Agile Product Lifecycle Management for Process

Getting Started Guide

Release 6.0.0.4.0

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Agile Product Lifecycle Management for Process, Release 6.0.0.4.0

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February 2012

Document Control

Change Record

Date	Author	Revision	Change Reference
Sept-07	Agile/Oracle	1.0	Initial release, Part No. TPPR-0055-5.1A
Feb-08	Oracle	2.0	Second release, Part No. E10997-01
Sept-09	Oracle	3.0	Third release, Part No. E12382-01
Feb-10	Oracle	4.0	Fourth release, Part No. E12382-01
Sept-10	Oracle	5.0	Fifth release, Part No. E18525-01
Aug-11	Oracle	6.0	Sixth release, Part No. E24908-01
Feb-12	Oracle	7.0	Seventh release, Part No. E24908-02

Contents

ABOUT THIS MANUAL

Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site: http://www.oracle.com/technetwork/documentation/agile-085940.html contains the latest versions of the Agile PLM for Process PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the Agile PLM for Process documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Reader™ version 7.0 or later. This program can be downloaded from the Adobe Web site: http://www.adobe.com/.

If you need additional assistance or information, please go to http://metalink.oracle.com or phone 1.800.233.1711 for assistance.

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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 Management for Process Administrator User Guide.*

Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

Where to Find Information

Consult the table below to find specific information from the relevant Agile Product Lifecycle Management for Process information source.

Table 1: Agile Product Lifecycle Management for Process documentation topics, by source

Information type	Getting Started Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile Product Lifecycle Management for Process		●		●		
Cache management		●				
Core data management		●				
Custom data management		●				
Feature requests					●	●
Group management		●				
Installing Agile Product Lifecycle Management for Process				●		●
Known issues			●			
Last-minute changes			●			
Profiles and preferences	●					
Resolved issues			●			
Searching for data	●					
System-based roles		●				

Table 1: Agile Product Lifecycle Management for Process documentation topics, by source (continued)

Information type	Getting Started Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Technical support					●	
Understanding the user interface	●					
Using Agile Product Lifecycle Management for Process	●			●		

Document Conventions

The following formatting elements appear in Agile Product Lifecycle Management for Process documentation.

Element	Meaning
Helvetica Condensed, 9 pt. bold type	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
Blue italic font	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.
Note Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
Caution! Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
Important Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.

CHAPTER 1

Using Agile Product Lifecycle Management for Process

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

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

Overview

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

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

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

Agile Product Lifecycle Management for Process Applications

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

Table 1-1: Agile Product Lifecycle Management for Process applications

Application	Description
Product Data Management Applications	
Global Specification Management (GSM)	Captures the entire product genealogy from ingredients and packaging to finished products, in multiple languages and cultures.
Supply Chain Relationship Management (SCRM)	Enables technical, quality, and sourcing approval management of suppliers, companies, and facilities.
Reporting (RPT)	Provides reporting capabilities on products and suppliers, based on user-defined criteria and reporting templates.
Content Synchronization and Syndication (CSS)	Enables data synchronization to other internal systems and external trading partners and data pools.
Document Reference Library (DRL)	Provides a central location for storing, cataloging, and publishing documents used in the solution. These documents can be exposed to internal users or external users via the Supplier Portal.
Formulation and Compliance Applications	
Computer Aided Compliance Screening (CACS)	Provides the ability to analyze and screen products through rules and regulations to ensure their compliance with customer, market, and regulatory constraints.
Product Quality Scorecard (PQS)	Allows management of samples and scorecards to ensure that raw materials and finished goods are conforming to specification.
Nutrition Surveillance Management (NSM)	Enables users to capture and manage nutrition surveillance results and compare results to nutrition data at the specification level.
Listed Ingredient Ordering	Provides the ability to create complex ingredient statements for formulation outputs.
Formula Optimization	Allows users to run the linear optimization engine to find the optimal output formulation based on user-defined objectives and constraints.
Label Claims Determination	Provides the ability to interrogate a specification for claims applicability based on a centralized rule base.
Product Supplier Collaboration Applications	
eQuestionnaire (eQ)	Provides users with a tool to obtain specification data from suppliers and manage their disposition in GSM.

Table 1-1: Agile Product Lifecycle Management for Process applications (continued)

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

Understanding the User Interface

When you first log in, the Agile Product Lifecycle Management for Process application displays in an Internet Explorer screen. **The following Internet Explorer actions are unsupported:**

- Using multiple tabs and/or windows as part of the same session.
- Using the browser's back button for navigation. Always use in-application navigation.
- Using the browser's Close icon () for closing application dialog boxes. Always use the application **Done** or **Cancel** button to properly close a dialog box.

Resizing the Screen

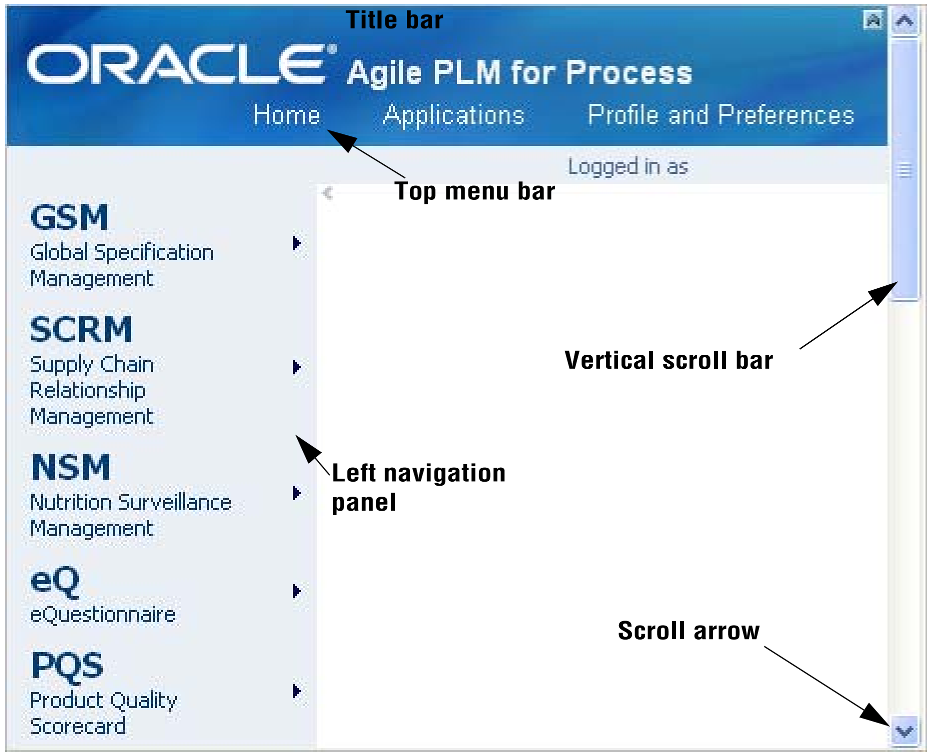
You can view the application in full screen mode by pressing the **F11** key. Depending on your settings, this action hides the toolbars and options at the top of the screen, while keeping the standard buttons displayed. Press **F11** again to restore the screen to the original size.

