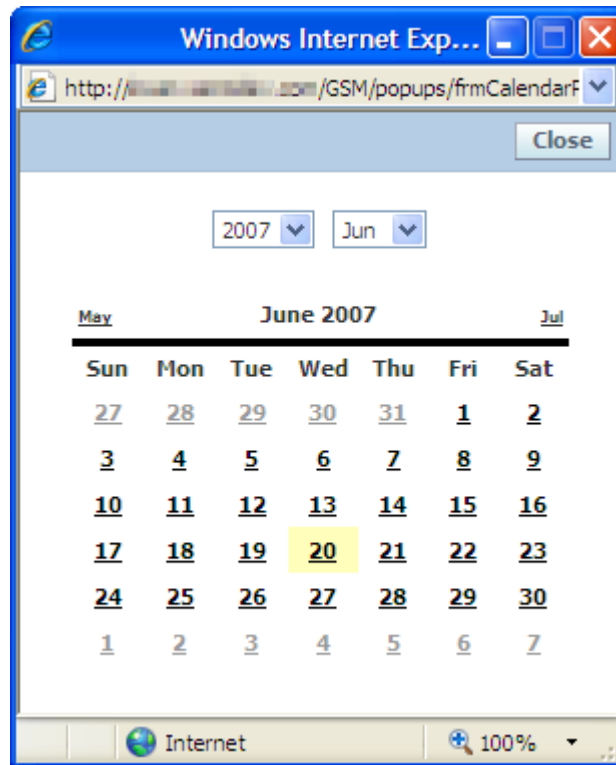
- Single-select tree of choices with option buttons, as shown in figure 1-7 below

Figure 1-7: Single-select tree of choices with options buttons



- Calendar dialog box, as shown in figure 1-8 below, used exclusively for date fields

Figure 1-8: Calendar dialog box



- Subsearch (search-within-search) dialog box, for use in narrowing down a large number of options, as described in [Using the Subsearch Tool](#) on page 1-14

### *Using the Subsearch Tool*

Possibly the most complex method of entering data in the search terms field is through use of the subsearch (search-within-search) dialog box. This dialog box enables you to do a “mini-search” with selected criteria in order to populate a large text field that you can then manually edit before sending its contents into the search terms field of the main search form. The fields displayed in the subsearch vary based on context, and there are a large number of possible combinations.

There are three basic steps to using the subsearch (or search-within-search) tool:

- 1** Search for your criteria using the search form at the top
- 2** Select one or more hyperlinked search results (which then appear in the Selected Items box)
- 3** Click **Done** to close the dialog box and send the contents of the Selected Items box to the search terms field of the main search window.

See figure 1-9 for an illustration of how to use the subsearch tool.

Figure 1-9: Using the subsearch tool

The screenshot shows a web-based subsearch tool interface. At the top, there is a 'Select Search Type' section with a dropdown menu set to 'Trade Specifications' and a 'Search' button. Below this is the 'Search Criteria' section, which includes a 'Spec Name' dropdown, a 'Contains' dropdown, and a text input field containing 'tom'. A red box highlights the 'Select Search Type' section, and an arrow points to it with the annotation '1. Perform a preliminary search using the search form at the top'. Below the search criteria is the 'Search Result' section, which contains a table with three columns: 'Spec #', 'Spec Name', and 'Item Type'. The table lists five search results, each with a 'Spec #', a 'Spec Name' (which is a clickable link), and an 'Item Type'. A red box highlights the 'Spec Name' column, and an arrow points to it with the annotation '2. Click the links of the search results that your preliminary search produced'. Below the search results is the 'Selected Items' section, which contains a list of selected items. A red box highlights the list, and an arrow points to it with the annotation '3. Click Done'. At the bottom of the 'Selected Items' section are three buttons: 'Remove', 'Clear', and 'Done'. The 'Done' button is highlighted with a red box.

**Select Search Type**

Trade Specifications

**Search Criteria**

Spec Name  tom

**Search Result**

Spec #	Spec Name	Item Type
5077663-001	<a href="#">Chicken Breast with Tomato</a>	Added Unit
5085045-001	<a href="#">Lemonade EA and Custom</a>	Consumer Unit
5085231-001	<a href="#">Lemonade EA and Custom</a>	Consumer Unit
5085235-001	<a href="#">Lemonade EA and Custom</a>	Consumer Unit
5082076-001	<a href="#">toms rc10 spec</a>	Consumer Unit

1 2

**Selected Items**

Chicken Breast with Roasted Garlic Tomato Dipping Sauce  
Lemonade EA and Custom Section Test

Because of the nested design of the subsearch tool, there are too many permutations to cover all of them in a user manual. Therefore you can consider the samples below (figure 1-10 and figure 1-11) as representative of the whole.

Figure 1-10: Subsearch tool when searching for facilities, blank

**GSM - Windows Internet Explorer**

http://.../gsm/PopUps/frmSearchableMultiSelect.aspx?ie&delimit%2C&Data

**Select Search Type**

Facility

**Search Criteria**

Facility Name   --

**Search Result**

**Selected Items**

Done In 100%

Figure 1-11: Facilities subsearch tool showing selected search results

The screenshot shows a web-based search interface for facilities. At the top right is a 'Close' button. Below it is a 'Select Search Type' section with a dropdown menu set to 'Facility' and a 'Search' button. The 'Search Criteria' section contains two rows of criteria: 'Company Name' with the operator 'Contains' and the term 'sugar', and 'Facility Name' with the operator 'Contains' and the term 'domino'. Below this is a 'Search Result' section containing a table with one row of results. The table has columns for Facility (Prodika#), Facility Name, Company Name, City, State/Province, and Country. The result row shows '5010686' for the facility ID, 'Acme Sugar - Baltimore' for the facility name, 'Acme Sugar Refining Co.' for the company name, 'Baltimore' for the city, 'MD' for the state, and 'USA' for the country. Below the table is a 'Selected Items' section with a text box containing 'Sweet Sugar Co.' and buttons for 'Remove', 'Clear', and 'Add Facility'.

**Select Search Type**

Facility

**Search Criteria**

Company Name  Contains  sugar

Facility Name  Contains  domino

**Search Result**

Facility (Prodika#)	Facility Name	Company Name	City	State/Province	Country
5010686	<a href="#">Acme Sugar - Baltimore</a>	Acme Sugar Refining Co.	Baltimore	MD	USA

1

**Selected Items**

Sweet Sugar Co.

### *Searching for Field Types That Do Not Use the Search Terms Field*

The following two field types make use of logical, yes-or-no operators for which the search terms field is unnecessary:

- Exists
- True or False

If the field in which you are searching is one of these types, for example, Sourcing Approval or Supplier signed spec, you complete the search criteria when you choose the operator (Is NULL, Is FALSE, Is TRUE).

### **Adding More Criteria**

In addition to the basic entry fields on the search form—key field list, operator, and search term—two action links appear, **more criteria** and **additional attributes**, as shown in figure 1-12.

Figure 1-12: The More Criteria and Additional Attributes action links on the main search form

**Packaging Material Specs**

**Taxonomy Search**

**Search Criteria**

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

**more criteria... additional attributes...**

**Search Reset Save Search Load Search**

**Search Results**

Results Per Page

When clicked, the first of these action links, **more criteria**, creates a second row of the main three search fields. You can use additional rows to enter additional search parameters.

## Searching Custom Data

You can use the second action link, **additional attributes**, to search for specifications with existing extended attributes or custom sections. The link opens a new dialog box with two main sections: Extended Attributes and Custom Section, as shown in figure 1-13.

Figure 1-13: The Additional Attributes dialog box, showing Extended Attributes and Custom Section areas

**Done**

**Extended Attributes**

Extended Attributes	Condition	Target

**Add New**

**Custom Section**

Custom Section	Row	Column	Condition	Target

**Add New**

## Searching for Extended Attributes

Extended attributes are fields of data that your organization has defined. They are one method of extending the functionality of Global Specification Management. Extended attributes define important features and characteristics of a material. You can build these attributes to meet specific needs.



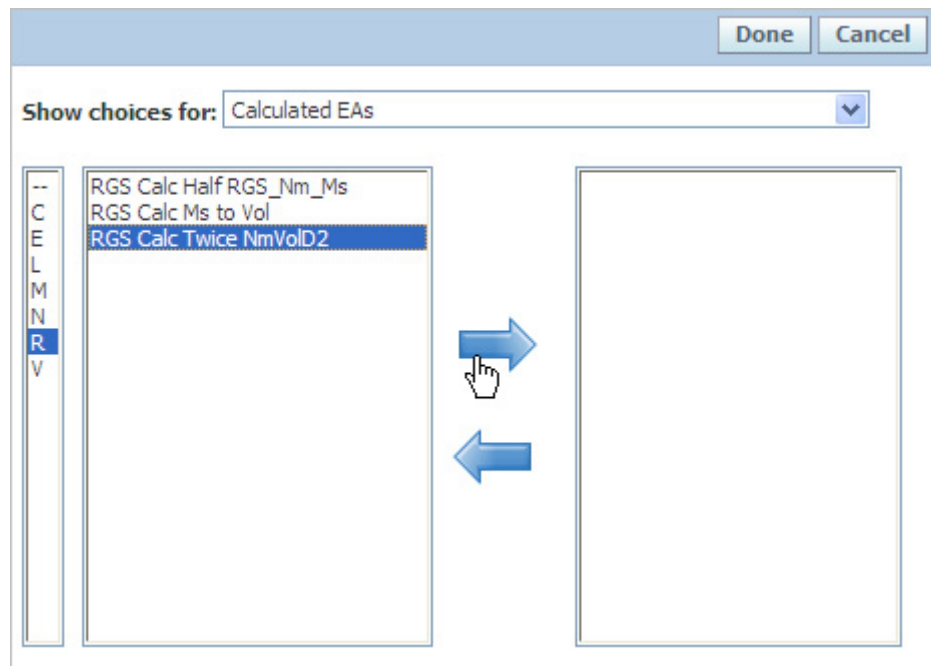
Use extended attributes to manage:

- ❑ **Material Attributes**—Stable characteristics of a product that typically do not change on a unit-by-unit, lot-by-lot, or batch-by-batch basis
- ❑ **Presentation**—Extended Attributes are presented on a specification as a single attribute or in a custom section (table format).

### To add an extended attribute to your search criteria:


- 1 After you have chosen your search field, operator, and search criteria, click the **additional attributes** action link at the right side of the last row of search fields. The Additional Attributes dialog box displays, showing an Extended Attributes section and a Custom Section section, as shown in table 1-13 on page 1-18.
- 2 In the Extended Attributes section, click **Add New**. A multiple-select dialog box appears, listing the extended attributes available to that object type, as shown in figure 1-14.

Figure 1-14: Multiple-select dialog box, launched by clicking Add New



**Note** Data in the prepopulated list is read-only. To add to or modify this list, contact your Agile Product Lifecycle Management for Process data administrator.


- 3 Select the extended attribute(s) in the left box and click the add selected data icon ( ➡ ) to move them to the box on the right.
- 4 At the top right of the dialog box, click **Done**. The dialog box closes, and your selected extended attribute(s) appears listed in an Extended Attributes table in another dialog box.
- 5 Click the edit icon ( ✎ ) next to the new extended attribute. The dialog box reloads in editable mode.

- 6 Select an evaluation operator from the **Conditions** drop-down list and type a target in the **Target** field.
- 7 Click the apply changes icon (  ) next to the extended attribute that you want to search for.
- 8 At the top right of the dialog box, click **Done**. The dialog box closes, and your selected extended attribute appears listed in an Extended Attributes table just below the basic search form.
- 9 Click **Search** to search for an extended attribute using all of the search criteria that you have selected. GSM displays the result of your search in the Search Results section.

## Searching for Custom Sections

The procedure for adding a custom section to your search criteria is similar to that for adding an extended attribute.

### To add a custom section to your search criteria:

- 1 Follow step 1 through step 5 as discussed above in the procedure directly above, substituting “custom section” for “extended attribute.”
- 2 Select a row and column from the **Row** and **Column** drop-down lists and an evaluation operator from the **Conditions** drop-down list.
- 3 Select from the **Target** drop-down list, the Target field has displayed in the form of a drop-down list or type the target in the **Target** field, if that field has displayed as a text entry field (display will vary based on the custom section).
- 4 Click the apply changes icon (  ) next to the custom section that you want to search for.
- 5 At the top right of the dialog box, click **Done**. The dialog box closes, and your selected custom section appears listed in a Custom Sections table just below the basic search form.
- 6 Click **Search** to search for a custom section using all of the search criteria that you have selected. GSM displays the result of your search in the Search Results section.

## 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.

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**Important** Unlike with other kinds of searches, you cannot save custom data search criteria.

---

**To save search criteria:**

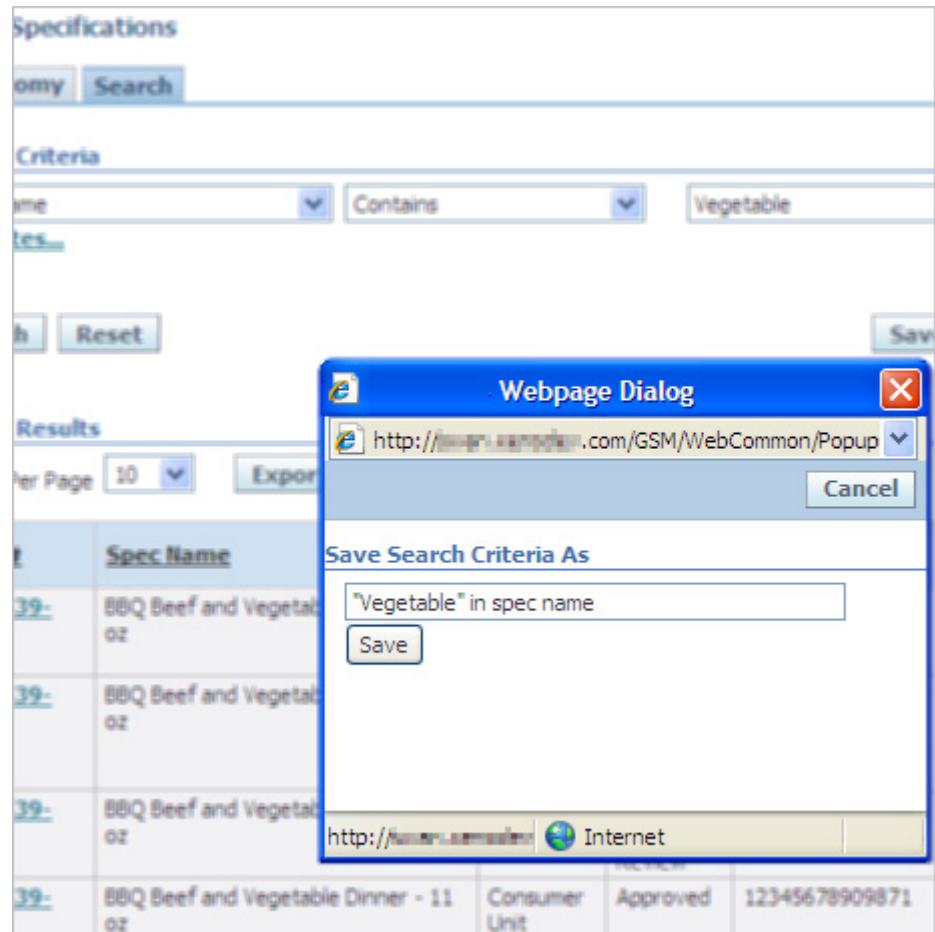
- 1 Enter your search criteria as described in [Understanding the Search Form](#) on page 1-5.
- 2 Click **Save Search**, as shown in figure 1-15. A **Save Search Criteria As** dialog box displays, as shown in figure 1-16, on page 1-22.

Figure 1-15: Search form showing Save Search button

The screenshot shows a web interface for searching trade specifications. At the top right is a 'Create New' button. Below it is a 'Trade Specifications' section with 'Taxonomy' and 'Search' tabs. The 'Search' tab is active, showing 'Search Criteria'. There are dropdowns for 'Spec Name' and 'Contains', followed by a text input field containing 'Vegetable'. To the right of the input field are links for 'more criteria...' and 'additional attributes...'. Below these are 'Search', 'Reset', 'Save Search' (circled in red), and 'Load Search' buttons. The 'Search Results' section shows 'Results Per Page' set to 10 and an 'Export' button. Below this is a table with search results.

Spec #	Spec Name	Item Type	Status	GTIN/UPC/EAN	Supercedes	Equivalent
<a href="#">5077539-001</a>	Vegetable Dinner - 11 oz	Consumer Unit (co-pack)	Packaging Engineering Review	00000000000123	New Item	5010040800
<a href="#">5077539-002</a>	Vegetable Dinner - 11 oz	Consumer Unit (not for resale)	Draft			5010040800

Figure 1-16: The Save Search Criteria As dialog box



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

After you have saved one or more searches, you can very easily retrieve saved search criteria.

### To retrieve a saved search:

- 1 On any search form, click **Load Search**. A **Saved Searches for [Your Name]** dialog box displays, showing a list of all of the searches that you have saved, as shown in figure 1-17.

Figure 1-17: Saved Searches for [Your Name] dialog box

Name	Search Criteria	
<a href="#">Trade Specs with Tomatoes</a>	Spec Name Contains tom	X
<a href="#">Trade Spec with additive Alginic Acid</a>	Additives Contains One Alginic Acid	X

- 2 Click the hyperlinked name of the saved search to load. GSM closes the dialog box and loads the saved search criteria into the main search form, as shown in figure 1-18, on page 1-23.

Figure 1-18: Saved search criteria, loaded into the main search form

**Trade Specifications** Create New

Taxonomy Search

**Search Criteria**

Spec Name Contains tom

Country Of Origin Contains One USA [+ more criteria...](#) [less criteria...](#) [additional attributes...](#)

Search Reset Save Search Load Search

## Exporting Search Results

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

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

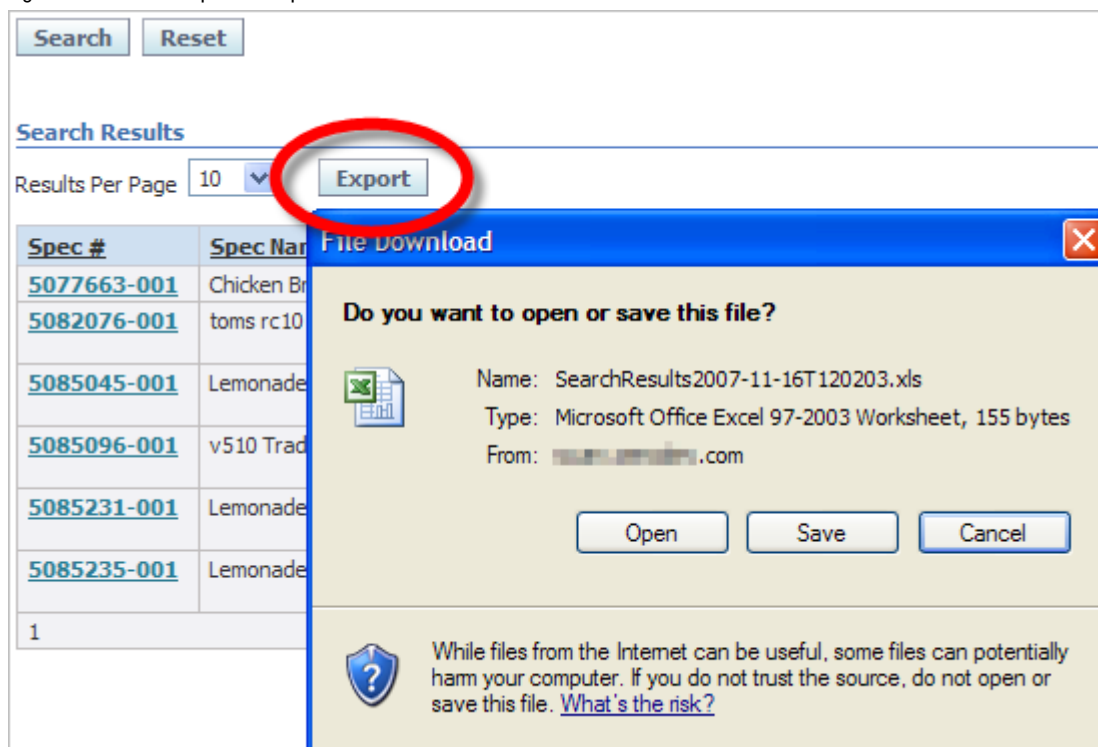
- 1 Execute a search, as described earlier. GSM displays the search results, as shown in figure 1-19.

Figure 1-19: Search results list

Search Results						
Results Per Page	10	<b>Export</b>				
Spec #	Spec Name	Item Type	Status	GTIN/UPC/EAN	Supercedes	Equivalent
<a href="#">5077663-001</a>	Chicken Breast with Tomato Dipping Sauce	Traded Unit	Draft			
<a href="#">5082076-001</a>	toms rc10 spec	Consumer Unit	Draft			
<a href="#">5085045-001</a>	Lemonade EA and Custom Section Test	Consumer Unit	Draft			
<a href="#">5085096-001</a>	v510 Trade CEA Custom Section 20070730	Consumer Unit	Draft			
<a href="#">5085231-001</a>	Lemonade EA and Custom Section T	Consumer Unit				
<a href="#">5085235-001</a>	Lemonade EA and Custom Section rc21	Consumer Unit	Draft			
1						

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

Figure 1-20: 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.

---

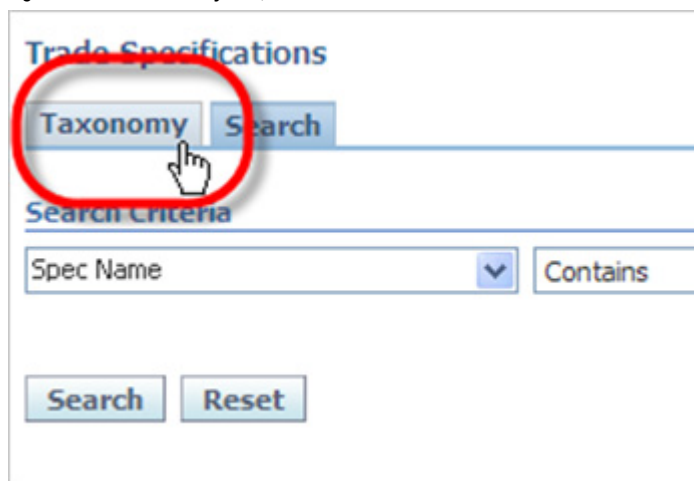
**Note** Search results display in alphabetical order by default. To re-sort results, click any column head and the data redisplay sorted on that column. Click any column head a second time to reverse the sort order based on that column.

---

## Understanding the Taxonomy Tab

The second method of finding data within Agile Product Lifecycle Management for Process (GSM) is the Taxonomy tab, which resides on the same page as the main search form (see figure 1-21).

Figure 1-21: Taxonomy tab, as seen from the main search form tab



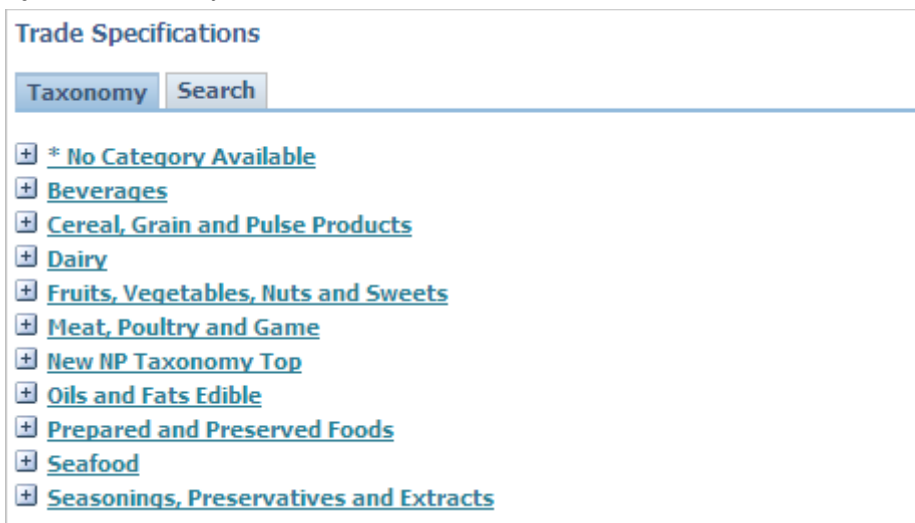
If you need to locate a specification from within a large database, the most efficient tool to use is the search form. We recommend that you use the Taxonomy tab if you would like to:

- ❑ Get a global view of what other specifications and categories exist
- ❑ Gain a better understanding of where your desired specification fits in within the larger hierarchy
- ❑ Get a quick view of how many specifications comprise a grouping
- ❑ Get a quick view of the type of specifications in a grouping

**To locate a specification using the Taxonomy tab:**

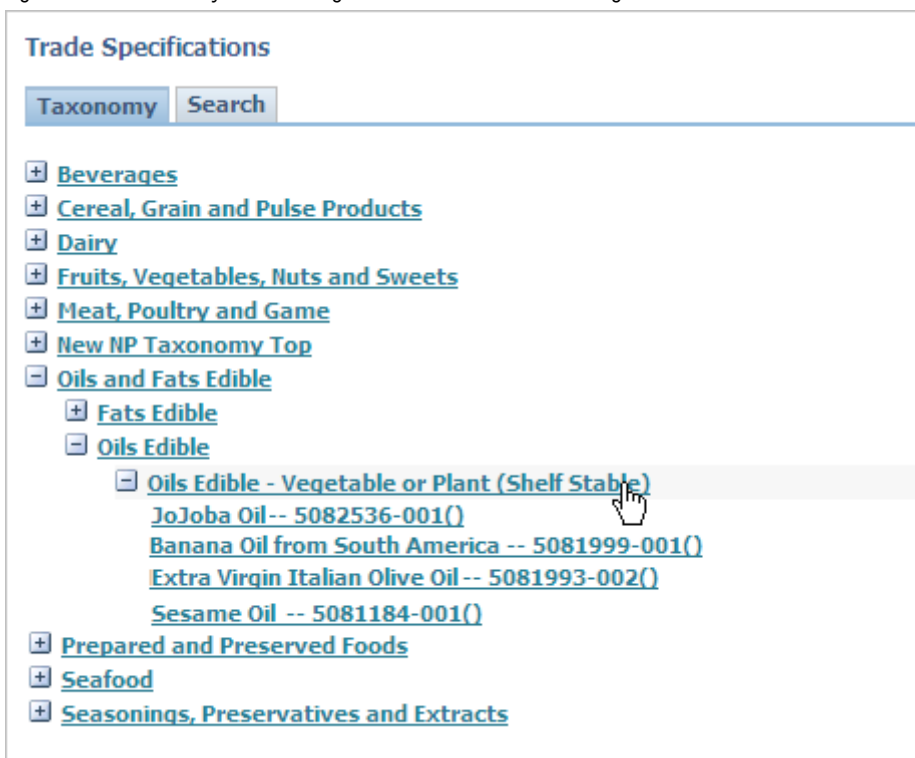
- 1 Open GSM and click any specification type in the left navigation panel. The main search form screen appears.
- 2 Click on the **Taxonomy** tab, as shown in figure 1-21, on page 1-25. The Taxonomy tab page displays, showing the first-level list of categories relevant to your selected specification type, as shown in figure 1-22 below.

Figure 1-22: Taxonomy tab, default, first-level view



- 3 Click the category of the specification that you are looking for. The category opens, displaying one or more second-level categories, as shown in figure 1-23.

Figure 1-23: Taxonomy tab showing second- and third-level categories







- 4 Continue clicking categories in the tree that you have opened until you reach your desired specification, which is at the level that shows no expand node icon (  ) or collapse node icon (  ) next to the hyperlink, as shown in figure 1-24. That level is the end level.

Figure 1-24: Taxonomy tab showing fully expanded branch



- 5 Click your hyperlinked specification. The specification opens the Summary tab of the full specification-specific information screen



# Working with Specifications

---

*This chapter presents guidance on using workflows and other common features of Global Specification Management.*

*Topics in this chapter include:*

- ❑ *Creating Specifications*
  - ❑ *Managing Specifications*
  - ❑ *Comparing Specifications*
  - ❑ *Printing Specifications*
- 

## Creating Specifications

### Creating a New Specification

All specification types have the same creation process in Global Specification Management (GSM).

**To create a specification:**

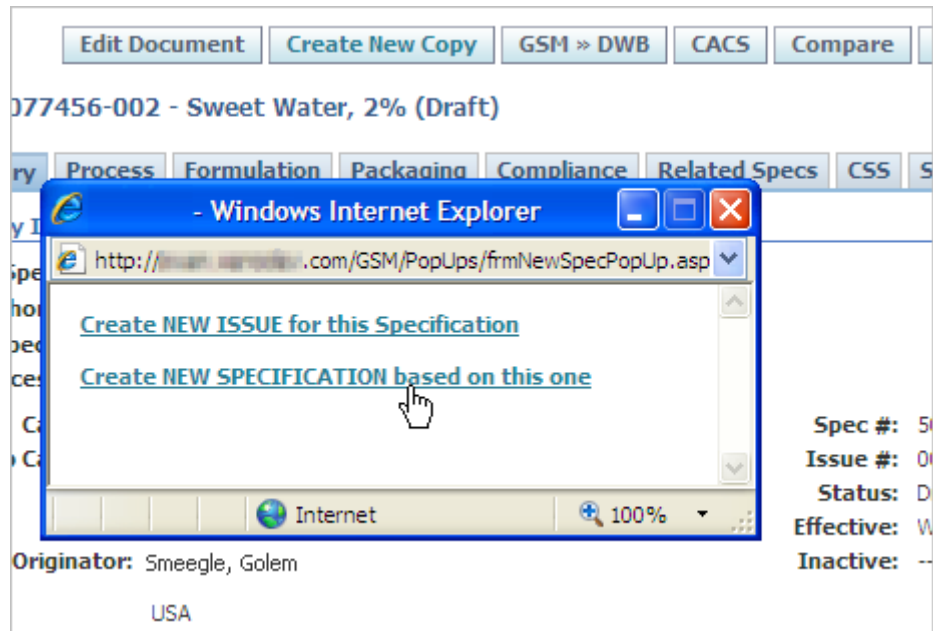
- 1** On the left navigation panel, click the specification type. GSM displays the specification search page for that specification type.
- 2** Click **Create New** at the upper right of the page. A specification page opens with empty fields.
- 3** Follow the guidelines for your desired specification type as laid out in the chapter in this manual that specifically addresses that type of specification.

## Creating a Copy of an Existing Specification

### To create a copy of an existing specification:

- 1 Navigate to the specification to copy.
- 2 On the specification page, click **Create Copy** at the upper right of the page. GSM displays a dialog box, as shown in figure 2-1, below.

Figure 2-1: Create New Specification links



- 3 Click the **Create NEW ISSUE for this Specification** link to create another issue of the specification. This action duplicates most of the data on the specification, increasing the latest Issue # by 1 for the current specification number prefix.

---

**Note** The action in this step is the method of choice when you want to issue the specification. GSM appends issue numbers to the end of the specification number when specifications are referenced. For example, in the specification # 5077456-001, the last 3 digits (001) represent the issue number. GSM tracks specification issues by using the item history feature. For more information, please see [Item History](#) on page 2-3.

---

- 4 Click the **Create NEW SPECIFICATION based on this one** link to create a copy of the specification. This action duplicates most data on the specification, assigning a new specification number. This method saves time when creating similar specifications.

---

**Note** When a copy or issue of a specification is created, the resolved workflow and active workflow step will not follow the specification. The specification will re-resolve to a workflow when saved within GSM. For more on workflows, please see [Resolving Workflows](#) on page 2-6.

---

## Item History

Specification issues are tracked using the item history feature. To access the item history of a specification, navigate to the specification and do one of the following:



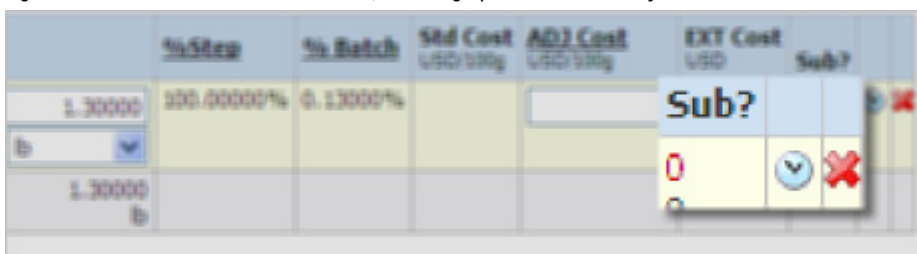
- ❑ Click **Item History** at the upper right of the page. GSM opens the Spec History dialog box, as shown in figure 2-3, below.
- ❑ In the Bill of Materials table, click the edit icon (  ) next to the specification whose history you want to see. The table reloads in editable mode. In the second-to-last column, click the specification history icon (  ) as shown in figure 2-2 below.

Figure 2-2: BOM table in editable mode, showing specification history icon



%Step	%Batch	Std Cost USD/Unit	Adj Cost USD/Unit	EXT Cost USD	Sub?
1.30000	100.00000%	0.13000%			Sub?
					0 v
1.30000					

Figure 2-3: Spec History dialog box

Spec History

Close

Name	Spec Number	Create Date	Originator	Last Modified	Status	Reason for Change
Vinegar - Distilled - 120 GRAIN	5077511-003	9/22/2007	Ott, Mel	9/22/2007	Draft	Added Regulatory Extended Data
Vinegar - Distilled - 120 GRAIN	5077511-002	9/22/2007	Wu, May	9/22/2007	Approved	Adjusted Formulation
Vinegar - Distilled - 120 GRAIN	5077511-001	9/30/2004	Jones, Jo	9/22/2007	Approved	

The Spec History table displays all issues of the specification that exist. Along with other identifying information, this table also displays the reason that the specification was changed. The value in the Reason for Change column appears in most specifications in a field in the Summary Information section of the Summary tab. This section is ordered from newest to oldest, highlighting the specification that you are on.

## Managing Specifications

All GSM specifications are workflow enabled. A workflow is a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules. In Agile Product Lifecycle Management for Process, workflows are managed using the Workflow Administration (WFA) application. For more information on WFA, please see the “Workflow Management for GSM” chapter in the *Agile Product Lifecycle for Process Administrator User Guide*.

## Action Items

As a document moves through the workflow process, the system generates a to-do list, or “action items,” for designated team members. When a specification, or business object, moves from one workflow status to another, GSM adds an entry to the Action Items list for the current owner of that object.

There are three types of action items:

- ❑ Specification
- ❑ Signature document
- ❑ Activity

### Accessing Your Action Items

You can access the Action Items page in three different ways:

- ❑ Click **Applications > GSM > Action Items** on the Application menu in the top menu bar
- ❑ Click **GSM > Action Items** on the GSM application menu on the left navigation panel
- ❑ From within GSM, click **Action Items** on the left navigation panel

## Understanding the Action Items Page

As shown in figure 2-5, the Action Items page contains a table with the following columns:

**Title**—The number and name of the specification

**Type**—The type of action item, hyperlinked to the actual object

**Status**—The workflow step that the object is in (for example, draft, developmental, draft (review), requested for certification, and others)

**RAG/SLA**—A visual representation of the status of your action item (RAG = red, amber, and green dates) as shown below:

Figure 2-4: Red-amber-green (RAG) symbols



**Note** If the RAG status is **Late** (■), the amber (approaching deadline) and red (deadline) dates appear immediately after the red “late” symbol.

Figure 2-5: The Action Items page

GSM Action Items			
Title	Type	Status	RAG/SLA
5083512-001	<a href="#">Nutrient Profile</a>	Draft	■
5082867-001 Color Solution - BQT	<a href="#">Nutrient Profile</a>	Draft	■
5082868-001 Color Solution - BQT	<a href="#">Nutrient Profile</a>	Draft	■
5085535-001 Color Solution - BQT	<a href="#">Nutrient Profile</a>	Draft	■
5085254-001 v510rc22 BU transition	<a href="#">Ingredient Specifications</a>	Review	■ Aug 7/Aug 9
5085256-001 v510rc22 BU transition 2	<a href="#">Ingredient Specifications</a>	Review	■ Aug 7/Aug 9
5085420-001 DG v510rc14 Orange Drink	<a href="#">Nutrient Profile</a>	Draft	■

■ Late (Red)  
■ Needs Attention (Amber)  
■ Normal (Green)

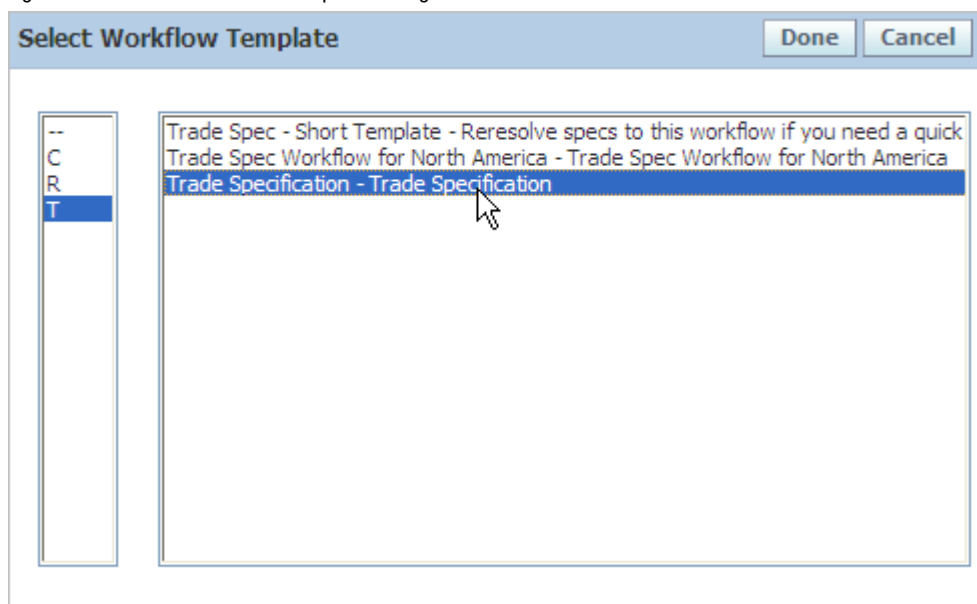
The RAG status is an indicator of compliance with the established service level agreement (SLA) timelines for that document type. SLAs for a specification are defined in that specification’s workflow.

## Resolving Workflows

When you first save a specification within GSM, the application associates a workflow with the specification. In some cases, when the specification resolves to multiple workflow templates, you will need to select the workflow template from the available options.

In such a situation, select a template for this specification from the Select Workflow Template dialog box, shown in figure 2-6, below, and then click **Done** at the top right corner of the dialog box.

Figure 2-6: Select Workflow Template dialog box



---

**Important** Once you have selected a workflow template, you will not be asked to define the workflow again. If your specification needs to be re-resolved, you will need to use the Resolve Workflow button, which is visible only to those with the user role of [CAN\_RERESOLVE\_WORKFLOWS]. For more information on user roles, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

---



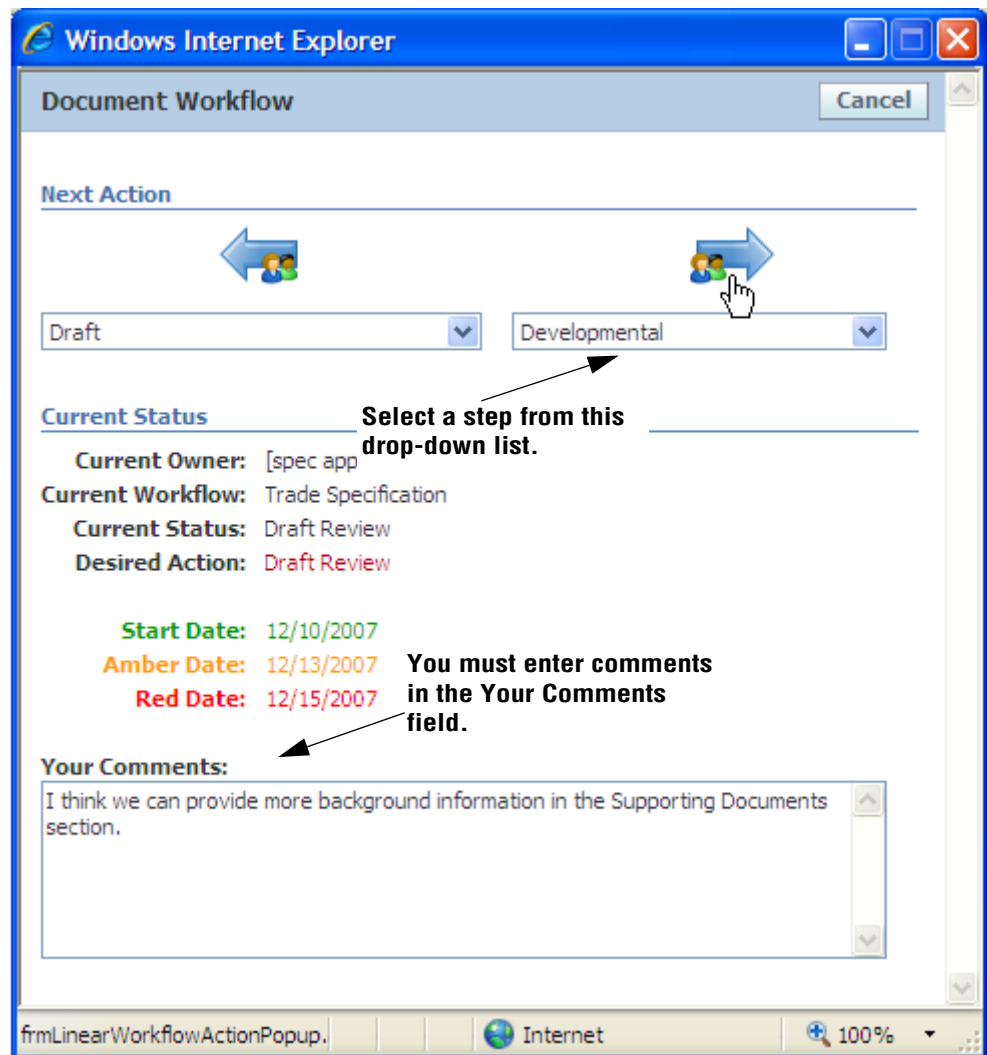
## Transitioning a Workflow

Within a specification or signature document, use the workflow feature to move a document from one workflow step to another.