Note The internet browser back and refresh buttons are typically used for static websites. Agile Product Lifecycle Management for Process uses dynamic web pages and session-based information thus making the back and refresh buttons not supported.

Navigating the Page

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

Figure 1-1: Home page

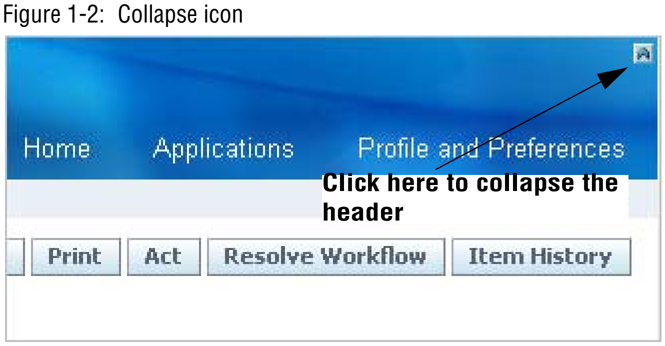


Refer to *Defining Your Profile and Preferences* on page 1-34 for more information on managing your profile and preferences.

Collapsing and Expanding the Header

To collapse the header area at the top of the screen, click the collapse icon ( ), shown in figure 1-2 below. Click it again to expand the header area.

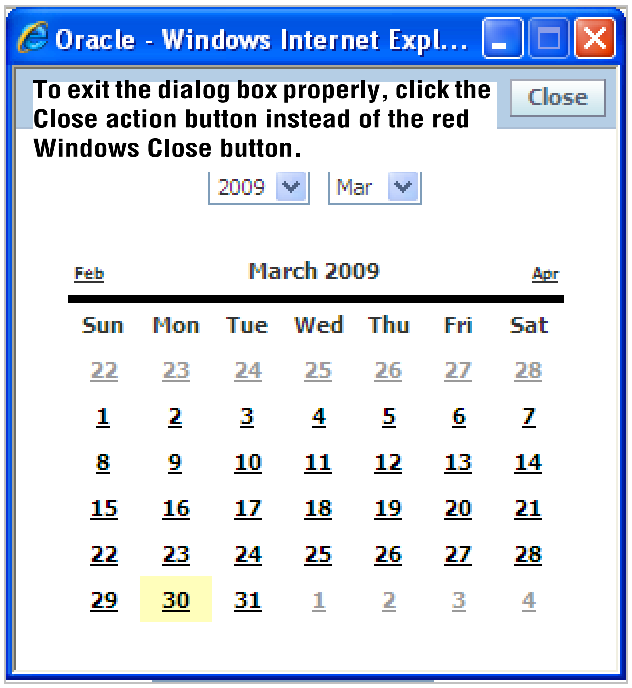
Figure 1-2: Collapse icon



Working with Dialog Boxes

Dialog boxes, as shown in figure 1-3 below, are commonly used throughout Agile PLM for Process applications. Dialog boxes appear when the user takes action, such as selecting a link, clicking an action button, or clicking an icon, from a main page. Dialog boxes contain action buttons and other options through which users can carry out a particular command or task.

Figure 1-3: Dialog box



Note Be sure to use the action buttons, such as **Done** or **Cancel**, when you have completed your actions in a dialog box. If you click the **System Window Close** icon ( ) instead of the action buttons within the dialog box, unexpected results may occur. See *Buttons, Tabs, and Sections* on page 1-9 for more information on action buttons.

Accessing an Application

From the portal Home page, you can access an application and its features using the left navigation panel or the Applications choice on the top menu bar. The left navigation panel, shown in figure 1-4 below, is only available from the main portal page.

Figure 1-4: Main portal page, left navigation panel, GSM application, submenu options

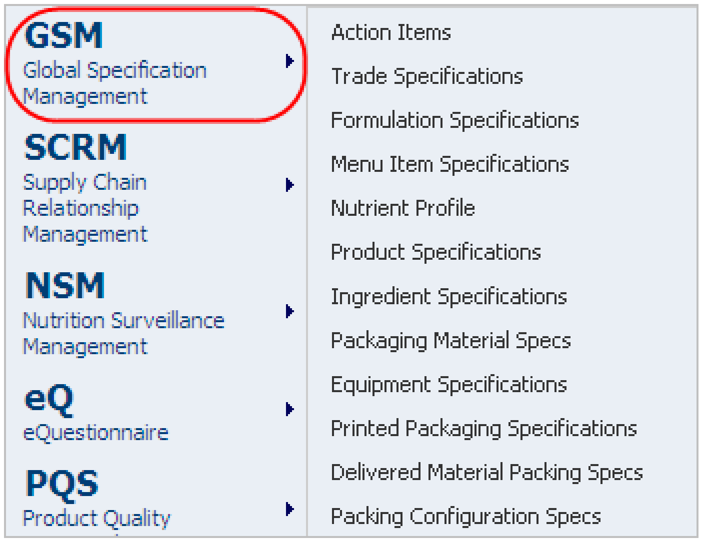
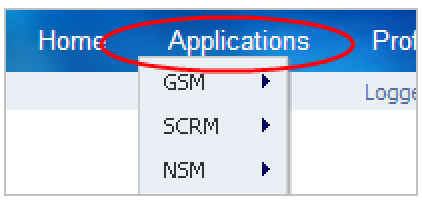


Figure 1-5 below shows the Applications menu.

Figure 1-5: Top menu bar, Applications menu



Hiding Portal Navigation

From the portal Home page, you can hide the left navigation panel by clicking the hide navigation panel icon ( ), shown in figure 1-6 below. Click it again to show the navigation panel.

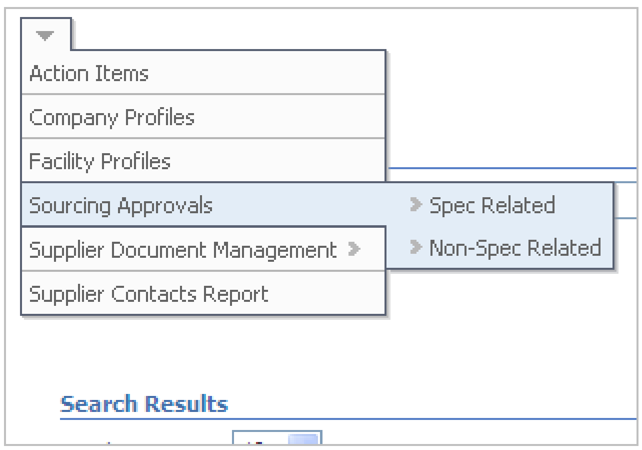
Figure 1-6: Hide navigation panel icon

Navigating Inside an Application

You will find navigation within each application. To access the navigation, click on the application navigation icon ( ) shown in figure 1-7. This icon is located below the header. A menu will appear with all of the navigation options for that application. Some navigation elements contain submenus, represented by the expand icon ( ). Figure 1-8 below shows an example of a submenu in SCRM.

Figure 1-7: Application navigation Icon

Figure 1-8: SCRM submenu



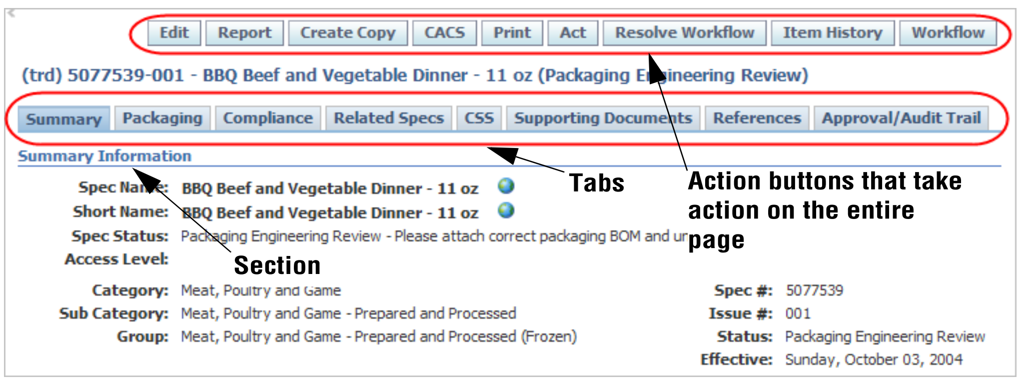
Working with a Page

When you select a menu option, often the first page you see is a basic search page. Refer to *Understanding the Search Page* on page 1-18 for more information on performing searches.

Buttons, Tabs, and Sections

Once you have selected an item to work with, such as a trade specification, the page consists of several elements that are common across all applications, as figure 1-9 shows below.

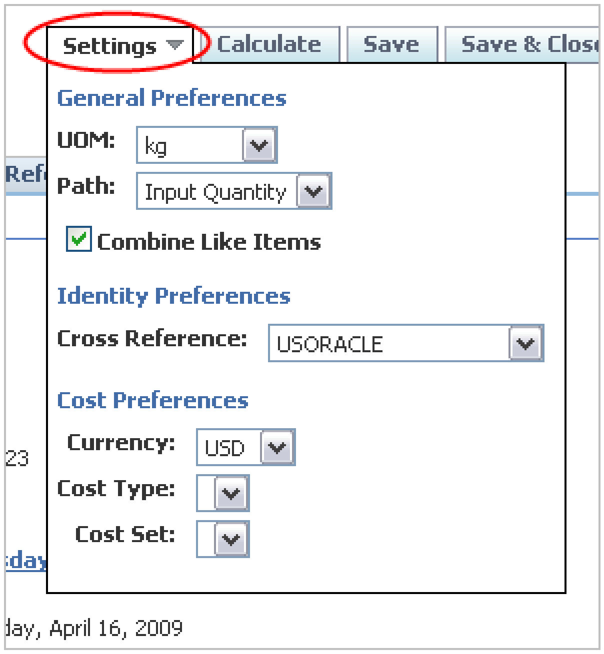
Figure 1-9: Tabs, buttons, linked fields



- **Action Buttons**—Use buttons in the upper right corner of the page to take actions that affect the entire page, such as save, edit, and create new. The buttons that are displayed vary based on such things as your assigned role and permissions and the current state of the item. See *Buttons Within a Page* on page 1-12 for information on buttons used within the page.

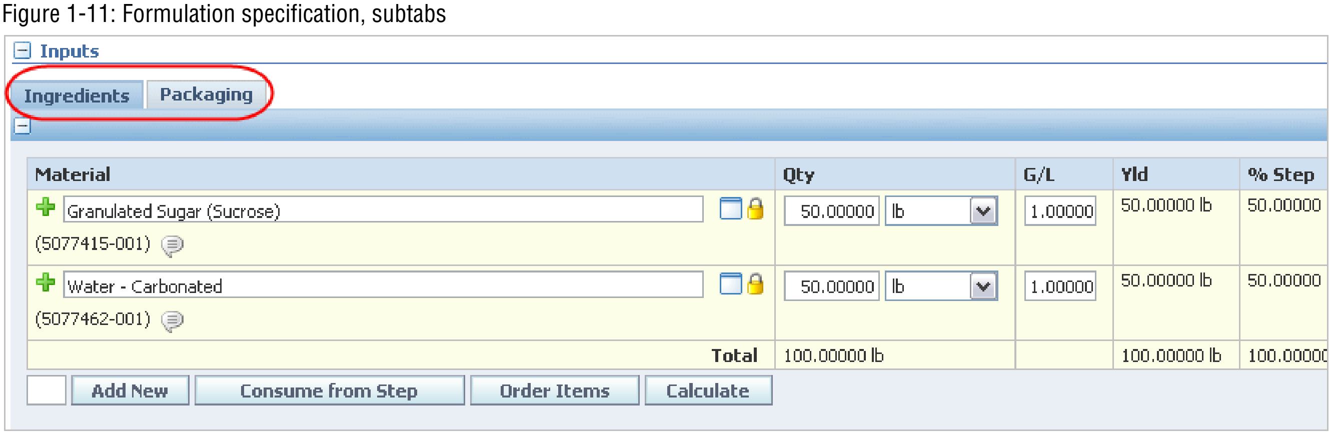
  Some action buttons display panels. Those action buttons contain an arrow ( ) to the right of the button name. When you click on this button, a panel will appear, as figure 1-10 shows below.