### To move a document in a workflow:

- 1 Click **Workflow** at the top right of the page. The Document Workflow dialog box opens, as shown in figure 2-7. Remember that the buttons and fields that display vary based on the workflow and current workflow step.

Figure 2-7: Document Workflow dialog box



- 2 Enter comments in the **Your Comments** field (required).
- 3 Select a step from a drop-down list in the Next Action section.
- 4 Click the advance workflow icon (➡) to forward the specification or signature document to the next step in the approval process, or click the move back icon (⬅) to return it to a prior step. The system updates the workflow status based on your selection.

## Selecting Workflow Participants

If the workflow icon includes people (👥➡️), in the next dialog box you may have to select workflow participants, such as one or more owners, persons being asked for a signature, or persons being notified. As figure 2-9, on page 2-8 shows, the dialog box may contain preselected data or may prompt you to select one or more participants. Refer to figure 2-8 through figure 2-10, on page 2-8 for an example of selecting workflow participants.

Figure 2-8: Choose from different owners

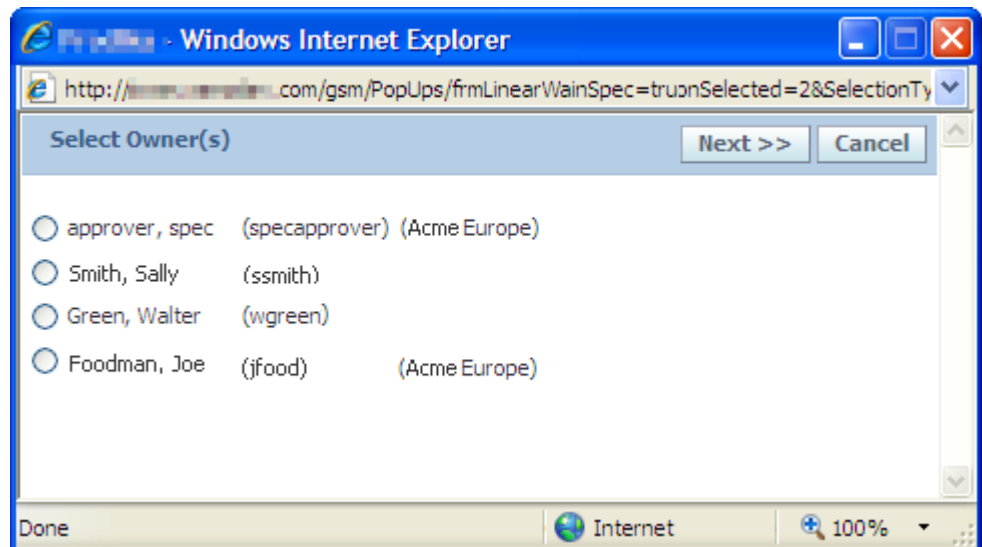
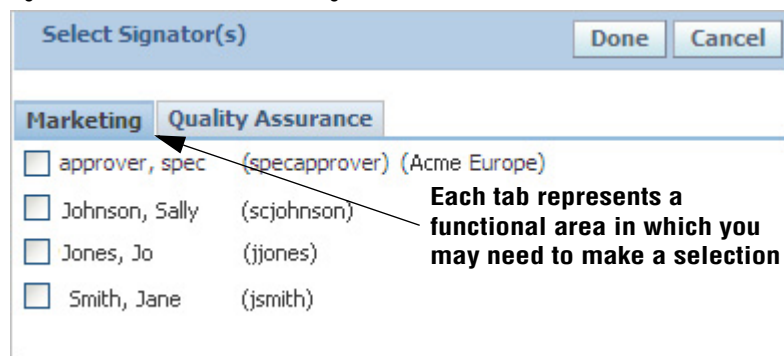


Figure 2-9: Owner has been preselected



Figure 2-10: Select one or more signatories from each tab



## Working with Signature Documents

Use a signature document to solicit approval for a specification before the specification can move to the next step in the workflow. All requested signature documents must be moved to an approved state before the specification can move to the next workflow step. When you select a signature document—whether by action item or an email link—GSM displays the signature document page, as shown in figure 2-11 below:

Figure 2-11: Signature document page

**Summary** | **Approval/Audit Trail**

You have been asked to approve the specification for **Liquid Smoke Flavoring** on behalf of **Food S**

Please use the "Workflow" option (in the upper right-hand corner) to submit your approval (or return comments) once you have reviewed the specification:

**Specification: Liquid Smoke Flavoring (5081231-001)**  
[»click HERE to review the specification](#)

The Summary tab shows the specification that you have been asked to review. You can follow the link to view the specification.

As figure 2-12 shows below, the Approval/Audit Trail tab shows the current status and owner of the signature document, the desired action, assigned dates, and the history of the signature document.

Figure 2-12: Signature Approval tab

### Current Status

**Current Owner:** [Sally Johnson]  
**Current Workflow:** Global Specification Approval (Needs translation)  
**Current Status:** Draft (Review)  
**Desired Action:** This specification requires your review and approval. Please approve and send (or return with comments).  
**Start Date:** 8/3/2007  
**Amber Date:** -----  
**Red Date:** -----

### Event History

Status	User	Time	Comments
Draft	Jo Ellen Jones	8/3/2007 3:43:53 PM	
Draft	Sarah Goodman	9/28/2004 6:18:13 PM	

Click **Workflow** at the top right of the page to take action on the signature document by changing its status to “approved” or “not approved.”

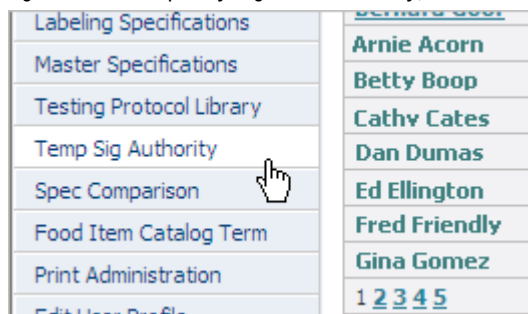
### Temporary Signature Authority

Temporary signature authority enables a person who has been asked to provide a signature to assign that task to another user. A user with temporary authority can view and advance or move back all signature documents that are currently owned by the original signature authority. Tasks assigned to a user with temporary authority also appear in the Action Items list of that person.

### Accessing Temporary Signature Authority

Access temporary signature authority from the left navigation panel, as shown in figure 2-13, below.

Figure 2-13: Temporary Signature Authority, from left navigation panel

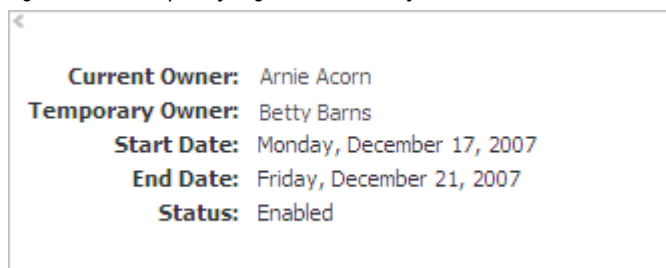


You can search for existing signature authorities. For detailed guidance on searching, please see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

### Creating a Temporary Signature Authority

To create a new signature authority, click **Create New** at the upper right of the page. Figure 2-14 below shows the fields on this page.

Figure 2-14: Temporary Signature Authority fields



### Temporary Owner

You can designate temporary signature authority by clicking the **Temporary Owner** link. GSM displays the user selection dialog box, which you can use to search for the desired user. Selecting the user name closes the dialog box and populates the Temporary Owner field.

### Start and End Date

These fields represent when the temporary signature authority begins and ends. To change the dates listed, click the date. GSM displays a calendar popup window that you can use to select new dates.

### Status

Using this field, you can enable and disable the signature authority.

### Editing an Existing Temporary Signature Authority

You can edit existing signature authorities that you have created. Search and select the signature authority to edit and click **Edit Document** at the upper right of the page. When done editing, click **Save & Close Document**.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 2-15: Current Status section

**Current Status**

**Current Owner:** [Charlie Callas]

**Current Workflow:** All Members Test

**Current Status:** Admin Review

**Desired Action:** Admin Review

**Start Date:** 9/28/2007

**Amber Date:** -----

**Red Date:** -----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 2-16: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

## Signature Document Section

The Signature Document section, shown in figure 2-17 below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the “approved” state before the specification can be moved forward in the workflow.

Figure 2-17: Signature Document section

Signature Document		
Draft Review (Begin 10-Dec-07)		
Jo Jones - Initiator looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec
<a href="#">View Historical Signature Documents</a>		

The View Historical Signature Documents link, which appears below the table in this section, opens a view of signature documents completed prior to the current stage.

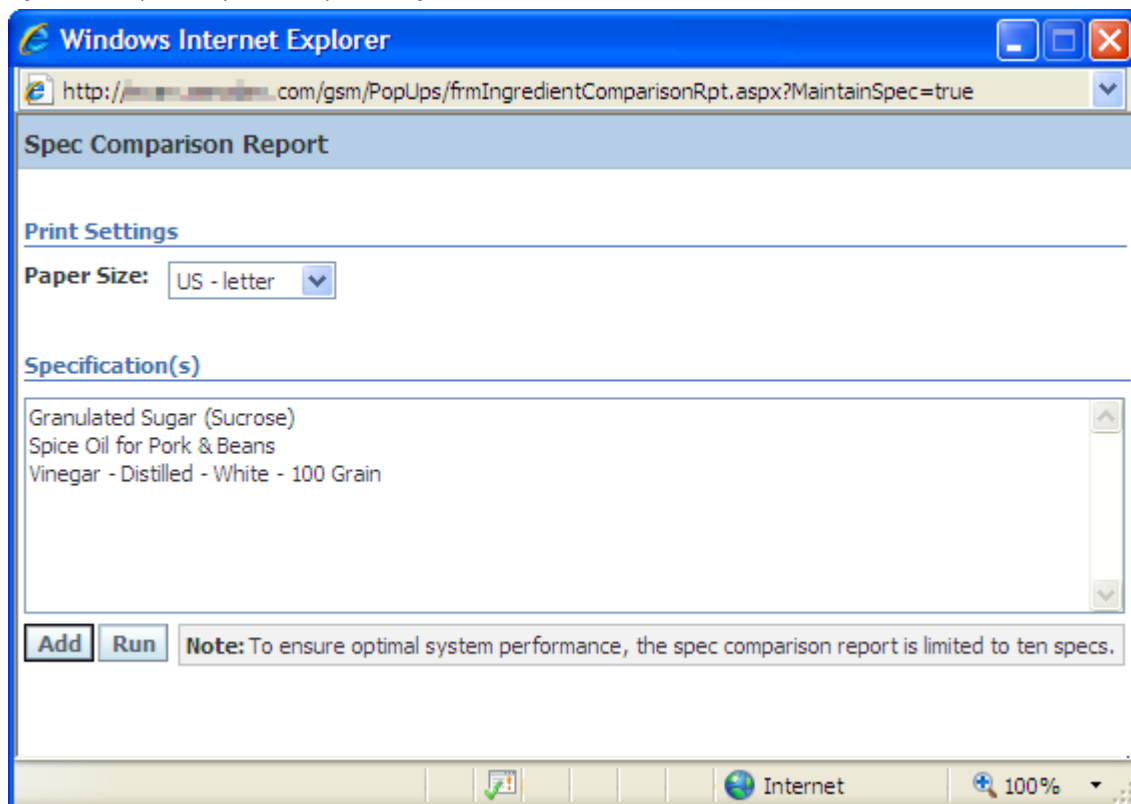
## Comparing Specifications

You can compare up to 10 ingredient specifications by using the specification comparison tool.

### To access this tool:

- 1 Click **Spec Comparison** on the left navigation panel. GSM displays the Spec Comparison Report dialog box, as shown in figure 2-18, below.

Figure 2-18: Spec Comparison Report dialog box



- 2 Click **Add** to select the specifications to compare. GSM opens the specification search dialog box.
- 3 Find up to 10 specifications to compare and click **Add Specs**. The specifications search dialog box closes, and your selected specifications appear in the Specification(s) box.
- 4 Click **Run** to generate the report. GSM generates a Spec Comparison Report in Adobe Acrobat .PDF format.

## Printing Specifications

Where available, you can print specifications by clicking **Print** at the upper right of the specification page, thereby opening the print dialog box. Options in the printing dialog box vary according to specification type, as discussed below.

### Printing Trade Specifications

Trade specifications follow a unique printing method. The printing dialog box can contain many sections, depending on what items are related to that specification.

The sections include Documentation Format and Packaging Hierarchy. The print dialog box for trade specifications may contain sections for additional, related items.

#### Documentation Format Section

The Documentation Format section, shown in figure 2-10, contains fields that directly affect the format of the printed output.

Figure 2-19: Documentation Format section

The screenshot shows a 'Documentation Format' section within a print dialog. At the top right are 'Print' and 'Close' buttons. The section title 'Documentation Format' is underlined. Below it, the 'Business Unit' is set to 'Acme North America' with a dropdown arrow. A note says 'Please select the business unit on behalf of which you would like to'. 'Paper Size' is 'US - letter' with a dropdown. 'Include Cross Reference' is '--None' with a dropdown. 'Document Control' has two radio buttons: 'Controlled Copy' and 'Uncontrolled Copy' (which is selected). 'Print Template' is 'Default' with a dropdown. 'Include Activity Summary' is an unchecked checkbox. 'Style/Layout' is 'EXTERNAL SPECIFICATION' with a dropdown. 'Include Cover Sheet' is an unchecked checkbox.

Key fields include:

**Business Unit**—Controls which master specifications are available for printing. Changing this value changes the master specification listing.

**Paper Size**—Controls the page size.

**Include Cross Reference**—Includes the selected cross-reference inside the header of each printed page.

**Document Control**—Dictates which watermark to display (“CONTROLLED COPY” or “UNCONTROLLED COPY”).

**Print Template**—If enabled, this field lists all format options for the specification type.

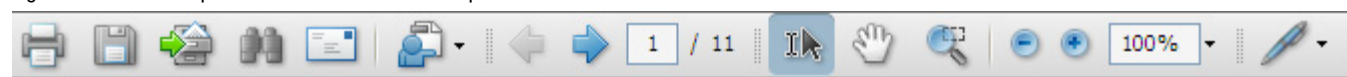


**Include Activity Summary**—Attach a summarized printout of each activity that is attached to the specification.

**Style/Layout**—Dictates the style and output of the specification.

**Include Cover Sheet**—Adds a cover sheet to the outgoing PDF, as shown in figure 2-20 below.

Figure 2-20: Trade specification cover sheet sample



BBQ Beef and Vegetable Dinner - 11 oz (5077539-001) #			
<b>ACME</b>	<b>Cover Sheet</b>	Status:	Packaging Engineering Review
		Effective:	03-Oct-2004
		Prepared By:	Jones, Sally

### Summary Information

**Spec Name:** BBQ Beef and Vegetable Dinner - 11 oz  
**Short Name:** BBQ Beef and Vegetable Dinner - 11 oz  
**Spec Status:** Packaging Engineering Review - Please attach correct packaging  
**Effective:** 03-Oct-2004 **Spec #:** 5077539  
**Supersedes:** New Item **Issue #:** 001

### Documentation Version/Status

Dependent Specification(s)	Effective Date	Status
BBQ Beef and Vegetable Dinner - 11 oz (trd 5077539-001 )	03-Oct-2004	Packaging Engineering R
Beef w/BBQ Sauce TMC (pro 5077461-001 )	28-Sep-2004	Draft
Beef w/BBQ Sauce (pro 5077461-002 )	06-Oct-2004	Draft (Review)
Beef w/BBQ Sauce (pro 5077461-003 )	07-Oct-2004	Draft (Review)
Seasond Beef w/BBQ Sauce (pro 5077630-001 )	15-Dec-2004	Draft

As shown in figure 2-20 above, the cover sheet includes the following information:

- Specification name and number
- Status of the specification and all dependent specifications
- Effective date of the specification and all dependent specifications
- Name of the preparer
- Name of the specification, if any, that this specification supersedes

## Packaging Hierarchy

The Packaging Hierarchy section contains a list of all related trade specifications and their objects that are available for printing. The final printed output is an Adobe Acrobat (PDF) file.

### *Title Specification*

This drop-down list controls what specification will be displayed at the top of the hierarchy. Changing this value adjusts the related trade specification listing.

### *Related Trade Specifications*

The trade specifications available for printing are organized by item type (TU=Traded Unit or CU=Consumer Unit). The active specification is shown in the row that is highlighted.

The printed output includes everything that you have selected in the Related Trade Items table. Those objects vary by specification but could include:

- Specification—indicated by the specification name and item type
- Supporting Documents—indicated by the type or name of the document




To include any of these items in your printed output, check the box next to the corresponding item in the **Append Specification** column.

You can print attachments individually outside of the printed output. These attachments are listed underneath the associated trade specification and are indicated by the attachment file name.

Figure 2-21: Packaging Hierarchy section

**Packaging Hierarchy:**

**Title Specification:** BBQ Beef and Vegetable Dinner - 11 oz (5077539-003) ▼


Related Trade Items		Include Summary	Append Specification
CU	BBQ Beef and Vegetable Dinner - 11 oz Consumer Unit - 12345678909871 (3)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	 Low Res Product Shot - product.gif	--	<input type="checkbox"/>
	 Product Fact Sheet	--	<input type="checkbox"/>
	 Rich Text Document - Sample colors	--	<input type="checkbox"/>
TU	Frozen Dinner carton Traded Unit - (1)	<input type="checkbox"/>	<input type="checkbox"/>
CU	Juice pack Consumer Unit - (1)	<input type="checkbox"/>	<input type="checkbox"/>
TU	Crate Traded Unit (no children) - 12312312312311	<input type="checkbox"/>	<input type="checkbox"/>

To print attachments, click the linked attachment file name. The printed output can include images in JPG or GIF format. To include a JPG or GIF, check the box in the **Append Specification** column next to the image(s) to include.

### Additional Related Items

Additional related items are listed below the Packaging Hierarchy section. These items are listed in their own sections. Each section is titled by the item type, as shown in figure 2-22.

Figure 2-22: Packaging Material Specs section

Packaging Material Specs			
Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9 (5077540-001)	--	<input type="checkbox"/>	
Corrugated Case (5077482-001)	--	<input type="checkbox"/>	
 <a href="#">daisy042007.jpg</a>	--	<input type="checkbox"/>	

## Printing Process Specifications

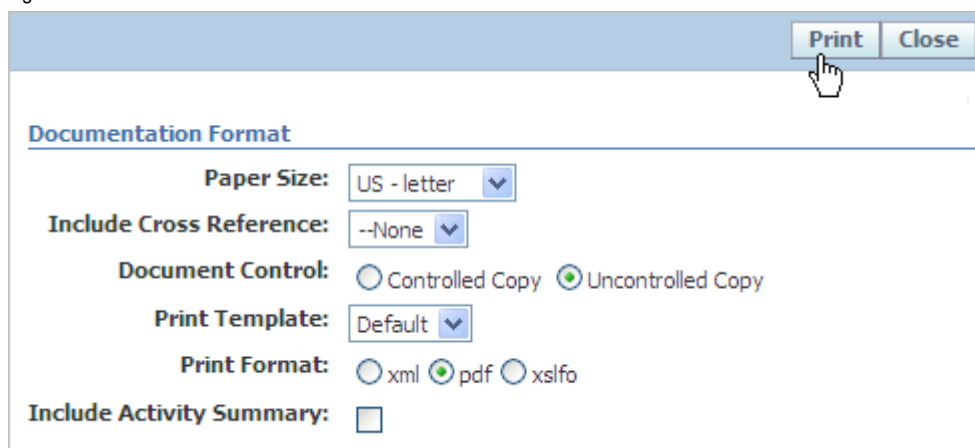
Process specifications follow a unique printing method. The printing dialog box contains the following sections:

- ☐ Documentation Format
- ☐ Batch Scaling and Substitutions
- ☐ Related Trade Item Packaging
- ☐ Specification Summary
- ☐ Manufacturing Instructions
- ☐ Print Settings

### Documentation Format Section

The documentation format section, shown in figure 2-23, contains fields that directly affect the format of the printed output.

Figure 2-23: Documentation Format section



**Print** **Close**

**Documentation Format**

**Paper Size:** US - letter

**Include Cross Reference:** --None

**Document Control:** ☐ Controlled Copy ☒ Uncontrolled Copy

**Print Template:** Default

**Print Format:** ☐ xml ☒ pdf ☐ xlsfo

**Include Activity Summary:** ☐

Key fields include:

**Paper Size**—controls the page size

**Include Cross Reference**—Includes the selected cross-reference inside the header of each printed page.

**Document Control**—dictates which watermark to display (“controlled copy” or “uncontrolled copy”).

**Print Template**—If enabled, this field lists all format options for the specification type.

**Print Format**—defines the format of the printed output

**Include Activity Summary**—Attach a summarized printout of each activity that is attached to the specification.

## Batch Scaling and Substitutions Section

This section, shown in figure 2-24, contains fields that enable you to scale and adjust the size of your batch.

Figure 2-24: Batch Scaling and Substitutions section

**Batch Scaling And Substitutions**

**Target Batch Size:** Fill Quantity = 5.00000 kg  
Approximate Yield = 3.72502 kg ( 1.03473 TUs )

**Scale Intermediates:** None

**Material Substitutions:** None

**BOM Multiples:**  x  x

Key fields include:

**Target Batch Size**—enables you to adjust the batch size by specifying a fill quantity, approximate yield or a new number of traded units.

**Scale Intermediates**—enables you to adjust the batching information of lower level process specifications.

**BOM Multiples**—enables you to provide up to two multipliers for the batch quantities

## Specification Summary Section

The specification summary section enables you to select which content to include in your printed output.

Figure 2-25: Specification Summary section

Specification Summary	
<input checked="" type="checkbox"/> Include Top-Level Formulation	<input type="checkbox"/> Include Formula Breakdown (Yield)
<input checked="" type="checkbox"/> Include 100% Formulation (Yield)	<input type="checkbox"/> Include Formula Breakdown (Quantity)
<input checked="" type="checkbox"/> Include 100% Formulation (Quantity)	<input type="checkbox"/> Include Analytical Properties Summary
<input type="checkbox"/> Include 100% Formulation (Traded Unit Quantity)	<input type="checkbox"/> Include Cross Reference Matrix
<input type="checkbox"/> Include Packaging Rollup	<input type="checkbox"/> Include Compliance Information
<input checked="" type="checkbox"/> Include Ingredient Summary	
<input checked="" type="checkbox"/> Include Extended Attributes	<input checked="" type="checkbox"/> Include Custom Sections

Options include:

- Include Top-Level Formulation
- Include 100% Formulation (Yield)
- Include 100% Formulation (Quantity)
- Include 100% Formulation (Traded Unit Quantity)
- Include Packaging Rollup
- Include Ingredient Summary
- Include Custom Sections
- Include Formula Breakdown (Yield)
- Include Formula Breakdown (Quantity)
- Include Analytical Properties Summary\*
- Include Cross Reference Matrix
- Include Compliance Information
- Include Extended Attributes

\* Depending on configuration of your installation

## Manufacturing Instructions Section

The manufacturing instructions section enables you to select which factory floor documentation you want to include in your printed output.

Figure 2-26: Manufacturing Instructions section

Manufacturing Instructions	
<input type="checkbox"/> Include Floor Summary	<input type="checkbox"/> Include all possible raw material substitutions
<input type="checkbox"/> Include Full Instructions (Rich Text)	<input type="checkbox"/> Show Gain/Loss Factor
<input type="checkbox"/> Include Analytical Properties	<input type="checkbox"/> Show Yield

Options include:

- Include Floor Summary
- Include Full Instructions (Rich Text)
- Include Analytical Properties (depending on configuration of your installation)
- Include all possible raw material substitutions
- Show Gain/Loss Factor
- Show Yield

## Print Settings Section

The Print Settings section displays the active and child process specifications available for printing. Available related items are listed under each specification in the print settings table. Check the box in the **MFG Instructions** column to include the corresponding item.

Figure 2-27: Print Settings section






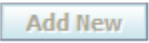

Print Settings				MFG Instructions	Print Worksheets
Process Specifications					
9.0	Sweet Water, 2%			<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Operations/Equipment -			--	--
	Process Map			<input checked="" type="checkbox"/>	<input type="checkbox"/>
	HACCP -			--	--
8.0	CACS Lemonade - Release 7			<input checked="" type="checkbox"/>	<input type="checkbox"/>
7.0	CACS Sweetwater			<input checked="" type="checkbox"/>	<input type="checkbox"/>
6.0	Orange Juice			<input checked="" type="checkbox"/>	<input type="checkbox"/>
5.0	CACS Ext Att ST			<input checked="" type="checkbox"/>	<input type="checkbox"/>
4.0	CACS 1.1.2.1 Process			<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.0	Caloric water volumetric			<input checked="" type="checkbox"/>	<input type="checkbox"/>
2.0	Density Calc			<input checked="" type="checkbox"/>	<input type="checkbox"/>
1.0	Orange Mango Light			<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Process Map			<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Worksheets

You can add worksheets to the worksheet table and then include them in the printed output. Check the box in the **Print Worksheets** column next to the corresponding item to include these worksheets in your printed output.

Worksheets are created in Print Administration. Worksheet options available during printing are based on the facility information on the process specification and the worksheets that have been associated with that facility. For more information on worksheets, see chapter 19, [Print Administration](#).

Figure 2-28: Worksheets

Worksheet Format		Worksheet Options	
	pre-sample	Multi-batch	No Instructions <input checked="" type="checkbox"/> Lot Record <input type="checkbox"/> QC Checks
	Pre-Measure Worksheet 	Print Worksheet Test 	Multi-batch 
			

**Note** You must add a worksheet using GSM Print Administration before you can print it by checking the box.

## Printing Other Specifications



Generally, all specifications other than process specifications use the same print function. The printing dialog box for these specifications contains two sections:

- Documentation Format
- Specification Listing

### Documentation Format

The specification format section, shown in figure 2-29, contains fields that directly affect the format of the printed output.

Figure 2-29: Specifications Format dialog box

### Documentation Format

**Business Unit :**   
 Please select the business unit on behalf of which you would like to

**Paper Size:**

**Document Control:** ☐ Controlled Copy ☒ Uncontrolled Copy

**Print Template:**

**Include Activity Summary:** ☐

Key fields include:

**Business Unit**—Controls which master specifications are available for printing. Changing this value changes the master specification listing in the Specification Listing section.

**Paper Size**—Controls the page size.

**Document Control**—Dictates which watermark to display (“CONTROLLED COPY” or “UNCONTROLLED COPY”).

**Print Template**—If enabled, this field lists all format options for the specification type.

**Include Activity Summary**—Attach a summarized printout of each activity that is attached to the specification.

## Specification Listing

The specification listing section contains a list of all specifications and their objects available for printing. Specifications available for printing vary based on specification type. The final printed output is an Adobe Acrobat (PDF) file. The print output can include multiple specifications and objects.

The specification listing section includes the following information:

### *Specification Type*

The specifications available for printing are organized by specification type. The active specification is indicated by the text Current Specification

### *Sections*

The printed output includes everything you have selected in the Sections column. Those objects vary by specification type but could include:

**Specification**—indicated by the specification number and name

**Supporting Documents**—indicated by the type or name of the document (does not include supporting documents/attachments that are marked as proprietary)

**Custom Sections**—indicated by the name of the custom section

**Testing Protocols**—indicated by the name of the testing protocol

**% Breakdown**—indicated by the % Breakdown name (does not include % breakdowns that are marked as proprietary)

### *Attachments*

You can print attachments individually outside of the printed output. These attachments are listed in the Attachments column and are indicated by the attachment file name. The printed output can include images in JPG or GIF format. To include JPG or GIF images in the output, check the **Supporting Documentation** check box in the same row as the image files that you would like to include.



Figure 2-30: Ingredient specification print example

Specification Type	Sections	Attachments
<b>Current Specification</b>	<input type="checkbox"/> 5077417-001 Tomato Paste - Cold Break (36% N.T.) (08-May-2003)	
	<input type="checkbox"/> Nutrient Composition	
	<input type="checkbox"/> Testing Protocol: Acme 3210 (25-Jan-2007)	
	<input type="checkbox"/> 5077480-001 Case Pack - 60 lbs - Meat (29-Sep-2004)	
<b>Packing Configuration Specs</b>	<input type="checkbox"/> Supporting Documentation	<a href="#">Prototype IV Picture1.jpg</a>
	<input type="checkbox"/> Rich Text -	
	<input type="checkbox"/> Acme - Contaminants and Residues	
<b>Delivered Material Packing Specs</b>	<input type="checkbox"/> 5077514-001 Wax Lined Boxes (04-Mar-1993)	
<b>Labeling Specifications</b>	<input type="checkbox"/> 5077513-001 Pallet Label Type A (04-Mar-1993)	
	<input type="checkbox"/> Attachments	<a href="#">picture - 2006+logow.jpg</a>
	<input type="checkbox"/> Rich Text - please read	
	<input type="checkbox"/> 5077453-001 Shelf Life Extension - QCP I-620 (2004)	

Specifications

Custom sections

Supporting documents



# Commonly Used Sections

---

*This chapter describes sections that are used in many or most specification types.*

*Topics in this chapter include:*

- ❑ *Summary Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *CSS Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Custom Data*
- 

## Overview

Information in Agile Product Lifecycle Management for Process (GSM) is organized into tabs that are in turn organized into sections. Several sections are common to all or most types of specifications.

This chapter describes the most commonly used tabs and the sections within them.

## Summary Tab

The Summary tab in GSM contains three sections common to most specification types:


- Summary Information
- Cross References
- Approved for Use In


## Summary Information Section

The section contains the primary identifying information for the specification.

Figure 3-1: Summary Information section

**Summary Information**

**Spec Name:** DG v510rc14 Mango/Orange Drink 

**Short Name:** DG v510rc14 Mango/Orange Drink 

**Spec Status:** Draft - This specification is currently in draft status

**Access Level:**

**Category:**  **Spec #:** 5085421


**Sub Category:**  **Issue #:** 001

**Group:**  **Status:** Draft

**Originator:**  **Effective:** [Tuesday, August 28, 2007](#)

**Inactive:** [-----](#)

**Supercedes:**

**Reason for Change:** 

The table below shows the key fields for the Summary Information section:

Table 3-1: Summary Information key fields

Field Name	Importance	Details
<b>Spec Name</b>	Required	Use it to identify your specification. This data is used throughout the PLM suite when linking/ referencing specifications.
<b>Short Name</b>		Short name is a shorter reference to the specification name. Short name may or may not be required or even displayed. It is based on configuration settings in your environment.
<b>Category/Sub Category/Group</b>	Required, Drives behavior	Defaults to the first node in the specification category taxonomy
<b>Originator</b>	System Generated	Auto-populated field that denotes the person who created the specification. <ul style="list-style-type: none"> <li>• Originator Name</li> <li>• Originator Country</li> </ul>
<b>Spec #</b>		Number used to identify specifications
<b>Issue #</b>		The issue number, generated when an issue is created.
<b>Status</b>		Shows the current workflow status
<b>Access Level</b>		Represents the access level for secured objects on that specification.

---




**Note** Date fields vary based on specification type.

---

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 3-2: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<input type="button" value="Add New"/>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

---

**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle Management for Process Administrator User Guide*.

---

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 3-3: Approved for Use In section with Concepts and Business Units fields

The screenshot shows a form titled "Approved for Use In". It contains two text input fields. The first field is labeled "Concept(s):" and contains the text "Other". The second field is labeled "Business Unit(s):" and contains the text "North America".

Figure 3-4: Approved for Use In section with Business Units and countries fields

The screenshot shows a form titled "Approved for Use In". It contains a table with two columns: "Business Unit(s)" and "Countries". The table has one row with the values "North America" and "USA". There are green checkmark and plus icons in the first column, and a red X icon in the last column. Below the table is an "Add New" button with a hand cursor pointing to it.

	Business Unit(s)	Countries	
✓ ↩ +	North America	+ USA	✗

Add New

## Compliance Tab

The Compliance tab contains the compliance data related to a specification.

### Compliance Information Section

#### Adding Compliance Items

Figure 3-5: Compliance Information section

The screenshot shows a form titled "Compliance Information". It contains a text input field labeled "Complies With:" with the text "Non-GM, Halal, Kosher".

#### To add items:

- 1 Click the **Complies With** link to open the Compliance dialog box. Select the compliance items to add on the left, holding down the **Ctrl** key to select multiple compliance items.
- 2 Click the add selected data icon (➡) to move your selections to the right.
- 3 When you have made all of your selections, click **Done**. The page reloads and the Complies With field displays your choices.

#### Removing Compliance Items

##### To remove one or more compliance items:

- 1 Click the **Complies With** link to open the Compliance dialog box.
- 2 Select the compliance items to remove on the right, holding down the **Ctrl** key to select multiple compliance items.
- 3 Click the remove selected data icon (⬅) to remove the selected items from the selection box.

- 4 Click **Done** to commit your changes. The page reloads and the Complies With field reflects your changes.

Some specifications contain an rollout icon (📄) to the right of the Complies With field. This icon opens the compliance roll up dialog box.

**Note** For the specification to be marked as “compliant” based on the roll up, compliance items marked as “negative” only have to be declared on one item; those not marked as negative must be declared on all formula items. “Complies With” items are positive by default and can only be made negative via script.

## Additives, Allergens, and Intolerances Sections

**Note** The Additives, Allergens, and Intolerances sections all follow the same procedures. This section demonstrates the use of additives, but the same behavior can be used for allergens or intolerances.

The Additives section contains the additives data linked to a specification, and can be broken out by “known to contain,” “does not contain,” and “may contain.”

Figure 3-6: Additives section

**Additives**

**Additives (known to contain):**

			Max / 100g	Source / Comments
	Hydrochloric Acid	<=	1.00000 ppm	
	Sodium Ferrocyanide	<=	2.00000 ppm	

**Additives (does not contain):**


Acesulfame K, Acetic Acid Esters of Mono- and Diglycerides of Fatty Acids, Acetone

**Additives (may contain):**




			Max / 100g	Source / Comments
	Nuts	<=	450.00000 mg	residue
	Pectin	<=	<input type="text" value="25"/> <input type="text" value="g"/>	as a thickening agent

## Adding Additives

### To add items:

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to add on the left.
- 3 Click the add selected data icon (  ) to move your selections to the right.
- 4 When you have made all of your selections, click **Done**.
- 5 The page reloads, and the Additives table displays the additives that you selected.

### To add/edit the Max/100g and Source/Comments values:


- 1 Click the edit row icon (  ) to the left of the row to edit.
- 2 Once done editing, click the apply changes icon (  ) to apply your changes or click the undo icon (  ) to cancel your changes.

---

**Note** Max/100g values and Source/Comment values are only available for Known to Contain and May Contain fields.

---

## Removing Additives


To remove a single additive, click the delete icon (  ) when the row is open for edit.

---

**Note** As described above, removing values is only available for Known to Contain and May Contain fields.

---

### To remove one or more additives:

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to remove on the right.
- 3 Click the remove selected data icon (  ) to remove them from the selection box.
- 4 Click **Done** to commit your changes.

## Related Specs Tab

### Associated Specifications Section


In this section you can relate the current specification to one or more specifications in the system. The Associated Specifications section provides a context for that relationship. You can define pairs of contexts (such as “source/by-product” or “primary/alternate”) and can apply these contexts to both sides of an association. You can configure these relationships according to your business needs and can define relationships on one specification that are derived on the associated specification(s).



For example, “Process Specification ABC” could be associated to one or more ingredients as by-products of the process. These ingredients would be declared and visible as “by-products of Process Specification ABC.” On the individual ingredient specifications, “Process Specification ABC” would be automatically displayed as a “source.”

System ID is a code that identifies an external database. Agile PLM for Process obtains this code from the external system.



Figure 3-7: Associated Specifications section

Associated Specifications		
System ID:	USBPCS 	
Specification	Association	Comments
<a href="#">Sweet Water, 2%</a> (pro 5077456-003)	Process Specification ABC	
<a href="#">Sweet Water, 2%</a> (pro 5077456-001)	Process Specification ABC	

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 3-8: Master Specifications section

Master Specifications			Explicitly set
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, *Master Specifications* for more information.

## CSS Tab

The sole section in the CSS (content synchronization and syndication) tab, Initial Publication, contains the list of publications related to the specification.

You can create initial publications only from within GSM. Using the CSS application, you can syndicate these publications to an internal or external target system. Once created, these publications can be managed on the CSS tab of the specification or they can be managed inside the CSS application. As shown in the figure below, this section contains additional data about each publication.

Figure 3-9: Initial Publication section

Initial Publication									
	Trading Partner	Publication Type	Target Market	Initial Publication	Last Updated	Info Provider	Manufacturer	Current Status	
	GB » MDR » MDREU -	New	GB	-----	12/14/2007	Acme Company Ltd	Acme	Draft GS1:	
	US » PDK » Syndication WebService - PDK_WS	Initial Load ▾	US	-----	12/14/2007	Acme	ABCD ▾	Draft GS1:	
<div> Add New Validate For Publication </div>									

### To add an initial publication:

- 1 Click **Edit Document** to put the specification in editable mode.
- 2 Click **Add New** under the Initial Publication table. The publications requirements dialog box displays, as shown below.

Figure 3-10: CSS Publications Requirements dialog box

**3** Specify the following required data:

- **Manufacturer**—Defines the source of the data being syndicated. For Global Data Synchronization Network (GDSN) compliant target systems, this is the Global Locator Number or GLN of the information provider.
- **Publication Type**—Used for GDSN compliant target systems. Typically this is used to tell retailers if it is the first time they have received this product information or if they already have it and should update their information.
- **Target Market**—Defines the destination for the syndicated data. Publications are organized by target market. Target market is a GDSN term used to indicate the country where the trade item is available for sale. For example, the US and Canada are two different target markets.

---

**Note** This information resides on the Summary tab of the saved publication.

---

**4** Click **Save**. The publication appears in the Initial Publication table. The default starting status for publications depends on the configuration of the publication workflow.

---

**Note** You cannot view publications with a current status of “Draft.” Statuses are controlled and updated automatically by the publication workflow.

---

For more information, please see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*.

## Supporting Documents Tab

The Supporting Documents page includes sections which vary depending on specification type. The following sections are found on most specification types:

- ☐ Supporting Documents
- ☐ DRL Documents
- ☐ Testing Protocols
- ☐ Attachments

## Supporting Documents Section

### Overview

The Supporting Documents section enables you to add unique documents to the specification. You can add the following document types:

- ☐ Attachments/Procedures
- ☐ Rich Text
- ☐ Product Facts Sheet
- ☐ Nutrient Composition
- ☐ Operation/Equipment
- ☐ HACCP
- ☐ Process Map

**Note** The Supporting Documents section is unique to each specification type. Not all document types can be found on all specification types.




### Creating a Supporting Document

The specification needs to be in edit mode before you can add a supporting document to it.

#### To create a supporting document:

- 1 Click **Edit Document** at the upper right corner of the page. The page reloads with several hyperlinks displayed below the table in the Supporting Documents section.
- 2 From the links below the supporting documents table, click the type of document to create.