Figure 1-10: Formulation Settings action button



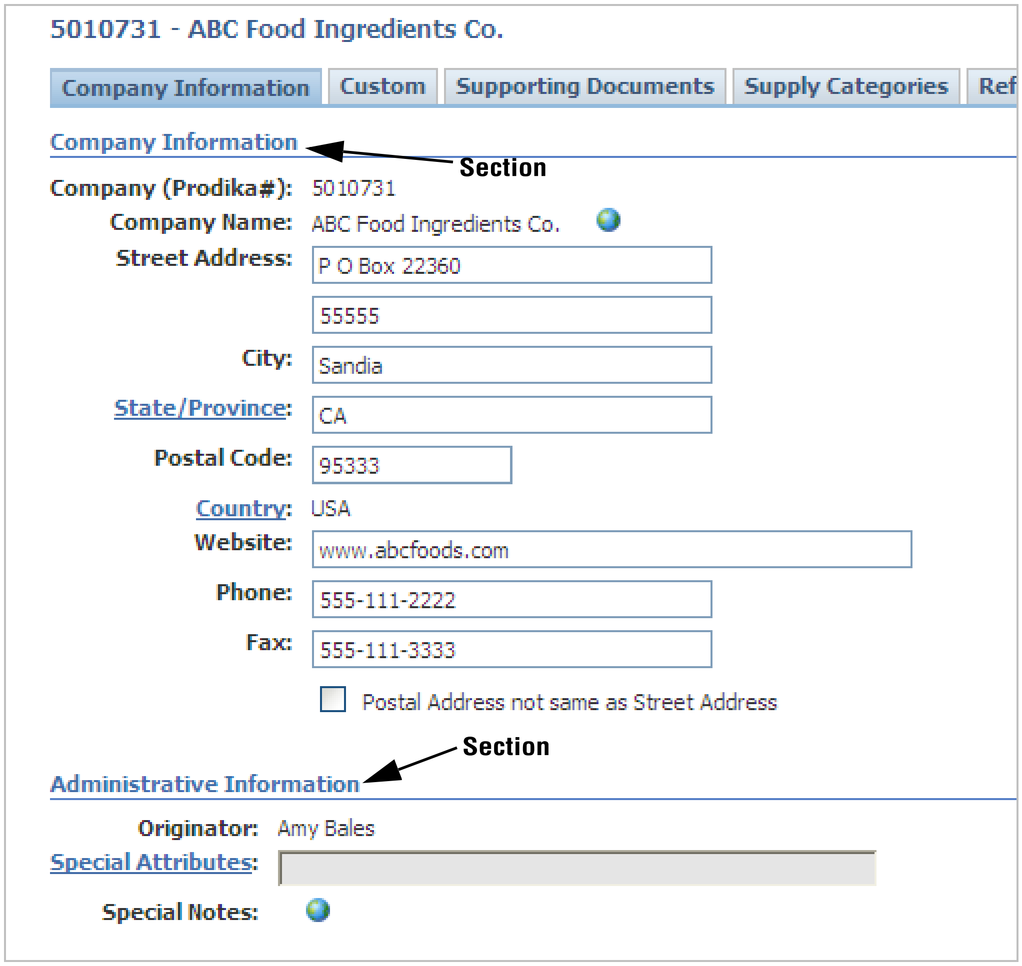
- **Tabs**—The tabs represent logical groupings of data for the item you are working with. Click a tab to work with data on that page. The tabs that are displayed vary based on such things as your company's installed applications and the current state of the item that you are working with. Inline tabs have been introduced with formulation specifications.
- **Subtabs**—Some GSM specifications contain tabs within a page. These tabs divide the page content into more usable sections, as figure 1-11 shows below.

Figure 1-11: Formulation specification, subtabs



- **Sections**—Each page consists of sections, which group related information. Figure 1-12 below shows two sections on a page.

Figure 1-12: Sections within a page

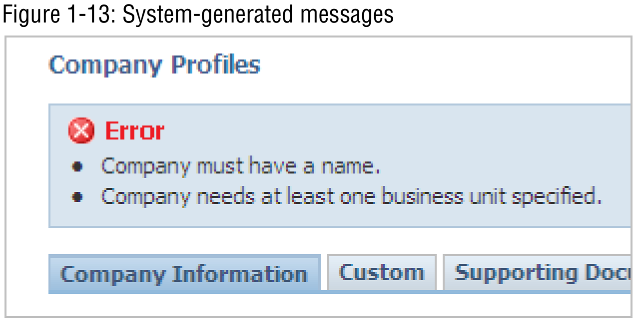


System-Generated Messages

System generated messages appear either at the top of the page, as figure 1-13 shows below, or at the top of a section. Messages are defined as follows:

- Errors—Corrections must be made before the user can save the data entered.
- Warnings, Informations, and Notifications—Messages that may be important to the user.

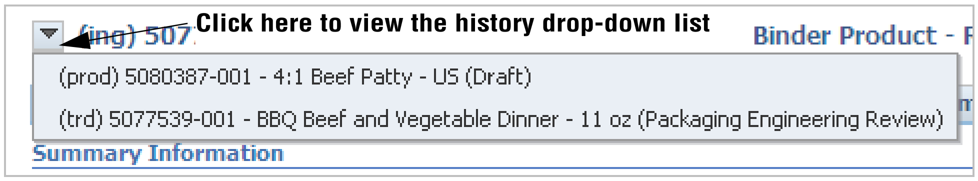
Figure 1-13: System-generated messages



History Drop-Down Menu

The history drop-down menu is only supported for Global Specification Management (GSM) specifications and activities. You can display the history drop-down menu by selecting **Show History** in your User Profile, as described in *Settings Section* on page 1-35. Click it to view a list of recently viewed specifications or activities, as figure 1-14 shows below. You can click any item in the list to return to it.