Figure 3-11: Supporting Documents section (Ingredient Specification example)

Supporting Documents		
	Supporting Documents for this Specification	Security Classification
	<a href="#">Attachments/Procedures - Low Res Product Shot - product.gif</a>	
	<a href="#">Attachments/Procedures - Vegetable Priorities - Priorities-Sept.20.txt, System Restore Procedures - Rescued document 1.txt</a>	
	<a href="#">Attachments/Procedures - Procedure for Restoring Critical Systems - Rescued document 2.txt</a>	Attachments -- Contextual
<a href="#">Attachments/Procedures</a> <a href="#">Rich Text</a> <a href="#">Product Facts Sheet</a> <a href="#">View Thumbnails</a>		

### Managing Supporting Documents


To view a supporting document, click the hyperlinked document name. You can only edit supporting documents when the specification is in edit mode.

**To edit a supporting document:**

- 1 When the specification is in edit mode, click the edit icon (  ) in the row of the document to edit. The page reloads and displays the row in edit mode.
- 2 Open the document in edit mode by clicking the hyperlinked document name, or click the delete icon (  ) to delete that document from the specification.
- 3 After making your changes to your document, click the apply changes icon (  ) to apply the changes or the undo icon (  ) to cancel your changes.
- 4 Click **Save** at the upper right of the page to save your changes.

**Document Types***Attachments/Procedures Document Type*

Figure 3-12: Attachment/Procedures window

Attachment/Procedures		Done	Cancel
<b>Summary Information</b>			
Spec Name: <b>BBQ Beef and Vegetable Dinner - 11 oz</b>			
Spec Status: Draft - Draft			
Access Level:			
Category:	Meat, Poultry and Game	Spec #:	5077539
Sub Category:	Meat, Poultry and Game - Prepared and Processed	Issue #:	002
Group:	Meat, Poultry and Game - Prepared and Processed (Frozen)	Status:	Draft
		Effective:	Wednesday, October 06, 2004
Originator:	Johnson, Sally	Available Date:	-----
		End Available Date:	-----
Supersedes: 5077539-001 - BBQ Beef and Vegetable Dinner - 11 oz			
Reason for Change:			
Security Classification:	<input type="text" value=""/> 		
<b>Attachments</b>			
<input type="button" value="Add New"/>			

An attachments/procedures document is a collection of attachments. Each document includes the noneditable summary section, which pulls its content from the parent specification.

**To add an attachment to a document:**

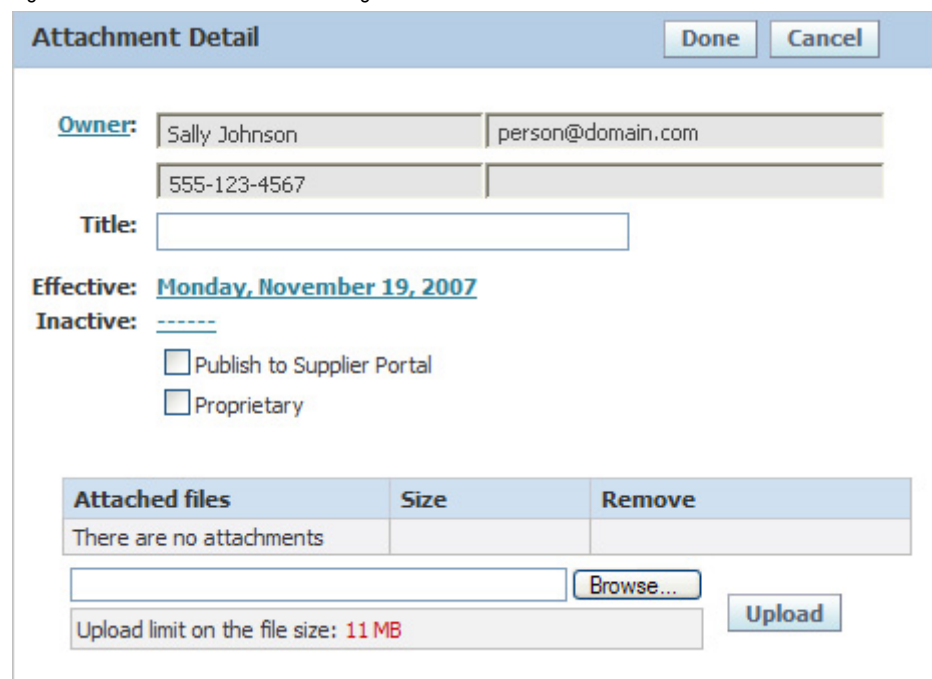
- 1 Click **Add New** below the attachments table. The Attachment Details dialog box displays, as shown in figure 3-13, on page 3-12.
- 2 Complete the following fields, as shown in table 3-2 below:

Table 3-2: Attachment Detail fields

Field	Definition
<b>Owner</b>	Owner of the attachment.
<b>Title</b>	Title of the attachment.
<b>Effective</b>	Effective date of the attachment.
<b>Publish to Supplier Portal</b>	Check this box if you want to publish the attachment on Supplier Portal.
<b>Proprietary</b>	Check this box to prevent the attachment from being exposed in the supplier portal or from being printed

- 3 Attach the file by clicking **Browse** to search for the file, and then click **Upload**.
- 4 Click **Done** on the Attachment Details dialog box and then click **Done** on the Attachment/Procedures page.
- 5 Click **Save**.

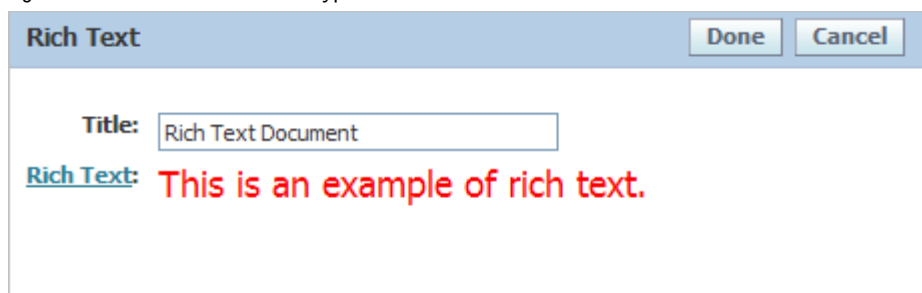
Figure 3-13: Attachment Details dialog box



The screenshot shows the 'Attachment Detail' dialog box. At the top right are 'Done' and 'Cancel' buttons. The 'Owner' section has a text input with 'Sally Johnson' and an email input with 'person@domain.com'. Below that is a phone number input with '555-123-4567'. The 'Title' section has an empty text input. The 'Effective' date is set to 'Monday, November 19, 2007'. The 'Inactive' section has a dashed line. There are two checkboxes: 'Publish to Supplier Portal' and 'Proprietary', both of which are unchecked. Below these is a table with three columns: 'Attached files', 'Size', and 'Remove'. The table contains one row with the text 'There are no attachments'. At the bottom, there is a file input field, a 'Browse...' button, and an 'Upload' button. A red text label indicates 'Upload limit on the file size: 11 MB'.

## Rich Text Document Type

Figure 3-14: Rich text document type

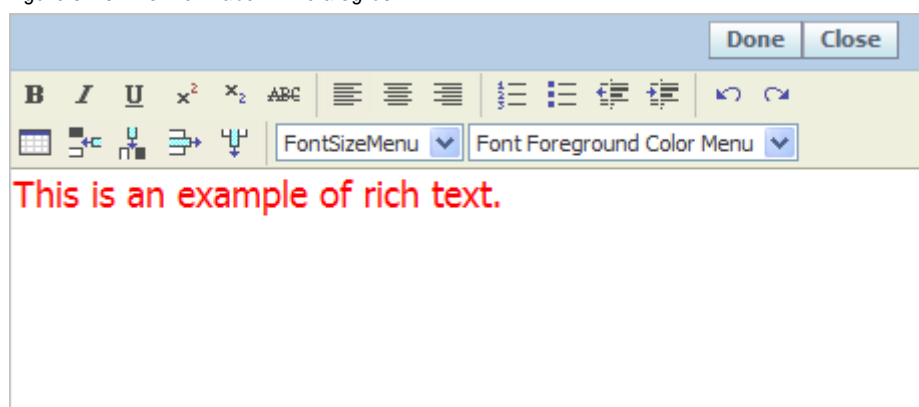


The rich text document type is a way to create a formatted attachment to the specification that can be printed in line with the printed specification. The rich text document includes a title and an enriched textual entry.

### To add rich text:

- 1 Click the **Rich Text** label link. The rich text dialog box opens.

Figure 3-15: Rich text label link dialog box



Using the rich text dialog box, you can apply simple formatting (boldface, font color, font size, bullets, numbering, and so on.).

## Product Facts Sheet

Use the Product Fact Sheet document to store a product fact sheet configuration for this specification. Using the product fact sheet configuration, you can choose:

- A fact panel format
- Which optional declarations should show up on the printed fact panel
- What other product information should also be shown on the fact sheet (such as product description, ingredient statement, and compliance information)

Once you have configured the fact sheet, you can print it with the trade specification print dialog box or by itself.

### Nutrient Composition

Select Nutrient Composition as a supporting document to create a new a nutrient composition document and enter the composition data for that specification, as shown in figure 3-16, *Nutrient Composition page*, on page 3-14. A specification can have only one nutrient composition.

Figure 3-16: Nutrient Composition page

**Nutrient Composition**
Done

**Summary Information**

---

**Spec Name:** DRL migration

**Short Name:** nqa

**Spec Status:** Draft - Draft

**Access Level:**

**Category:** Pulses

**Sub Category:** Other Beans

**Group:** Dried/Dehydrated3

**Originator:** Johnson, Sally

**Spec #:** 5084931

**Issue #:** 001

**Status:** Draft

**Effective:** Thursday, July 19, 2007

**Inactive:** -----

**Supercedes:**

**Reason for Change:**

**Nutrient Composition**

	Nutrient	Per 100mL	per 100 grams	Method	Source	Comments
	Calories	1340.00000 kcal	4635.000 kcal		USDA Nutrient Database	
	Energy kJ	5608.00000 kJ	193162.000 kJ		USDA Nutrient Database	
	Protein	89.32000 g	30837.730 g		USDA Nutrient Database	
	Carbohydrates	242.60000 g	83757.650 g		USDA Nutrient Database	
	Dietary Fiber	97.69200 g	33728.163 g		From Nutritional Database	
	Total Sugar	15.57600 g	5377.614 g		From Nutritional Database	
	Total Fat	5.12000 g	1767.680 g		USDA Nutrient Database	
	Saturated Fat	1.32400 g	457.111 g		USDA Nutrient Database	
	Polyunsaturated Fat	2.20800 g	762.312 g		USDA Nutrient Database	
	Trans Fatty Acid	0.26000 g	89.765 g		From Nutritional Database	
	Cholesterol	0.00000 mg	0.000 mg		USDA Nutrient Database	
	Manganese	5.23600 mg	1807.729 mg		USDA Nutrient Database	

Add New
Import
NSM



Key fields include:

**Per 100g**—values per nutrient

**Method**—select the method for determining this value; methods are configured per nutrient item

**Source**—administered list of sources that declare where this information came from. This will be automatically populated if the value was set from some other source in the Agile solution.

Click **Import** to select and import nutrient values from nutrient profiles or from Food Composition Library (FCL) items if your environment has them available.

---

**Note** The Food Composition Library will need to be configured as a part of your implementation.

---

Click **NSM** to select and import nutrient values from nutrient analyses or nutrient composites in the Nutrient Surveillance Management (NSM) application.

### *Operation/Equipment*

An operation/equipment document is a collection of attachments. Each document includes the noneditable summary section, which pulls its content from the parent specification. For instructions for adding an attachment, see [Attachments/Procedures Document Type](#) and the procedure under it on page 3-12.

### *HACCP*

An HACCP document can host a collection of attachments. Each document includes the noneditable summary section, which pulls its content from the parent specification. For instructions for adding an attachment, see [Attachments/Procedures Document Type](#) and the procedure under it on page 3-12.

### *Process Map*

With the process map configuration document you can configure the types of available information to see on process maps when you choose to print them on a process specification.

### *View Thumbnails*



In some specifications, you can view attached images in a thumbnail view (for supported file formats). Click the **View Thumbnails** link to open a dialog box showing all supported image types in thumbnail format.

## DRL Documents Section

In the DRL Documents section you can link the specification to existing DRL (Document Reference Library) catalog and document references. All referenced catalogs and documents are read only. DRL catalogs and documents are created and managed using the DRL application. For more information about the DRL application, see the *Agile Product Lifecycle for Process Document Reference Library User Guide*.

A DRL catalog is a collection of DRL documents and child catalogs. The DRL table consists of two columns: Name and Type. Name displays the DRL document or catalog name. The type column identifies the linked DRL item as either document or a catalog, as shown in figure 3-17 below.

Figure 3-17: DRL Documents section

DRL Documents		
	Name	Type
	<a href="#">Corporate Policies &amp; Procedures</a>	Document
	<a href="#">East &amp; West</a>	Catalog
<div>Add - Browse      Add - Search</div>		

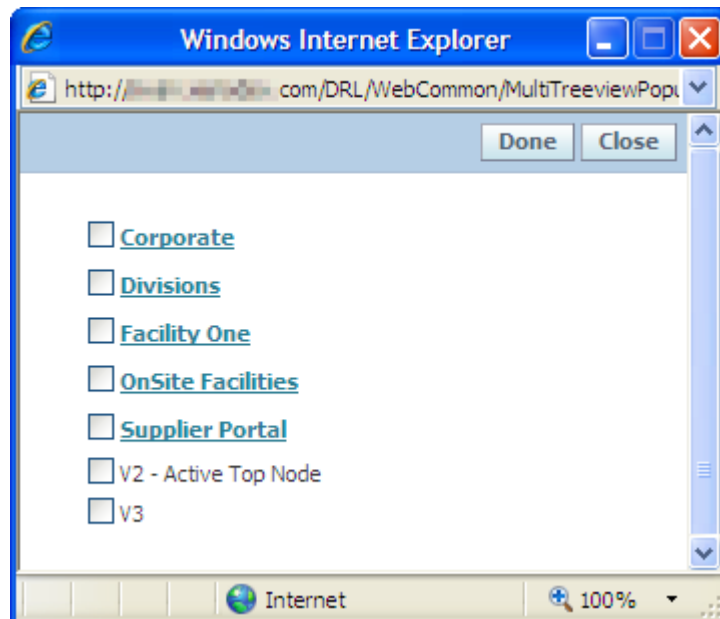
## Viewing DRL Catalogs and Documents

You can view a DRL document or catalog by clicking on the linked name.

### Viewing a Catalog Reference

A catalog opens the DRL catalog viewer dialog box. In this view you can expand the catalog to view its contents. Select a document name to open the DRL document viewer.

Figure 3-18: DRL catalog viewer

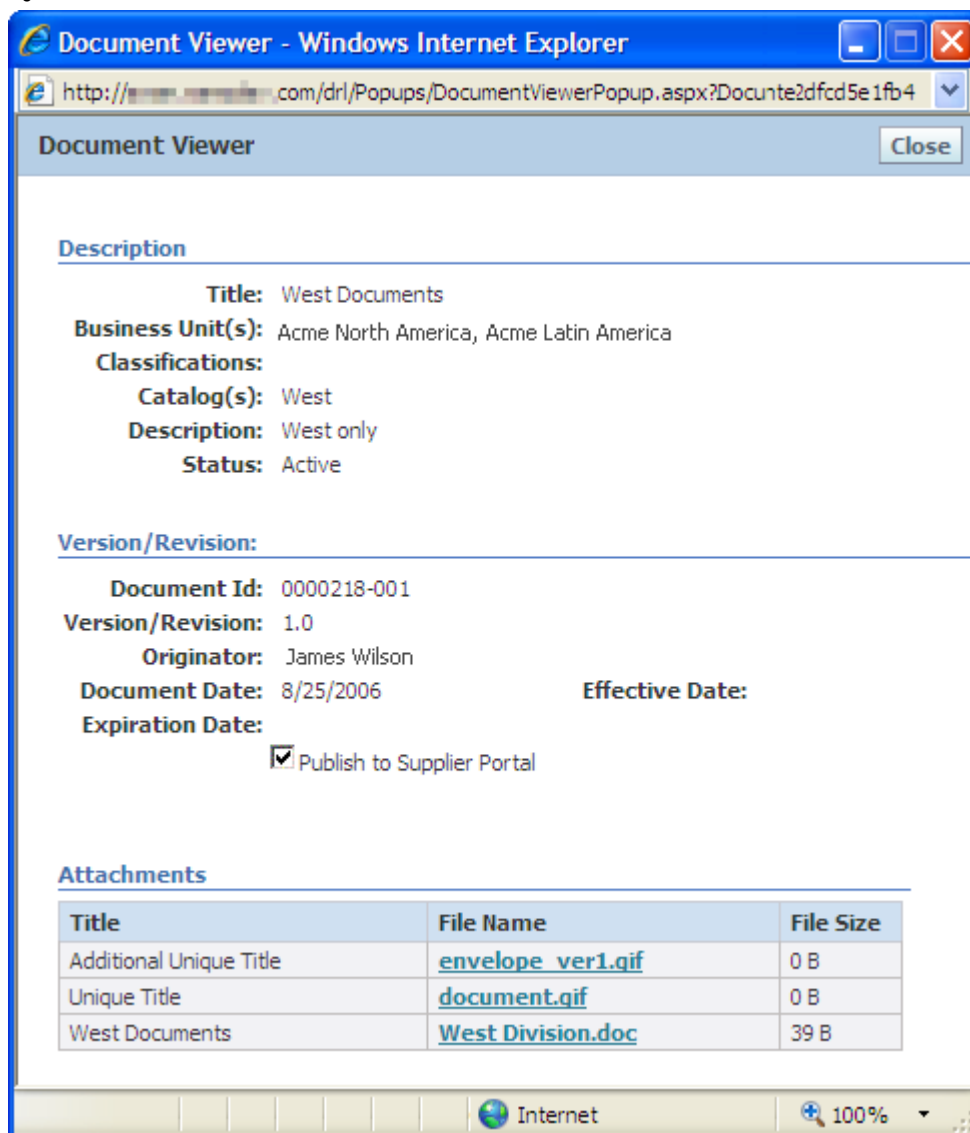


## Viewing a Document Reference

Documents open the DRL document viewer dialog box. A DRL document contains the following sections:

- ❑ Description
- ❑ Version/Revision
- ❑ Attachments

Figure 3-19: DRL document viewer



### Description

This field contains the overall identifying information of the DRL document. It includes the document title, description, and status. It also lists which catalogs, business units, and classifications the document is assigned to.

### *Version/Revision*

Use this information to track versions and revisions for the document. This section includes:

- Document ID
- Document dates
- Whether or not the document is publishable to the Supplier Portal
- Originator of the document
- Reason for any revision (if revised)

### *Attachments*

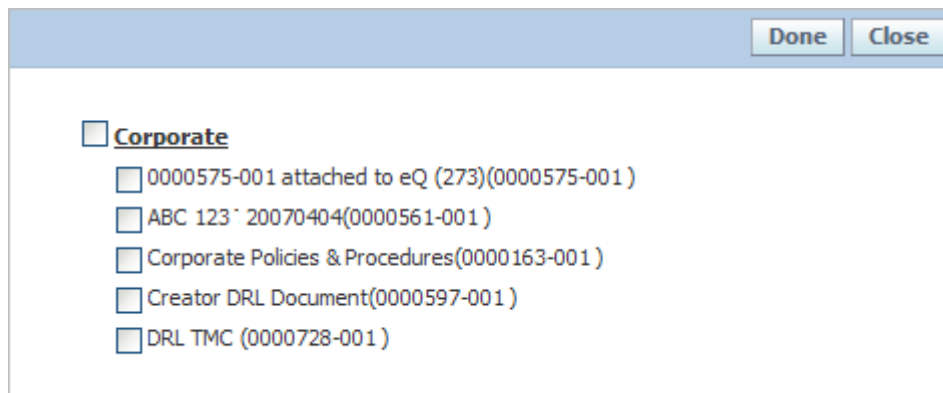
This table lists all of the attachments added to the document. It includes attachment title, file name, and file size. You can view an attachment by clicking its file name.

### *Adding DRL Catalog and Document References*

In order to add a DRL catalog or document, you need to place the specification in edit mode. You can add DRL catalogs and/or documents to the DRL section in two ways:

**Browsing**—Click **Add - Browse**. The DRL browse dialog box displays. You can link an entire catalog of documents or a specific individual document. Each linked node is a catalog. Click the link to expand the catalog and view its contents. A catalog can hold other catalogs and individual documents.

Figure 3-20: DRL browse dialog box



**Searching**—Click **Add - Search**. The DRL search dialog box opens. You can search for documents using the provided criteria. Refer to the *Agile Product Lifecycle Management for Process Getting Started Guide* for more information about searching.

Figure 3-21: DRL search form

The screenshot shows a web-based search interface for Document Requirements Library (DRL). It is divided into three main sections: Search Criteria, Search Results, and Selected Items.

**Search Criteria:** This section contains a search bar with the following criteria: "Document Date" (selected from a dropdown), "Greater Than" (selected from a dropdown), and "8/28/2007" (entered in a text box). There is a green plus icon and a link "more criteria...". Below the search bar are four buttons: "Search", "Reset", "Save Search", and "Load Search".

**Search Results:** This section shows the results of the search. It includes a "Results Per Page" dropdown set to "10". Below this is a table with four columns: "Document #", "Title", "Originator", and "Status".

Document #	Title	Originator	Status
<a href="#">0000850-001</a>	plant inspection	Sally Johnson	Active
<a href="#">0000870-001</a>	Animal inspection	Joe Foodman	Active
<a href="#">0000871-001</a>	vegetable index	Nick Oftime	Active

Below the table is a page indicator showing "1".

**Selected Items:** This section shows a list of selected items in a text box: "0000850-001", "0000870-001", and "0000871-001". Below the text box are three buttons: "Remove", "Clear", and "Done".

## Testing Protocols Section

In the Testing Protocols section you can link testing protocols to the specification. For a more detailed discussion of testing protocols, please see Chapter 18, *Testing Protocol Library*.

The specification needs to be in edit mode before you can add a testing protocol. You can add testing protocols to the section in two ways:

**Add a new protocol.**—Click **Add New**. The testing protocol dialog box displays, allowing you to create a new testing protocol. This testing protocol will be specific to this specification.

**Add an existing protocol.**—Click **Pull from Library**. The testing protocol search dialog box displays. You can search for testing protocols using the provided criteria. Refer to the *Agile Product Lifecycle Management for Process Getting Started Guide* for more information about searching.

**Note** Protocols from the testing protocol library are managed centrally. Changes made in the testing protocol library will be reflected on any specification which consumes that testing protocol.

Select protocols from your search results by clicking the protocol number of each testing protocol you would like to reference, thereby adding the protocol to the selection box below it. When you are finished adding protocols, click **Add Spec** to add the testing protocols to the specification.

## Attachments Section

The attachments section is where you add individual documents to a specification. An attachment is an individual document. For instructions for adding an attachment, see [Attachments/Procedures Document Type](#) and the procedure under it on page 3-12.

## % Breakdown (Formula) Section

The % Breakdown (Formula) section contains any percent breakdown formulas for the specification. You can use these breakdowns to host different versions of the formula breakdown based on supply or regulatory differentiation.

Figure 3-22: % Breakdown section

% Breakdown		
%Breakdown Documents for this Specification	Restrictions	Formulation Classifications
  <a href="#">Liquid Smoke Formulation</a>	USA	

Key fields include:

**Restrictions**—this is used to help categorize different versions of the breakdowns for usage in the Listed Ingredient Order (LIO) tool in Design Workbench

**Formula Classification**—Formula classifications can be used to enforce security for individual specifications. Classifications can be managed in the Admin Tool and are tied to user groups. Only users in the associated groups can view formulas that have a formulation classification.

**Note** On a trade specification, this section only appears when the item type is “co-pack.” When it is available, this section appears on the Supporting Documents tab.

## % Breakdown Detail

On the % Breakdown detail page you can capture header information about the breakdown, such as publication, sourcing, and formulation information. This page is where the itemized % breakdown is captured and defined.

## Publish Settings Section

In this section you can capture information that helps determine how to use this breakdown elsewhere in the system.

Figure 3-23: Publish Settings section

**Publish Settings**

**Description:** Liquid Smoke Formulation

**Restrictions:** USA

**Formulation Classifications:**

**Publish Settings:** ☐ Publish to Supplier Portal ☒ Proprietary ☐ Master Formula

Key fields include:

**Restrictions**—A list of configurable tags that you can assign to the disclosure to prevent use in the LIO process. LIO will only use disclosures with the same restriction(s) or no restrictions applied.

**Formula Classification**—You can use formula classifications to enforce security for individual specifications. Your Agile administrator can manage classifications in the admin tool. Classifications are tied to user groups. Only users in the associated groups can view formulas that have a formulation classification.

**Publish Settings:**

- Publish to Supplier Portal—Expose formulation in the supplier portal
- Proprietary—Prevent this formulation from being exposed in the supplier portal or from being printed
- Master Formula—Denotes that this formula is considered the master formulation

## Related Sourcing Approval Section

In this section you can associate an existing supplier with this formulation. You can select a supplier from any of the current sourcing relationships that are related to the specification. These relationships help determine visibility to the % breakdown in the Supplier Portal.

Figure 3-24: Related Sourcing Approvals section

Related Sourcing Approvals			
Company Name	Facility Name	Receiving Facilities	Status
U.S. Salt Co.	U.S. Salt Co. - Glen Burnie	North American BU	Review





[Add New](#)

## Formula Section

In this section you can declare the breakdown along with associated information such as country of origin. You can add items to the breakdown as free text, from existing ingredient specifications in the system, Food Composition Library, or from the Food Item Catalog.

Figure 3-25: Formula section

**Formula**

	Component	Description	Country of Origin	Complies With	Formulation	OR	Range	Function	Critical
	Salt - Granulated		USA		50%		min: % max: %		<input checked="" type="checkbox"/>
	Tomato Paste - Grade A		USA		40%		min: % max: %		<input checked="" type="checkbox"/>
	Cherry tomato		USA		10%		min: % max: %		<input checked="" type="checkbox"/>
				<b>Total:</b>	<b>100%</b>		<b>min: 0% max: 0%</b>		

Add New

Food Item Catalog



## References Tab

The Reference page contains the list of all reference data linked to a specification. The following sections appear on most specification types:

- Activities
- Suppliers
- Specification Dependencies
- Related Documents

### Activities Section

The Activities section displays all GSM activities that contain this specification as the primary object. The description of an activity is the activity's name and number. To view an associated activity, click the description. For more information on GSM activities, refer to Chapter 17, [Activities](#).

Figure 3-26: Activities section

Activities	
Activity Type	Description
activity workflow	<a href="#">Canoe (5082750-001)</a>
v500 activity workflow	<a href="#">Spec Turbo 555 (5086543-001)</a>
Activity XYZ	<a href="#">Grouping (5086766-001)</a>
activity workflow	<a href="#">Floater (5086612-001)</a>

### Suppliers Section

Supply Chain Relationship Management (SCRM) is the application dedicated to managing supplier information. However, you can manage some supplier-related tasks from within GSM. For detailed information on SCRM, see the *Agile Product Lifecycle for Process Supply Chain Relationship Management User Guide*.

The Suppliers section of the References tab displays a summary of sourcing approval documents that are associated with the specification. If you initiate the creation of a sourcing approval from within GSM, you can add new suppliers in the following ways.

#### To add a new supplier to the specification:

- 1 With the specification in read mode, click **Add New**. The SCRM facility search dialog box opens.
- 2 Search for the facility that will supply this specification. Refer to the *Agile Product Lifecycle Management for Process Getting Started Guide* for help with searching.
- 3 Select a facility. The SCRM application opens, displaying a new specification-related sourcing approval, with prepopulated specification and sourcing facility fields.

**Note** Sourcing approvals can also be created directly from Supply Chain Relationship Management.

For more information on creating specification-related sourcing approvals, refer to the *Agile Product Lifecycle for Process Supply Chain Relationship Management User Guide*.



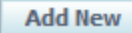

You can also import sourcing approvals from an existing specification. This action creates a copy of an existing sourcing approval, linking it to your active specification.

### To import a sourcing approval from an existing specification:

- 1 With the specification in read mode, click **Import**. GSM opens the Import Sourcing Approvals dialog box. If the previous issue of the specification has sourcing approvals, the dialog box will be populated with references to the sourcing approvals from the prior issue.
- 2 Click **Add Specs**. GSM opens the Specification Search dialog box.
- 3 Find the specifications that reference the sourcing approvals that you would like to import.
- 4 Once all of the specifications are selected, click **Add Spec** to apply your selections and close the dialog box. The Import Sourcing Approvals dialog box should now contain any sourcing approvals that existed on the selected specifications.
- 5 Select the sourcing approvals to add and click **Done**. The system creates new instances of sourcing approvals and populates them with data from the selected sourcing approvals.

The Suppliers section displays important identifying information from the specification. You can click the add data icon (+) to go directly to the sourcing approval. You can click the hyperlinked company or facility name to go directly to the SCRM company or facility profile.

Figure 3-27: Suppliers section

Suppliers								
	Company	Facility	Sourcing Type	Receiving Facilities	Sourcing Approval Status	Protocol ID	Supplier Item #	Notes
	<a href="#">I P T SK Foods</a>	<a href="#">IPT Ware-house</a>	Producer	Angus Facility Auburn Heights Plant Piedmont Facility	Review	A		
	<a href="#">Bellingham</a>	<a href="#">Akron</a>			Draft			
<div>   </div>								

## Specification Dependencies Section

The Specification Dependencies section contains the list of parent and child specifications that are directly or indirectly related on this specification. This information is read only.

Click the **Parent Specifications** or **Child Specifications** link to open the listing dialog box. The dialog box displays a table that contains the parent or child specification type and the number of specifications of that type that are related with the specification that you are viewing. If you click the specification type hypertext link, the table expands and displays the specification number and name of all the dependent specifications.

You can go directly to a related specification by clicking on the linked specification name.

Figure 3-28: Specification Dependencies section

Close	
<a href="#">Ingredient Specifications</a>	0
<a href="#">Packing Configuration Specs</a>	1
<a href="#">Delivered Material Packing Specs</a>	1
<a href="#">Labeling Specifications</a>	1
<a href="#">Master Specifications</a>	2
	<a href="#">5077412-002 Allergen Disclosure - None</a> <a href="#">5077454-001 Kosher Certifications</a>

## Related Documents Section

The Related Documents section contains the list of NPD activities and NSM documents related to a specification. This list contains system-generated information that is read only.

Click the **NPD Activities** link to open the NPD Activities dialog box. The dialog box displays all related NPD activities.

Refer to the *Agile Product Lifecycle Management for Process New Product Development User Guide* for more information.

Figure 3-29: Related Documents section

Related Documents	
<a href="#">NPD Activities</a>	Display all NPD activities that have been related to this specification.
<a href="#">Related NSM Documents</a>	Display all NSM Items that have been related to this specification.

Click the **Related NSM Documents** link to open the Related NSM Documents dialog box. The dialog box displays two sections: Nutrient Analysis and Nutrient Composite. The Nutrient Analysis section displays a table that contains the analysis number, date of analysis, source facility, and description. The analysis number is a link to the actual analysis associated with the specification. The Nutrient Composition section displays a table with composite number, date of composite, title, and description. The composite number is linked to the actual composite associated with the specification. Refer to the *Agile Product Lifecycle Management for Process Nutrient Surveillance Management User Guide* for more information.

## Custom Data

Select specifications contain custom data. Use custom data to enter customized information, in the form of extended attributes or custom sections.

The extended attributes and custom sections templates are created and maintained by your administrator.

Custom data can consist of:

- ☐ Extended Attributes
- ☐ Custom Sections

For more information on creating custom data or extended attributes, see the *Agile Product Lifecycle Management for Process Administrator User Guide*.

---



**Important** If you remove a custom section or extended attribute, the system deletes the data that you entered. Delete data with caution, because deleted data cannot be restored.

---

## Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 3-30: Extended Attributes section

Extended Attributes				
 Extended Attributes			Notes	
 RGS calc Ln D0	mm			
 Calc Ms to Vol	ratio			
 Calc Twice NmVolD2	mL			
				

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 3-31: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<div>Edit Section</div>		
<div>Add Section Remove Section</div>		

## Calculated Attributes

Some extended attributes inside the Extended Attributes table and in custom sections can be calculated. A calculated extended attribute is an attribute that references other specification attributes and performs calculations. When you add a calculated attribute to your specification, GSM calculates it when you click any of the following buttons at the top right of the page:

- **Calculate**
- **Save**
- **Save & Close Document**

GSM can calculate attributes only when the specification is in edit mode. If GSM encounters an error while calculating the attribute, it displays a calculation error icon (⚠️). In some cases, you can click the error icon to see error details.

---

**Note** You can add each distinct attribute to a specification once only. Only distinct attributes inside the Extended Attributes table are pulled into Design Workbench for use in prototyping.

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## Trade Specifications

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*This chapter presents an overview of GSM capabilities regarding trade specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Packaging Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *CSS Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *Regulatory/Legislation Detail Page*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Trade Specification page consists of the following tabs:

- ❑ *Summary Tab* on page 4-3
- ❑ *Packaging Tab* on page 4-10
- ❑ *Compliance Tab* on page 4-14
- ❑ *Related Specs Tab* on page 4-17
- ❑ *CSS Tab* on page 4-18
- ❑ *Supporting Documents Tab* on page 4-20
- ❑ *References Tab* on page 4-26
- ❑ *Approval/Audit Trail Tab* on page 4-26

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current trade specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **CACS**—Screen the current specification using Computer Aided Content Screening (CACS), an application that you can use to inspect materials for fitness against any number of user-defined screens. (Appears only if your installation includes CACS.) For more information on CACS, please refer to the *Agile Product Lifecycle Management for Process Computer Aided Content Screening User Guide*.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Trade Specifications](#) on page 2-14.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#).
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)



## Summary Tab





Key sections in the Summary tab include:

- ❑ [Summary Information](#) on page 4-3
- ❑ [Product Identification Section](#) on page 4-4
- ❑ [Relationship Information Section](#) on page 4-5
- ❑ [Next Lower Level Items Section](#) on page 4-5
- ❑ [Parent Items \(Calculated\) Section](#) on page 4-6
- ❑ [Brand Information Section](#) on page 4-6
- ❑ [Product Classification Section](#) on page 4-7
- ❑ [Cross References Section](#) on page 4-8
- ❑ [Approved for Use In Section](#) on page 4-9

## Summary Information

The section contains the primary identifying information for the specification.

Figure 4-1: Summary Information section

Summary Information	
<b>Spec Name:</b>	DG v510rc14 Mango/Orange Drink 
<b>Short Name:</b>	DG v510rc14 Mango/Orange Drink 
<b>Spec Status:</b>	Draft - This specification is currently in draft status
<b>Access Level:</b>	<input type="text" value=""/> 
<b>Category:</b>	Beverages <b>Spec #:</b> 5085421
<b>Sub Category:</b>	Non Alcoholic Beverages - Ready to Drink <b>Issue #:</b> 001
<b>Group:</b>	Non-Carbonated <b>Status:</b> Draft
<b>Originator:</b>	Joseph Foodman <b>Effective:</b> <a href="#">Tuesday, August 28, 2007</a>
	<b>Inactive:</b> -----
	USA
<b>Supercedes:</b>	<input type="text" value=""/>
<b>Reason for Change:</b>	

The table below shows the key fields for the Summary Information section:

Table 4-1: Summary Information key fields

Field Name	Importance	Details
<b>Spec Name</b>	Required	Use it to identify your specification. This data is used throughout the PLM suite when linking/ referencing specifications.
<b>Short Name</b>		Short name is a shorter reference to the specification name. Short name may or may not be required or even displayed. It is based on configuration settings in your environment.
<b>Category/Sub Category/Group</b>	Required, Drives behavior	Defaults to the first node in the specification category taxonomy
<b>Originator</b>	System Generated	Auto-populated field that denotes the person who created the specification. <ul style="list-style-type: none"> <li>Originator Name</li> <li>Originator Country</li> </ul>
<b>Spec #</b>		Number used to identify specifications
<b>Issue #</b>		The issue number, generated when an issue is created.
<b>Status</b>		Shows the current workflow status
<b>Access Level</b>		Represents the access level for secured objects on that specification.

**Note** Date fields vary based on specification type.

## Product Identification Section

In this section you can document product identifiers like GTIN (Global Trade Item Number). Additionally, the Item Type chosen here determines which fields and sections appear elsewhere in the specification. Figure 4-2 and figure 4-3 below demonstrate some of the field variations based on the Item Type field.

Figure 4-2: Product Identification section (Traded unit)

**Product Identification**

**Item Type:** Consumer Unit (co-pack)

**GTIN/UPC/EAN:** 00000000000123

**Description:** Description

**PLU Description:** BEEF BBQ DINNER\_

**POS Description:** BEEF BBQ DINNER\_

Figure 4-3: Product Identification section, Consumer Unit (not for resale)

Product Identification	
<b>Item Type:</b>	Consumer Unit (not for resale)
<b>Description:</b>	11.0 oz single server meal consisting of seasoned cooked beef and shoestring carrots.

Key fields include:

**Item Type**—The item type selected determines which fields and sections are visible on specification. For example, co-pack items have sections available to create supply associations and formulation breakdowns. These sections are unavailable for other trade item types.

**GTIN/UPC/EAN**—This field is not visible for “Consumer Unit - Not for Resale” trade items.

**PLU Description**—This field is not visible for “Consumer Unit - Not for Resale” trade items.


**POS Description**—This field is not visible for “Consumer Unit - Not for Resale” trade items.

Most other specifications are static in nature, but the trade item is dynamic. The trade item specification can display different attributes, fields, or sections based on the item type selected.

## Relationship Information Section

In this section you can establish a relationship to a primary (or master) trade specification.

Figure 4-4: Relationship Information section

Relationship Information				
	Spec #	Spec Name	Relationship	
	<a href="#">5077539-003</a>	BBQ Beef and Vegetable Dinner - 11 oz	Primary	





You can establish only one primary relationship here. The specification that you establish a primary relationship for will be considered a variant of this primary specification.

You cannot syndicate variant trade specifications. This feature enables you to create more than one specification with the same GTIN to track variance of trade specifications. The ability to create multiple GTINs for a single specification is necessary because, if you have more than one specification with the same GTIN, you will receive an error when trying to syndicate the specification. If you have created a specification with a duplicate GTIN as a variant, no error will occur.

## Next Lower Level Items Section

In this section you can capture the next lower level in the trade item hierarchy along with quantity information.

Figure 4-5: Next Lower Level Items section

Next Lower Level Items				
	Spec #	Spec Name	GTIN/UPC/EAN	Quantity
	<a href="#">5077539-001</a>	BBQ Beef and Vegetable Dinner - 11 oz	00000000000123	1
	<a href="#">5077644-001</a>	BBQ Beef Dinner Portion - 11 oz for Syndication	12345678909886	1
	<a href="#">5081380-001</a>	BBQ Beef and Vegetable Dinner - 12 oz	1111111222221	1
	<a href="#">5082225-001</a>	BBQ Beef and Vegetable Dinner - 11 oz - 2	00000000000123	1
<a href="#">Add New</a>				

**Note** This section does not appear when the item type is a “Traded Unit (no children)” or “Traded Unit (no children - co-pack).”

## Parent Items (Calculated) Section

This section shows the derived relationships based on other specifications that have referenced this specification as a lower level item.





Figure 4-6: Parent Items (Calculated) section

Parent Items (Calculated)		
Spec #	Spec Name	GTIN/UPC/EAN
<a href="#">5077539-001</a>	BBQ Beef and Vegetable Dinner - 11 oz	00000000000123

## Brand Information Section

In this section you can declare any relevant brand information.

Figure 4-7: Brand Information section

Brand Information	
<b>Trading Company:</b>	<input type="text" value="The Grocer Food Company Ltd"/>
<b>Brand:</b>	<input type="text" value="Aqaris"/> 
<b>SubBrand:</b>	<input type="text" value="Frozen Dinner"/> 
<b>Product Name:</b>	<input type="text" value="BBQ Beef Dinner"/> 
<b>Brand Description:</b>	<input type="text" value="Mr. Sky's BBQ Beef Dinner"/> 
<b>Label Owner:</b>	<input type="text" value="Branded Manufacturer Label"/>

Key fields include:

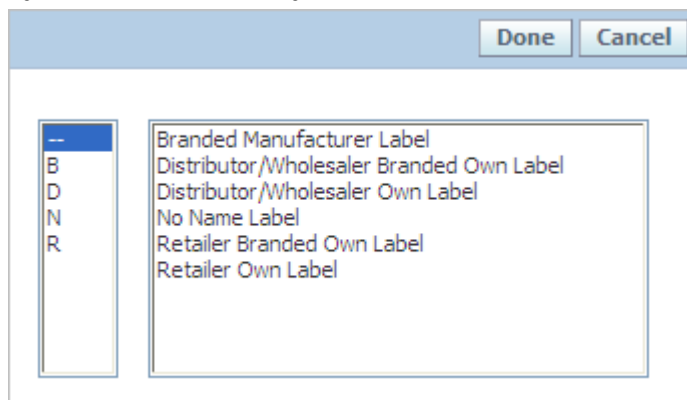
**Trading Company**—Click the hyperlinked field label to display a dialog box from which you can choose a company from a prepopulated list (configured by your administrator).

**Brand**—Click the hyperlinked field label to display a dialog box from which you can choose a brand name from a prepopulated list (configured by your administrator).

**SubBrand**—Free text entry field that you can use for a more granular level of information about brand, for example.

**Label Owner**—Click the hyperlinked field label to display a dialog box from which you can choose a label owner from a prepopulated list (configured by your administrator), as shown in figure 4-8 below.

Figure 4-8: Label Owner dialog box



## Product Classification Section

In this section you can declare any relevant product classification information. The trade item type declared on the specification affects which of these fields are visible (based on relevance).

Figure 4-9: Product Classification section (traded unit)

Product Classification	
<u>UNSPSC Code:</u>	Frozen combination meals (50192702)
<u>UDEX Classification:</u>	Frozen Foods - 14 Meat/Poultry/Meat Substitutes With Additions (Frozen) - 435 Beef With Additions (Frozen) - 144352387
<u>GPC Code:</u>	Meat, Poultry, Game and Batrachian - Prepared and Processed
<u>Country Of Origin:</u>	USA
<u>Tax Type/Rate:</u>	GST 3 %

Figure 4-10: Product Classification section, Traded Item (no children)

Product Classification	
<u>UDEX Classification:</u>	Frozen Foods - 14 Meat/Poultry/Meat Substitutes With Additions (Frozen) - 435 Beef With Additions (Frozen) - 144352387
<u>GPC Code:</u>	Meat, Poultry, Game and Batrachian - Prepared and Processed
<u>Country Of Origin:</u>	USA
<u>Tax Type/Rate:</u>	GST 3 %

Figure 4-11: Product Classification section, Consumer Unit (not for resale)

Product Classification	
<b>UDEX Classification:</b>	Frozen Foods - 14
	Meat/Poultry/Meat Substitutes With Additions (Frozen) - 435
	Beef With Additions (Frozen) - 144352387
<b>GPC Code:</b>	Meat, Poultry, Game and Batrachian - Prepared and Processed
<b>Country Of Origin:</b>	USA

Key fields include:

**UNSPSC Code**—This field is not visible on Traded Unit (no children - co-pack), Traded Unit (no children), Consumer Unit (co-pack), or items not meant for resale.

**UDEX Classification**—Search against taxonomies used by UDEX Electronic Exchange.




**GPC Code**—Click the hyperlinked field label to display a dialog box from which you can choose a GPC code taxonomy.

**Tax Type/Rate**—Click the hyperlinked field label to display a dialog box from which you can choose a tax type or rate. This field is not visible on items not meant for resale.

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 4-12: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<input type="button" value="Add New"/>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

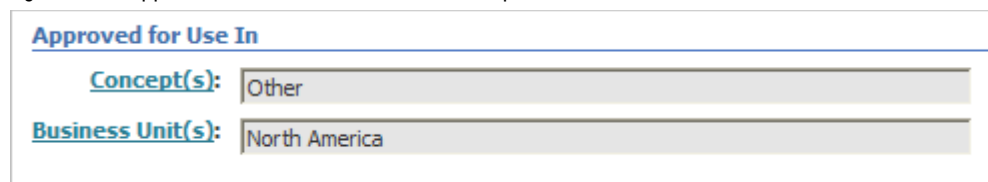
**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

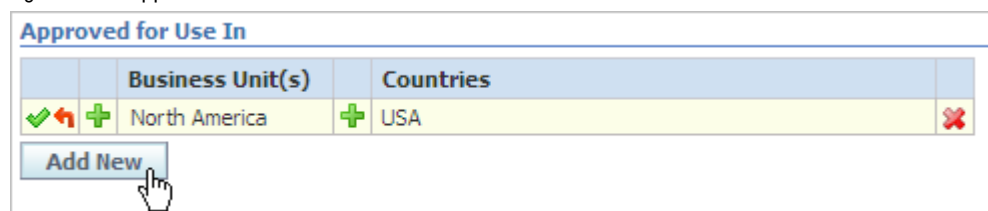
This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 4-13: Approved for Use In section with Concepts and Business Units fields








The screenshot shows a form titled "Approved for Use In". It contains two input fields: "Concept(s)" with the value "Other" and "Business Unit(s)" with the value "North America".

Figure 4-14: Approved for Use In section with Business Units and countries fields



The screenshot shows a form titled "Approved for Use In" with a table below it. The table has two columns: "Business Unit(s)" and "Countries". The first row contains "North America" and "USA". There are icons for adding, deleting, and editing rows. Below the table is an "Add New" button with a hand cursor pointing to it.

	Business Unit(s)	Countries
  	North America	 USA 

Add New

## Packaging Tab

This tab hosts all of the attributes necessary to describe the traded or consumer unit information, including dimensional and weight information, shelf life, and packaging details.

Key sections in the Packaging tab include:

- ❑ [Packaging Attributes \(Consumer Unit\) Section](#) on page 4-10
- ❑ [Packaging Attributes \(Traded Unit\) Section](#) on page 4-11
- ❑ [Stacking Height Section](#) on page 4-12
- ❑ [Storage Requirements Section](#) on page 4-12
- ❑ [Shelf Life Section](#) on page 4-12
- ❑ [Packaging Materials Section](#) on page 4-13
- ❑ [Alternate Packaging Section](#) on page 4-13
- ❑ [Environmental Waste \(per item sold\) Section](#) on page 4-14

### Packaging Attributes (Consumer Unit) Section

Depending on the item type of the specification, different packaging attributes can appear in this section. The attributes below are designed to capture information about a consumer unit.

Figure 4-15: Packaging Attributes (Consumer Unit) section

**Packaging Attributes (Consumer Unit)**

**Packaging Type:** Ring

**Label Weight:** 1.2 g

**Label Volume:** 0.024 m3

**Container Net Weight:** 0.3222 kg

**Tare Weight:** 10 oz

**Gross Weight:** 13 oz

**Inner Pack:**

**Inner Pack Label Text:** Acme Delicious BBQ Beef -n- Veggie Dinner

**Product Dimensions:**

Length	Width	Height	Volume
7 in	5 in	0.75 in	26.25 Cu. In.

**Coding:** MFG CODE 121223.23

Key fields include:

**Packaging Type**—Click the hyperlinked field label to display a dialog box from which you can choose a packaging type from a list of available types

**Tare Weight**—This section appears when the item type is a “consumer unit” or a “traded unit (no children).” For more information on tare weight and gross weight, see [Tare Weight Section](#) on page 10-3.

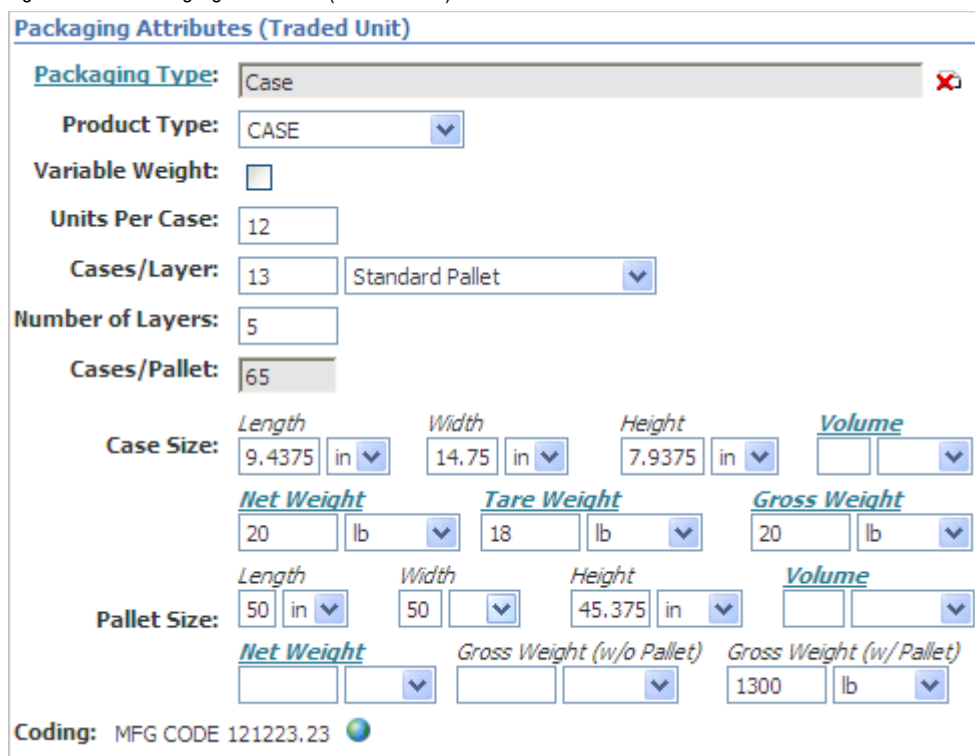
**Gross Weight**—Net weight + tare weight. Click the hyperlinked field label to choose.




## Packaging Attributes (Traded Unit) Section


As with consumer units, depending on the item type of the specification, different packaging attributes can appear in this section. This section appears when the item type is a “traded unit.” The attributes below are designed to capture information that help describe a traded unit, such as case and pallet information.

Figure 4-16: Packaging Attributes (Traded Unit) section




**Packaging Attributes (Traded Unit)**

**Packaging Type:** Case 

**Product Type:** CASE 

**Variable Weight:** ☐





**Units Per Case:** 12




**Cases/Layer:** 13 **Standard Pallet** 

**Number of Layers:** 5





**Cases/Pallet:** 65




**Case Size:**


<i>Length</i>	<i>Width</i>	<i>Height</i>	<i>Volume</i>
9.4375 in 	14.75 in 	7.9375 in 	

**Net Weight** 20 lb  **Tare Weight** 18 lb  **Gross Weight** 20 lb 

**Pallet Size:**

<i>Length</i>	<i>Width</i>	<i>Height</i>	<i>Volume</i>
50 in 	50 	45.375 in 	

**Net Weight**  **Gross Weight (w/o Pallet)**  **Gross Weight (w/ Pallet)** 1300 lb 

**Coding:** MFG CODE 121223.23 

Key fields include:

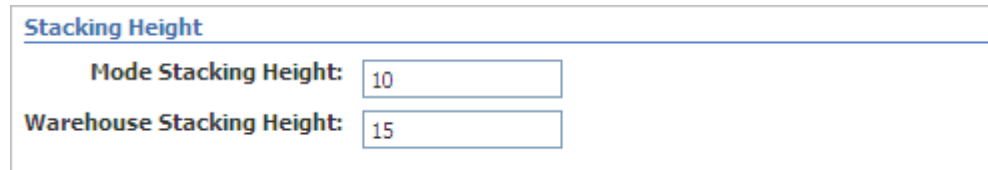
**Packaging Type**—Click the hyperlinked field label to choose a packaging type from a list of available types.

**Product Type**—Choose a product type by selecting from a list of available types.

## Stacking Height Section

In this section you can describe the stacking height information relevant to this specification. This section appears when the item type is a “traded unit.”

Figure 4-17: Stacking Height section



The form titled "Stacking Height" contains two input fields. The first field is labeled "Mode Stacking Height:" and contains the value "10". The second field is labeled "Warehouse Stacking Height:" and contains the value "15".

Key fields include:

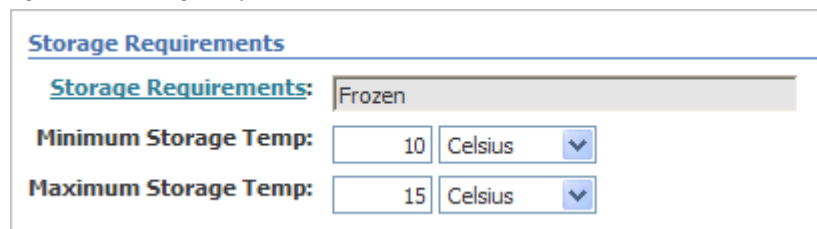
**Mode Stacking Height**—Enter the number of levels that the product can be stacked.

**Warehouse Stacking Height**—Enter the number of units that can be stacked in warehouse storage.

## Storage Requirements Section

This section is for describing the storage requirements relevant to this specification.

Figure 4-18: Storage Requirements section



The form titled "Storage Requirements" contains a dropdown menu labeled "Storage Requirements:" with the value "Frozen". Below this are two input fields for temperature. The first is labeled "Minimum Storage Temp:" and contains the value "10" followed by a dropdown menu set to "Celsius". The second is labeled "Maximum Storage Temp:" and contains the value "15" followed by a dropdown menu set to "Celsius".

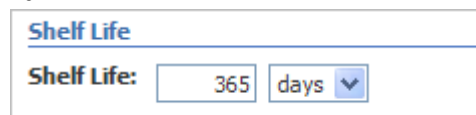
Key fields include:

**Storage Requirements**—Click the hyperlinked field label to display a dialog box from which you can choose the storage requirements from a list of options.

## Shelf Life Section

This section is for describing the shelf life relevant to this specification.

Figure 4-19: Shelf Life section



The form titled "Shelf Life" contains a single input field labeled "Shelf Life:" with the value "365" and a dropdown menu set to "days".

## Packaging Materials Section

In this section you can describe the packaging associated with this specification by associating and categorizing packaging and printed packaging specifications.

Figure 4-20: Packaging Materials section

**Packaging Materials**

ERP System:

Pkg Type	Packaging Material Specification	Units	Scrap Factor
Intermediate	<a href="#">Carton - Paper Board - Frozen Meal - 7 x 1 x 9</a> (5077540-001)	1.00000 units per Traded Unit	1.00000

**Add New**

Key fields include:

**ERP System**—This enables you to select the relevant cross-reference from the system so that the system's equivalent package identification number can be seen along with the PLM number. Changing this selection toggles the presentation of that equivalent number, but the preference is not stored as part of the specification.

**Pkg Type**—Enables you to categorize how the packaging is applied to this item, for example, whether it is considered inner, intermediate, or outer packaging.

## Alternate Packaging Section

In this section you can describe the alternate packaging associated with this specification. You can do so by associating packaging and printed packaging specifications to the packaging that they are allowed to substitute for.

Figure 4-21: Alternate Packaging section

**Alternate Packaging**

Packaging Material Specification	Units	Substitutes	Scrap Factor
<a href="#">Carton - Paper Board - Frozen Meal - 7 x 1 x 9</a> (5077540-001)	1.00000 units	5077540-001	1.00000

**Add New**


Key fields include:

**Substitutes**—Choose which piece of packaging (from the Packaging Materials section) that this alternate is meant to substitute for.

## Environmental Waste (per item sold) Section

This section provides a place to log known waste materials for this specification along with other relevant attributes required for environmental waste reporting.

Figure 4-22: Environmental Waste (per item sold) section

Environmental Waste (per item sold)				
	Material Class	Weight	Percent Recyclable	% Composed of Recycled Materials
	OTHER PLASTIC	1 g	45 %	12 %
<a href="#">Add New</a>				

Key fields include:

**Material Class**—Click the hyperlinked field label to display a dialog box from which you can choose a material class from a prepopulated list.

## Compliance Tab



Key sections in the Compliance tab include:

- ❑ [Extended Attributes Section](#) on page 4-14
- ❑ [Custom Sections](#) on page 4-15
- ❑ [Compliance Information Section](#) on page 4-15
- ❑ [Allergens, Intolerances, and Additives](#) on page 4-15

## Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 4-23: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<a href="#">Add New</a>				

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 4-24: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

## Compliance Information Section

The Compliance Information section contains the compliance data linked to a trade specification.

Key fields include:

**Label Claims**— Apply one or more label claims to a trade specification. The label claims values are maintained by an administrator.

**Complies With**— Click the hyperlinked field label to open a dialog box of compliance items. Click compliance items to add on the left, holding down the **Ctrl** key to select multiple compliance items.

## Allergens, Intolerances, and Additives

**Note** The Additives, Allergens, and Intolerances sections all follow the same procedures. This section demonstrates the use of additives, but the same behavior can be used for allergens or intolerances.

The Additives section contains the additives data linked to a specification, and can be broken out by “known to contain,” “does not contain,” and “may contain.”

Figure 4-25: Additives section

**Additives**

**Additives (known to contain):**

			Max / 100g	Source / Comments
	Hydrochloric Acid	<=	1.00000 ppm	
	Sodium Ferrocyanide	<=	2.00000 ppm	

**Additives (does not contain):**

Acesulfame K, Acetic Acid Esters of Mono- and Diglycerides of Fatty Acids, Acetone

**Additives (may contain):**

			Max / 100g	Source / Comments	
	Nuts	<=	450.00000 mg	residue	
	Pectin	<=	<input type="text" value="25"/> <input type="text" value="g"/>	as a thickening agent	

## Adding Additives

### To add items:

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to add on the left.
- 3 Click the add selected data icon ( ) to move your selections to the right.
- 4 When you have made all of your selections, click **Done**.
- 5 The page reloads, and the Additives table displays the additives that you selected.

### To add/edit the Max/100g and Source/Comments values:

- 1 Click the edit row icon ( ) to the left of the row to edit.
- 2 Once done editing, click the apply changes icon ( ) to apply your changes or click the undo icon ( ) to cancel your changes.

**Note** Max/100g values and Source/Comment values are only available for Known to Contain and May Contain fields.

## Removing Additives

To remove a single additive, click the delete icon ( ) when the row is open for edit.

**Note** As described above, removing values is only available for Known to Contain and May Contain fields.

**To remove one or more additives:**

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to remove on the right.
- 3 Click the remove selected data icon (←) to remove them from the selection box.
- 4 Click **Done** to commit your changes.

## Related Specs Tab



The Related Specs tab contains the following sections:

- ❑ **Process Sheets**— Discussed below, at [Process Sheets Section](#) on page 4-17.
- ❑ **Associated Specifications**— For discussion of this commonly used field, please see [Associated Specifications Section](#) on page 3-6.
- ❑ **Master Specifications**— Discussed below, at [Master Specifications Section](#) on page 4-17.

## Process Sheets Section

Here you can associate this specification with one or more process specifications that describe how this item is manufactured.



Figure 4-26: Process Sheets section

Process Sheets			
	Spec #	Spec Name	
	<a href="#">5083155-001</a>	Meat Mix, Salisbury Steak, 15% Pork	
	<a href="#">5080675-001</a>	Beef w/BBQ Sauce	
	<a href="#">5085587-002</a>	Lowfat Seasoned Beef w/BBQ Sauce	
	<a href="#">5077633-001</a>	Lite Beef w/BBQ Sauce	
	<a href="#">5077630-001</a>	Seasoned Beef w/BBQ Sauce	
<a href="#">Add New</a>			

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 4-27: Master Specifications section

Master Specifications			
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	Explicitly set
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	Explicitly set
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	Implicitly set (not editable)
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, *Master Specifications* for more information.

## CSS Tab

The sole section in the CSS (content synchronization and syndication) tab, Initial Publication, contains the list of publications related to the specification.

You can create initial publications only from within GSM. Using the CSS application, you can syndicate these publications to an internal or external target system. Once created, these publications can be managed on the CSS tab of the specification or they can be managed inside the CSS application. As shown in the figure below, this section contains additional data about each publication.

Figure 4-28: Initial Publication section

Initial Publication									
	Trading Partner	Publication Type	Target Market	Initial Publication	Last Updated	Info Provider	Manufacturer	Current Status	
	GB » MDR » MDREU -	New	GB	-----	12/14/2007	Acme Company Ltd	Acme	Draft GS1:	
	US » PDK » Syndication WebService - PDK_WS	Initial Load ▾	US	-----	12/14/2007	Acme	ABCD ▾	Draft GS1:	
Add New		Validate For Publication							

### To add an initial publication:

- 1 Click **Edit Document** to put the specification in editable mode.
- 2 Click **Add New** under the Initial Publication table. The publications requirements dialog box displays, as shown below.



Figure 4-29: CSS Publications Requirements dialog box

3 Specify the following required data:

- **Manufacturer**—Defines the source of the data being syndicated. For Global Data Synchronization Network (GDSN) compliant target systems, this is the Global Locator Number or GLN of the information provider.
- **Publication Type**—Used for GDSN compliant target systems. Typically this is used to tell retailers if it is the first time they have received this product information or if they already have it and should update their information.
- **Target Market**—Defines the destination for the syndicated data. Publications are organized by target market. Target market is a GDSN term used to indicate the country where the trade item is available for sale. For example, the US and Canada are two different target markets.

---

**Note** This information resides on the Summary tab of the saved publication.

---

4 Click **Save**. The publication appears in the Initial Publication table. The default starting status for publications depends on the configuration of the publication workflow.

---

**Note** You cannot view publications with a current status of “Draft.” Statuses are controlled and updated automatically by the publication workflow.

---

For more information, please see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*.

## Supporting Documents Tab

Key sections in the Supporting Documents tab include:

- ❑ **Supporting Documents**—The document types available are Product Facts Sheet, Attachments/Procedures, and Rich Text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10.
- ❑ **DRL Documents**—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- ❑ **Testing Protocols**—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19.
- ❑ **Nutrient Profile**—[Nutrient Profile Section](#) on page 4-20.
- ❑ **% Breakdown section**—This section only appears on trade items that are identified as “co-pack.” For discussion of this commonly used section, please see [% Breakdown \(Formula\) Section](#) on page 3-20.
- ❑ **Regulatory/Legislation**—[Regulatory/Legislation Section](#) on page 4-20.

## Nutrient Profile Section

In this section you can create new or associate existing nutrient profiles for this specification.

Figure 4-30: Nutrient Profile section

Nutrient Profile				
Profile #	Nutrient Profile	Active Profile	Effective Date	Status
<a href="#">5077592-001</a>	DWB Nutrient Profile: Tomato Puree, 8.6% Total Solids	<input type="checkbox"/>	Monday, October 04, 2004	Approved
<a href="#">5077592-002</a>	DWB Nutrient Profile: Tomato Puree, 8.6% Total Solids	<input type="checkbox"/>	Tuesday, October 05, 2004	Draft




Nutrient profiles are actually separate documents from the trade specification with their own workflows.

More than one nutrient profile can exist on a trade specification, but one of the nutrient profiles must be flagged as the “Active Profile” for usage in rollups elsewhere in the system.

## Regulatory/Legislation Section

The Regulatory/Legislation section displays summary details of the regulatory documents that have been created for this trade specification.

Figure 4-31: Regulatory/Legislation section

Regulatory/Legislation					
Filing #	Name	Type	Status	Approval #	
 0000564	<a href="#">Meat Mix, Salisbury Steak, 15% Pork(11/19/2007)</a>	Generic	Draft		
 0000565	<a href="#">Meat Mix, Salisbury Steak, 15% Pork(11/19/2007)</a>	USDA	Approved	252545	
 0000566	<a href="#">Meat Mix, Salisbury Steak, 15% Pork(11/19/2007)</a>	CFIA	Pending		
<a href="#">Add New</a>					

Key fields include:

**Filing #**—A system-assigned number associated with the regulatory filing.

**Approval #**—An internal tracking number that you can enter in the Regulatory/Legislative Detail tab, Cover Page tab, Application Summary section. (See [Application Summary Section](#) on page 4-21 below.)

## Regulatory/Legislation Detail Page

On the Regulatory Legislation Detail page you can generate and document data that supplements the trade specification in order to produce regulatory filing documentation.

This page is unusual in that you access it from within another tab (Supporting Documents). To access the Regulatory/Legislation Detail window, click the hyperlinked specification name in the Regulatory/Legislation section of the Supporting Documents tab. A new window opens with five tabs:

- ❑ [Cover Page Tab](#) on page 4-21
- ❑ [Product Formula Tab](#) on page 4-23
- ❑ [Processing Procedures Tab](#) on page 4-24
- ❑ [Comments Tab](#) on page 4-24
- ❑ [Attachments Tab](#) on page 4-25

## Cover Page Tab

On the Cover Page tab you can define the application summary data including the application type. The application type in turn drives some of the relevant fields on the rest of the cover page.

Cover Page has the following sections:

- ❑ [Application Summary Section](#) on page 4-21
- ❑ [\[Application Type\] Cover Page Section](#) on page 4-22

### Application Summary Section

In this section you can identify information that will help classify and generate a regulatory filing application such as the name of the product, the status, and the process specification to use to generate the procedures.

Figure 4-32: Application Summary section

The screenshot shows the 'Application Summary' section of a web application. It contains several input fields and dropdown menus:

- Application Type:** A dropdown menu with 'USDA' selected.
- Name of Product:** A text input field containing 'Meat Mix, Salisbury Steak, 15% Pork'.
- Spec #:** A text input field containing '0000565'.
- Status:** A dropdown menu with 'Approved' selected.
- Approval Date:** A date picker showing '10/16/2007' with a red 'X' icon to its right.
- Approval #:** A text input field containing '252545'.
- Process Specification:** A dropdown menu showing '(5083155-001) Meat Mix, Salisbury Steak, 15% Pork rr'.

Key fields include:

**Application Type**—Controls which cover page attributes are visible and the printed format of the filing

**Status**—You can alter the status when the specification is in edit mode

**Process Specification**—Choose from a list of process specifications that are tied to this trade item. The process specification identified here is the one that the system uses to generate data elsewhere in the filing document.

## [Application Type] Cover Page Section

This section enables you to capture information necessary for generating different regulatory forms.

Figure 4-33: [Application Type] Cover Page section

The screenshot shows the '[Application Type] Cover Page' section. It contains the following fields and controls:

- Agent Name, Address, Telephone No.:** A large text area with up and down arrow buttons on the right.
- Establishment No. / Foreign Country:** A text input field with '(if applicable)' to its right.
- HACCP Process Category:** A dropdown menu.
- Type of Approval Requested:** A dropdown menu.
- Prior Approval:** A checkbox labeled 'Previously Approved?'.
- Area Of Principal Display Name:** A text input field with '(Square inches)' to its right.
- Total Available Labeling Space for Entire Package:** A text input field with '(Square inches)' to its right.
- Name and Address of Firm:** A large text area with up and down arrow buttons on the right.
- Generate Formula/Procedures:** A button at the bottom right.

Key fields include:

**Agent Name, Address, Telephone No.**—Click **Agent Name**, the hyperlinked part of the field label, to open a dialog box from which you can choose a company from a prepopulated list. When you select the company, the dialog box closes and the company name, address, and telephone number appear in the text box to the right of the field label.

**HACCP Process Category**—From the drop-down list, select an HACCP (Hazard Analysis and Critical Control Point) process category.

Click **Generate Formula/Procedures** to pull information from the selected process specification and nutrient profile to build the filing.

## Product Formula Tab

The Product Formula tab contains only one section: Product Formula.

### Product Formula Section

In the Product Formula section you can store an enriched text rendering of the product formulation for use when generating the document. Using the **Generate Formula** button, you can automatically generate an enriched text version of the formulation information from the process specification selected on the cover page tab.

Figure 4-34: Product Formula section

INGREDIENTS	Sugar (sucrose) - Cumin Granulated - Extra fine	Composite Listing
9-inch uncooked pie crust	100.0000	93.0233 %
Ground cloves	100.0000	4.6512%
	-----	-----

## Processing Procedures Tab

Processing Procedures, the sole section in this tab, is for storing an enriched text rendering of the processing procedures that can be used when generating the document. You can use the Generate Procedures button to automatically generate an enriched text version of the processing procedures information from the process specification selected on the Cover Page tab.

Figure 4-35: Processing Procedures section

The screenshot shows a software window with a title bar containing 'Save', 'Save & Close', 'Save & Print', and 'Cancel' buttons. Below the title bar is a tabbed interface with five tabs: 'Cover Page', 'Product Formula', 'Processing Procedures' (which is the active tab), 'Comments', and 'Attachments'. The 'Processing Procedures' tab contains a 'Generate Procedures' button. Below this button, the text 'Processing Procedures:' is followed by two lists of instructions. The first list is for 'Meat Mix, Salisbury Steak, 15% Pork' and contains eight steps. The second list is for 'Onions, Reconstituted TMC 20060816' and contains three steps.

Save Save & Close Save & Print Cancel

Cover Page Product Formula Processing Procedures Comments Attachments

Processing Procedures

Generate Procedures

**Processing Procedures:** Meat Mix, Salisbury Steak, 15% Pork

1. Dry Preblending Instructions
2. Hydrated TVP Preparation
3. Wet Preblending Instructions
4. Hydrauflake Beef and Pork
5. Convey Meats to Blender
6. Add Steps 1, 2, 3 and Remaining Ingredients to Blender
7. Discharge Meat Blend to Grinder
8. Grinder with Bone Extractor: Plate Size 1/8 Inch

Onions, Reconstituted TMC 20060816

1. Weigh Dried Onions into a Container
2. Measure Hot Water (T>140F) into the Same Container and Stir
3. Allow Onions to Hydrate in Water at Least 15 Minutes Before Use

## Comments Tab

In Comments, the sole section in this tab, you can store enriched text comments for use when generating the document.

Figure 4-36: Comments section

The screenshot shows the same software window as Figure 4-35, but with the 'Comments' tab selected. The 'Comments' tab contains a 'Comments:' label followed by a single line of text: 'This product is to be used by the consumer as specified.'

Save Save & Close Save & Print Cancel

Cover Page Product Formula Processing Procedures Comments Attachments

Comments

**Comments:** This product is to be used by the consumer as specified.

## Attachments Tab

The Attachments tab contains the following sections:

- ☐ Related Specifications
- ☐ Attachments

### Related Specifications Section

The section allows you to reference attachments from ingredient and packaging specifications related to the product.


Figure 4-37: Related Specifications section

Related Specifications	
<b><u>Ingredient Specification(s):</u></b>	<div> <div>5077441-001 - Salt - Granular - Not Iodized</div> <div>5077444-001 - Textured Soy Flour - Caramel Colored</div> <div>5077446-001 - Soy Protein Concentrate - Powdered</div> <div>5077447-001 - Soluble Black Pepper on Dextrose</div> <div>5077448-001 - Breeding - NW #B34216</div> <div>5077450-001 - Beef - Lean - Finely Textured</div> <div>5077451-001 - Pork Trimmings - Raw - 72% Lean</div> <div>5077462-001 - Water - Carbonated</div> <div>5077484-001 - Onion - Chopped - Dehydrated</div> </div>
<b><u>Packaging Specification(s):</u></b>	

### Attachments Section

In this section you can attach binary documents such as Adobe™ Acrobat (PDF) documents and Microsoft Office documents.

Figure 4-38: Attachments section

Attachments				
	Title	Filename	Filesize	Remove
	Logo Attachment	<a href="#">LogoSmall.jpg</a>	2 KB	
<a href="#">Add Attachment</a>				

## References Tab

The trade specification References tab contains the list of all reference data linked to a specification. Key sections in the References tab include:

- ❑ **Suppliers section**—This section only appears on trade items that are identified as “co-pack.” For discussion of this commonly used section, please see [Suppliers Section](#) on page 3-23.
- ❑ **Activities section**—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ **Specification Dependencies section**—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 4-39: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.

Figure 4-40: Event History section



Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	



## Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 4-41: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec
looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



## Process Specifications

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*This chapter presents an overview of the capabilities of Global Specification Management regarding process specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Copying Data to Design Workbench*
  - ❑ *Summary Tab*
  - ❑ *Process Tab*
  - ❑ *Formulation Tab*
  - ❑ *Packaging Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *CSS Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Process Specification page consists of the following tabs:

- ❑ *Summary Tab* on page 5-4
- ❑ *Process Tab* on page 5-6
- ❑ *Formulation Tab* on page 5-9
- ❑ *Packaging Tab* on page 5-11
- ❑ *Compliance Tab* on page 5-12
- ❑ *Related Specs Tab* on page 5-15
- ❑ *CSS Tab* on page 5-16
- ❑ *Supporting Documents Tab* on page 5-18
- ❑ *References Tab* on page 5-19
- ❑ *Approval/Audit Trail Tab* on page 5-20

## Page-Level Functions

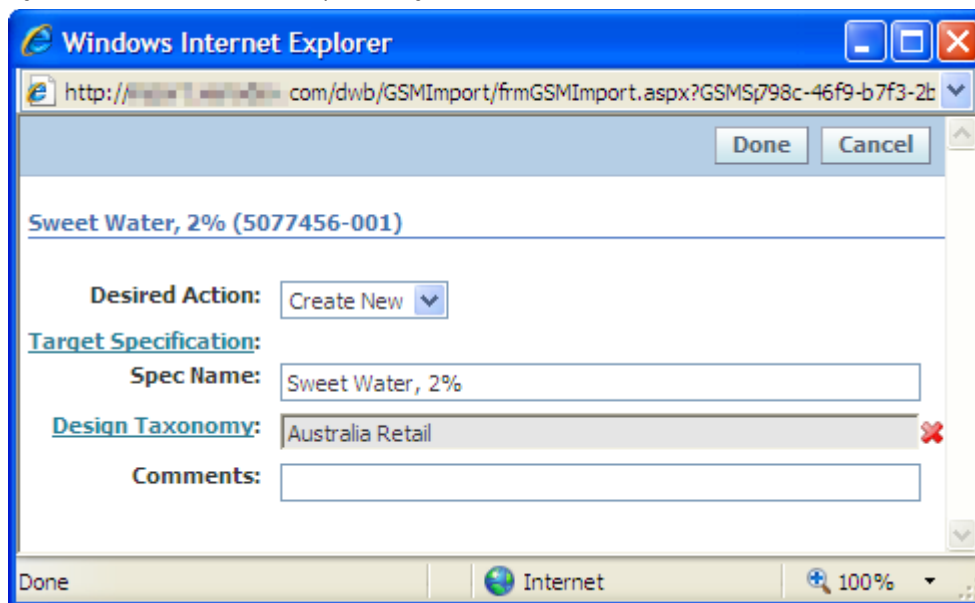
In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current process specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **GSM>>DWB**—Copy the data in this specification into the Design Workbench (DWB) application. (Appears only if your installation includes DWB.) For more information, this function see [Copying Data to Design Workbench](#) on page 5-3. For more information on DWB, please see the *Agile Product Lifecycle Management for Process Design Workbench User Guide*.
- ❑ **CACS**—Screen the current specification using Computer Aided Content Screening (CACS), an application that you can use to inspect materials for fitness against any number of user-defined screens. (Appears only if your installation includes CACS.) For more information on CACS, please refer to the *Agile Product Lifecycle Management for Process Computer Aided Content Screening User Guide*.
- ❑ **Compare**—Compare two or more process specifications.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Process Specifications](#) on page 2-17.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Copying Data to Design Workbench

If you have the proper permissions, you can copy the data in the current specification into the Design Workbench (DWB) application. To copy data, click **GSM>>DWB**. A data export dialog box opens, as shown in figure 5-1 below.

Figure 5-1: GSM to DWB Data Export dialog box



**Note** If you do not have sufficient permissions, the Desired Action field contains one entry: **No Permissions on Spec**. To get the proper permissions, consult your administrator.

Key fields include:

**Desired Action**—As shown in the figure above, the options of this drop-down list are: “Update Existing,” “Create New,” and “Create New Issue.”

**Target Specification**—Click the hyperlinked field name to open a dialog box from which to select the target specification. If the specification has previously been exported to DWB, GSM prepopulates this field with the name of the name of the specification.

**Spec Name**—To rename the default name to another, modify this field.

**Design Taxonomy**—Click the hyperlinked field name to open a dialog box from which to select the taxonomy of the specification.

When updating an existing specification, GSM:

- ❑ Updates the Spec Name, Design Taxonomy, and Approved for Use In sections on the Summary tab.
- ❑ Completely replaces the Formulation tab.
- ❑ Completely replaces the Trade Item tab.
- ❑ Rolls up the nutrient values but maintains the existing nutrient visibility with no change on the Nutrients/Properties tab.

For more information about DWB, please see the *Agile Product Lifecycle Management for Process Design Workbench User Guide*.

## Summary Tab


Key sections in the Summary tab include:

- ❑ [Facility Information Section](#) on page 5-4
- ❑ [Product Attributes Section](#) on page 5-4
- ❑ [Relationship Information Section](#) on page 5-4
- ❑ [Cross References Section](#) on page 5-5
- ❑ [Approved for Use In Section](#) on page 5-6

## Facility Information Section

The Facility Information section contains the list of facilities linked to a process specification. This information is useful in areas such as printing. When printing, you can use this section to help identify site-specific factory floor worksheets.



Figure 5-2: Facility Information section

Facility Information			
	Facility Name	Company Name	Country
	<a href="#">Centersville Facility</a>	Peedmont Foods	USA
<a href="#">Add New</a>			

## Product Attributes Section

The Product Attributes section contains some top-level attributes that help describe a process specification.


Figure 5-3: Product Attributes section

Product Attributes	
<b>Description:</b>	Tomato Puree, 8.6% Total Solids 
<b>Internal Shelf Life:</b>	<input type="text"/> <input type="text"/> 
<b>Classification:</b>	<input type="text"/>
<b>Storage Requirements:</b>	<input type="text"/>

## Relationship Information Section

The Relationship Information section enables you to create a relationship to a master process specification. This feature is useful for relating recipe variants to a master formula. There can only be one master formula related to each specification.




Figure 5-4: Relationship Information section

Relationship Information				
	Spec #	Spec Name	Relationship	
	<a href="#">5077461-003</a>	Beef w/BBQ Sauce	Master	

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 5-5: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<input type="button" value="Add New"/>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

---

**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

---

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 5-6: Approved for Use In section with Concepts and Business Units fields

The screenshot shows a form titled "Approved for Use In". It contains two fields: "Concept(s):" with the value "Other" and "Business Unit(s):" with the value "North America".

Figure 5-7: Approved for Use In section with Business Units and countries fields

The screenshot shows a form titled "Approved for Use In". It contains a table with two columns: "Business Unit(s)" and "Countries". The table has one row with the values "North America" and "USA". There are icons for adding, deleting, and editing rows. Below the table is an "Add New" button.

Business Unit(s)	Countries
North America	USA

Add New

## Process Tab

In the Process tab you can define the steps used to manufacture the material.

## Process Steps Section

The Process Steps section contains the list of process steps in a process specification. You can click the view details icon (🔍) to view the step details or the edit icon (✏️) to put the row in edit mode.

Figure 5-8: Process steps

The screenshot shows a form titled "Process Steps". It contains a table with the following columns: Step Name, Batch Size, % as Filled, Yield Size, and % of Yield. The table has four rows of process steps and a total row. There are icons for adding, deleting, and editing rows. Below the table is an "Add New" button.

Step Name	Batch Size	% as Filled	Yield Size	% of Yield
Dilute Tomato Paste	543.46660 lb	39.29601 %	543.46660 lb	39.29601 %
Slurry 1	5.00000 lb	0.36153 %	5.00000 lb	0.36153 %
Pre-Infusion Tanks	0.00000 lb	0.00000 %	0.00000 lb	0.00000 %
Add Water	834.54044 lb	60.34246 %	834.54044 lb	60.34246 %
<b>Total</b>	<b>1383.00705</b> lb		<b>1383.00705 lb</b>	

Add New



## Step Summary Section

In this section you can capture step summary information like a step name, a floor summary, or enriched text instructions for each step.

Figure 5-9: Step Summary section

Pre-Infusion Tanks

Step Name: Pre-Infusion Tanks

Floor Summary:

A) Collect sauce in post infusion tank  
B) Start tank agitation  
C) After all sauce is in the tank, hold for 5 minutes

Note: This value will be summarized to appear in factory floor worksheets and systems.

Instructions:

enter instructions here in rich text format.

## Bill of Materials Section

This section is for describing the bill of materials for the step. can consist of ingredient or intermediate process specifications. You can edit the quantity, yield, and gain/loss factor for each material in the bill of materials.

Figure 5-10: Bill of Materials section

Bill of Materials						
	Ingredient/Process Specification	Quantity	Gain/Loss Factor	Yield	%Step	% Batch
	<u>Tomato Paste - Cold Break</u> 018078 (ing 5077417-001)	128.70000 lb	1.0000	128.70000 lb	23.68131 %	9.30581 %
	<u>Water - Carbonated</u> 22202 (ing 5077462-001)	49.70000 gal (US)	1.0000	49.70000 gal (US)	76.31869 %	29.99020 %
	<b>Total</b>	<b>543.46660 lb</b>		<b>543.46660 lb</b>		
<div> <div>Add New</div> <div>Pull From Step</div> <div>Order Bill of Materials</div> </div>						


Click **Pull from Step** to use or move materials from other steps already defined in the process.

Click **Order Bill of Materials** to change the listed order of items in the bill of materials.

## Alternate Ingredients Section

In this section you can define alternate ingredients that a user may use in this step of the process. You can replace each item in the primary bill of materials with one or more alternate ingredients. You assign to each alternate a substitution factor to denote how users doing formulation work should use the alternate material to replace the original material.