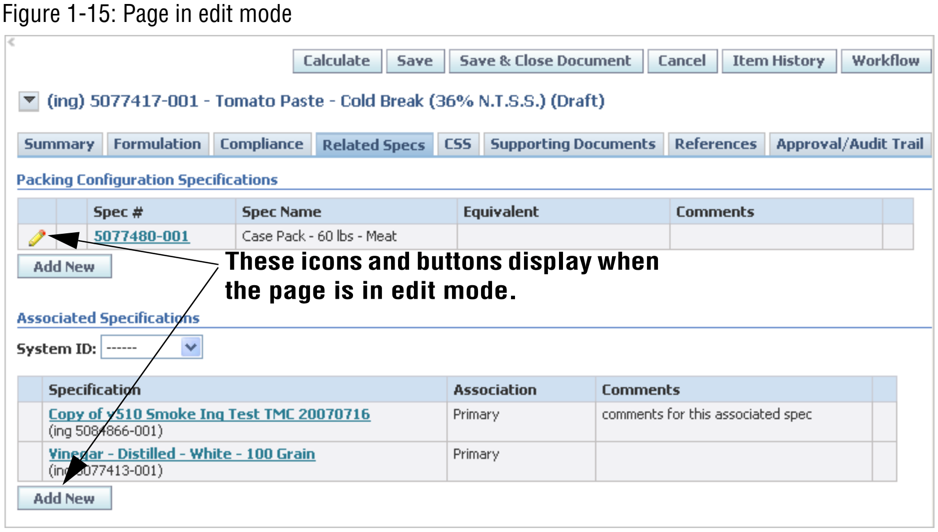
Figure 1-14: GSM history drop-down list



Buttons Within a Page

When you click **Edit** at the top right corner of a page, the page redisplays in edit mode. Note that the action buttons change, and additional buttons and icons may display on the page. Use these additional buttons to perform tasks in the appropriate section. Figure 1-15 below shows the Related Specs tab of an ingredient specification in edit mode. Note that the **Edit** action button has been replaced by the **Save** and **Save & Close Document** buttons. Within the page, the **Add New** button displays below tables, indicating that you can add information, and the edit icon ( ) displays to the left of rows that you can edit. For more information on modifying data in a table, see *Tables* on page 1-14.

Figure 1-15: Page in edit mode



Some specifications do not rely on the edit icon ( ) for edits. Those specifications contain "Edit All" grids, as shown in figure 1-16 below.

Figure 1-16: Formulation specification, Formulation tab in edit mode

Inputs

Step	Material	Qty	G/L	Yld	% Batch	USD/100g	EXT Cost
1	Water - Carbonated (5077462-001)	10.00000 kg	1.00000	10.00000 kg	66.66667	0.00000	0.00000
1	Sugar - Granulated (5077505-001)	3.00000 kg	1.00000	3.00000 kg	20.00000	0.00000	0.00000
1	Lemon Juice - Single Strength (5077421-001)	2.00000 kg	1.00000	2.00000 kg	13.33333	0.00000	0.00000
		15.00000 kg		15.00000 kg	100.00000		0.00000

Add New Calculate

Tables

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

Users can edit most table rows using the edit icon, as described below.

To edit a table row:

1. Click **Edit**. The page redisplays in edit mode.
2. Click the edit icon ( ) in the row that you want to modify. Additional icons indicate that the row is in edit mode, as figure 1-17 shows below.

Figure 1-17: Row in edit mode

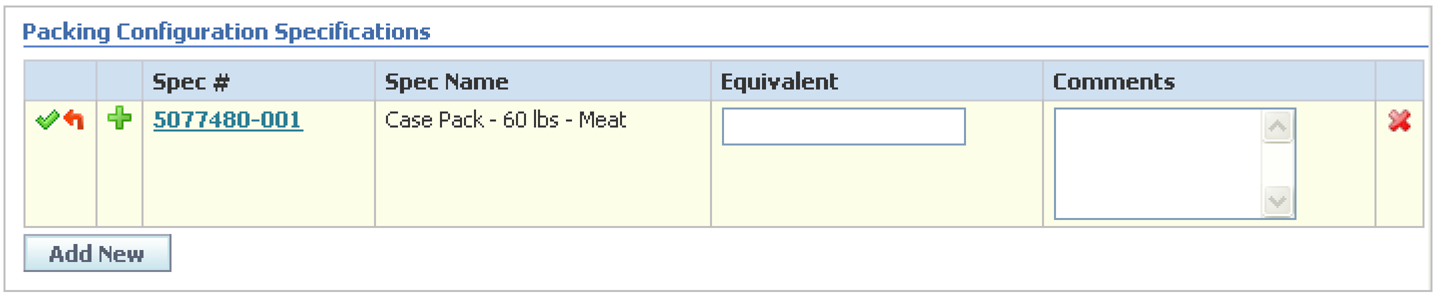


Table 1-2 defines icons that are commonly used in tables:

Table 1-2: Common icons

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

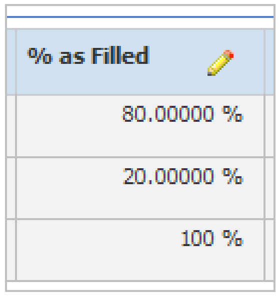
3. Enter data in the appropriate fields and click the apply changes icon ( ) to save changes, or use the other icons listed above to make modifications.
4. Click **Save** at the top of the page.

To add a table row:

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

On some tables, you can also edit columns by clicking the edit icon ( ) displayed in the column heading, as figure 1-18 shows below. Agile PLM for Process displays each field in the column in editable mode.

Figure 1-18: Edit icon in column heading



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

Selection Lists

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

Figure 1-19: Dialog box showing radio buttons (single selection)