Figure 5-11: Alternate Ingredients section

Alternate Ingredients			
	Orig Material(s)	Substitute Factor / Substitute Material(s)	Description
	5080824-001	425.00000 <a href="#">CACS Water</a> (ing 5081464-001)	
<a href="#">Add New</a>			

## Packaging Materials Section

In this section you can describe the packaging materials that are relevant to this step of the process, as shown in figure 5-12below:


Figure 5-12: Packaging Materials section

Packaging Materials				
	Pkg Type	Packaging Material Specification	Units	Scrap Factor
	Inner	<a href="#">OVAL IQF TRAY WIDE SIDE LEADING</a> 090908 (5077544-001)	16.00000 oz per Consumer Unit	1.00000
<a href="#">Add New</a>				

## Alternate Packaging Section

In this section you can define alternate packaging materials that may be used in this step of the process. You can replace each item in the primary packaging materials with one or more alternate materials. You assign to each alternate a substitution factor to denote how users doing formulation work should use the alternate material to replace the original material.

Figure 5-13: Alternate Packaging section

Alternate Packaging				
	Packaging Material Specification	Units	Substitutes	Scrap Factor
	<a href="#">Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9</a> (5077540-001)	0		1
<a href="#">Add New</a>				

## Process Map Annotations Section

In this section you can add some annotations and printing preferences that can be used in process specification printing if you are using process maps.

Figure 5-14: Process Map Annotations section

**Process Map Annotations**

**Step Annotations:** Normal Blade required on Liquifier

**Equipment Notes:** Liquifier

☐ Insert a page-break before printing this step

## Formulation Tab

The Formulation tab contains the data related to the bill of materials, batch attributes and ingredient statement of a process specification.

### Bill of Materials Section

The Bill of Materials section contains the list of ingredients and intermediates included in the bill of materials of a process specification. The bill of materials listed here represents an aggregated, 100% formulation.

You can edit the **% as Filled**, **% Batch**, **Total Quantity**, and **Total Yield** fields. The values in each of these fields are calculated, but when you edit these fields, GSM applies the weighted changes to the items in each step-specific bill of materials defined in the Bill of Materials section.


Figure 5-15: Bill of Materials section

<b>Bill of Materials</b>				
<b>Ingredient/Process Specification</b>	<b>Quantity</b>	<b>% as Filled</b>	<b>Yield</b>	<b>% Batch</b>
<u>Water - Carbonated</u> 22202 (ing 5077462-001)	414.766 lb	29.990%	414.76660 lb	29.99020 %
<u>Tomato Paste - Cold Break</u> 018078 (ing 5077417-001)	128.700 lb	9.305%	128.70000 lb	9.30581 %
<u>Salt - Granular - Not Iodized</u> 34131 (ing 5077441-001)	2.000 lb	0.144%	2.00000 lb	0.14461 %
<u>Saturated Salt Solution</u> 012999 (ing 5077565-001)	3.000 lb	0.216%	3.00000 lb	0.21692 %
<u>Pure "D" Water</u> (ing 5080824-001)	834.540 lb	60.342%	834.54044 lb	60.34246 %
<b>Total</b>	<b>1383.007 lb</b>		<b>1383.00705 lb</b>	
<b>Add New</b>				

## Alternate Ingredients Section

The Alternate Ingredients section contains alternate ingredients that may be used for a process specification. Each alternate material is related to an original material and allows for a substitution factor.

Figure 5-16: Alternate Ingredients section

Alternate Ingredients			
	Orig Material(s)	Substitute Factor / Substitute Material(s)	Description
	5080824-001	425.00000 <a href="#">CACS Water</a> (ing 5081464-001)	
<a href="#">Add New</a>			

## Approximate Yield Section

The Approximate Yield section contains the yield data for a process specification.

Figure 5-17: Approximate Yield section

Approximate Yield	
Labeled Unit Contents: <input type="text" value="0"/> <input type="text" value="kg"/>	Quantity/Traded Unit: <input type="text" value="0"/>
Beginning Batch Size: 1383.00705 lb	Beginning % Total Solids: <input type="text" value="8.60031"/> %
Processing Loss Factor: <input type="text" value="1.00000"/>	Water Gain/Loss Factor: <input type="text" value="1.00000"/>
Approximate Yield: <input type="text" value="1383.00705"/> lb	Final % Total Solids: <input type="text" value="8.60031"/>
Labeled Units/Batch: <input type="text" value="0.00000"/>	Final Density: g = mL
Traded Units/Batch: <input type="text" value="0.00000"/>	Final Density Override: <input type="text" value="8.66300"/> <input type="text" value="lb"/> = <input type="text" value="1.00000"/> <input type="text" value="gal (US)"/>
<a href="#">Calculate Approximate Yield</a>	<a href="#">Pull Relative Density Override From Batch</a>

Key fields include:

**Labeling Unit Contents**— The amount per consumer unit

**Beginning Batch Size**— the batch size calculated from the specification

**Processing Loss Factor**— Estimated total loss for the process

**Approximate Yield**— The calculated yield based on the batch size, processing loss, and water gain/loss factor

**Labeled Units/Batch**— The calculated number of consumer units per batch

**Traded Units/Batch**— The calculated number of traded units per batch

**Quantity/Traded Unit**— The quantity of labeled units per traded unit

**Beginning % Total Solids**— The percent of total solids, not accounting for water gain or loss

**Water Gain/Loss Factor**— Estimated gain/loss factor for water

**Final % Total Solids**— Percent of total solids after adjusting for water gain/loss. This value is used in other areas of Agile Product Lifecycle Management for Process

**Final Density**— The calculated density of the batch. This value is used in other areas of Agile Product Lifecycle Management for Process

**Final Density Override**— Enables you to override the final density. If declared, this value is used instead of the value in the Final Density field in other areas of Agile Product Lifecycle Management for Process

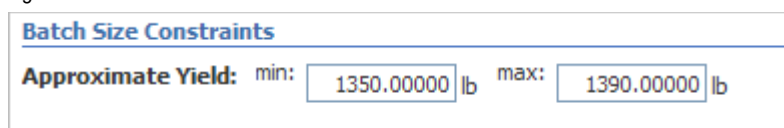
Click **Calculate Approximate Yield** to recalculate the fields in the Approximate Yield section based on the variables that you have entered.

Click **Pull Relative Density Override From Batch** to populate the Final Density Override field with the calculated batch density.

## Batch Size Constraints Section

The Batch Size Constraints section, as shown in figure 5-18 below, contains the min/max batch size constraints that you must apply to a process specification in order to use batch scaling.

Figure 5-18: Batch Size Constraints section



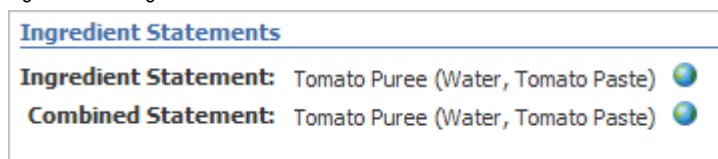
**Batch Size Constraints**

**Approximate Yield:** min:  lb max:  lb


## Ingredient Statements Section


The Ingredient Statements section contains the ingredient statement and combined statement of a process specification. Combined Statement is used in Design Workbench for Label Ingredient Order.

Figure 5-19: Ingredients section



**Ingredient Statements**

**Ingredient Statement:** Tomato Puree (Water, Tomato Paste) 

**Combined Statement:** Tomato Puree (Water, Tomato Paste) 

## Packaging Tab

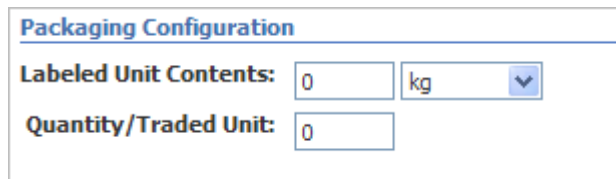
The Packaging tab contains the packaging data related to a process specification. It contains two sections:

- ☐ Packaging Configuration section
- ☐ Packaging Materials section

## Packaging Configuration Section

The Packaging Configuration section contains the data related to the packaging configuration (trade unit) of a process specification.

Figure 5-20: Packaging Configuration section





The form titled "Packaging Configuration" contains two input fields. The first field is labeled "Labeled Unit Contents:" and has a text input with the value "0" and a unit dropdown menu set to "kg". The second field is labeled "Quantity/Traded Unit:" and has a text input with the value "0".

## Packaging Materials Section

The Packaging Materials section lists all packaging materials referenced in your process step.

Figure 5-21: Packaging Materials section

Packaging Materials			
Pkg Type	Packaging Material Specification	Units	Scrap Factor
 Inner	<a href="#">OVAL IQF TRAY WIDE SIDE LEADING</a> 090908 (5077544-001)	16.00000 oz per Consumer Unit	1.00000
 Outer	<a href="#">Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9</a> (5077540-001)	1.00000 units per Consumer Unit	1.00000

## Compliance Tab



The Compliance tab includes the following sections:

- ❑ [Extended Attributes Section](#) on page 5-13
- ❑ [Custom Sections](#) on page 5-13
- ❑ Compliance Information—For discussion of this commonly used section, please see [Compliance Information Section](#) on page 3-4
- ❑ [Allergens, Intolerances, and Additives](#) on page 5-13

## Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 5-22: Extended Attributes section

Extended Attributes			
 Extended Attributes		Notes	
 RGS calc Ln D0	mm		
 Calc Ms to Vol	ratio		
 Calc Twice NmVolD2	mL		
<a href="#">Add New</a>			

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 5-23: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

## Allergens, Intolerances, and Additives

**Note** The Additives, Allergens, and Intolerances sections all follow the same procedures. This section demonstrates the use of additives, but the same behavior can be used for allergens or intolerances.

The Additives section contains the additives data linked to a specification, and can be broken out by “known to contain,” “does not contain,” and “may contain.”

Figure 5-24: Additives section

**Additives**

**Additives (known to contain):**

			Max / 100g	Source / Comments
	Hydrochloric Acid	<=	1.00000 ppm	
	Sodium Ferrocyanide	<=	2.00000 ppm	

**Additives (does not contain):**

Acesulfame K, Acetic Acid Esters of Mono- and Diglycerides of Fatty Acids, Acetone

**Additives (may contain):**

			Max / 100g	Source / Comments	
	Nuts	<=	450.00000 mg	residue	
	Pectin	<=	<input type="text" value="25"/> <input type="text" value="g"/>	as a thickening agent	

## Adding Additives

### To add items:

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to add on the left.
- 3 Click the add selected data icon ( ) to move your selections to the right.
- 4 When you have made all of your selections, click **Done**.
- 5 The page reloads, and the Additives table displays the additives that you selected.

### To add/edit the Max/100g and Source/Comments values:

- 1 Click the edit row icon ( ) to the left of the row to edit.
- 2 Once done editing, click the apply changes icon ( ) to apply your changes or click the undo icon ( ) to cancel your changes.

**Note** Max/100g values and Source/Comment values are only available for Known to Contain and May Contain fields.

## Removing Additives

To remove a single additive, click the delete icon ( ) when the row is open for edit.

**Note** As described above, removing values is only available for Known to Contain and May Contain fields.



**To remove one or more additives:**

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to remove on the right.
- 3 Click the remove selected data icon (←) to remove them from the selection box.
- 4 Click **Done** to commit your changes.

## Related Specs Tab

The Related Specs tab contains the following sections:

- ❑ Trade Specifications section— Discussed below, at [Trade Specifications Section](#) on page 5-15.
- ❑ Associated Specifications section— For discussion of this field, please see [Associated Specifications Section](#) on page 3-6.
- ❑ Master Specifications section— Discussed below, at [Master Specifications Section](#) on page 5-15.

## Trade Specifications Section

The Trade Specifications section contains the list of trade specifications linked to a process specification.



Figure 5-25: Trade Specifications section

Trade Specifications	
Spec #	Spec Name
<a href="#">5085734-001</a>	Tomato Puree

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 5-26: Master Specifications section

Master Specifications			Explicitly set
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	Implicitly set (not editable)
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, *Master Specifications* for more information.

## CSS Tab

The sole section in the CSS (content synchronization and syndication) tab, Initial Publication, contains the list of publications related to the specification.

You can create initial publications only from within GSM. Using the CSS application, you can syndicate these publications to an internal or external target system. Once created, these publications can be managed on the CSS tab of the specification or they can be managed inside the CSS application. As shown in the figure below, this section contains additional data about each publication.

Figure 5-27: Initial Publication section

Initial Publication									
	Trading Partner	Publication Type	Target Market	Initial Publication	Last Updated	Info Provider	Manufacturer	Current Status	
	GB » MDR » MDREU -	New	GB	-----	12/14/2007	Acme Company Ltd	Acme	Draft GS1:	
	US » PDK » Syndication WebService - PDK_WS	Initial Load ▾	US	-----	12/14/2007	Acme	ABCD ▾	Draft GS1:	
Add New		Validate For Publication							

### To add an initial publication:

- 1 Click **Edit Document** to put the specification in editable mode.
- 2 Click **Add New** under the Initial Publication table. The publications requirements dialog box displays, as shown below.

Figure 5-28: CSS Publications Requirements dialog box

**Manufacturer:** Acme

**Publication Type:** ☒ Initial Load ☐ New

[AU](#)  
[GB](#)  
[NZ](#)  
[US](#)  
[PDK](#) [WS](#)  
[UCC](#)

☒ US » East » The Large Supermarket - 023123098121203  
☐ US » East » Food Barrel (Atlanta, GA) - 032874987434234  
☐ US » East » Food Barrel (Marietta, GA) - 03287498743001  
☐ US » East » Food Barrel (Smith, AR) - 0328749874342123  
☐ US » East » Food Barrel (Penn, FL) - 023098709874234  
☐ US » East » Food Barrel (New Orleans, LA) - 011111143423

3 Specify the following required data:

- **Manufacturer**—Defines the source of the data being syndicated. For Global Data Synchronization Network (GDSN) compliant target systems, this is the Global Locator Number or GLN of the information provider.
- **Publication Type**—Used for GDSN compliant target systems. Typically this is used to tell retailers if it is the first time they have received this product information or if they already have it and should update their information.
- **Target Market**—Defines the destination for the syndicated data. Publications are organized by target market. Target market is a GDSN term used to indicate the country where the trade item is available for sale. For example, the US and Canada are two different target markets.

---

**Note** This information resides on the Summary tab of the saved publication.

---

4 Click **Save**. The publication appears in the Initial Publication table. The default starting status for publications depends on the configuration of the publication workflow.

---

**Note** You cannot view publications with a current status of “Draft.” Statuses are controlled and updated automatically by the publication workflow.

---

For more information, please see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*.

## Supporting Documents Tab

The Process Specification Supporting Documents tab contains the following sections:

- ❑ **Attachments section**—For discussion of this commonly used section, please see [Attachments Section](#) on page 3-20
- ❑ **Supporting Documents section**—The document types available are Operations/Equipment, HACCP, Process Map, and Rich Text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10
- ❑ **DRL Documents section**—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15
- ❑ **Testing Protocols section**—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19
- ❑ **Nutrient Profile section**—Discussed below, at [Nutrient Profile Section](#) on page 5-18

## Nutrient Profile Section

In this section you can create new or associate existing nutrient profiles for this specification.

Figure 5-29: Nutrient Profile section

Nutrient Profile				
Profile #	Nutrient Profile	Active Profile	Effective Date	Status
<a href="#">5077592-001</a>	DWB Nutrient Profile: Tomato Puree, 8.6% Total Solids	<input type="checkbox"/>	Monday, October 04, 2004	Approved
<a href="#">5077592-002</a>	DWB Nutrient Profile: Tomato Puree, 8.6% Total Solids	<input type="checkbox"/>	Tuesday, October 05, 2004	Draft

Nutrient profiles are actually separate documents from the process specification with their own workflows.

More than one nutrient profile can exist on a process specification, but one of the nutrient profiles must be flagged as the “active profile” for usage in rollups elsewhere in the system.

## References Tab

The Process Specification Reference tab contains the following sections:

- ❑ Suppliers section—For discussion of this commonly used section, please see [Suppliers Section](#) on page 3-23.
- ❑ DWB Profiles section—Discussed below, at [DWB Profiles Section](#) on page 5-19.
- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Specification Dependencies section—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.
- ❑ Flight Check section—Discussed below, at [Flight Check Section](#) on page 5-19.
- ❑ Related Documents section—For discussion of this commonly used section, please see [Related Documents Section](#) on page 3-25.

## DWB Profiles Section

The DWB Profiles section contains the list of DWB profiles linked to this specification. You can use DWB profiles to define design overrides that you or users can use when developing inside the Design Workbench application. You can add DWB profiles even when the specification is no longer editable. For more information, see the *Agile Product Lifecycle for Process Design Workbench User Guide*.

Figure 5-30: DWB Profiles section

DWB Profiles		
Taxonomy	Originator	
<a href="#">North America</a>	Sally Johnson	✖
Add New		

## Flight Check Section

The Flight Check section generates the Flight Check report. The purpose of the Flight Check report is to inspect the process specification and ensure that various elements of the specification are ready for production (that is, preproduction inspection).

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 5-31: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 5-32: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

### Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 5-33: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator  looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.





## Menu Item Specifications

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*This chapter presents an overview of the capabilities of Global Specification Management regarding menu item specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Build Tab*
  - ❑ *Packaging Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Menu Item Specifications page consists of the following tabs:

- ❑ [Summary Tab](#) on page 6-3
- ❑ [Build Tab](#) on page 6-5
- ❑ [Packaging Tab](#) on page 6-6
- ❑ [Compliance Tab](#) on page 6-7
- ❑ [Related Specs Tab](#) on page 6-9
- ❑ [Supporting Documents Tab](#) on page 6-11
- ❑ [References Tab](#) on page 6-11
- ❑ [Approval/Audit Trail Tab](#) on page 6-12

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current menu item specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **CACS**—Screen the current specification using Computer Aided Content Screening (CACS), an application that you can use to inspect materials for fitness against any number of user-defined screens. (Appears only if your installation includes CACS.) For more information on CACS, please refer to the *Agile Product Lifecycle Management for Process Computer Aided Content Screening User Guide*.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

Key sections in the Summary tab include:

- ❑ [Menu Item Description Section](#) on page 6-3
- ❑ [Cross References Section](#) on page 6-3
- ❑ [Approved for Use In Section](#) on page 6-4

## Menu Item Description Section

This section provides fields that you can use to categorize and classify menu items. Additionally, it has enriched text fields that enable descriptions of menu items, packaging, and appearance, as well as sensory descriptions.

Figure 6-1: Menu Item Description section

The screenshot shows the 'Menu Item Description' section of a form. It includes the following fields:

- Standard:** A dropdown menu currently showing 'Local - Meets Global Standard'.
- Menu Item Class:** A text field containing 'AOW Emerging "Brand Identified"'.
- Menu Item:** A large, bold, blue text field containing 'Big Stuff Hamburger Meal'.
- Packaging:** A text field containing 'Paper Cover with Big Stuff Branding Images.'
- Appearance:** A text field containing 'Large Hamburger with pickles, onions and tomato.'
- Sensory:** A text field containing 'Served fresh, hot and made to order.'

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 6-2: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

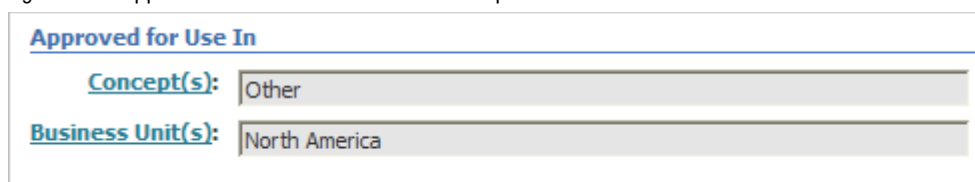
**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

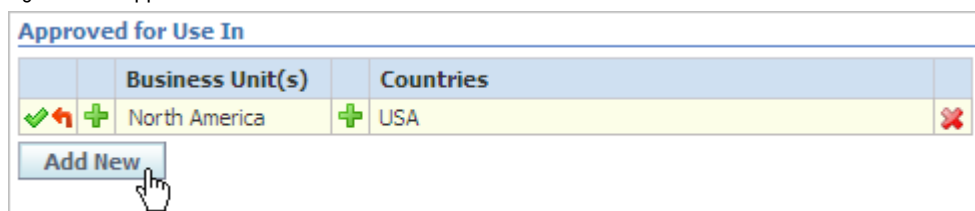
This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 6-3: Approved for Use In section with Concepts and Business Units fields



The screenshot shows a form titled "Approved for Use In". It contains two fields: "Concept(s):" with the value "Other" and "Business Unit(s):" with the value "North America".

Figure 6-4: Approved for Use In section with Business Units and countries fields



The screenshot shows a form titled "Approved for Use In". It contains a table with two columns: "Business Unit(s)" and "Countries". The table has one row with "North America" and "USA". There are icons for adding, deleting, and editing rows. Below the table is an "Add New" button.

Business Unit(s)	Countries
North America	USA

Add New

## Build Tab

The Build tab consists of two sections:

- ❑ Menu Item Build section
- ❑ Alternate Products/Menu Items section

### Menu Item Build Section

The Menu Item Build section contains the products or menu items that make up a menu item. You can adjust the quantity and comments around that item in the build when the specification is in edit mode. GSM calculates the weight and build percentage when you click the apply changes icon (✓) in that row.

Figure 6-5: Menu Item Build section detail showing one item, in edit mode

Menu Item Build									
		Product / Menu Item	Quantity	Weight	Build %	Comments			
✓	✗	+	<a href="#">Cheese Slice</a> (5082117-001)	1 g	33.33 %		⬇	✗	
			<a href="#">Bun - Fresh - Global</a> (5080383-002)	1 g	33.33 %				
			<a href="#">4:1 Beef Patty</a> (5084160-001)	1 g	33.33 %				
			Total	3 g					
Add New									



The units of measure (UOMs) for the build quantities may vary. By default, mass-based units of measure are available for each product specification. If the product specification has a relative density, then volume-based UOMs are also available. If the product specification also has a unit conversion factor, then a unit/count unit of measure will be available. You can use unit/count units of measure when referring to menu items that are represented in the build.

### Alternate Products/Menu Items Section

The Alternate Products/Menu Items section contains the product and menu item specification data that you can use as a substitute for one of the items in a build. You can replace each item in the primary build with one or more alternate items.

In this section you can define alternate products or menu items that may be used. You can replace each item in this section with one or more alternate items. You assign to each alternate a substitution factor to denote how users doing formulation work should use the alternate item to replace the original.

Figure 6-6: Alternate Products/Menu Items section

Alternate Products/Menu Items			
	Orig Material(s)	Substitute Factor / Substitute Material(s)	Description
	5084160-001	1 4:1 Beef Patty - Australia (5080389-001)	
	5080383-002	1 Bun - Fresh - Australia (5080386-001)	
<input type="button" value="Add New"/>			

## Packaging Tab








The Packaging tab contains information related to the packaging of a specific menu item specification and consists of two sections:

- Packaging Materials
- Alternate Packaging

### Packaging Materials Section

In this section you can describe the packaging associated with this specification by associating and categorizing packaging and printed packaging specifications.

Figure 6-7: Packaging Materials section

Packaging Materials					
	Pkg Type	Packaging Material Specification	Units	Scrap Factor	
	Outer	<a href="#">Label - Paper - 300 x 406</a> (5077465-001)	1.00000 units	1.00000	
  	Inner 	<a href="#">Corrugated Case</a> (5077482-001)	1 units 	2.00000	
<input type="button" value="Add New"/>					


Key fields include:

**Pkg Type**—Enables you to categorize how the packaging is applied to this item, for example, whether the packaging is considered inner, intermediate, or outer packaging.

### Alternate Packaging Section

The Alternate Packaging section contains information related to any acceptable alternative packaging options.

Figure 6-8: Alternate Packaging section

Alternate Packaging				
	Packaging Material Specification	Units	Substitutes	Scrap Factor
	<a href="#">Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9</a> (5077540-001)	0		1
<input type="button" value="Add New"/>				

## Compliance Tab





The Compliance tab includes the following sections:

- ❑ [Extended Attributes Section](#) on page 6-7
- ❑ [Custom Sections](#) on page 6-7
- ❑ [Compliance Information Section](#) on page 6-8
- ❑ [Allergens, Intolerances, and Additives](#) on page 6-8

### Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 6-9: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<a href="#">Add New</a>				

### Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 6-10: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

## Compliance Information Section

The Compliance Information section contains the compliance data linked to a menu item specification.

Key fields include:

**Label Claims**— This field enables one or more label claims values to be applied to a menu item specification. The label claims values are maintained by an administrator.





**Complies With**—For discussion of this field, please see [Compliance Information Section](#) on page 3-4

## Allergens, Intolerances, and Additives

**Note** The Additives, Allergens, and Intolerances sections all follow the same procedures. This section demonstrates the use of additives, but the same behavior can be used for allergens or intolerances.

The Additives section contains the additives data linked to a specification, and can be broken out by “known to contain,” “does not contain,” and “may contain.”

Figure 6-11: Additives section


Additives					
<b>Additives (known to contain):</b>		Hydrochloric Acid	<=	1.00000 ppm	Source / Comments
		Sodium Ferrocyanide	<=	2.00000 ppm	
<b>Additives (does not contain):</b>	Acesulfame K, Acetic Acid Esters of Mono- and Diglycerides of Fatty Acids, Acetone				
<b>Additives (may contain):</b>		Nuts	<=	450.00000 mg	residue
		Pectin	<=	<input type="text" value="25"/> <input type="text" value="g"/>	as a thickening agent

## Adding Additives




To add items:

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to add on the left.



- 3 Click the add selected data icon (  ) to move your selections to the right.
- 4 When you have made all of your selections, click **Done**.
- 5 The page reloads, and the Additives table displays the additives that you selected.

#### To add/edit the Max/100g and Source/Comments values:


- 1 Click the edit row icon (  ) to the left of the row to edit.
- 2 Once done editing, click the apply changes icon (  ) to apply your changes or click the undo icon (  ) to cancel your changes.

---

**Note** Max/100g values and Source/Comment values are only available for Known to Contain and May Contain fields.

---

### Removing Additives


To remove a single additive, click the delete icon (  ) when the row is open for edit.

---

**Note** As described above, removing values is only available for Known to Contain and May Contain fields.

---

#### To remove one or more additives:

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to remove on the right.
- 3 Click the remove selected data icon (  ) to remove them from the selection box.
- 4 Click **Done** to commit your changes.

## Related Specs Tab


The Related Specs tab contains the following sections:

- ❑ [Global/Regional Standard Section](#) on page 6-9
- ❑ [Alternate Standards Section](#) on page 6-10
- ❑ [Master Specifications Section](#) on page 6-10

### Global/Regional Standard Section

The Global/Regional Standard section contains any specifications that are global/regional standards related to the menu item specification. You can associate only one global/regional standard to each specification.

Figure 6-12: Global/Regional Standard section

Global/Regional Standard		
	Spec #	Spec Name
	<a href="#">5079864-001</a>	Child Alternate menu item

## Alternate Standards Section

The Alternate Standards section lists any alternate standard specifications for the menu item specification. GSM locates and displays any alternates that are linked to any other specification that references the current specification as a global/regional standard.



Figure 6-13: Alternate Standards section

Alternate Standards		
	Spec #	Spec Name
	<a href="#">5079864-001</a>	Child Alternate menu item

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 6-14: Master Specifications section

Master Specifications			Explicitly set
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	Implicitly set (not editable)
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, *Master Specifications* for more information.

## Supporting Documents Tab

The Menu Item Specification Supporting Documents tab consists of four sections:

- ❑ Supporting Documents section—The document types available are product facts sheet, attachments/procedures, and rich text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- ❑ Testing Protocols—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19.
- ❑ Nutrient Profile—Discussed below, at [Nutrient Profile Section](#) on page 6-11.

## Nutrient Profile Section

In this section you can create new nutrient profiles or associate the menu item specification to existing nutrient profiles.

Figure 6-15: Nutrient Profile section

Nutrient Profile				
Profile #	Nutrient Profile	Active Profile	Effective Date	Status
<a href="#">5077592-001</a>	DWB Nutrient Profile: Tomato Puree, 8.6% Total Solids	<input type="checkbox"/>	Monday, October 04, 2004	Approved
<a href="#">5077592-002</a>	DWB Nutrient Profile: Tomato Puree, 8.6% Total Solids	<input type="checkbox"/>	Tuesday, October 05, 2004	Draft

**Note** Nutrient profiles are separate documents from the menu item specification with their own workflows.

## References Tab

The Menu Item Specifications References tab consists of three sections:

- ❑ Specification Dependencies—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.
- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Related Documents—For discussion of this commonly used section, please see [Related Documents Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 6-16: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 6-17: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

### Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 6-18: Signature Document section

Signature Document		
Draft Review (Begin 10-Dec-07)		
Jo Jones - Initiator looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



## Nutrient Profiles

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding nutrient profiles.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Nutrient Panel Tab*
  - ❑ *Label Composition Tab*
  - ❑ *Ext Data Tab*
  - ❑ *Related Specs Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Nutrient Profile page consists of the following tabs:

- ❑ [Summary Tab](#) on page 7-2
- ❑ [Nutrient Panel Tab](#) on page 7-5
- ❑ [Label Composition Tab](#) on page 7-13
- ❑ [Ext Data Tab](#) on page 7-14
- ❑ [Related Specs Tab](#) on page 7-14
- ❑ [Supporting Documents Tab](#) on page 7-15
- ❑ [References Tab](#) on page 7-16
- ❑ [Approval/Audit Trail Tab](#) on page 7-16

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current nutrient profile. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

The Nutrient Profile Summary tab consists of the following five sections:

- ❑ **Summary Information** section—For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Weight/Volume/Serving Information Section](#) on page 7-3
- ❑ [Ingredient Statements Section](#) on page 7-4
- ❑ [Approved for Use In Section](#) on page 7-4.
- ❑ [Issue History Section](#) on page 7-4



## Weight/Volume/Serving Information Section

Figure 7-1: Nutrient Profile Weight/Volume/Serving Information section

**Weight/Volume/Serving Information**

**Density:** 1 g = 100 mL

**Label Volume:** 10 mL 100 mL

**Label Weight:** 100 g 10 kg

**Reference Amount:**

**Classification:**

**Amount Per Serving:** 100 g 1000 mg

**Servings Per Pack:** 1

**Serving Size (label):**

**Servings/Pack (label):**

**Special Attributes:**

Key fields in this section include:

- **Density**—Captures the density, which value is used in volumetric nutrient declarations. You can define nutrients per 100 g or per 100 mL. Density is used in the conversion between these two.
- **Label Volume**—The volume that is intended to show up on the label. There are two entry fields, to accommodate two units of measure, for example, 1 gal (US) 5 fl oz (US).
- **Label Weight**—The weight that is intended to show up on the label. There are two entry fields, to accommodate two units of measure, for example, 3 lb 8 oz (US).
- **Reference Amount**—Also known as Reference Amount Customarily Consumed (RACC), the value in this field is the typical amount that someone consumes in one sitting. Click the **Reference Amount** link to search for a RACC set forth by an authority such as the U.S. Food and Drug Administration. This data is used in determining label claims.
- **Classification**—Used in determining label claims.
- **Amount Per Serving**—Used to determine the Per Serving values on the nutrition panel.
- **Serving Size (label) Servings/Pack (label)**—Used for labeling
- **Special Attributes**—Choose from a prepopulated list of special attributes maintained by your administrator.

## Ingredient Statements Section

The Ingredient Statements section contains the ingredient statement for general use in labeling.

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 7-2: Approved for Use In section with Concepts and Business Units fields

The screenshot shows a form titled "Approved for Use In". It contains two input fields: "Concept(s)" with the value "Other" and "Business Unit(s)" with the value "North America".

Figure 7-3: Approved for Use In section with Business Units and countries fields

The screenshot shows a form titled "Approved for Use In" with a table below it. The table has two columns: "Business Unit(s)" and "Countries". The first row contains "North America" and "USA". There are icons for adding, deleting, and saving. Below the table is an "Add New" button.

Business Unit(s)	Countries
North America	USA

## Issue History Section

Item History displays all issues of the nutrient profile that exist. Along with the identifying information of the specification, the Item History section also displays the Reason for Change value.

Figure 7-4: Issue History section

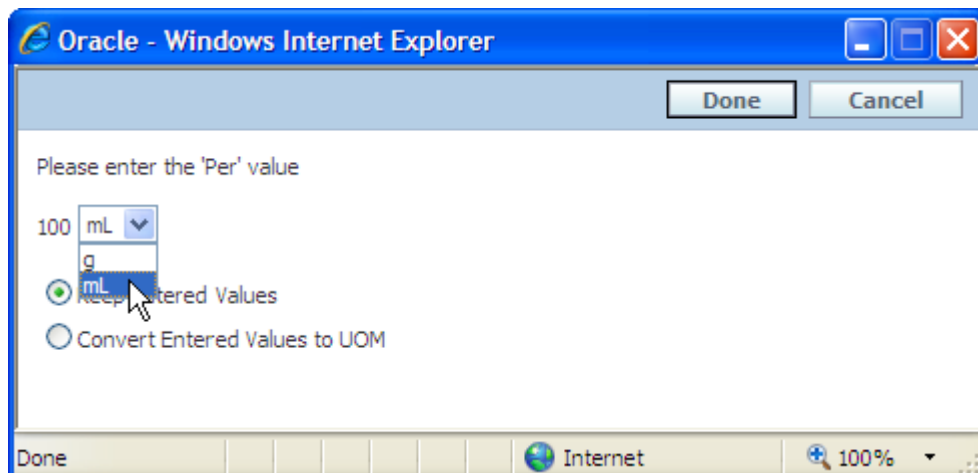
Issue History				
Profile #	Reason for Change	Issue #	Date Created	Status
<a href="#">5082518-001</a>		001	1/31/2007 9:26:00 AM	Approved

## Nutrient Panel Tab

### Nutrient Profile Section

Nutrient Profile, the sole section in the Nutrient Panel tab, stores the nutritional information for the related specifications, as shown in figure 7-6, below. As shown in figure 7-7, you can declare nutrient data by volume (if density has been defined) or by mass, as shown in the dialog box in figure 7-5 below.

Figure 7-5: Per 100g/Per100mL dialog box















This data can appear within Product Fact Sheets and within Design Workbench, and you can use this data when determining label claims.

Figure 7-6: Nutrient Profile section showing the Per 100g column

Nutrient Profile					
Nutrient	Per 100g	Source	Per Serving	Final Values	Comments
Calories	884.00000 kcal	<a href="#">NSM Analysis (0000166 )</a>	97.24000 kcal	97.24 kcal	
Energy kJ	3699.00000 kJ	<a href="#">NSM Analysis (0000166 )</a>	406.89000 kJ	406.89 kJ	
Carbohydrates	0.00000 g	<a href="#">NSM Analysis (0000166 )</a>	0.00000 g	.0 g	
Total Fat	500.00000 g	<a href="#">NSM Analysis (0000166 )</a>	55.00000 g	55.0 g	
Saturated Fat	49.30000 g	<a href="#">NSM Analysis (0000166 )</a>	5.42300 g	5.423 g	
Monounsaturated Fat	37.00000 g	<a href="#">NSM Analysis (0000166 )</a>	4.07000 g	4.07 g	
Polyunsaturated Fat	9.30000 g	<a href="#">NSM Analysis (0000166 )</a>	1.02300 g	1.023 g	
Cholesterol	0.00000 mg	<a href="#">NSM Analysis (0000166 )</a>	0.00000 mg	.0 mg	
Zinc	0.00000 mg	<a href="#">NSM Analysis (0000166 )</a>	0.00000 mg	.0 mg	
Copper	0.00000 mg	<a href="#">NSM Analysis (0000166 )</a>	0.00000 mg	.0 mg	
Selenium	0.00000 µg	<a href="#">NSM Analysis (0000166 )</a>	0.00000 µg	.0 µg	

Rollup
Label Claims

Figure 7-7: Nutrient Profile section showing the Per 100mL column

Nutrient Profile							
	Nutrient	Per 100mL 	per 100 grams	Source	Per Serving	Final Values	Comments
	Calories	884.00000 kcal	336000000.00000 kcal	<a href="#">NSM Analysis (0000166 )</a>	97.24000 kcal	97.24 kcal	
	Energy kJ	3699.00000 kJ	1579600000.00000 kJ	<a href="#">NSM Analysis (0000166 )</a>	406.89000 kJ	406.89 kJ	
	Protein	0.00000 g	0.00000 g	<a href="#">NSM Analysis (0000166 )</a>	0.00000 g	.0 g	
	Carbohydrates	0.00000 g	0.00000 g	<a href="#">NSM Analysis (0000166 )</a>	0.00000 g	.0 g	
	Dietary Fiber	0.32734 g	1409360.00000 g	abc	0.03601 g	.03601 g	
	Total Sugar	1.56877 g	6475080.00000 g	abc	0.17256 g	.17256 g	
	Total Fat	500.00000 g	200000000.00000 g	<a href="#">NSM Analysis (0000166 )</a>	55.00000 g	55.0 g	
	Saturated Fat	49.30000 g	197200000.00000 g	<a href="#">NSM Analysis (0000166 )</a>	5.42300 g	5.423 g	
	Cholesterol	0.00000 mg	0.00000 mg	<a href="#">NSM Analysis (0000166 )</a>	0.00000 mg	.0 mg	
	Ash	0.00000 g	0.00000 g	<a href="#">NSM Analysis (0000166 )</a>	0.00000 g	.0 g	
	Pyridoxine - B6	0.00000 mg	0.00000 mg	<a href="#">NSM Analysis (0000166 )</a>	0.00000 mg	.0 mg	

Key fields include:

**Nutrient**—The name of the nutrient.

**Per 100g / Per 100mL**—The mass or volume-based declaration for the nutrient. Volume (per 100mL) column can be displayed only if the density has been defined in the Summary tab.

**Source**—The source system that nutrient data was retrieved from.

**Per Serving**—Per Serving nutritional information. GSM calculates this field from the Per 100g/100ml field and the Amount Per Serving data field.

**Final Values**—GSM calculates the value in the Final Values field as part of the per serving calculation. Unlike with per serving values, however, you can manually overwrite the values in this field.

Figure 7-8: Nutrient profile Rollup screen

**Note:** Values displayed on this screen are calculated from lower-level specification data and should be considered theoretical. These values may not match the information that has been formally declared on the Specification or the Nutrient Profile.

**Grand child menu item (5079865-001)**

	Product/Menu Item	Quantity
<input checked="" type="checkbox"/>	My Burger	40 g
<input checked="" type="checkbox"/>	My Burger	50 g

**ADDITIONAL ITEMS**

Product/Menu Item	Quantity

**Nutrient Rollup**

Nutrients	Per 100	g <input type="button" value="v"/>	Total
Calories	250.0 kcal		225.0 kcal
Carbohydrates	200.0 g		180.0 g
Carbohydrate (Available)	150.0 g		135.0 g
Calcium	100.0 mg		90.0 mg
d-Biotin	2000.0 mg		1800.0 mg
Carotene	10.0 µg		9.0 µg

**Ingredient Statement (as declared on Nutrient Profile)**

**Ingredient Statement:** BLENDED VEGETABLES (Corn, Carrots, Peas), POTATOES (Potatoes, Soybean Oil, CONTAINS 2% OR LESS OF THE FOLLOWING: BBQ Sauce Dry Mix, Salt), BEEF, BBO SAUCE (Water, Brown Sugar, Vinegar, Tomato Paste, Lemon Juice, CONTAINS 2% OR LESS OF THE FOLLOWING: Molasses, Modified Food Starch, Chili Powder, Salt, Liquid Smoke Flavor, Xanthan Gum, Caramel Color, Mustard Flour, Garlic, Granulated Onion, Paprika), WATER, SUGAR

**Compliance Rollup**



Complies With	

	Spec	Max / 100g	Source / Comments
Allergens (known to contain)			
Intolerances (known to contain)			
Additives (known to contain)			

	Spec	Max / 100g	Source / Comments
Allergens(may contain)			
Intolerances(may contain)			
Additives(may contain)			

	Spec		
Allergens (does NOT contain)			
Intolerances (does NOT contain)			
Additives (does NOT contain)			

**To calculate the value of the Per Serving field:**

- 1 Click **Edit Document** at the upper right of the page to put the specification in edit mode.
- 2 Click the edit icon (  ) for a nutrient and then click the **Per Serving** link in the header section. After you select a rounding rule set, GSM calculates the value.
- 3 Click the apply changes icon (  ) to apply your change. GSM stores the value for future use.

**To add a nutrient manually:**

- 1 Click **Edit Document** at the upper right of the page to put the specification in edit mode.
- 2 Click **Add New** and select the nutrients from the dialog box that appears.

**To import nutritional data from the Food Composition Library:**

- 1 Click **Edit Document** at the upper right of the page to put the specification in edit mode.
- 2 Click **Import** and select **Food Composition Library** in the drop-down list.
- 3 Search and select the item to import. A dialog box displays a list of nutrients and their values.
- 4 Select the nutrients to import and click **Done**. The nutrient profile displays the selected nutrients, along with their values.

**To import nutritional data from another nutrient profile:**

- 1 Click **Edit Document** at the upper right of the page to put the specification in edit mode.
- 2 Click **Import** and select **Nutrient Profile** in the drop-down list.
- 3 Search and select the item to import. A dialog box displays a list of nutrients and their values.
- 4 Select the nutrients to import and click **Done**. The nutrient profile displays the selected nutrients, along with their values.

**To import nutrient analysis or nutrient composites from the Nutrition Surveillance Management application (NSM):**

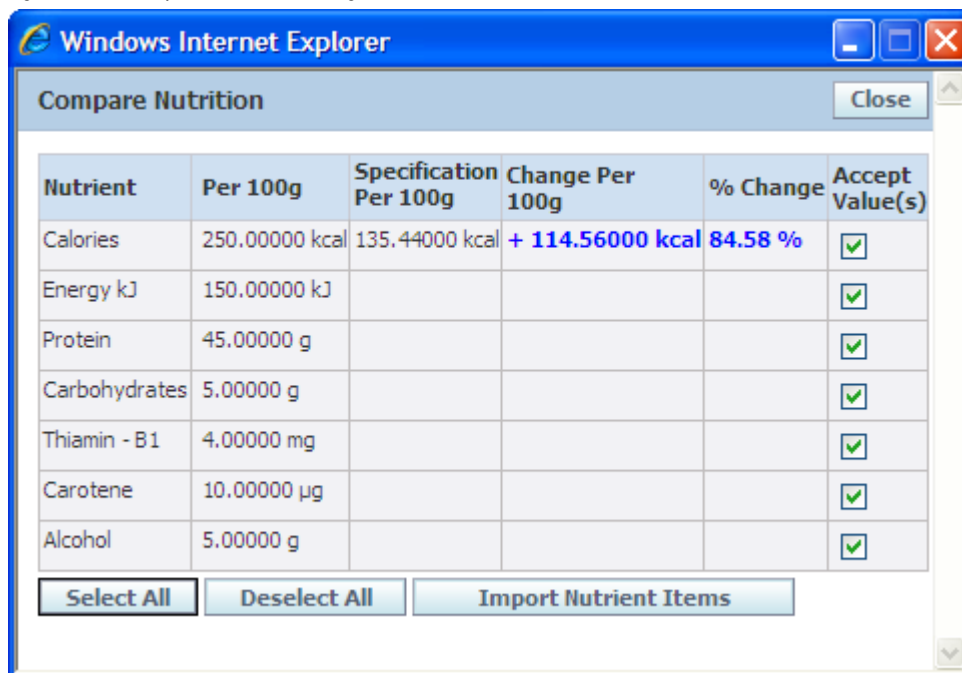
- 1 At the upper right of the page, click **Edit Document**. The Nutrient Profile page reloads in edit mode, in which the Label Claims button is gone and three new buttons are present:
  - Add New
  - Import
  - NSM

Each row in the Nutrient Profile table is now editable

- 2 Click **NSM**. The Import Nutrient Items search page appears.
- 3 Select **Nutrient Analysis** or **Nutrient Composites** in the drop-down list near the top of the page, enter search criteria, and click **Search**. A Search Results section appears, with a table of search results.

- 4 Click a hyperlinked analysis number or composite number in the first column of the search results table. The Compare Nutrition dialog box opens, displaying the nutrient information and the difference between what you selected and the current nutrient profile, as shown in figure 7-9 below.

Figure 7-9: Compare Nutrition dialog box



- 5 Select the items to import and click **Import Nutrient Items**. GSM imports the selected items and displays them in the Nutrient Profile section, as shown in figure 7-10 below:

Figure 7-10: Imported nutrient items

Summary Nutrition Panel Label Composition Ext Data Related Specs Approv						
Nutrient Profile						
	Nutrient	Per 100g	Source	Per Serving	Final Values	Comments
	Calories	250.00000 kcal	<a href="#">NSM Analysis (00850)</a>	135.440 kcal		
	Energy kJ	150.00000 kJ	<a href="#">NSM Analysis (00850)</a>			
	Protein	45.00000 g	<a href="#">NSM Analysis (00850)</a>			
	Thiamin - B1	4.00000 mg	<a href="#">NSM Analysis (00850)</a>			
	Carotene	10.00000 µg	<a href="#">NSM Analysis (00850)</a>			
	Alcohol	5.00000 g	<a href="#">NSM Analysis (00850)</a>			
Add New Import NSM						

- 6 To roll up nutrient data for menu items only, click **Rollup**.



---

**Note** This button is present only in nutrient profiles that have been associated with a menu item specification.

---

A dialog box displays the following:

- Nutrient data rolled up
- The ingredient statement from the nutrient profile
- Compliance data broken out by specification.

**To change the source specifications of the nutrient rollup data:**

- 1 Select only the desired menu items and products in the tables on the left. You can also add menu items or products by selecting **Add New**.
- 2 Click the **Total** link at the top right of the page to recalculate the rollup data.

## Label Claims

Using the label claims determination feature, you can interrogate a product for claims applicability based on a centralized rule base segregated by label claims authority. The system can evaluate comparative claims if you provide additional nutrient information that describes the comparative product.

**To view label claims:**

- 1 Click the **Nutrition Panel** tab.
- 2 Click **Label Claims**.
- 3 Optionally, from the Label Claims Authority drop-down list, select a specific rule base to use for considering claims applicability. All selected claims based on the label claims authority appear in the Applicable Claims table with color coding to show whether the claim may be made for the product.
- 4 Click **Display Label Claims** to display the Applicable Claims table.

The system evaluates label claims against rules that you previously defined. When the system evaluates a claim as compliant, the Comments column displays supporting information for the claim along with one or more user-defined values supporting the assessment in the Calculation(s) column, as shown in figure 7-11, on page 7-11. If the system finds that the claim is invalid, no such information appears in the Comments column.



Figure 7-11: Claims determination

Claims Determination		Comparative/Reference Product	
<b>Label Claim Authority</b>			
Label Claim Authority:		US FDA Nutrient Claims 2005	<a href="#">Display Label Claims</a>
<b>Applicable Claims</b>			
Label Claim/Type of Claim	Yes/No	Comments	Calculations
Lite or Light (w/ Total Fat disclosure)	No		
Sodium (Salt Free)	Yes	<p>Meals and main dishes: "Salt Free" must meet criterion for "Sodium Free". Less than 5 mg per labeled serving.</p> <p>ATTENTION: Lists no ingredient that contains sodium chloride or generally understood to contain sodium, except if the ingredient listed in the ingredient statement has an asterisk that refers to footnote (e.g., "** adds a trivial amount of sodium").</p> <p>Individual foods: "Salt Free" must meet criterion for "Sodium Free". Less than 5 mg per reference amount and per labeled serving.</p> <p>ATTENTION: Lists no ingredient that contains sodium chloride or generally understood to contain sodium, except if the ingredient listed in the ingredient statement has an asterisk that refers to footnote (e.g., "** adds a trivial amount of sodium").</p>	<p>mg Sodium (per RACC)</p> <p>mg Sodium (per serving)</p>
Cholesterol (Low)	No		
Total Fat (Low)	No		
Lite or Light	No		
Cholesterol (Free)	No		
Sodium (Reduced/Less)	No		
Sodium (Light in Sodium)	No		
Total Fat (100% Fat Free)	No		
Total Fat (Reduced/Less)	No		
Saturated Fat (Low)	No		
Cholesterol (Reduced/Less)	No		
Sugar (Reduced/Less)	No		
Lite or Light (w/ Calories disclosure)	No		

When you click the **Comments** column head within the Applicable Claims table, the Comments column of those claims that are not applicable displays additional information about claims that may not be made for the product, as shown in figure 7-12 below. The Comments column also includes error information.

Figure 7-12: Applicable Claims table, expanded

Claims Determination		Comparative/Reference Product	
<b>Label Claim Authority</b>			
Label Claim Authority:		US FDA Nutrient Claims 2005	<a href="#">Display Label Claims</a>
<b>Applicable Claims</b>			
Label Claim/Type of Claim	Yes/No	Comments	Calculations
Lite or Light (w/ Total Fat disclosure)	No	<p>Meal or main dish product meets definition for "Low Calorie" or "Low Fat" meal and is labeled to indicate which definition is met.</p> <p>ATTENTION: For "Light" claims: Generally, percentage reduction for both fat and calories must be stated. An exception is that percentage reduction need not be specified for "low-fat" products. Quantitative comparisons must be stated for both fat and calories.</p>	
Sodium (Salt Free)	Yes	<p>Meals and main dishes: "Salt Free" must meet criterion for "Sodium Free". Less than 5 mg per labeled serving.</p> <p>ATTENTION: Lists no ingredient that contains sodium chloride or generally understood to contain sodium, except if the ingredient listed in the ingredient statement has an asterisk that refers to footnote (e.g., "** adds a trivial amount of sodium").</p> <p>Individual foods: "Salt Free" must meet criterion for "Sodium Free". Less than 5 mg per reference amount and per labeled serving.</p> <p>ATTENTION: Lists no ingredient that contains sodium chloride or generally understood to contain sodium, except if the ingredient listed in the ingredient statement has an asterisk that refers to footnote (e.g., "** adds a trivial amount of sodium").</p>	<p>mg Sodium (per RACC)</p> <p>mg Sodium (per serving)</p>
Cholesterol (Low)	No	<p>Individual foods: 20 mg or less per reference amount (and per 50 g of food if reference amount is small). Also, Cholesterol claims are only allowed when food contains 2 g or less saturated fat per reference amount.</p> <p>ATTENTION: If qualifies by special processing and total fat exceeds 13 g per reference and labeled serving, the amount of cholesterol must be "Substantially Less" (25%) than in a reference food with significant market share</p>	

### Comparative / Reference Product Tab

Some claims require another product to compare to, such as "Sodium (Light in Sodium)."

**To set the reference product:**

- 1 Click the **Comparative / Reference Product** tab.
- 2 Click the **Reference Product** link to select the reference product.
- 3 Fill in the **Reference Amount**, **Serving Size** and **Classification** fields as necessary. The nutrient data displays in the Nutrient Composition table.
- 4 Click the **Claims Determination** tab and click **Display Label Claims** to run the label claims process. Those claims that need a reference product will use the one that you just entered.

## Label Composition Tab

If you have created a label composition in the Listed Ingredient Order (LIO) tool in Design Workbench (DWB) and have transferred it to the nutrient profile, then this tab displays the label composition.

---

**Note** This tab is only present if your installation includes the Design Workbench application.

---

Label Composition, the sole section in the Label Composition tab, displays the percent breakdown of the specification for labeling purposes. You can import this data from the DWB application after the LIO process is complete. The resulting data in the nutrient profile is read only.

Figure 7-13: Label Composition section

Label Composition	
Item	Formulation
BLENDED VEGETABLES	27.7273%
POTATOES	26.3636%
BEEF	22.7273%
BBQ SAUCE	18.1818%
WATER	4.9000%
SUGAR	0.1000%

## Ext Data Tab



This page includes the following sections:

- ❑ Extended Attributes—Discussed below, at [Extended Attributes Section](#) on page 7-14
- ❑ Custom Sections—Discussed below, at [Custom Sections](#) on page 7-14

### Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 7-14: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<a href="#">Add New</a>				

### Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 7-15: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

## Related Specs Tab

Related Specs, the sole section in the Related Specs tab, displays the process and trade specifications that use the current nutrient profile. The system automatically generates the list of specifications to which this nutrient profile is tied and displays them in this section. Click the linked number in the **Spec #** column to open the specification.

Figure 7-16: Related Specs section

Summary	Nutrition Panel	Label Composition	Ext Data	Related Specs	Approval/Audit T
<b>Related Specs</b>					
Spec #	Spec Name	Type			
<a href="#">5077461-001</a>	Beef w/BBQ Sauce TMC	Process Sheet Specification			
<a href="#">5084873-001</a>	Copy of BBQ Beef and Vegetable Dinner - 11 oz	Trade Specification			
<a href="#">5082979-001</a>	BBQ Beef and Vegetable Dinner - 11 oz	Trade Specification			
<a href="#">5080561-001</a>	BBQ Beef and Vegetable Dinner - 11 oz - 12x Case for Syndication	Trade Specification			
<a href="#">5077644-001</a>	BBQ Beef Dinner Portion - 11 oz for Syndication	Trade Specification			
<a href="#">5077640-001</a>	BBQ Beef and Vegetable Dinner - 11 oz - 12x Case for Syndication	Trade Specification			
<a href="#">5077539-005</a>	BBQ Beef and Vegetable Dinner - 11 oz	Trade Specification			

## Supporting Documents Tab

In Supporting Documents, the only section in this tab, you can attach any background documents that may help to explain the nutrient profile. The document types available are Attachments/Procedures and Rich Text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10.

## References Tab

For discussion of the Activities section, the only section in the References tab, please see [Activities Section](#) on page 3-23.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 7-17: Current Status section

**Current Status**  
**Current Owner:** [Charlie Callas]  
**Current Workflow:** All Members Test  
**Current Status:** Admin Review  
**Desired Action:** Admin Review  
  
**Start Date:** 9/28/2007  
**Amber Date:** -----  
**Red Date:** -----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 7-18: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

### Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 7-19: Signature Document section

Signature Document		
Draft Review (Begin 10-Dec-07)		
Jo Jones - Initiator looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.





# Product Specifications

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*This chapter presents an overview of the capabilities of Global Specification Management regarding product specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Formulation Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

## Overview

The Product Specification page consists of the following tabs:

- ❑ *Summary Tab* on page 8-3
- ❑ *Formulation Tab* on page 8-5
- ❑ *Compliance Tab* on page 8-6
- ❑ *Related Specs Tab* on page 8-8
- ❑ *Supporting Documents Tab* on page 8-10
- ❑ *References Tab* on page 8-10
- ❑ *Approval/Audit Trail Tab* on page 8-10

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current product specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **CACS**—Screen the current specification using Computer Aided Content Screening (CACS), an application that you can use to inspect materials for fitness against any number of user-defined screens. (Appears only if your installation includes CACS.) For more information on CACS, please refer to the *Agile Product Lifecycle Management for Process Computer Aided Content Screening User Guide*.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

The Product Specification Summary tab contains the following sections:

- ❑ Summary Information—For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Product Attributes Section](#) on page 8-3
- ❑ [Design Attributes Section](#) on page 8-3
- ❑ [Cross References Section](#) on page 8-4
- ❑ [Approval/Audit Trail Tab](#) on page 8-10

## Product Attributes Section

The Product Attributes section contains the specific core attributes of a product specification.

Figure 8-1: Product Attributes section

Product Attributes			
<b>Standard:</b>	Local - Acceptable Alternative ▼		
<b>Description:</b>	apples sold in Daisyland 🌐		
<b>Classification:</b>	Critical, Mild Acid, High Acid, Low Acid, Medium Acid, Micro Sensitive		
<b>Primary Shelf Life:</b>	10	Days ▼	Cool ▼
<b>Secondary Shelf Life:</b>	2	Days ▼	Dark ▼
<b>Tertiary Shelf Life:</b>	30	Days ▼	Cool ▼
<b>Storage Instructions:</b>	Store in a dry soft place - on cushions 🌐		
<b>Shipping Conditions:</b>	Not Exposed to Sunlight		
<b>Shipping Instructions:</b>	Ship on a padded truck 🌐		

## Design Attributes Section

The Design Attributes section contains product information that is used for mass conversions elsewhere in Agile Product Lifecycle Management for Process.

Figure 8-2: Design Attributes section

Design Attributes (for internal use only)			
<b>Density:</b>	10	g ▼	= 20 mL ▼
<b>Unit Conversion:</b>	3	mg ▼	
<b>Total Solids:</b>	4.50000 %		

Key fields include:

**Density** —Allows for the entry of mass-to-volumetric conversion factor.




**Unit Conversion** — Allows the declaration of an actual weight or measurement for a particular unit. For example: 1 slice cheese = 3.2 oz.

**Total Solids** — Allows for the declaration of the material's “% total solid” composition.

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 8-3: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<input type="button" value="Add New"/>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

---

**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

---

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 8-4: Approved for Use In section with Concepts and Business Units fields

The screenshot shows a form titled "Approved for Use In". It contains two fields: "Concept(s):" with the value "Other" and "Business Unit(s):" with the value "North America".

Figure 8-5: Approved for Use In section with Business Units and countries fields

The screenshot shows a form titled "Approved for Use In". It contains a table with two columns: "Business Unit(s)" and "Countries". The table has one row with "North America" and "USA". There are icons for adding, deleting, and editing rows. Below the table is an "Add New" button.

Business Unit(s)	Countries
North America	USA

## Formulation Tab

The Formulation tab contains the data related to the ingredient statements and formulations of a product specification and consists of two sections:

- ❑ [Ingredient Statements Section](#) on page 8-5
- ❑ Formula section—For discussion of this commonly used section, please see [% Breakdown \(Formula\) Section](#) on page 3-20.

### Ingredient Statements Section

The Ingredient Statements section contains the ingredient statement for the product specification. You can input the ingredient statement in two ways:

- GSM can derive it from a formulation that you select. To select a formulation, click the hyperlinked **Ingredient Statement** field label and select your choice.
- You can manually enter this information in the Ingredient Statement field.

Figure 8-6: Ingredient Statements section

The screenshot shows a form titled "Ingredient Statements". It contains two fields: "Ingredient Statement:" with the value "apples, wax" and "Combined Statement:" with the value "apples, wax".

### Formula Section

For discussion of this section, please see [% Breakdown \(Formula\) Section](#) on page 3-20.

## Compliance Tab





The Compliance tab includes the following sections:

- ❑ [Extended Attributes Section](#) on page 8-6
- ❑ [Custom Sections](#) on page 8-6
- ❑ Compliance Information section—For discussion of this commonly used section, please see [Compliance Information Section](#) on page 3-4.
- ❑ [Allergens, Intolerances, and Additives](#) on page 8-6

### Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 8-7: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<a href="#">Add New</a>				

### Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 8-8: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

### Allergens, Intolerances, and Additives



**Note** The Additives, Allergens, and Intolerances sections all follow the same procedures. This section demonstrates the use of additives, but the same behavior can be used for allergens or intolerances.

The Additives section contains the additives data linked to a specification, and can be broken out by “known to contain,” “does not contain,” and “may contain.”

Figure 8-9: Additives section

**Additives**





**Additives (known to contain):**

			Max / 100g	Source / Comments
	Hydrochloric Acid	<=	1.00000 ppm	
	Sodium Ferrocyanide	<=	2.00000 ppm	

**Additives (does not contain):**


Acesulfame K, Acetic Acid Esters of Mono- and Diglycerides of Fatty Acids, Acetone

**Additives (may contain):**




			Max / 100g	Source / Comments	
	Nuts	<=	450.00000 mg	residue	
 	Pectin	<=	<input type="text" value="25"/> <input type="text" value="g"/>	as a thickening agent	

## Adding Additives

### To add items:


- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to add on the left.
- 3 Click the add selected data icon (  ) to move your selections to the right.
- 4 When you have made all of your selections, click **Done**.
- 5 The page reloads, and the Additives table displays the additives that you selected.

### To add/edit the Max/100g and Source/Comments values:

- 1 Click the edit row icon (  ) to the left of the row to edit.
- 2 Once done editing, click the apply changes icon (  ) to apply your changes or click the undo icon (  ) to cancel your changes.


**Note** Max/100g values and Source/Comment values are only available for Known to Contain and May Contain fields.

## Removing Additives

To remove a single additive, click the delete icon (  ) when the row is open for edit.

**Note** As described above, removing values is only available for Known to Contain and May Contain fields.

**To remove one or more additives:**

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to remove on the right.
- 3 Click the remove selected data icon (  ) to remove them from the selection box.
- 4 Click **Done** to commit your changes.

## Related Specs Tab


The Related Specs tab contains the following sections:

- ❑ [Global/Regional Standard Section](#) on page 8-8
- ❑ [Alternate Standards Section](#) on page 8-8
- ❑ [Packing Configurations Specifications Section](#) on page 8-9
- ❑ [Master Specifications Section](#) on page 8-9

### Global/Regional Standard Section

The Global/Regional Standard section contains any specifications that are global/regional standards related to the product specification. You can associate only one global/regional standard to each specification.

Figure 8-10: Global/Regional Standard section

Global/Regional Standard			
	Spec #	Spec Name	
	<a href="#">5079864-001</a>	Child Alternate menu item	

### Alternate Standards Section

The Alternate Standards section lists any alternate standard specifications for the product specification. GSM locates and displays any alternates that are linked to any other specification that references the current specification as a global/regional standard.

Figure 8-11: Alternate Standards section



Alternate Standards			
	Spec #	Spec Name	
	<a href="#">5079864-001</a>	Child Alternate menu item	



## Packing Configurations Specifications Section

The Packing Configurations Specifications section contains the packing configurations specifications associated with the product specification. In this section you can describe the multiple ways in which your specified material can be delivered (for instance, case/packaging variants).

Figure 8-12: Packing Configuration Specifications section

Packing Configuration Specifications				
	Spec #	Spec Name	Equivalent	Comments
	<a href="#">5082071-002</a>	Packing Configuration 20061213		
	<a href="#">5082709-002</a>	Packing Configuration 20070212		
<a href="#">Add New</a>				



Key fields include:

**Equivalent**—Use this field to associate a cross-reference equivalent per packing configuration.

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 8-13: Master Specifications section

Master Specifications			Explicitly set
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	<div>Implicitly set (not editable)</div>
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, *Master Specifications* for more information.

## Supporting Documents Tab

The Product Specifications Supporting Documents tab consists of three sections:

- ❑ Supporting Documents section—The document types available are attachments/procedures, nutrient composition, and rich text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- ❑ Testing Protocols section—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19.

## References Tab

The Product Specifications References tab consists of the following sections:

- ❑ Suppliers section—For discussion of this commonly used section, please see [Suppliers Section](#) on page 3-23.
- ❑ Specification Dependencies—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.
- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Related Documents—For discussion of this commonly used section, please see [Related Documents Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 8-14: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

## Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 8-15: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

## Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 8-16: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator  looks good so far (Jo Jones - 10-Dec-07)	<u>Marketing</u> - May Wu (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec
	<u>Quality Assurance</u> - Ty Ott (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



## Ingredient Specifications

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*This chapter presents an overview of the capabilities of Global Specification Management regarding ingredient specifications.*

*Topics in this chapter include:*

- ❑ *Summary Tab*
  - ❑ *Formulation Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *CSS Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Ingredient Specification page consists of the following tabs:

- ❑ *Summary Tab* on page 9-2
- ❑ *Formulation Tab* on page 9-6
- ❑ *Compliance Tab* on page 9-6
- ❑ *Related Specs Tab* on page 9-9
- ❑ *CSS Tab* on page 9-10
- ❑ *Supporting Documents Tab* on page 9-12
- ❑ *References Tab* on page 9-12
- ❑ *Approval/Audit Trail Tab* on page 9-13

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current ingredient specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **CACS**—Screen the current specification using Computer Aided Content Screening (CACS), an application that you can use to inspect materials for fitness against any number of user-defined screens. (Appears only if your installation includes CACS.) For more information on CACS, please refer to the *Agile Product Lifecycle Management for Process Computer Aided Content Screening User Guide*.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

The Ingredient Specification Summary tab contains the following sections:

- ❑ **Summary Information**—For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Ingredient Attributes Section](#) on page 9-3
- ❑ [Shelf Life Section](#) on page 9-3
- ❑ [Design Attributes Section](#) on page 9-4
- ❑ [Cross References Section](#) on page 9-4
- ❑ [Approved for Use In Section](#) on page 9-5

## Ingredient Attributes Section

The Ingredient Attributes section contains specific, core attributes of an ingredient specification, as shown in figure 9-1, below. The Classification field may be required, depending on the configuration of your installation.

Figure 9-1: Ingredient Attributes section

Ingredient Attributes	
<b>Description:</b>	BEANS, PEAS, WHITE (NAVY), DRY are dry mature white beans, also known as navy beans. They are a variety of common bean, with the exception of total foreign material and contrasting classes. The beans possess a clean, natural odor. 🌍
<b>Classification:</b>	Critical, High Acid
<b>Country Of Origin:</b>	USA
<b>Shipping Requirements:</b>	Cool, Not Exposed to Sunlight
<b>Shipping Instructions:</b>	🌍

## Shelf Life Section

Shelf lives can be declared in multiple contexts, usually based on storage conditions. You can store one set of shelf life conditions for frozen material and another for refrigerated material. For each separate context you can store values such as storage requirements and instructions, relative humidity, and supplier and internal shelf life.

Figure 9-2: Shelf Life section

Shelf Life							
	Storage Requirements	Tags	Supplier's Shelf Life	Internal Shelf Life	Min Days Remaining	Storage Instructions	Relative Humidity
	<b>Preferred Shelf Life</b> Dry Ambient	Do Not Publish to Supplier	1 days	1 days	2 days	3 months, stored intact and unopened containers at ambient temperature, in a clean, dry area, away from malodorous materials.	
<div>Add New</div>							

Key fields include:

**Type**—Describes the context for the shelf life. Each specification can have only one shelf life record for each type.

**Tags**—These tags describe how the shelf life will be used elsewhere in the system. For example, the “Suppress Printing” tag will keep that shelf life record from being printed.

## Design Attributes Section

The design attributes in this section can be used by process specifications or Design Workbench specifications.

Figure 9-3: Design Attributes section

**Design Attributes (for internal use only)**

**Density:**   =

**Unit Conversion:**

**Total Solids:**  %

Key fields include:

**Density**—Necessary for calculating density in areas of the application such as process specifications or for Design Workbench specifications




**Unit Conversion**—Necessary for calculating mass in some areas of the application in which units are used as a UOM.

**Total Solids**—Necessary for calculating total solids in areas of the application such as for process specifications or for Design Workbench specifications

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.

Figure 9-4: Cross References section


Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<input type="button" value="Add New"/>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.



**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

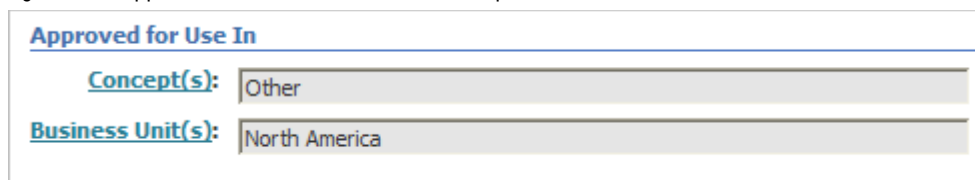
**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 9-5: Approved for Use In section with Concepts and Business Units fields






The screenshot shows a form titled "Approved for Use In". It contains two fields: "Concept(s):" with the value "Other" and "Business Unit(s):" with the value "North America".

Figure 9-6: Approved for Use In section with Business Units and countries fields



The screenshot shows a form titled "Approved for Use In" with a table. The table has two columns: "Business Unit(s)" and "Countries". The first row contains "North America" and "USA". There are icons for adding, deleting, and saving. An "Add New" button is visible below the table.

	Business Unit(s)	Countries
  	North America	 USA

 Add New

## Formulation Tab

The Formulation tab contains the data related to the ingredient statements and formulations of an ingredient specification. This tab has two sections:

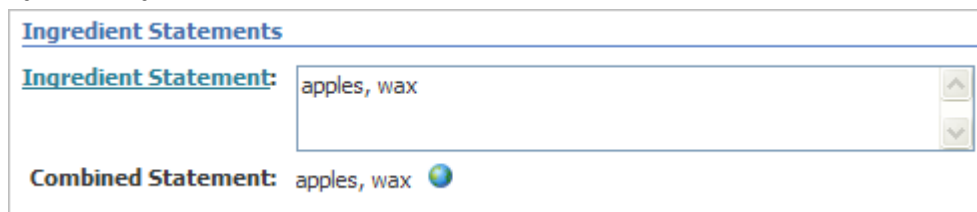
- ❑ Ingredient Statements section—Discussed below, at [Ingredient Statements Section](#) on page 9-6.
- ❑ % Breakdown section—For discussion of this section, please see [% Breakdown \(Formula\) Section](#) on page 3-20.

### Ingredient Statements Section

The Ingredient Statements section contains the ingredient statement for the ingredient specification. You can input the ingredient statement in two ways:

- GSM can derive it from a formulation that you select. To select a formulation, click the hyperlinked **Ingredient Statement** field label and select your choice.
- You can manually enter this information in the Ingredient Statement field.

Figure 9-7: Ingredient Statements section



The screenshot shows a web interface for the 'Ingredient Statements' section. At the top, the title 'Ingredient Statements' is displayed in blue. Below it, the label 'Ingredient Statement:' is followed by a text input field containing the text 'apples, wax'. To the right of the input field are up and down arrow buttons. Below the input field, the label 'Combined Statement:' is followed by the text 'apples, wax' and a small globe icon.

### % Breakdown Section

For discussion of this section, please see [% Breakdown \(Formula\) Section](#) on page 3-20.

## Compliance Tab




The Compliance tab includes the following sections:

- ❑ [Extended Attributes Section](#) on page 9-7.
- ❑ [Custom Sections](#) on page 9-7.
- ❑ Compliance Information section—For discussion of this commonly used section, please see [Compliance Information Section](#) on page 3-4.
- ❑ [Additives, Allergens, and Intolerances Sections](#) on page 3-5.

## Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 9-8: Extended Attributes section

Extended Attributes			
 Extended Attributes		Notes	
 RGS calc Ln D0	mm		
 Calc Ms to Vol	ratio		
 Calc Twice NmVolD2	mL		
<a href="#">Add New</a>			

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 9-9: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

## Allergens, Intolerances, and Additives

**Note** The Additives, Allergens, and Intolerances sections all follow the same procedures. This section demonstrates the use of additives, but the same behavior can be used for allergens or intolerances.

The Additives section contains the additives data linked to a specification, and can be broken out by “known to contain,” “does not contain,” and “may contain.”

Figure 9-10: Additives section

**Additives**

**Additives (known to contain):**

			Max / 100g	Source / Comments
	Hydrochloric Acid	<=	1.00000 ppm	
	Sodium Ferrocyanide	<=	2.00000 ppm	

**Additives (does not contain):**

Acesulfame K, Acetic Acid Esters of Mono- and Diglycerides of Fatty Acids, Acetone

**Additives (may contain):**

			Max / 100g	Source / Comments	
	Nuts	<=	450.00000 mg	residue	
	Pectin	<=	<input type="text" value="25"/> <input type="text" value="g"/>	as a thickening agent	

## Adding Additives

### To add items:

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to add on the left.
- 3 Click the add selected data icon ( ) to move your selections to the right.
- 4 When you have made all of your selections, click **Done**.
- 5 The page reloads, and the Additives table displays the additives that you selected.

### To add/edit the Max/100g and Source/Comments values:

- 1 Click the edit row icon ( ) to the left of the row to edit.
- 2 Once done editing, click the apply changes icon ( ) to apply your changes or click the undo icon ( ) to cancel your changes.


**Note** Max/100g values and Source/Comment values are only available for Known to Contain and May Contain fields.

## Removing Additives

To remove a single additive, click the delete icon ( ) when the row is open for edit.

**Note** As described above, removing values is only available for Known to Contain and May Contain fields.

**To remove one or more additives:**

- 1 Click the **Additives** link to open the Additives dialog box.
- 2 Select the additives to remove on the right.
- 3 Click the remove selected data icon (  ) to remove them from the selection box.
- 4 Click **Done** to commit your changes.


## Related Specs Tab

- The Related Specs tab contains the following sections:
- [Packing Configurations Specifications Section](#) on page 9-9
- Associated Specifications section—For discussion of this field, please see [Associated Specifications Section](#) on page 3-6.
- [Master Specifications Section](#) on page 9-10

## Packing Configurations Specifications Section

The Packing Configurations Specifications section contains the Packing Configurations Specifications associated with the ingredient specification. In this section you can describe the multiple ways in which this ingredient can be delivered (for instance, case/packaging variants).

Figure 9-11: Packing Configurations Specifications section

Packing Configuration Specifications				
	Spec #	Spec Name	Equivalent	Comments
	<a href="#">5082071-002</a>	Packing Configuration 20061213		

Key fields include:

**Equivalent**—In this field you can associate a cross-reference equivalent per packing configuration.

## Associated Specifications Section

For discussion of this commonly used field, please see [Associated Specifications Section](#) on page 3-6.

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 9-12: Master Specifications section

Master Specifications			Explicitly set
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	Implicitly set (not editable)
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, *Master Specifications* for more information.

## CSS Tab

The sole section in the CSS (content synchronization and syndication) tab, Initial Publication, contains the list of publications related to the specification.

You can create initial publications only from within GSM. Using the CSS application, you can syndicate these publications to an internal or external target system. Once created, these publications can be managed on the CSS tab of the specification or they can be managed inside the CSS application. As shown in the figure below, this section contains additional data about each publication.

Figure 9-13: Initial Publication section

Initial Publication									
	Trading Partner	Publication Type	Target Market	Initial Publication	Last Updated	Info Provider	Manufacturer	Current Status	
	GB » MDR » MDREU -	New	GB	-----	12/14/2007	Acme Company Ltd	Acme	Draft GS1:	
	US » PDK » Syndication WebService - PDK_WS	Initial Load	US	-----	12/14/2007	Acme	ABCD	Draft GS1:	
Add New		Validate For Publication							

### To add an initial publication:

- 1 Click **Edit Document** to put the specification in editable mode.
- 2 Click **Add New** under the Initial Publication table. The publications requirements dialog box displays, as shown below.

Figure 9-14: CSS Publications Requirements dialog box

**Manufacturer:** Acme

**Publication Type:** ☒ Initial Load ☐ New

[AU](#)  
[GB](#)  
[NZ](#)  
[US](#)  
[PDK](#) [WS](#)  
[UCC](#)

☒ US » East » The Large Supermarket - 023123098121203  
☐ US » East » Food Barrel (Atlanta, GA) - 032874987434234  
☐ US » East » Food Barrel (Marietta, GA) - 03287498743001  
☐ US » East » Food Barrel (Smith, AR) - 0328749874342123  
☐ US » East » Food Barrel (Penn, FL) - 023098709874234  
☐ US » East » Food Barrel (New Orleans, LA) - 011111143423

3 Specify the following required data:

- **Manufacturer**—Defines the source of the data being syndicated. For Global Data Synchronization Network (GDSN) compliant target systems, this is the Global Locator Number or GLN of the information provider.
- **Publication Type**—Used for GDSN compliant target systems. Typically this is used to tell retailers if it is the first time they have received this product information or if they already have it and should update their information.
- **Target Market**—Defines the destination for the syndicated data. Publications are organized by target market. Target market is a GDSN term used to indicate the country where the trade item is available for sale. For example, the US and Canada are two different target markets.

---

**Note** This information resides on the Summary tab of the saved publication.

---

4 Click **Save**. The publication appears in the Initial Publication table. The default starting status for publications depends on the configuration of the publication workflow.

---

**Note** You cannot view publications with a current status of “Draft.” Statuses are controlled and updated automatically by the publication workflow.

---

For more information, please see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*.

## Supporting Documents Tab

The Ingredient Specification Supporting Documents tab contains the list of all supporting documents associated with an ingredient specification. The Supporting Documents tab consists of three sections:

- ❑ Supporting Documents section—The document types available are attachments/procedures, nutrient composition, and rich text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- ❑ Testing Protocols section—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19.

## References Tab

The Ingredient Specification References tab contains the list of all the reference data linked to an ingredient specification. The References tab contains the list of all reference data linked to a specification and includes the following sections:

- ❑ Suppliers section—For discussion of this commonly used section, please see [Suppliers Section](#) on page 3-23.
- ❑ DWB Profiles section—Discussed below, at [DWB Profiles Section](#) on page 9-12.
- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Specification Dependencies section—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.
- ❑ Related Documents—For discussion of this commonly used section, please see [Related Documents Section](#) on page 3-25.

## DWB Profiles Section

The DWB Profiles section contains the list of DWB Profiles linked to this specification. In the DWB Profiles section you can define design overrides for use when developing inside the Design Workbench application. You can add DWB profiles even when the specification is no longer editable. For more information, see the *Agile Product Lifecycle for Process Design Workbench User Guide*.

Figure 9-15: DWB Profiles section

DWB Profiles		
Taxonomy	Originator	
<a href="#">North America</a>	SallyJohnson	✖
<a href="#">Add New</a>		



## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 9-16: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 9-17: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

### Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 9-18: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator  looks good so far (Jo Jones - 10-Dec-07)	<u>Marketing</u> - May Wu (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec
	<u>Quality Assurance</u> - Ty Ott (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.

## Packaging Material Specifications

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*This chapter presents an overview of the capabilities of Global Specification Management regarding packaging material specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Compliance Tab*
  - ❑ *Printed Packaging Material Tab*
  - ❑ *Related Specs Tab*
  - ❑ *CSS Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Packaging Material Specification page consists of the following tabs:

- ❑ *Summary Tab* on page 10-2
- ❑ *Compliance Tab* on page 10-6
- ❑ *Printed Packaging Material Tab* on page 10-7
- ❑ *Related Specs Tab* on page 10-7
- ❑ *CSS Tab* on page 10-9
- ❑ *Supporting Documents Tab* on page 10-11
- ❑ *References Tab* on page 10-11
- ❑ *Approval/Audit Trail Tab* on page 10-12

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current packaging material specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

The Packaging Material Specification Summary tab contains the following sections:

- ❑ **Summary Information**—For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Packaging Attributes Section](#) on page 10-3
- ❑ [Tare Weight Section](#) on page 10-3
- ❑ [Cross References Section](#) on page 10-4
- ❑ [Approved for Use In Section](#) on page 10-5

## Packaging Attributes Section

A packaging material specification has a number of core attributes, such as description, storage requirements, and relative humidity. List those attributes in this section.

Figure 10-1: Packaging Attributes section

The screenshot shows a web form titled "Packaging Attributes". It contains several fields: "Packaging Description:" with a text area containing "This label must comply with the General Specification PL001, 'Labels, Pa laws and the particulars of the specification."; "Storage Requirements:" with a text area containing "Use: 16 oz Acme Brand Products (see Supporting Documents)."; "Relative Humidity:" with a dropdown menu; and "Storage Instructions:" with a dropdown menu. Each dropdown menu has a small globe icon next to it.

## Tare Weight Section

As shown in the figure below, the Tare Weight section displays the tare weights for trade items, which GSM automatically calculates based on the rollup of packaging materials within the packaging hierarchy.

Figure 10-2: Tare Weight section

The screenshot shows a web form titled "Tare Weight". It contains two rows of input fields. The first row is labeled "Reference Weight:" and has a text input field with the value "23", a dropdown menu with "g" selected, and a small downward arrow icon. The second row is labeled "Tare Weight:" and has a text input field with the value "3", a dropdown menu with "g" selected, a "per" label, a text input field with the value "6", and a dropdown menu with "units" selected.

From within a trade specification Packaging Attributes section, click the hyperlinked **Tare Weight** field label to have GSM calculate the appropriate tare weight, as shown in the figure below. If you have supplied the net weight, GSM can also calculate the gross weight of the product (net weight + tare weight).

Figure 10-3: Portion of a trade specification Packing Attributes section showing the hyperlinked Tare Weight field label

**Packaging Attributes (Consumer Unit)**

**Packaging Type:** Ring

**Label Weight:** 1.2 g

**Label Volume:** 0.024 m3

**Container Net Weight:** 0.3222 kg

**Tare Weight:** 10 oz

**GrossWeight:** 13 oz

**Inner Pack:**

**Inner Pack Label Text:** Acme Delicious BBQ Beef -n- Veggie Dinner






**Product Dimensions:**

Length	Width	Height
7 in	5 in	0.75 in

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 10-4: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
  	Oracle System	USORACLE	987654321-A	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<a href="#">Add New</a>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 10-5: Approved for Use In section with Concepts and Business Units fields

The screenshot shows a form titled "Approved for Use In". It contains two fields: "Concept(s)" with the value "Other" and "Business Unit(s)" with the value "North America".

Figure 10-6: Approved for Use In section with Business Units and countries fields

The screenshot shows a form titled "Approved for Use In" with a table. The table has two columns: "Business Unit(s)" and "Countries". The first row contains "North America" and "USA". There are icons for adding, deleting, and editing rows. Below the table is an "Add New" button.

	Business Unit(s)	Countries
✓ ↻ +	North America	+ USA

Add New

## Compliance Tab


The Compliance tab contains the compliance data related to a packaging material specification. It has the following sections:

- ❑ Extended Attributes section—For discussion of this commonly used section, please see [Extended Attributes Section](#) on page 3-26.
- ❑ [Custom Sections](#) on page 10-6
- ❑ [Environmental Waste Section](#) on page 10-6

## Environmental Waste Section

This section provides a place to log known waste materials for this specification material, along with other relevant attributes required for environmental waste reporting.