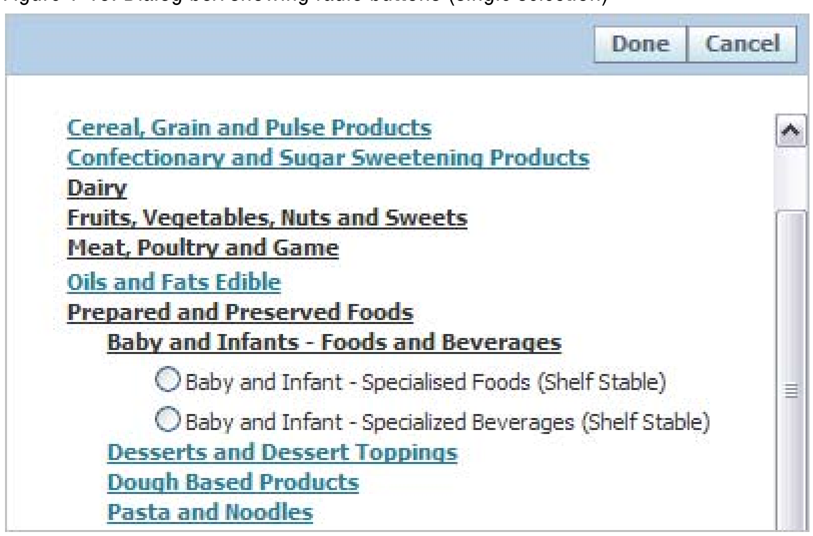
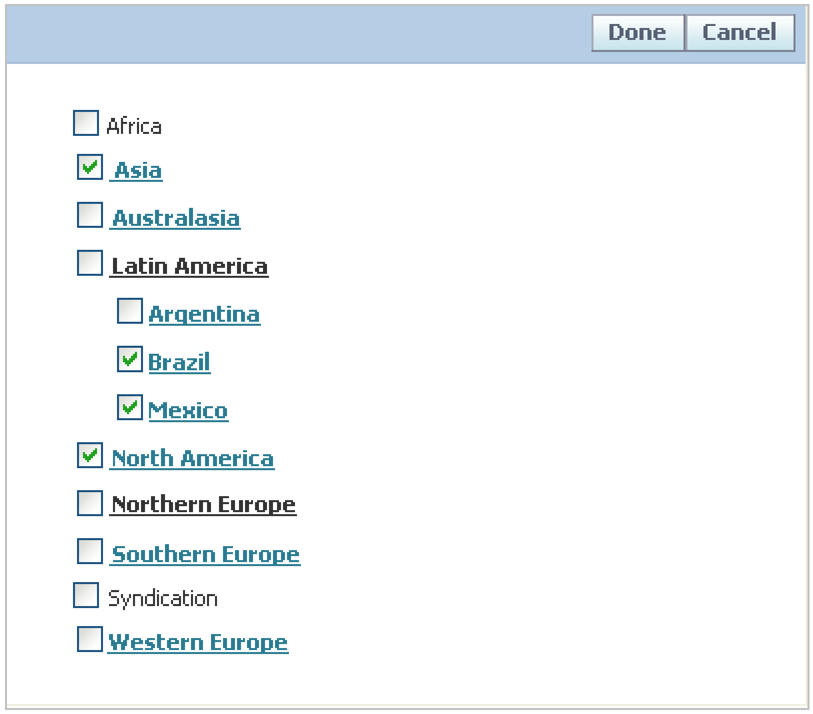


Figure 1-20: Dialog box showing check boxes (multiple selections)

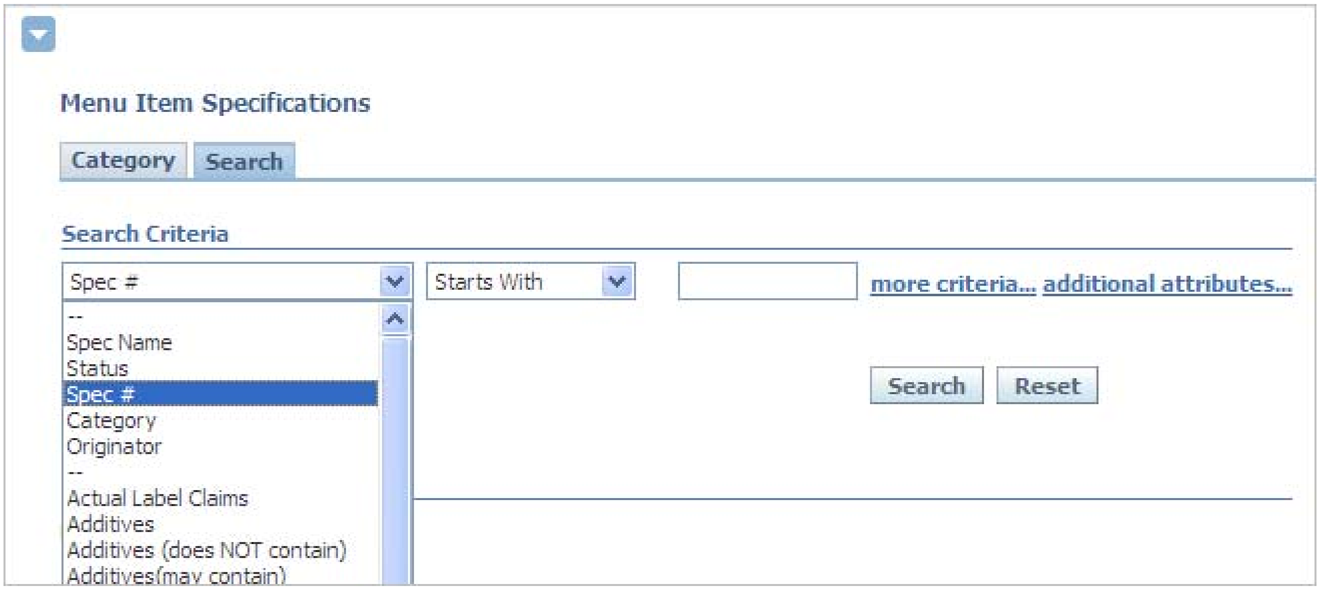


Keystroke Shortcuts

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

For example, the menu item specification search page shows “Spec Name” as the default search criteria in the key field. If you would like to search by “Spec #”, click the field, then press the **S** key two times to get to that option, as figure 1-21 shows below. You can then press the **Tab** key to move to the next field. You can also use the arrow keys to scroll through options in drop-down lists.

Figure 1-21: Spec # selected using keystroke shortcut



Finding Data

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

- Searching
- Browsing by category

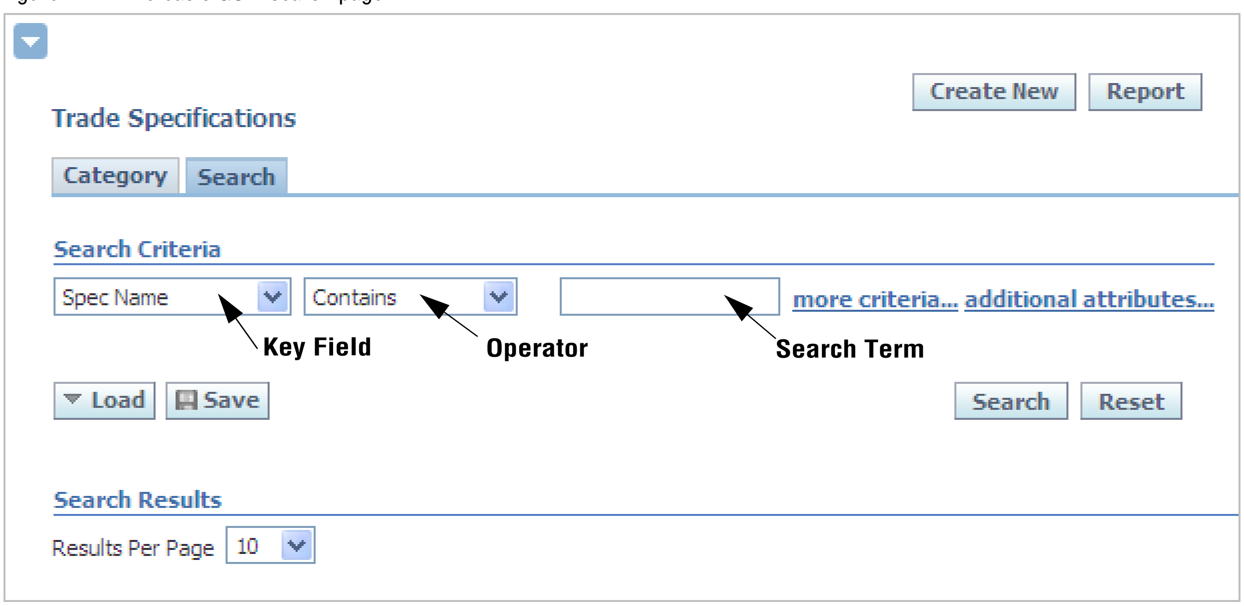
This section explores the first method. For guidance on using the browsing method, see *Understanding the Category Tab* on page 1-32.

Understanding the Search Page

The initial screen in most applications of Agile Product Lifecycle Management for Process consists of a search page. The search page, featuring the Entity Query Tool (EQT), has a basic structure but can vary greatly based on application or other factors. See figure 1-22 for an illustration of the basic search page.

Note Search results depend on visibility and security settings. For more information on visibility, refer to Chapter 6, "Using WFA to Manage GSM Workflows" of the *Agile Product Lifecycle Management for Process Administrator User Guide*. For information on security settings, refer to Chapter 11, "Implementing Security" of the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Figure 1-22: The basic GSM search page



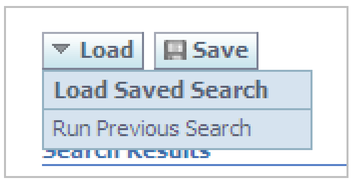
The search page resides on the Search tab, one of two tabs on most initial screens, the other being Category (see *Understanding the Category Tab* on page 1-32). To find a specification using the search page, set search criteria using a combination of three basic fields in the Search Criteria section. As shown in figure 1-22, these fields are:

- Key field
- Operator
- Search term

The main search page includes the following buttons, as shown in figure 1-22:

Load—Loads a saved search and allows you to run your last search. Figure 1-23 below shows these options. For more information on running a saved search, see *To retrieve a saved search:* on page 1-29.

Figure 1-23: Load menu



Save—Saves search criteria in a reusable library. Use this option if you use certain search criteria often (see *Saving Search Criteria* on page 1-28).

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

Reset—Clears all search criteria fields and results.

In most search pages, the first two search criteria fields contain a default value. In the case of a trade specification, "Spec Name" (as shown in figure 1-22, on page 1-18) is the default value.

Search Field Definitions

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

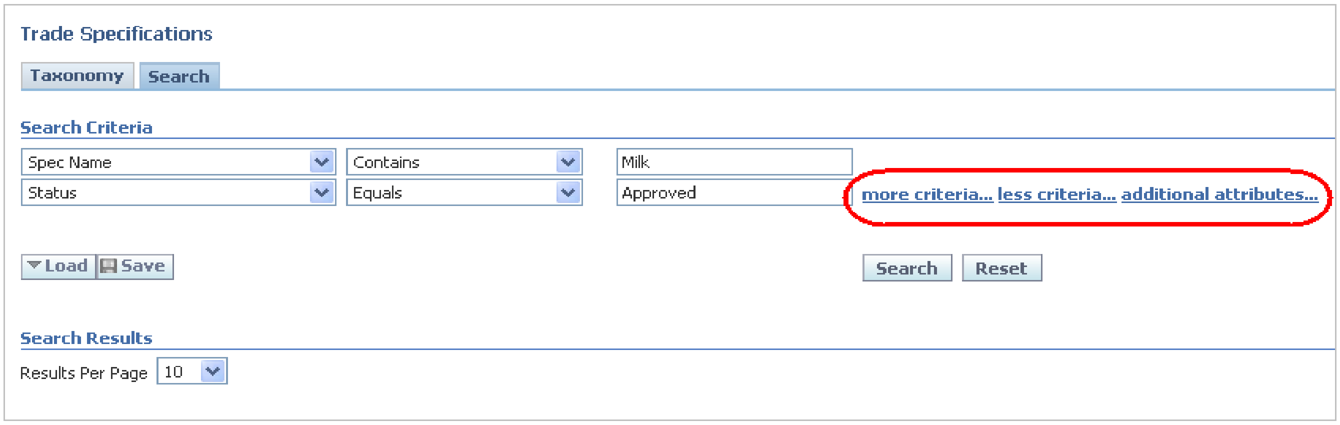
Table 1-3: Fields on the main search page

Field	Description
Key field list	Select from a list of fields to search in. This list varies based on the application menu search option that you chose.
Operator	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.
Search term	The actual word or words that you are looking for. If this field is preceded by an add data icon ( ), click it to view a dialog box with available choices. You can also enter a percent sign (%) to perform a wildcard search on a single character.
Results per page	Sets the number of search results to display at one time.

Action Links

In addition to the basic entry fields on the search page—key field list, operator, and search term— three action links may appear, as shown in figure 1-24. Like other linked fields, action links perform an action.