Figure 10-7: Environmental Waste section

Environmental Waste (per item sold)				
	Material Class	Weight	Percent Recyclable	% Composed of Recycled Materials
	OTHER PLASTIC	1 g	45 %	12 %
<a href="#">Add New</a>				

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 10-8: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		





## Printed Packaging Material Tab

### Printed Packaging Material Section

The Printed Packaging Material section, the only section in the Printed Packaging Material tab, contains the list of printed packaging specifications linked to a packaging material specification.

Figure 10-9: Printed Packaging Material section

Printed Packaging Material		
	Spec #	Spec Name
	<a href="#">5083312-001</a>	Corrugated Washing Machine box
	<a href="#">5077609-001</a>	ACME PROMO CARTON
<a href="#">Add New</a>		

## Related Specs Tab




The Related Specs tab contains the following sections:

- ❑ [Sub Components Section](#) on page 10-7
- ❑ [Packing Configuration Specifications Section](#) on page 10-8
- ❑ [Equipment Specifications Section](#) on page 10-8
- ❑ [Master Specifications Section](#) on page 10-8

### Sub Components Section

The Sub Components section contains any packaging material specifications that are subcomponents of this specification. You can categorize each subcomponent based on packaging type, for example, “inner,” “outer,” and “intermediate.” Additionally, you can declare the quantity of each subcomponent.



Figure 10-10: Sub Components section

Sub Components			
	Pkg Type	Packaging Material Specification	Quantity
	Intermediate	<a href="#">Corrugated Case</a> (5077482-001)	45 g
	Intermediate	<a href="#">Packaging Spec</a> (5080410-001)	1550 g
	Intermediate	<a href="#">Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9</a> (5077540-001)	100 g
<a href="#">Add New Sub Components</a>			

## Packing Configuration Specifications Section

The Packing Configuration Specifications section contains the packing configuration specifications associated with the packing material specification. In this section you can describe the multiple ways in which your material can be delivered (for instance, case/packaging variants).

Figure 10-11: Packing Configuration Specifications section

Packing Configuration Specifications					
	Spec #	Spec Name	Equivalent	Comments	
	<a href="#">5085559-001</a>	Related Packing Configuration	457830982		
	<a href="#">5077480-001</a>	Case Pack - 60 lbs - Meat	238908765423		
<a href="#">Add New</a>					

Key fields include:

**Equivalent**—In this field you can associate a cross-reference equivalent per packing configuration.

## Equipment Specifications Section

The Equipment Specifications section contains the list of equipment specifications linked to a packaging material specification.


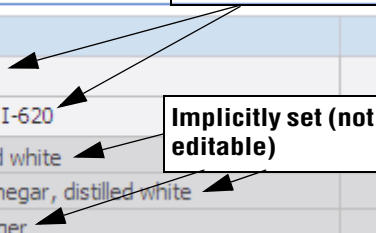

Figure 10-12: Equipment Specifications section

Equipment Specifications			
	Spec #	Spec Name	
	<a href="#">5080120-001</a>	ACME COMPANY (EUROPE) - V 680MD	
<a href="#">Add New</a>			

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 10-13: Master Specifications section

Master Specifications			Explicitly set
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, *Master Specifications* for more information.

## CSS Tab

The sole section in the CSS (content synchronization and syndication) tab, Initial Publication, contains the list of publications related to the specification.

You can create initial publications only from within GSM. Using the CSS application, you can syndicate these publications to an internal or external target system. Once created, these publications can be managed on the CSS tab of the specification or they can be managed inside the CSS application. As shown in the figure below, this section contains additional data about each publication.

Figure 10-14: Initial Publication section

Initial Publication									
	Trading Partner	Publication Type	Target Market	Initial Publication	Last Updated	Info Provider	Manufacturer	Current Status	
	GB » MDR » MDREU -	New	GB	-----	12/14/2007	Acme Company Ltd	Acme	Draft GS1:	
	US » PDK » Syndication WebService - PDK_WS	Initial Load ▾	US	-----	12/14/2007	Acme	ABCD ▾	Draft GS1:	
Add New		Validate For Publication							

### To add an initial publication:

- 1 Click **Edit Document** to put the specification in editable mode.
- 2 Click **Add New** under the Initial Publication table. The publications requirements dialog box displays, as shown below.

Figure 10-15: CSS Publications Requirements dialog box

**Manufacturer:** Acme

**Publication Type:** ☒ Initial Load ☐ New

**AU**

**GB**

**NZ**

**US**

**PDK WS**

**UCC**

- ☒ US » East » The Large Supermarket - 023123098121203
- ☐ US » East » Food Barrel (Atlanta, GA) - 032874987434234
- ☐ US » East » Food Barrel (Marietta, GA) - 03287498743001
- ☐ US » East » Food Barrel (Smith, AR) - 0328749874342123
- ☐ US » East » Food Barrel (Penn, FL) - 023098709874234
- ☐ US » East » Food Barrel (New Orleans, LA) - 011111143423

3 Specify the following required data:

- **Manufacturer**—Defines the source of the data being syndicated. For Global Data Synchronization Network (GDSN) compliant target systems, this is the Global Locator Number or GLN of the information provider.
- **Publication Type**—Used for GDSN compliant target systems. Typically this is used to tell retailers if it is the first time they have received this product information or if they already have it and should update their information.
- **Target Market**—Defines the destination for the syndicated data. Publications are organized by target market. Target market is a GDSN term used to indicate the country where the trade item is available for sale. For example, the US and Canada are two different target markets.

---

**Note** This information resides on the Summary tab of the saved publication.

---

4 Click **Save**. The publication appears in the Initial Publication table. The default starting status for publications depends on the configuration of the publication workflow.

---

**Note** You cannot view publications with a current status of “Draft.” Statuses are controlled and updated automatically by the publication workflow.

---

For more information, please see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*.

## Supporting Documents Tab

The Packaging Material Specification Supporting Documents tab contains the list of all supporting documents associated with a packaging material specification. The Supporting Documents tab consists of three sections:

- ❑ Supporting Documents section—The document types available are attachments/procedures and rich text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- ❑ Testing Protocols section—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19.

## References Tab

The Packaging Material Specification References tab contains the list of all the reference data linked to a packaging material specification. It includes the following sections:

- ❑ Suppliers section—For discussion of this commonly used section, please see [Suppliers Section](#) on page 3-23.
- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Specification Dependencies section—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.
- ❑ Related Documents section—The available related documents include only NPD activities. For discussion of this commonly used section, please see [Related Documents Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 10-16: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 10-17: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

### Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 10-18: Signature Document section

Signature Document		
Draft Review (Begin 10-Dec-07)		
Jo Jones - Initiator  looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.





## Equipment Specifications

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding equipment specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Equipment Specification page consists of the following tabs:

- ❑ *Summary Tab* on page 11-2
- ❑ *Compliance Tab* on page 11-4
- ❑ *Related Specs Tab* on page 11-5
- ❑ *Supporting Documents Tab* on page 11-6
- ❑ *References Tab* on page 11-6
- ❑ *Approval/Audit Trail Tab* on page 11-7

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current equipment specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab




Key sections in the Summary tab include:

- ❑ Summary Information section —For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Cross References Section](#) on page 11-3
- ❑ [Approved for Use In Section](#) on page 11-3

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 11-1: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<input type="button" value="Add New"/>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

---

**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

---

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 11-2: Approved for Use In section with Concepts and Business Units fields

**Approved for Use In**

**Concept(s):** Other

**Business Unit(s):** North America

Figure 11-3: Approved for Use In section with Business Units and countries fields

**Approved for Use In**

	Business Unit(s)	Countries	
✓ ↺ +	North America	+ USA	✗

**Add New**

## Compliance Tab

The Equipment Specification Compliance tab consists of the following sections:

- ❑ Equipment Attributes section—This section contains a table called “Extended Attributes.” For discussion of this commonly used section, please see [Extended Attributes Section](#) on page 3-26.
- ❑ [Custom Sections](#) on page 11-4
- ❑ [Environmental Waste \(per Unit Sold\) Section](#) on page 11-5

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 11-4: Custom section

**Child Nutrition (Custom Section)**

	Amount	Soy Hydration Factor
<b>Minimum Soy Flour</b>	4 mm	0.002 mL
<b>Minimum Soy Protein Concentrate</b>	10 mm	0.05 mL
<b>Minimum Soy Protein Isolate</b>	8 mm	0.04 mL


**Edit Section**

**Add Section** **Remove Section**

## Environmental Waste (per Unit Sold) Section

This section provides a place to log known waste materials for this specification material along with other relevant attributes required for environmental waste reporting.

Figure 11-5: Environmental Waste (per unit sold) section

Environmental Waste (per item sold)				
	Material Class	Weight	Percent Recyclable	% Composed of Recycled Materials
	OTHER PLASTIC	1 g	45 %	12 %
<a href="#">Add New</a>				

## Related Specs Tab

The Related Specs tab contains the following sections:

- ❑ [Packaging Specifications Section](#) on page 11-5
- ❑ [Master Specifications Section](#) on page 11-5

## Packaging Specifications Section

In this section you can associate this specification with one or more packaging material specifications.



Figure 11-6: Packaging Specifications section

Summary		Compliance	Related Specs	Supporting Documents	References	Ap
Packaging Specifications						
Spec #	Spec Name					
<a href="#">5085064-001</a>	Packaging Material Security 20070728					

## Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 11-7: Master Specifications section

Master Specifications			Explicitly set
	Spec #	Spec Name	
	<a href="#">5077412-001</a>	Allergen Disclosure - None	Explicitly set
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	Explicitly set
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	Implicitly set (not editable)
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	Implicitly set (not editable)
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	Implicitly set (not editable)

---

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, [Master Specifications](#) for more information.

---

## Supporting Documents Tab

The Equipment Specification Supporting Documents tab contains the list of all supporting documents associated with an equipment specification. This tab consists of three sections:

- ❑ Supporting Documents section—The document types available are attachments/procedures and rich text. For discussion of this commonly used section, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- ❑ Testing Protocols section—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19.

## References Tab

The Equipment Specification References tab contains the list of all the reference data linked to an equipment specification and includes the following sections:

- ❑ Suppliers section—For discussion of this commonly used section, please see [Suppliers Section](#) on page 3-23.
- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Related Documents section—The available related documents include only NPD Activities. For discussions of this commonly used section, please see [Related Documents Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 11-8: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.

Figure 11-9: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

### Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 11-10: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator  looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	Review 15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	Review 15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



## Printed Packaging Specifications

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding printed packaging specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Markings Tab*
  - ❑ *Compliance Tab*
  - ❑ *Custom Sections*
  - ❑ *CSS Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Printed Packaging Specification page consists of the following tabs:

- ❑ [Summary Tab](#) on page 12-2
- ❑ [Markings Tab](#) on page 12-6
- ❑ [Compliance Tab](#) on page 12-7
- ❑ [Custom Sections](#) on page 12-7
- ❑ CSS (For discussion of this commonly used tab, please see [CSS Tab](#) on page 3-7)
- ❑ [Supporting Documents Tab](#) on page 12-10
- ❑ [References Tab](#) on page 12-11
- ❑ [Approval/Audit Trail Tab](#) on page 12-11

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current printed packaging specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

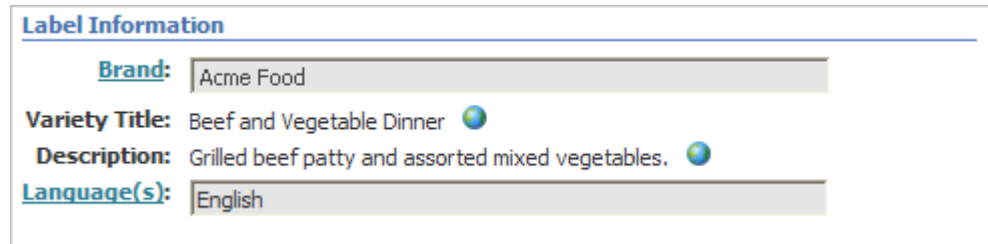
The Printed Packaging specification Summary tab contains the following sections:

- ❑ Summary Information section—For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Label Information Section](#) on page 12-3
- ❑ [Tare Weight Section](#) on page 12-3
- ❑ [Cross References Section](#) on page 12-4
- ❑ [Approved for Use In Section](#) on page 12-5

## Label Information Section

This section contains identifying information for the packaging label, as shown in figure 12-1 below.

Figure 12-1: Label Information section



**Label Information**

**Brand:** Acme Food

**Variety Title:** Beef and Vegetable Dinner 🌐

**Description:** Grilled beef patty and assorted mixed vegetables. 🌐

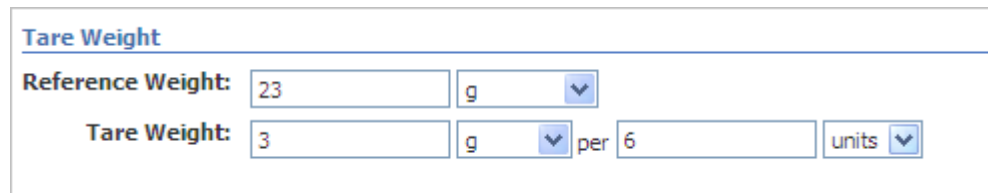
**Language(s):** English

**Note** The languages in the Language(s) field are different from the application languages that you can specify in the user profile. These languages refer to the languages that are represented on the physical label.

## Tare Weight Section

As shown in the figure below, the Tare Weight section displays the tare weights for trade items, which GSM automatically calculates based on the rollup of packaging materials within the packaging hierarchy.

Figure 12-2: Tare Weight section



**Tare Weight**

**Reference Weight:** 23 g

**Tare Weight:** 3 g per 6 units

From within a trade specification Packaging Attributes section, click the hyperlinked **Tare Weight** field label to have GSM calculate the appropriate tare weight, as shown in the figure below. If you have supplied the net weight, GSM can also calculate the gross weight of the product (net weight + tare weight).

Figure 12-3: Portion of a trade specification Packing Attributes section showing the hyperlinked Tare Weight field label

**Packaging Attributes (Consumer Unit)**

**Packaging Type:** Ring

**Label Weight:** 1.2 g

**Label Volume:** 0.024 m3

**Container Net Weight:** 0.3222 kg

**Tare Weight:** 10 oz

**GrossWeight:** 13 oz

**Inner Pack:**

**Inner Pack Label Text:** Acme Delicious BBQ Beef -n- Veggie Dinner




**Product Dimensions:**

Length	Width	Height
7 in	5 in	0.75 in

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 12-4: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	987654321-A	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
Add New					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 12-5: Approved for Use In section with Concepts and Business Units fields

The screenshot shows a form titled "Approved for Use In". It contains two fields: "Concept(s)" with the value "Other" and "Business Unit(s)" with the value "North America".

Figure 12-6: Approved for Use In section with Business Units and countries fields

The screenshot shows a form titled "Approved for Use In" with a table. The table has two columns: "Business Unit(s)" and "Countries". The first row contains "North America" and "USA". There are icons for adding, deleting, and editing rows. Below the table is an "Add New" button.

	Business Unit(s)	Countries
✓ ↻ +	North America	+ USA

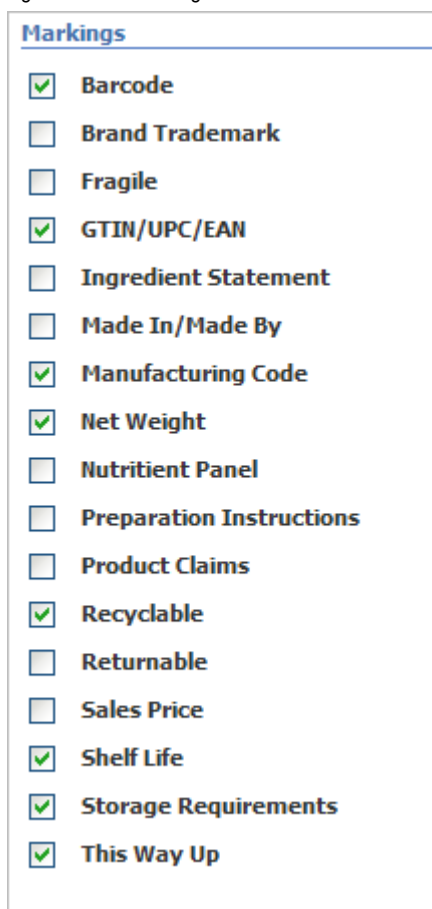
Add New

## Markings Tab

### Markings Section

In the Markings section, the only section of the Markings tab, you can select any markings that are represented on the packaging, such as those shown in figure 12-7 below.

Figure 12-7: Markings section



Markings	
<input checked="" type="checkbox"/>	Barcode
<input type="checkbox"/>	Brand Trademark
<input type="checkbox"/>	Fragile
<input checked="" type="checkbox"/>	GTIN/UPC/EAN
<input type="checkbox"/>	Ingredient Statement
<input type="checkbox"/>	Made In/Made By
<input checked="" type="checkbox"/>	Manufacturing Code
<input checked="" type="checkbox"/>	Net Weight
<input type="checkbox"/>	Nutrient Panel
<input type="checkbox"/>	Preparation Instructions
<input type="checkbox"/>	Product Claims
<input checked="" type="checkbox"/>	Recyclable
<input type="checkbox"/>	Returnable
<input type="checkbox"/>	Sales Price
<input checked="" type="checkbox"/>	Shelf Life
<input checked="" type="checkbox"/>	Storage Requirements
<input checked="" type="checkbox"/>	This Way Up

## Compliance Tab


The Compliance tab consists of two sections:

- ❑ [Extended Attributes](#) on page 12-7
- ❑ [Custom Sections](#) on page 12-7

### Extended Attributes

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 12-8: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<a href="#">Add New</a>				

### Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 12-9: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

## Related Specs Tab

The Related Specs tab contains the following sections:

- ❑ [Parent Packaging Material Section](#) on page 12-8
- ❑ [Master Specifications Section](#) on page 12-8

### Parent Packaging Material Section

In this section you can connect the printed packaging specification to a parent packaging material specification.

Figure 12-10: Parent Packaging Material section








Summary	Markings	Compliance	Related Specs	CSS	Supporting Documents
<b>Parent Packaging Material</b>					
Spec #	Spec Name				
<a href="#">5077540-001</a>	Carton - Paper Board - Frozen Meal - 7 x 1.25 x 9				

The printed packaging specification can have only one parent packaging material specification.

### Master Specifications Section

In this section you can explicitly connect the specification to one or more master specifications.

Figure 12-11: Master Specifications section

Master Specifications			Explicitly set
	<a href="#">5077412-001</a>	Allergen Disclosure - None	    
	<a href="#">5077453-001</a>	Shelf Life Extension - QCP I-620	
	<a href="#">5081969-001</a>	5002116 - Vinegar, distilled white	
	<a href="#">5081966-002</a>	new issue of 5002116 - Vinegar, distilled white	
	<a href="#">5083956-001</a>	5079816-004 - Veggie Burger	

**Note** Specifications can have both explicit associations with master specifications (defined by the relationship here) and implicit associations with master specifications (by which the relationship is defined on the master specification). See chapter 16, [Master Specifications](#) for more information.



## CSS Tab

The sole section in the CSS (content synchronization and syndication) tab, Initial Publication, contains the list of publications related to the specification.

You can create initial publications only from within GSM. Using the CSS application, you can syndicate these publications to an internal or external target system. Once created, these publications can be managed on the CSS tab of the specification or they can be managed inside the CSS application. As shown in the figure below, this section contains additional data about each publication.

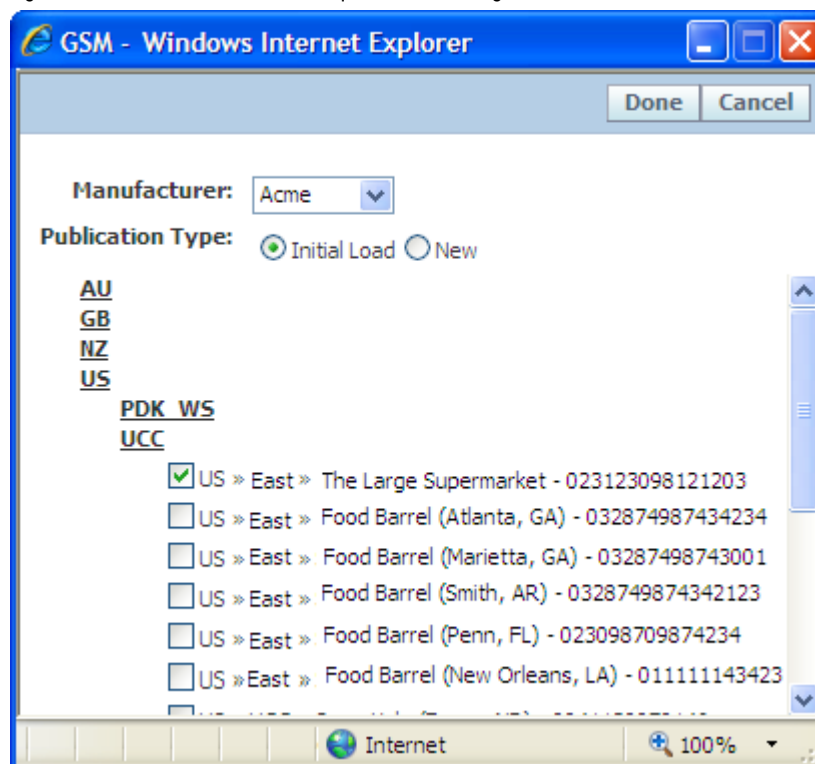
Figure 12-12: Initial Publication section

Initial Publication									
	Trading Partner	Publication Type	Target Market	Initial Publication	Last Updated	Info Provider	Manufacturer	Current Status	
	GB » MDR » MDREU -	New	GB	-----	12/14/2007	Acme Company Ltd	Acme	Draft GS1:	
	US » PDK » Syndication WebService - PDK_WS	Initial Load 	US	-----	12/14/2007	Acme	ABCD 	Draft GS1:	
<div> <span>Add New</span> <span>Validate For Publication</span> </div>									

### To add an initial publication:

- 1 Click **Edit Document** to put the specification in editable mode.
- 2 Click **Add New** under the Initial Publication table. The publications requirements dialog box displays, as shown below.

Figure 12-13: CSS Publications Requirements dialog box



**3** Specify the following required data:

- **Manufacturer**—Defines the source of the data being syndicated. For Global Data Synchronization Network (GDSN) compliant target systems, this is the Global Locator Number or GLN of the information provider.
- **Publication Type**—Used for GDSN compliant target systems. Typically this is used to tell retailers if it is the first time they have received this product information or if they already have it and should update their information.
- **Target Market**—Defines the destination for the syndicated data. Publications are organized by target market. Target market is a GDSN term used to indicate the country where the trade item is available for sale. For example, the US and Canada are two different target markets.

---

**Note** This information resides on the Summary tab of the saved publication.

---

**4** Click **Save**. The publication appears in the Initial Publication table. The default starting status for publications depends on the configuration of the publication workflow.

---

**Note** You cannot view publications with a current status of “Draft.” Statuses are controlled and updated automatically by the publication workflow.

---

For more information, please see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*.

## Supporting Documents Tab

The Supporting Documents tab consists of four sections:

- Attachments section—For discussion of this commonly used section, please see [Attachments Section](#) on page 3-20.
- Supporting Documents section—The only document type available for use in the Printed Packaging Specifications Supporting Documents tab is rich text. For more information, please see [Supporting Documents Section](#) on page 3-10.
- DRL Documents—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- Testing Protocols—For discussion of this commonly used section, please see [Testing Protocols Section](#) on page 3-19.

## References Tab

The Printed Packaging Specification References tab includes the following sections:

- ❑ Suppliers section—For discussion of this commonly used section, please see [Suppliers Section](#) on page 3-23.
- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Specification Dependencies section—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.
- ❑ Related Documents section—For discussion of this commonly used section, please see [Related Documents Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 12-14: Current Status section

**Current Status**

---

**Current Owner:** [Charlie Callas]  
**Current Workflow:** All Members Test  
**Current Status:** Admin Review  
**Desired Action:** Admin Review

**Start Date:** 9/28/2007  
**Amber Date:** -----  
**Red Date:** -----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.

Figure 12-15: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

## Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 12-16: Signature Document section

Signature Document		
Draft Review (Begin 10-Dec-07)		
Jo Jones - Initiator looks good so far (Jo Jones - 10-Dec-07)	Marketing - May Wu (Review - 10-Dec-07)	Review 15-Dec/ 17-Dec
	Quality Assurance - Ty Ott (Review - 10-Dec-07)	Review 15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.

## Delivered Material Packing Specifications

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding delivered material packing specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Delivered Material Packing Specification page consists of the following tabs:

- ❑ [Summary Tab](#) on page 13-2
- ❑ [Compliance Tab](#) on page 13-3
- ❑ [Related Specs Tab](#) on page 13-3
- ❑ [Supporting Documents Tab](#) on page 13-3
- ❑ [References Tab](#) on page 13-4
- ❑ [Approval/Audit Trail Tab](#) on page 13-4

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current delivered material packing specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

This tab contains the following sections:

- ❑ Summary Information section —For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ Approved for Use In section —For discussion of this commonly used section, please see [Approved for Use In Section](#) on page 3-3.

## Compliance Tab

### Environmental Waste Section

This section, the only section in the Compliance tab, provides a place to log known waste materials for this specification material, along with other relevant attributes required for environmental waste reporting.

Figure 13-1: Environmental Waste section


Environmental Waste (per item sold)				
	Material Class	Weight	Percent Recyclable	% Composed of Recycled Materials
	OTHER PLASTIC	1 g	45 %	12 %
<a href="#">Add New</a>				

## Related Specs Tab

### Labeling Specifications Section

In Labeling Specifications, the only section in the Related Specs tab, you can associate this specification with one or more labeling specifications that describe the labeling requirements for delivered items.

Figure 13-2: Labeling Specifications section

Labeling Specifications			
	Spec #	Spec Name	
	<a href="#">5077515-001</a>	Pallet Label Type B	
<a href="#">Add New</a>			

## Supporting Documents Tab

The Supporting Documents tab contains two sections:

- ❑ Supporting Documents section — The document types available for use are attachments/procedures and rich text. For more information, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents section — For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.

## References Tab

The References tab includes the following sections:

- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Specification Dependencies section—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 13-3: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.

Figure 13-4: Event History section



Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	



## Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 13-5: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec
looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



## Packing Configuration Specifications

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding packing configuration specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Packing Tab*
  - ❑ *Related Specs Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Packing Configuration Specification page consists of the following tabs:

- ❑ [Summary Tab](#) on page 14-2
- ❑ [Packing Tab](#) on page 14-4
- ❑ [Related Specs Tab](#) on page 14-6
- ❑ [Supporting Documents Tab](#) on page 14-8
- ❑ [References Tab](#) on page 14-8
- ❑ [Approval/Audit Trail Tab](#) on page 14-8

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current packing configuration specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature, please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab




This tab contains the following sections:

- ❑ Summary Information section —For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Cross References Section](#) on page 14-3
- ❑ [Approved for Use In Section](#) on page 14-3

## Cross References Section

The Cross References section contains the list of cross-reference numbers for the specification, as stored in external systems. You can use the equivalent value as a search criteria and it can display in specification search results.


Figure 14-1: Cross References section

Cross References					
	System Name	System ID	Equivalent	Externally Managed	
	SAP System	USSAP	5010040800AA	<input type="checkbox"/>	
	Oracle System	USORACLE	<input type="text" value="987654321-A"/>	<input type="checkbox"/>	
	BPCS System	USBPCS		<input checked="" type="checkbox"/>	
<input type="button" value="Add New"/>					

Key fields include:

**System ID**—A code that identifies an external database. Agile PLM for Process obtains this code from the external system.

**Equivalent**—The equivalent number designed to identify the material as it is referenced by other cross-reference systems.

**Externally Managed**—An indication of whether this data is managed externally or within Agile PLM for Process. If the data is managed externally, you cannot modify the equivalent number from within Agile PLM for Process. (Notice that there is no edit icon (  ) for the externally managed system shown above.)

If the cross-referenced database is managed from within Agile PLM for Process, you can modify the equivalent value in the Equivalent field in this table.

---

**Note** Only an Agile administrator can turn the Externally Managed flag on or off. For more information on this feature, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

---

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 14-2: Approved for Use In section with Concepts and Business Units fields

**Approved for Use In**

**Concept(s):** Other

**Business Unit(s):** North America

Figure 14-3: Approved for Use In section with Business Units and countries fields

**Approved for Use In**

	Business Unit(s)	Countries
✓ ↺ +	North America	+ USA

✗

Add New

## Packing Tab

This tab contains the following sections:

- ❑ [Packing Attribute \(Inner Pack\) Section](#) on page 14-4
- ❑ [Packing Attribute \(Master Case\) Section](#) on page 14-5
- ❑ [Extended Attributes](#) on page 14-5
- ❑ [Custom Sections](#) on page 14-6

### Packing Attribute (Inner Pack) Section

In this section you can capture attributes that describe the inner packing of the delivered material. For example, if you have a case that contains six smaller bags of material, this section would describe the bags.

Figure 14-4: Packing Attribute (inner pack) section

▼ (pcfg) 5077480-001 - Case Pack - 60 lbs - Meat (Developmental)

Summary Packing Related Specs Supporting Documents References Approvals

**Packing Attribute(inner pack)**

**Label Weight:** 2 oz

**Label Volume:** 1.22 Cu. cm

**Container Net Weight:** 3 lb 12 oz

**Gross Weight:** 15 lb

**Inner Pack:**

**Product Dimensions:**


<i>Length</i>	<i>Width</i>	<i>Height</i>
20 in	14 in	2 in

## Packing Attribute (Master Case) Section


In this section you can capture attributes that describe how the master case attributes of the delivered material. For example, if you have a case that contains six smaller bags of material, this section would describe the case.

Figure 14-5: Packing Attribute (master case) section


**Packing Attribute(master case)**

**Packaging Type:** Carton 





**Units Per Case:** 24

**Cases/Layer:** 6 **Standard Pallet** 





**Number of Layers:** 3


**Cases/Pallet:** 

**Case Size:**

<i>Length</i>	<i>Width</i>	<i>Height</i>	<i>Gross Weight</i>
350 cm 	450 cm 	15 cm 	5 kg 

**Pallet Size:**

<i>Length</i>	<i>Width</i>	<i>Height</i>	<i>Gross Weight</i>
1 m 	0.980 m 	2 m 	220 kg 

**Coding:** 





Key fields include:

**Packaging Type**— Describe the packaging type by selecting from a list of options.

## Extended Attributes

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 14-6: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<b>Add New</b>				

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 14-7: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL

Edit Section

Add Section Remove Section

## Related Specs Tab

The Related Specs tab contains the following sections:

- ❑ [Inner-Delivered Packing Specifications Section](#) on page 14-6
- ❑ [Intermediate-Delivered Material Packing Specifications Section](#) on page 14-7
- ❑ [Outer-Delivered Material Packing Specification Section](#) on page 14-7

In the sections in this tab you can further describe the packing configuration by distinguishing among inner, intermediate, and outer packing materials where relevant.

## Inner-Delivered Packing Specifications Section

In this section you can associate this packing configuration specification with one or more delivered material packing specifications to describe the inner packing.

Figure 14-8: Inner-Delivered Packing Specifications section

Summary Packing Related Specs Supporting Documents References Appro			
Inner-Delivered Material Packing Specifications			
	Spec #	Spec Name	Labeling Spec(s)
	<a href="#">5077514-001</a>	Wax Lined Boxes	5077513-001

Add New


The associated labeling specification numbers display automatically based on their relationship with the delivered material packing specifications.



## Intermediate-Delivered Material Packing Specifications Section

In this section you can associate this packing configuration specification with one or more delivered material packing specifications to describe the intermediate packing.

Figure 14-9: Intermediate-Delivered Material Packing Specifications section


Intermediate-Delivered Material Packing Specification				
	Spec #	Spec Name	Labeling Spec(s)	
	<u>5077481-001</u>	Corrugated Case Pack with Poly Liner	5082311-001 5084428-001 5085011-001 5083255-001 5083722-001	
<a href="#">Add New</a>				

The associated labeling specification numbers display automatically based on their relationship with the delivered material packing specifications.

## Outer-Delivered Material Packing Specification Section

In this section you can associate this packing configuration specification with one or more delivered material packing specifications to describe the outer packing.

Figure 14-10: Outer-Delivered Material Packing Specifications section

Outer-Delivered Material Packing Specifications				
	Spec #	Spec Name	Labeling Spec(s)	
	<u>5077514-001</u>	Wax Lined Boxes	5077513-001	
<a href="#">Add New</a>				

The associated labeling specification numbers display automatically based on their relationship with the delivered material packing specifications.

## Supporting Documents Tab

The Supporting Documents tab contains two sections:

- ❑ Supporting Documents section—The document types available are attachments/procedures and rich text. For more information, please see [Supporting Documents Tab](#) on page 3-9.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.

## References Tab

The References tab includes the following sections:

- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Specification Dependencies section—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 14-11: Current Status section

Current Status	
Current Owner:	[Charlie Callas]
Current Workflow:	All Members Test
Current Status:	Admin Review
Desired Action:	Admin Review
Start Date:	9/28/2007
Amber Date:	-----
Red Date:	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 14-12: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

## Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 14-13: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator  looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



## Labeling Specifications

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding labeling specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Compliance Tab*
  - ❑ *Related Specs Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Labeling Specifications page consists of the following tabs:

- ❑ Summary (see [Summary Tab](#) on page 15-3)
- ❑ Compliance (see [Compliance Tab](#) on page 15-4)
- ❑ Related Specs (see [Related Specs Tab](#) on page 15-4)
- ❑ Supporting Documents (see [Supporting Documents Tab](#) on page 15-4)
- ❑ References (see [References Tab](#) on page 15-5)
- ❑ Approval/Audit Trail (see [Approval/Audit Trail Tab](#) on page 15-5)

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current labeling specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature, please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS].)

## Summary Tab

The Label Specifications Summary tab contains the following three sections:

- ❑ Summary Information section—For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Labeling Description Section](#) on page 15-3
- ❑ [Approved for Use In Section](#) on page 15-3

## Labeling Description Section

This section provides a place to describe the labeling requirements for this specification.

Figure 15-1: Labeling Description section

**Labeling Description**

**Description:** Each container shall be clearly and properly labeled with the following information:

- Ingredient Name
- Ingredient Number (33302)
- Manufacturer's Name and Address
- Processing Date or equivalent lot number or date code.
- Net Weight
- Keep Frozen

Ingredient Number labeling is requested, but not required, on containers packed with receipt of a order (spot buys after the pack) as long as this number is referenced on with the purchase and shipment. 🌐

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 15-2: Approved for Use In section with Concepts and Business Units fields

**Approved for Use In**

**Concept(s):** Other

**Business Unit(s):** North America

Figure 15-3: Approved for Use In section with Business Units and countries fields

**Approved for Use In**

	Business Unit(s)	Countries	
✓ ↺ +	North America	+ USA	✗

**Add New** (with mouse cursor)

## Compliance Tab

This tab is not currently used but is present for legacy purposes only.

## Related Specs Tab

### Delivered Material Packing Specifications That Rely on This Specification Section

This section is the only one in the Related Specs tab. Information in this section is read only and so you cannot associate specifications here. The section displays the associations that have been made to this labeling specification from a delivered material packing specification.

Figure 15-4: Delivered Material Packing Specifications that rely on this Specification section

Delivered Material Packing Specifications that rely on this Specification	
Packing Spec #	Packing Spec Name
<a href="#">5077516-001</a>	Shipping Carton

## Supporting Documents Tab

The Label Specifications Supporting Documents tab consists of three sections:

- ❑ Attachments section—For discussion of this commonly used section, please see [Attachments Section](#) on page 3-20.
- ❑ Supporting Documents section—The only document type available for use in this section is rich text. For more information, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.



## References Tab

The Label Specifications References tab consists of two sections:

- ❑ Activities section—For discussion of this commonly used section, please see [Activities Section](#) on page 3-23.
- ❑ Specification Dependencies section—For discussion of this commonly used section, please see [Specification Dependencies Section](#) on page 3-25.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 15-5: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.

Figure 15-6: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

## Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 15-7: Signature Document section

Signature Document		
Draft Review (Begin 10-Dec-07)		
Jo Jones - Initiator looks good so far (Jo Jones - 10-Dec-07)	Marketing - May Wu (Review - 10-Dec-07)	Review 15-Dec/ 17-Dec
	Quality Assurance - Ty Ott (Review - 10-Dec-07)	Review 15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.

## Master Specifications

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding master specifications.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Summary Tab*
  - ❑ *Applies To Tab*
  - ❑ *Compliance Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *Ext Data Tab*
  - ❑ *References Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Master Specifications page consists of the following tabs:

- ❑ [\*Summary Tab\*](#) on page 16-2
- ❑ [\*Applies To Tab\*](#) on page 16-4
- ❑ [\*Compliance Tab\*](#) on page 16-6
- ❑ [\*Supporting Documents Tab\*](#) on page 16-6
- ❑ [\*Ext Data Tab\*](#) on page 16-6
- ❑ [\*References Tab\*](#) on page 16-7
- ❑ [\*Approval/Audit Trail Tab\*](#) on page 16-8

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current master specification. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Print**—Opens a highly configurable dialog box through which you can print the current specification in a variety of formats. For more information on printing a trade specification, please see [Printing Other Specifications](#) on page 2-21.
- ❑ **Act**—Create or modify an activity, or mini-workflow, for this specification. For more information about this function, please see chapter 17, [Activities](#). (Appears only if you have editorial control over the specification.)
- ❑ **Item History**—Display all issues of the specification that exist in a Spec History table, along with the reason for creating each issue and other identifying information. For more information on this feature please see [Item History](#) on page 2-3.
- ❑ **Workflow**—Move the current specification, or document, from one workflow step to another. For more information on workflows, please see [Transitioning a Workflow](#) on page 2-7.
- ❑ **Resolve Workflow**—Re-resolve the specification to a workflow (present only when you are logged in with a user account that has the user role of [CAN\_RERESOLVE\_WORKFLOWS]).

## Summary Tab


The Master Specifications Summary tab consists of three sections:

- ❑ Summary Information section—For discussion of this commonly used section, please see [Summary Information Section](#) on page 3-1.
- ❑ [Master Description Section](#) on page 16-3
- ❑ [Approved for Use In Section](#) on page 16-3
- ❑ [Custom Sections](#) on page 16-7

## Master Description Section

In this section you can describe the purpose of the master specification, as shown in figure 16-1 below.

Figure 16-1: Master Description section

Master Description	
<b>Description:</b>	A 25 gram sample representing each shipment, or each 40,000 lbs. of production, will be tested for Listeria. A certificate of analysis (COA) referencing all lots/code dates will be forwarded to Corporate Purchasing prior to shipment or transfer. One COA per purchase order or contract is acceptable. 


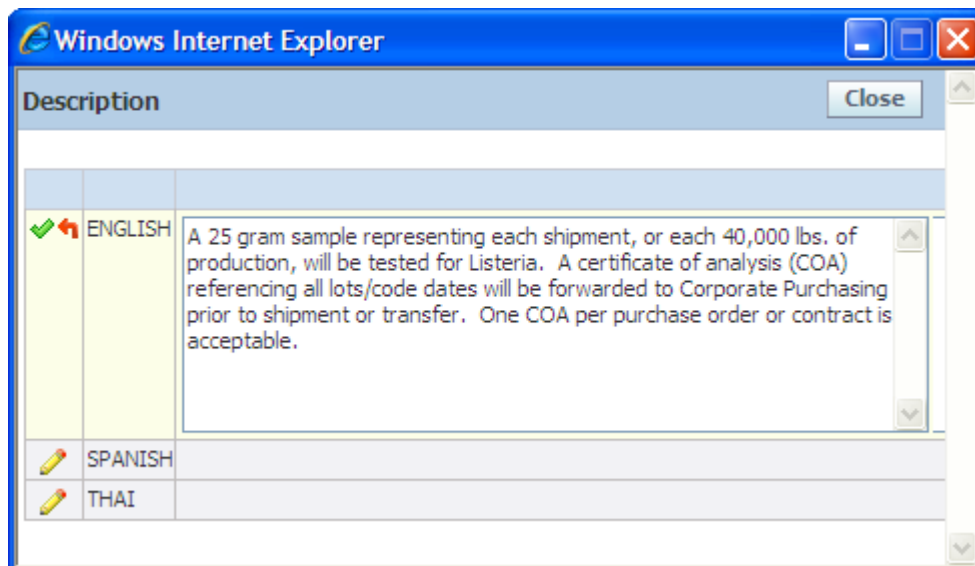



Click the alternate wording icon (  ) to provide the description in multiple languages, as shown in figure 16-2 below.

Figure 16-2: Master Description, alternative text input screen



Description		Close
	ENGLISH	A 25 gram sample representing each shipment, or each 40,000 lbs. of production, will be tested for Listeria. A certificate of analysis (COA) referencing all lots/code dates will be forwarded to Corporate Purchasing prior to shipment or transfer. One COA per purchase order or contract is acceptable.
	SPANISH	
	THAI	

## Approved for Use In Section

The Approved for Use In section contains a list of business units that the specification is approved for use in. Business Units is a required field. Business Unit is used in relation to search visibility. The Business Unit field can also be used as the deciding factor in workflow resolution.

This section is configurable. One configuration is Concepts and Business Unit; the other is Business Units and Countries, as shown in the figures below.

Figure 16-3: Approved for Use In section with Concepts and Business Units fields

Approved for Use In	
<u>Concept(s):</u>	Other
<u>Business Unit(s):</u>	North America

Figure 16-4: Approved for Use In section with Business Units and countries fields

Approved for Use In	
Business Unit(s)	Countries
North America	USA

Add New

## Applies To Tab

### Specification Categories Section

In Specification Categories, the only section in the Applies To tab, you can associate this master specification to other specifications in the system by choosing one or more categories that this master specification will automatically apply to, as shown in figure 16-5, below.

Figure 16-5: Specification Categories section

Summary Applies To Compliance Supporting Documents Ext Data Reference

**Specification Categories (if applicable)**

**This is applicable to All Specifications of this Type:**

Ingredient Specifications » Dairy Products » Butter » Unsalted

Trade Specifications

Equipment Specifications

Edit Applies To

You can apply specification categories from the highest to the lowest levels of the specification taxonomies. For example, you can create and apply a master specification that will automatically apply to the following:

- All ingredient specifications
- Ingredient specifications exclusively for produce
- Ingredient specifications for apples

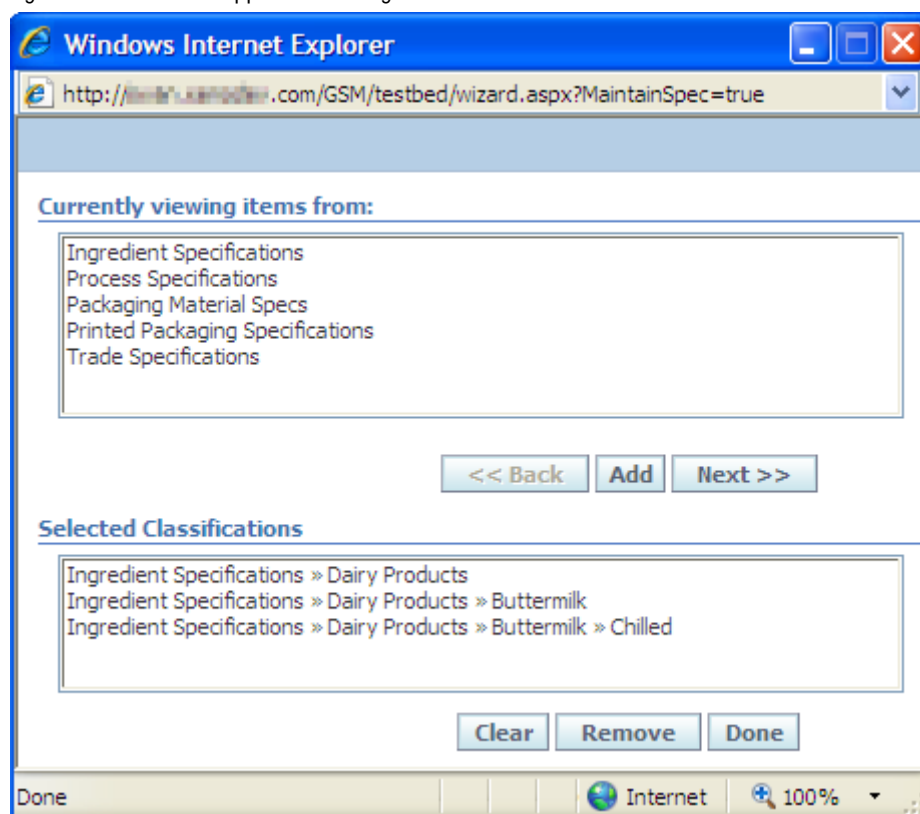
**Note** The business unit on the master specification must be the same on the associated specification for this master specification to be associated. The Business Unit field is set in the Approved for Use In section, as discussed in [Approved for Use In Section](#) on page 16-3.

Applied master specifications appear on the associated specification in the master specifications section of that specification. See [Master Specifications Section](#) on page 3-7 for more information.

**To apply a specification category:**

- 1 On the Applies To tab, in the upper right of the page, click **Edit**. GSM reloads the page in editable mode, showing the Edit Applies To button as shown in figure 16-5 above.
- 2 Click **Edit Applies To**. GSM displays a dialog box with two large fields: “Currently viewing items from” and “Selected Classifications,” as shown in figure 16-6 below.

Figure 16-6: The “Edit Applies To” dialog box



- 3 In the “Currently viewing items from” field, select one specification type.

---

**Note** This dialog box does not support multiple-select.

---





- 4 To choose from a preset list of subcategories associated with the selected specification type, click **Next>>**. GSM displays the list of subcategories for your selected specification type. (Continue this process until you arrive at the subcategory that you need.)
- 5 Click **Add**. Your selected subcategory appears in the “Selected Classifications” box.
- 6 Click **Done**. GSM closes the dialog box and adds your selections to the list in the Specification Categories section of the Applies To tab.
- 7 Click **Save** or **Save & Close Document**.

## Compliance Tab

This tab consists of a single section, Analytical Properties. The Analytical Properties table consists of the following columns, as shown in figure 16-7 below:

- ❑ Property Description
- ❑ Specification Limits
- ❑ Test Used
- ❑ Special Notes

Figure 16-7: Compliance tab, Analytical Properties section

Analytical Properties				
	Property Description	Specification Limits	Test Used	Special Notes
	<a href="#">Base</a> Plastic Containers (03343)			
<a href="#">Add New</a>				

## Supporting Documents Tab

This Supporting Documents tab consists of four sections:

- ❑ Attachments section—For discussion of this commonly used section, please see [Attachments Section](#) on page 3-20.
- ❑ Supporting Documents section—The only document type available for use in the Master Specifications Supporting Documents tab is rich text. For more information, please see [Supporting Documents Section](#) on page 3-10.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.
- ❑ [Custom Sections](#) on page 16-7

## Ext Data Tab

This tab consists of two sections:


- ❑ [Extended Attributes Section](#) on page 16-7
- ❑ [Custom Sections](#) on page 16-7



## Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 16-8: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<button>Add New</button>				

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 16-9: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<button>Edit Section</button>		
<div> <div><button>Add Section</button></div> <div><button>Remove Section</button></div> </div>		

## References Tab

For discussion of the Activities section, the only section in the References tab, please see [Activities Section](#) on page 3-23.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 16-10: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 16-11: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

### Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 16-12: Signature Document section

Signature Document		
Draft Review (Begin 10-Dec-07)		
Jo Jones - Initiator looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec
	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	Review  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



# CHAPTER 17

## Activities

---

*This chapter describes the purpose and use of the activities feature of Global Specification Management. Topics in this chapter include:*

- ❑ *Creating an Activity*
  - ❑ *Searching for an Activity*
  - ❑ *Summary Tab*
  - ❑ *Ext Data Tab*
  - ❑ *Supporting Documents Tab*
  - ❑ *Approval/Audit Trail Tab*
- 

### Overview

The Activity page consists of the following tabs:

- ❑ [Summary Tab](#) on page 17-3
- ❑ [Ext Data Tab](#) on page 17-5
- ❑ [Supporting Documents Tab](#) on page 17-6
- ❑ [Approval/Audit Trail Tab](#) on page 17-6

An activity is an additional workflow tied to a specification. Activities are based on workflow templates managed in the Workflow Administration application (WFA). For more on WFA, please see the *Agile Product Lifecycle for Process Administrator User Guide*.

### Creating an Activity

You can create an activity from within Global Specification Management (GSM) in two ways:

- ❑ At the specification level
- ❑ From the Activities search page (independent of any specification)

## Creating an Activity at the Specification Level

You can create an activity in GSM from within a specification.

### To create an activity at the specification level:

- 1 Access the specification to tie the activity to and click **Act** at the top right of the page. GSM displays the Activity page, opened to the Summary tab.
- 2 Type a title for the activity in the **Activity Title** field.
- 3 Click the hyperlinked **Activity Type** field label. A dialog box opens and displays a geographic list.
- 4 Select an application type from the list of types in that dialog box and click **Done** at the top right. The box closes and your selection appears in the Application Type field.
- 5 Continue filling out all required fields and any others that you wish to use as listed in the [Summary Tab](#), [Supporting Documents Tab](#), and [Approval/Audit Trail Tab](#) sections, later in this chapter.
- 6 Click **Save** or **Save & Close Document** at the top right of the activity page.

## Creating an Activity That Is Independent of Specifications

If you have the necessary user role, you can create an activity that is independent of an individual specification. You must use the Create New button on the Activities search page in order to create an activity of this type.

### To create a specification-independent activity:

- 1 From within GSM, click **Activity** on the left navigation panel. The Activities page displays.
- 2 Click **Create New** at the top right of the page. GSM displays an empty activity page opened to its Summary tab, as shown in figure 17-1 below.

Figure 17-1: Empty activity creation page

(act) 5086650-001

Summary Supporting Documents Ext Data Approval/Audit Trail

Activity Summary

Activity Title:  Activity#: 5086650-001

Activity Type: [Activity Type](#)

Originator: Johnson, Sally

Status: -

Special Notes:

Related Items

Type	Description
<a href="#">Add New</a>	

- 3 Follow the same steps as in the procedure for specification-dependent activities as described above (step 2 through step 6), keeping in mind that a specification-independent activity contains no Primary Action Item section.

## Searching for an Activity

From the Activities option on the left navigation panel, you can also search for an existing activity.

### To search for an existing activity:

- 1 Click **Activities** on the left navigation menu. The Activities search page loads.
- 2 From the leftmost drop-down list, select a key field to search on.
- 3 From the middle drop-down list, select an operator, for example, “Contains,” “Equals,” or “Starts With.”
- 4 In the rightmost drop-down list, select a search term, either by typing or by using the subsearch dialog box that is available if an add data icon (+) appears to the left of the field.
- 5 Under the search form to the left, click **Search**. GSM runs the query and reloads the page, showing your search results in a Search Results section.
- 6 Click the hyperlinked activity number of the activity to view. GSM opens the activity page, defaulting to the Summary tab.

**Note** For more detailed guidance on using the search form, please see [Understanding the Search Form](#) on page 1-5.

## Summary Tab

The Activity Summary tab contains the following sections:

- [Activity Summary Section](#) on page 17-3
- [Primary Action Item Section](#) on page 17-4 (for specification-dependent activities only)
- [Related Items Section](#) on page 17-5

## Activity Summary Section

The Activity Summary section contains the identifying information for the activity and specifies which workflow template the activity is following.

Figure 17-2: Activity Summary section

Activities	
Activity Type	Description
activity workflow	<a href="#">Canoe (5082750-001)</a>
v500 activity workflow	<a href="#">Spec Turbo 555 (5086543-001)</a>
Activity XYZ	<a href="#">Grouping (5086766-001)</a>
activity workflow	<a href="#">Floater (5086612-001)</a>

Key fields include:

**Activity Title**—Identify the activity by name (required field).

**Activity #**—Identify the activity by number (system-defined field).

**Activity Type**—Link the activity to an activity workflow template (required field). Your workflow administrator manages activity workflow templates using the Workflow Administration application (WFA).

---

**Note** For more information on managing workflow templates in WFA, please see the “Workflow Management for GSM” chapter in the *Agile Product Lifecycle for Process Administrator User Guide*.

---

**Originator**—Identify the person who created the activity (system-defined field).

**Status**—WFA template-defined field displaying the workflow step that the activity is currently in.

## Primary Action Item Section

The Primary Action Item section contains information defining the primary purpose of the activity.

---

**Note** This section appears only in activities that are tied to a specific specification. It does not appear when you are creating a new specification-independent activity.

---

Figure 17-3: Primary Action Item section

**Primary Action Item**

**Item Name:** [Allergen Disclosure - None \(5077412-001\)](#)

**Process Dependency:** *Item Status dependent on this activity?* ☒ Yes ☐ No

Activity must reach: Complete ▼

Before item leaves: Developmental ▼

Key fields include:

**Item Name**—Displays the name and number of the specification that the activity is tied to, hyperlinked to that specification.


**Process Dependency**—Displays whether the specification status is dependent on the activity. If the specification does depend on the activity, you can designate what step the activity must reach before the specification can move forward in the workflow.



## Related Items Section

The related items section contains the specifications and activities related to this activity. You can add other GSM objects to this section.

Figure 17-4: Related Items section

Related Items		
	Type	Description
	Ingredient Specifications	<a href="#">Beans - Peas - White (Navy) - Dry (5082449-001)</a>
<a href="#">Add New</a>		


## Ext Data Tab

The Ext Data tab can contain an Extended Attributes section, one or more custom sections, or it can be empty.

## Extended Attributes Section

Extended attributes define important features and characteristics of the specification. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 17-5: Extended Attributes section

Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<a href="#">Add New</a>				

## Custom Sections

Custom sections are configurable sets of extended attributes. The custom data that you enter is displayed in a table, as shown in the figure below.

Figure 17-6: Custom section

Child Nutrition (Custom Section)		
	Amount	Soy Hydration Factor
Minimum Soy Flour	4 mm	0.002 mL
Minimum Soy Protein Concentrate	10 mm	0.05 mL
Minimum Soy Protein Isolate	8 mm	0.04 mL
<a href="#">Edit Section</a>		
<a href="#">Add Section</a> <a href="#">Remove Section</a>		

## Supporting Documents Tab

The Supporting Documents tab contains the following sections:

- ❑ Supporting Documents section—The document types available are attachments/procedures and rich text. For more information, please see [Attachments/Procedures Document Type](#) on page 3-11 and [Rich Text Document Type](#) on page 3-13.
- ❑ DRL Documents section—For discussion of this commonly used section, please see [DRL Documents Section](#) on page 3-15.

## Approval/Audit Trail Tab

All workflow-enabled specifications contain an Approval/Audit Trail tab. This tab contains the data related to the workflow status and history of a specification. This page consists of three system-defined sections:

- ❑ Current Status
- ❑ Event History
- ❑ Signature Document

### Current Status Section

The Current Status section contains the workflow data related to a specification.

Figure 17-7: Current Status section

Current Status	
<b>Current Owner:</b>	[Charlie Callas]
<b>Current Workflow:</b>	All Members Test
<b>Current Status:</b>	Admin Review
<b>Desired Action:</b>	Admin Review
<b>Start Date:</b>	9/28/2007
<b>Amber Date:</b>	-----
<b>Red Date:</b>	-----

### Event History Section

The Event History section contains the list of preceding workflow actions associated with the specification.



Figure 17-8: Event History section

Event History			
Status	User	Time	Comments
Admin Review	Sally Johnson	9/28/2007 4:45:28 PM	

## Signature Document Section

The Signature Document section, shown in the figure below, contains the list of signature documents associated with that step of the workflow. All signature documents associated with a specification must be in the approved state before the specification can be moved forward in the workflow.

Figure 17-9: Signature Document section

Signature Document		
<b>Draft Review</b> (Begin 10-Dec-07)		
Jo Jones - Initiator	<a href="#">Marketing</a> - May Wu (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec
looks good so far (Jo Jones - 10-Dec-07)	<a href="#">Quality Assurance</a> - Ty Ott (Review - 10-Dec-07)	<b>Review</b>  15-Dec/ 17-Dec

Historical Signature Documents opens a view of signature documents completed prior to the current stage.

For more on signature documents see [Working with Signature Documents](#) on page 2-9.



## Testing Protocol Library

---

*This chapter describes the purpose and use of the Testing Protocol Library of Global Specification Management.*

*Topics in this chapter include:*

- ❑ *Page-Level Functions*
  - ❑ *Testing Protocol (Header) Section*
  - ❑ *Facility Information Section*
  - ❑ *Sections Section*
  - ❑ *Extended Attributes Section*
  - ❑ *Testing Protocol (Detail) Section*
- 

### Overview

The Testing Protocol Library is a centralized location where you can create and manage testing protocols for use in the Global Specification Management (GSM) and Product Quality Scorecard (PQS) applications. These testing protocols are global in scope. You can relate them to specifications by creating an association on the specification itself. Such an association enables you to reuse test protocols and apply them across sets of specifications to test those specifications using the same parameters.

Testing protocols created from an individual specification are limited in scope to that specification. You can view them in the library but cannot edit them from the library, as they are owned by the specification and can only be edited from that specification.

## Page-Level Functions

In the upper right corner of the page is a row of buttons that trigger actions that can affect the entire page. These buttons and their functions are:

- ❑ **Edit**—Place the entire page in edit mode so that you can modify it.
- ❑ **(Report)**—Depending on the configuration of your Agile PLM for Process installation, this button may or may not appear (on certain specifications). Click **Report** to launch the Reporting application.
- ❑ **Create Copy**—Create a new copy of the current testing protocol. For discussion of this commonly used function, please see [Creating a New Specification](#) on page 2-1.
- ❑ **Validate**—Validates the testing protocol to ensure that key data has been entered correctly.

## Testing Protocol Detail

In the testing protocol you can define and categorize quality attributes to measure and the scoring method to use in evaluating the results. You can access the testing protocol library from the GSM left navigation panel, near the bottom.

### Testing Protocol (Header) Section

This section captures information pertaining to the testing protocol such as name, description, and status. The Status field controls whether or not you can use the protocol on specifications. The only testing protocols that you can add to a specification are those with a status of “active.”

Figure 18-1: Testing Protocol (Header) section

The screenshot displays the 'Testing Protocol' header section. It includes the following fields and values:

- Protocol #:** 0000091
- Protocol Name:** Smoke Flavoring - 20061113 adding information
- Description:** hickory 658-a
- Status:** Inactive (dropdown menu)
- Scope:** Global
- Originator:** Foodscientist, Joseph
- Created:** 11/13/2006
- Edited:** 1/30/2007

There are globe icons next to the Protocol Name and Description fields, indicating they are searchable or filterable.

## Facility Information Section

In this section you can specify a set of facilities that you intend for this protocol to test.



Figure 18-2: Facility Information section

Facility Information				
	Facility Name	Country	Business Unit(s)	
	Asia Vendor Facility	Thailand	Vendors - Asia	
	Bacon Facility	USA	Acme Facilities - North America	
<a href="#">Add New</a>				

## Sections Section

In this section you can define a section for your protocol in which to group testing attributes for scoring. You can apply a scoring method and weight to each section to describe how GSM scores these attributes in the testing system.



Figure 18-3: Sections section

Sections				
	Section Name	Section Description	Section Weight	Scoring Method
	Manager Review	section 1 description	12	Lowest Score
	Executive Review	section 2 description	15	Simple Average
<a href="#">Add New</a>				

## Extended Attributes Section

Extended attributes define important features and characteristics of the testing protocol. You can build these attributes to meet specific needs, as shown in the figure below.

Figure 18-4: Extended Attributes section











Extended Attributes				
	Extended Attributes		Notes	
	RGS calc Ln D0	mm		
	Calc Ms to Vol	ratio		
	Calc Twice NmVolD2	mL		
<a href="#">Add New</a>				

## Testing Protocol (Detail) Section

In this section you can define which properties of the specification to test in this protocol and the details around the definition and scoring of the tests. You can add a number of extended attributes and define the testing parameters for each.

To edit any data in this table, click **Edit** at the upper right of the page. GSM reloads the page in editable form and displays an edit icon (✎) to the left of each editable row in the table. In the row to edit, click the edit icon. GSM reloads the page, displaying the row in editable mode (with a yellow background), including the apply changes icon (✓), the undo icon (↶), the delete icon (✕), and an add data icon (+) in the Property Description, Scoring, and Protocol ID columns, as shown in figure 18-5, below.

Figure 18-5: Testing Protocol (Detail) section

Testing Protocol																							
	ID	Property Description	Specification Limits	Scoring	Test Used	Protocol ID																	
	1	<u>Cooling - After Processing - Internal Temperature</u> Material Characteristics  Section: Temperature		Qualitative <table><tr><th>If Measure</th><th>Score =</th></tr><tr><td>20 degrees</td><td>6</td></tr><tr><td>30 degrees</td><td>5</td></tr><tr><td>32 degrees</td><td>4</td></tr><tr><td>33 degrees</td><td>3</td></tr><tr><td>35 degrees</td><td>2</td></tr><tr><td>39 degrees</td><td>1</td></tr><tr><td>41 degrees</td><td>0</td></tr></table> Weight: 10 NC: <=3 <div>Observations: 1. cold 4. moist 5. dry 3. cool 6. warm 2. hot</div>	If Measure	Score =	20 degrees	6	30 degrees	5	32 degrees	4	33 degrees	3	35 degrees	2	39 degrees	1	41 degrees	0	I-571	A 1 in every 5 B 1 in every 10 C 1 in every 100 U 1 in every 1000 X 1 in every 100000	
If Measure	Score =																						
20 degrees	6																						
30 degrees	5																						
32 degrees	4																						
33 degrees	3																						
35 degrees	2																						
39 degrees	1																						
41 degrees	0																						
 	2	<div> <u>Delivery Temperature</u> Material Characteristics  Section: Temperature <div>Temperature ▼</div></div>	<div><div></div><div></div></div>	<div> Qualitative <table><tr><th>If Measure</th><th>Score =</th></tr><tr><td>Frozen Solid</td><td>6</td></tr><tr><td>Semi-Frozen</td><td>5</td></tr><tr><td>Slushy</td><td>4</td></tr><tr><td>Melted</td><td>3</td></tr><tr><td>Tepid</td><td>2</td></tr><tr><td>Warm</td><td>1</td></tr><tr><td>Hot</td><td>0</td></tr></table>Weight: 80 NC: &lt;=3 <div>Observations:</div></div>	If Measure	Score =	Frozen Solid	6	Semi-Frozen	5	Slushy	4	Melted	3	Tepid	2	Warm	1	Hot	0	<div><div></div><div></div></div>	<div> B 1 in every 3</div>	<div></div>
If Measure	Score =																						
Frozen Solid	6																						
Semi-Frozen	5																						
Slushy	4																						
Melted	3																						
Tepid	2																						
Warm	1																						
Hot	0																						
	3	<u>Temperature - Bulk</u>		Qualitative		X1 in every																	



Key fields include:

**Property Description/Section**—Click the add data icon (+) to open a search form with which you can select a different property description. From the Section drop-down list, choose a section defined above to categorize which section this testing item belongs to.

**Specification Limits**—Define target, upper, and lower bounds for this test as well as a unit of measure.

**Scoring**—Set up the scoring for the item in this subsection. This field defines how to score this item in the testing system. Click the add data icon (+) in this column to open the Scoring dialog box, from which you can make your selections, as shown in figure 18-6 below.

Figure 18-6: Scoring dialog box

**Scoring** [Done] [Cancel]

**Testing Protocol Analytical Property**

**Property Name:** Acid Strength  
**Property Classification:** Chemical - Acid Content  
**Section:** section 1  
**Record As:** Qualitative  
**Scoring Weight:** 10  
**Non-Conformance:** <= 0

**Scoring**

If Measure	Score =
< 0	0
1	1
2	2
calculated sequentially (poor) 0 - 6 (excellent)	

[Add New]

**Observations**

Description

[Add New]

If you intend to use the testing protocol in PQS, then select “Qualitative” from the Record As drop-down list, as shown in figure 18-7, below.

Figure 18-7: Record As drop-down list

**Testing Protocol Analytical Property**

**Property Name:** Invert Sugar % (Dextrose and Fructose)

**Property Classification:** Chemical - Carbohydrates

**Section:** Manager Review

**Record As:** Qualitative

**Scoring Weight:**

**Non-Conformance:**

(For more information of PQS, please see the *Agile Product Lifecycle Management for Process Product Quality Scorecard User Guide*.) If you have the applicable administrative permissions, you can create observations that enable scorers to comment based on an administered list of options, as shown in figure 18-8, below.

Figure 18-8: Scoring column with data

**Scoring**

+ Qualitative

If Measure	Score =
bad	0
acceptable	3
great	6

**Weight:** 10

**NC:** <=0

**Observations:**

Does it taste good

**Protocol ID**—Describes how frequently to perform this test. Click the add data icon (+) in this column to display a dialog box in which to input test frequencies, as shown in figure 18-9, below. Use the apply changes icon (✓) to confirm new additions, and click **Done** in the upper right of the dialog box to close it and display your additions in the table.

Figure 18-9: Setting Protocol IDs and frequency

**Protocol IDs and Frequency**

Protocol ID	Frequency
buoyancy 7	1 in every 55
Shape - 110	1 in every 110
	1 in every

**Add New**

## Print Administration

---

*This chapter presents an overview of the capabilities of Global Specification Management regarding print administration.*

*Topics in this chapter include:*

- ❑ *Print Administration Page*
  - ❑ *Process Spec Print Model Page*
  - ❑ *Worksheet Identification Section*
  - ❑ *Worksheet Configuration Section*
- 

### Print Administration Page

When you select **Print Administration** from the Global Specification Management (GSM) menu, the Process Spec Print Model Search page displays. To create a new print model, click **Create New**. The Process Spec Print Model page displays.

### Process Spec Print Model Page

This page consists of two sections:

- Worksheet Identification
- Worksheet Configuration

## Worksheet Identification Section

The Worksheet Identification section contains the key data identifying a factory floor worksheet.

Figure 19-1: Worksheet Identification section

**Worksheet Identification**

**Worksheet Title:**

**Author:** Johnson, Sally

**Date Created:** 9/14/2007

**For Use In Facility:**

	Facility Name	Company Name	Country
	ABC Facility	ABC Company	USA

Add New

Key fields include:







**Worksheet Title**—The worksheet title displays at the top of the printed worksheet. This is a required field.

**Facility Name**—Determines which factory floor worksheet appears in the process specification print menu. GSM matches the facility information on the process specification against the facility names defined here.

## Worksheet Configuration Section

The Worksheet Configuration section contains the data needed to configure a factory floor worksheet.

Figure 19-2: Worksheet Configuration section, Process Spec Print Model page

Worksheet Configuration			
<b>Worksheet Style:</b>	Integrated BOM And Instructions ▼		
<b>Header Section:</b>	<b>INCLUDE THIS AS MY HEADER</b>		
<b>Header Row(s):</b>	<table border="1"> <thead> <tr> <th>Row Label</th> </tr> </thead> <tbody> <tr> <td> Add This Header Row</td> </tr> </tbody> </table>	Row Label	 Add This Header Row
Row Label			
 Add This Header Row			
	<input type="button" value="Add New"/>		
<b>Columns To Display:</b>	<input checked="" type="checkbox"/> Step Number <input checked="" type="checkbox"/> Cross Reference <input checked="" type="checkbox"/> Step Name <input checked="" type="checkbox"/> Fill Quantity <input checked="" type="checkbox"/> Specification Name <input checked="" type="checkbox"/> Fill Quantity Multiples		
<b>Checkboxes:</b>	5 ▼		
<b>Show Total Quantity Row:</b>	<input checked="" type="checkbox"/> Yes		
<b>Footer Row(s):</b>	<table border="1"> <thead> <tr> <th>Row Label</th> </tr> </thead> <tbody> <tr> <td> Add this footer row</td> </tr> </tbody> </table>	Row Label	 Add this footer row
Row Label			
 Add this footer row			
	<input type="button" value="Add New"/>		
<b>Footer Section:</b>	CONFIDENTIAL BUSINESS INFORMATION - DO NOT DISSEMINATE		

All fields in this section are optional and define the contents of the factory floor worksheet.

Key fields include:

**Worksheet Style**—Selects the worksheet style for this factory floor worksheet definition, for example you can integrate the BOM with the instructions or place the BOM above the instructions.

**Header Section**—Enriched text field that displays at the top of the worksheet matrix and acts as an overall descriptor for the worksheet.

**Header Row(s)**—You can define one or more header rows for taking notes at the batch level.

**Columns to Display**—Defines the data to display on the worksheet.

**Check boxes**—Defines the number of columns to display on the worksheet.

**Show Total Quantity Row**—Adds a quantity total.

**Footer Row(s)**—Define one or more footer rows to allow for batch-level note taking.

**Footer Section**—Enriched text field that acts as an overall descriptor for the worksheet that is displayed at the bottom of the worksheet matrix.



# User Profiles

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*This chapter describes the purpose and use of the user profiles feature of Global Specification Management. Topics in this chapter include:*

- ❑ *Edit User Profile*
  - ❑ *Contact Information*
  - ❑ *Application Preferences*
- 

## Edit User Profile

Edit User Profile is where you edit or view your settings and preferences for Global Specification Management (GSM).

To access this page, click **Edit User Profile** at the bottom of the left navigation panel. GSM displays the User Preferences dialog box, as shown in figure 20-1, on page 20-2.

Figure 20-1: The Edit User Profile page

<b>First Name:</b>	<input type="text" value="Jack"/>
<b>Last Name:</b>	<input type="text" value="Smith"/>
<b>Job Title:</b>	<input type="text" value="Second Vice-President"/>
<b>Business Phone:</b>	<input type="text" value="555-555-5555"/>
<b>Fax:</b>	<input type="text" value="555-234-5678"/>
<b>Email:</b>	<input type="text" value="jack.smith@mycompany.com"/>
<b>Street Address:</b>	<input type="text" value="2100 Some Street"/> <input type="text"/>
<b>City:</b>	<input type="text" value="New York"/>
<b>State/Province:</b>	<input type="text" value="NY"/>
<b>Postal Code:</b>	<input type="text" value="11597"/>
<b>Country:</b>	<input type="text" value="USA"/>
<b><u>BU Filter:</u></b>	<div>Acme North America, Acme South America, Acme Europe</div>
<b><u>Group Filter:</u></b>	<div></div>
<b>Catalog(s) Visibility:</b>	<div>Divisions » Europe, Divisions » North America » US, Global » North America</div>
<b>UI Language:</b>	<input type="text" value="English (United States)"/>
<b>Free Text Language:</b>	<input type="text" value="ENGLISH"/>
<b>Select Bandwidth:</b>	<input type="text" value="Low Bandwidth"/>
<b>Show History:</b>	<input checked="" type="checkbox"/>
<b>SingleTrans Editing:</b>	<input checked="" type="checkbox"/>
<b>Show Hidden Specs:</b>	<input checked="" type="checkbox"/>
<b>Taxonomy Tab Is Default:</b>	<input type="checkbox"/>



## 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

**Note** You can access any of the free-text contact information fields through the **Profiles and Preferences** menu on the top menu bar.

## Application Preferences

Within GSM, you can set your GSM preferences using the following fields:

- **BU Filter**—Filter search results based on business unit (For more information, see [Business Unit Filter Field](#) on page 20-6.)
- **Group Filter**—Filter group-defined attributes such as allergens, intolerances, additives, and Complies With lists. (For more information, see [Group Filter Field](#) on page 20-6.)
- **Catalog(s) Visibility**—A read-only field that displays which DRL catalogs you have access to.
- **UI Language**—Denote your preferred language for the user interface, including such items as navigation, tab labels, attribute labels, and so on.
- **Free Text Language**—Denote your preferred language for data that you enter into the system.
- **Show History**—Show the specification title and history drop-down list, as shown in figure 20-2, below.

Figure 20-2: History drop-down list



- **SingleTrans Editing**—Close free-text editable fields after you have made a single translation (For more information, see [SingleTrans Editing Field](#) on page 20-8.)
- **Show Hidden Specs**—Show specifications tagged as “hidden”
- **Taxonomy Tab Is Default**—Set the Taxonomy tab as the default tab that displays when you go to a specification search page.

The above options appear on the Edit User Profile page, as shown in figure 20-3, below.

Figure 20-3: The GSM Edit User Profile page

Save Save & Close Document Cancel

**First Name:** Sally

**Last Name:** Johnson

**Job Title:** Director of Marketing

**Business Phone:** 555-123-4567

**Fax:** 555-123-5678

**Email:** sjohnson@hercompany.com

**Street Address:** 123 Elm St.

Suite # 100

**City:** New York

**State/Province:** NY

**Postal Code:** 11579

**Country:** USA

**BU Filter:** Acme Northern Europe, Acme North America, Acme Southern Europe

**Group Filter:** USA

**Catalog(s) Visibility:** Agile, Corporate, Divisions, Facility One, On Site Facilities, Supplier Portal » North America, V3, V3 -2, V5 - RGS, v5.0

**UI Language:** English (United States)

**Free Text Language:** ENGLISH

**Select Bandwidth:** Low Bandwidth

**Show History:** ☒

**SingleTrans Editing:** ☒

**Show Hidden Specs:** ☒

**Taxonomy Tab Is Default:** ☐

**Same fields as in Profile and Preferences (Basic Information screen)**

**These fields are different from those in Profile and Preferences**

Most of the fields on this page are self-explanatory. The following is a description of those that may need further discussion.

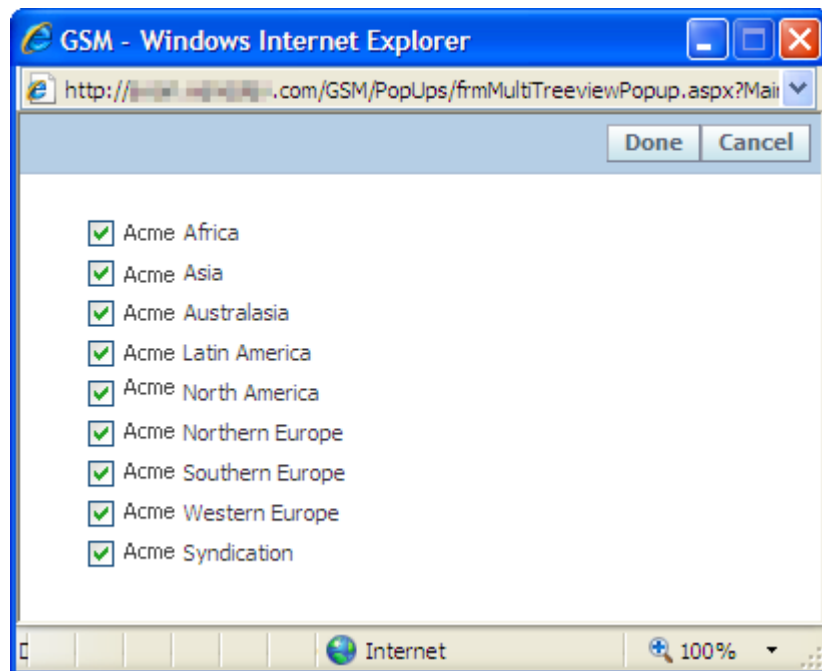
## Business Unit Filter Field

The **BU Filter** link opens a new screen with a list of the business units of your company.

### To add or remove business units with which you are associated:

- 1 Click the **BU Filter** link. A dialog box appears with a list of your company business units.

Figure 20-4: BU Filter dialog box



- 2 Check or clear any business units to create your preferred list.
- 3 Click **Done**. The dialog box closes, and your list of business units appears in the grayed-out BU Filter field of the Edit User Profile page.

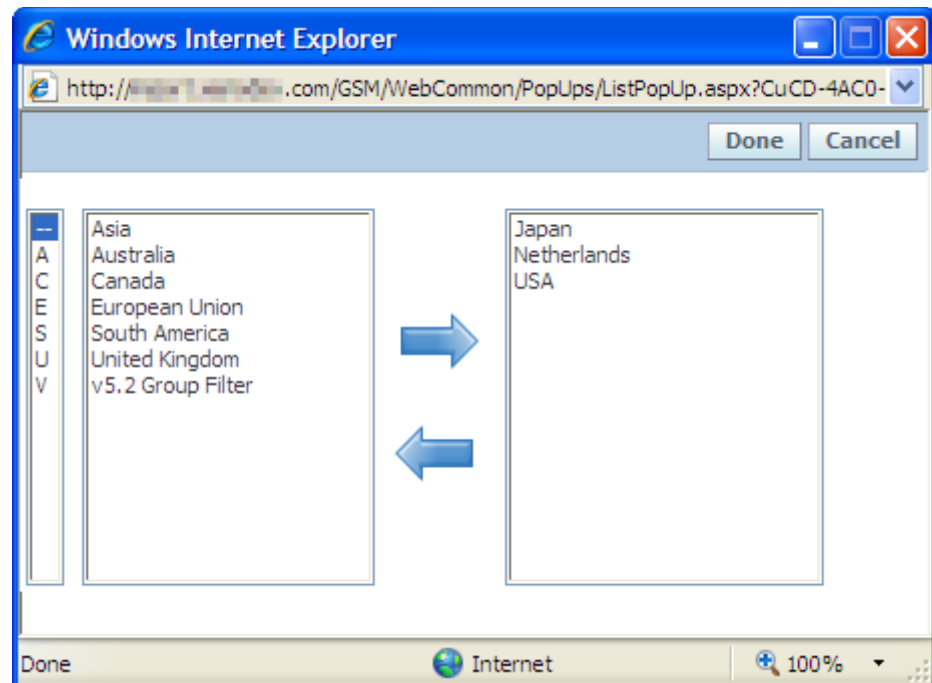
## Group Filter Field

Use the Group Filter field to set a relevant group filter for your user account. For example, if you always work out of the New York office, you might set for your account a filter that defaults to a geographic region such as the U.S. northeast.

**To add or remove groups:**

- 1 Click the **Group Filter** link. A dialog box appears that consists of three boxes and a list of your company groupings, as shown in figure 20-5 below.

Figure 20-5: Group Filter dialog box



- 2 If you want to filter groups alphabetically, click a letter in the first box on the left. The contents of the second box reload showing only those groups beginning with the letter that you selected.
- 3 To add a group, select it and then click the add selected data icon (➡). The selected group moves over to the box on the right.

---

**Note** This dialog box supports multiple select (Ctrl + mouse in Microsoft Windows™ operating systems).

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- 4 To remove one or more groups, select one or more groups in the box on the right and click the remove selected data icon (⬅). The selected group(s) move to the box on the left.
- 5 Click **Done**. The Group Filter dialog box closes, and your revised set of groups appears in the grayed-out Group Filter field in the Edit User Profile dialog box.

---

**Caution!** Even if there are groups that had already been added to the Group Filter field before you click the **Group Filter** link, the rightmost box in the Group Filter page displays as blank. If you open the Group Filter screen and click **Done** without making any changes, it will result in an empty Group Filter field in the Edit User Profile dialog box.

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## SingleTrans Editing Field

This feature causes free-text editable fields to close after you have made a single translation. SingleTrans editing is designed to be of help to users who routinely must translate fields.

Users who act as full-time translators, responsible for entering multiple translations or values for a given free-text item, may want to disable this feature.

# APPENDIX A

## Key Search Fields

*This appendix contains supplementary information about fields that are searchable within Global Specification Management.*

### □ Searchable Fields

## Searchable Fields

Table A-1 describes search fields whose meaning or use may not be self-explanatory.

Table A-1: Key field names of note in the search criteria key field list, described

Key field	Description
<b>Breakdown Component</b>	Search against the free text name of component, declared within the formulation percent breakdown
<b>Breakdown Component FIC Term</b>	Search against Food Item Catalog (FIC) terms that are declared within the formulation percent breakdown
<b>Breakdown Component Ingredient Specification</b>	Search against Ingredient Specifications that are declared within the formulation percent breakdown
<b>Breakdown Component COO</b>	Search against Country of Origin (COO) column declared within the formulation percent breakdown
<b>Breakdown Component FCL</b>	Search against Food Composition Library (FCL) terms that are declared within the formulation percent breakdown
<b>Breakdown Component Text</b>	Search against the free text name of component, declared within the formulation percent breakdown
<b>Combined Statement</b>	Search against the free-text combined statement used to declare materials in aggregation for labeling purposes.
<b>Concept (+Children)</b>	Search against the concept, including concepts that exist as a child in the hierarchy
<b>Concept (Exact Match)</b>	Search against the exact match of the concept
<b>Concept (Hierarchical)</b>	Search against the hierarchy (both up and down) that the concept exists in
<b>Equivalent</b>	Search against the equivalent number designed to identify the material as it is referenced by other cross reference systems
<b>GTIN/UPC/EAN</b>	Search against the Global Trade Item Number (GTIN) or European Article Number (EAN) or Universal Product Code (UPC) barcode number
<b>Menu Item Build</b>	Search against the Menu item specification or product specification listed in a menu item build
<b>Supplier signed spec</b>	Search against the flag on a sourcing approval that indicates has acknowledged a specification

Table A-1: Key field names of note in the search criteria key field list, described

Key field	Description
<b>System Equivalent</b>	Search against the equivalent number designed to identify the material as it is referenced by other cross reference systems
<b>Taxonomy</b>	Search against the specification category of a specification. You can also browse for specifications using specification categories in the Taxonomy tab.
<b>UDEX Classification</b>	Search against taxonomies used by UDEX Electronic Exchange.