Figure 1-24: Additional action links on the main search page



More Criteria

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

Less Criteria

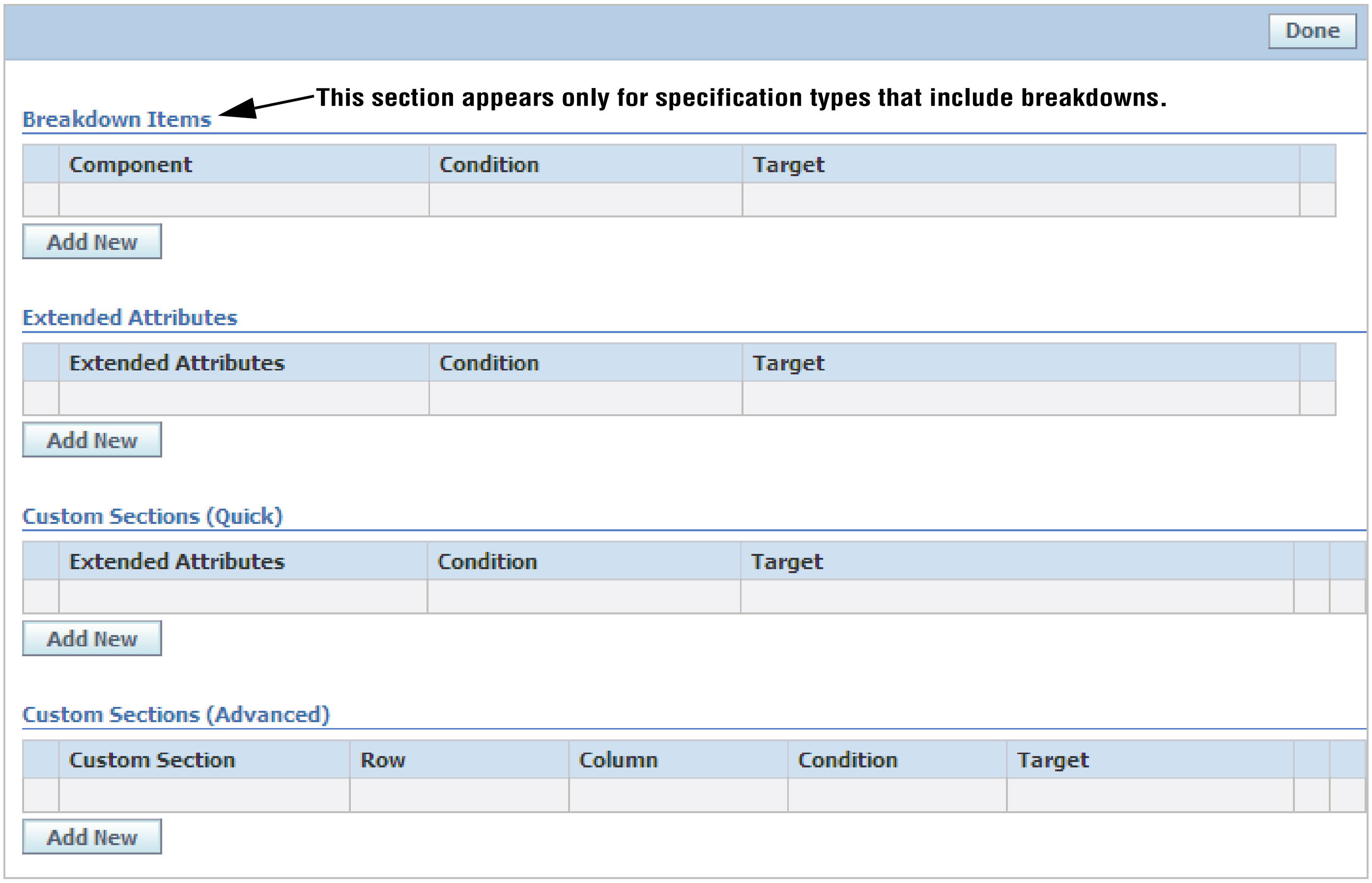
This link appears when additional search rows are added using the **more criteria** link. Click **less criteria** to remove each added row.

Additional Attributes

Where available, a third action link, **additional attributes**, opens the additional attributes dialog box, allowing you to search for three types of additional data:

1. Custom data—Search for custom data using three sections: Extended Attributes, Custom Sections (Quick), and Custom Sections (Advanced).
2. Breakdown items—The dialog box includes the Breakdown Items section for trade, product, and ingredient specifications.
3. Formulation inputs—The dialog box includes the Formulation Inputs section for formulation specifications.

Figure 1-25: The additional attributes dialog box



Searching Custom Data

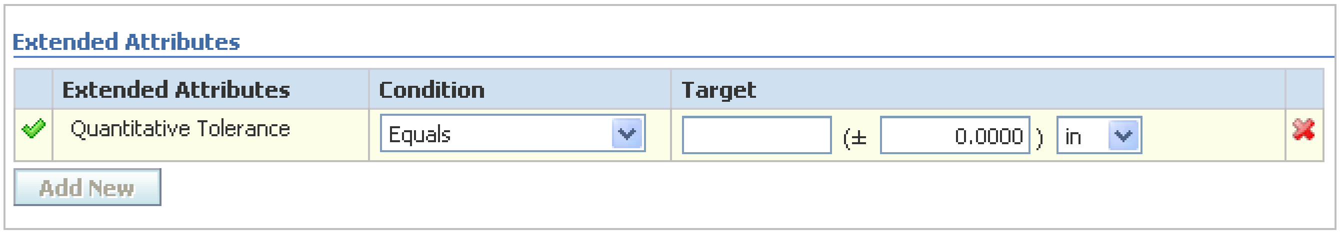
Extended Attributes

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

To search for extended attribute values:

1. In the Extended Attributes section, click **Add New.** A multiple-select popup window appears.
2. Select the extended attribute you want to search for, then click **Done**. Your selections display in the Extended Attributes table.
3. Click the edit icon ( ), shown in figure 1-26, to display the row in edit mode and further define the attribute you added. The target fields vary based on the extended attribute selected.

Figure 1-26: Defining the attribute



4 Click the apply changes icon ( ).

5 Click **Done**. The extended attribute is added to the search page.

You can add multiple extended attributes as search criteria.

Custom Sections

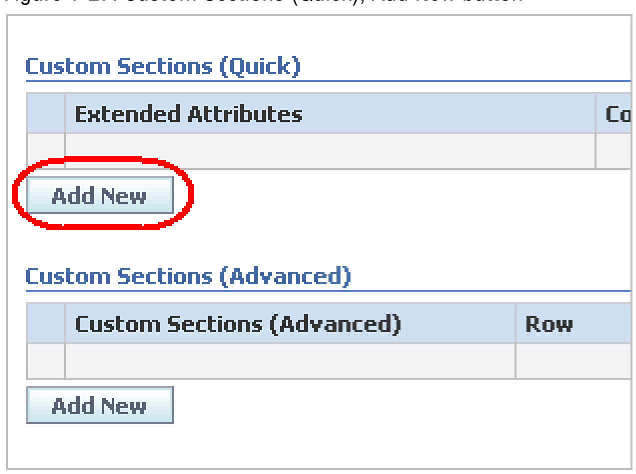
Custom sections are configurable *sets* of extended attributes. Two types of searches are available:

- Quick—Search by extended attribute name. This search returns all specifications that contain that extended attribute criteria inside a custom section.
- Advanced—Search by custom section row and column name. This search returns all specifications that contain that section-row-column combination.

To perform a quick search for values in a custom section:

1 In the Custom Section (Quick) section, click **Add New**, as shown in figure 1-27 below.

Figure 1-27: Custom Sections (Quick), Add New button

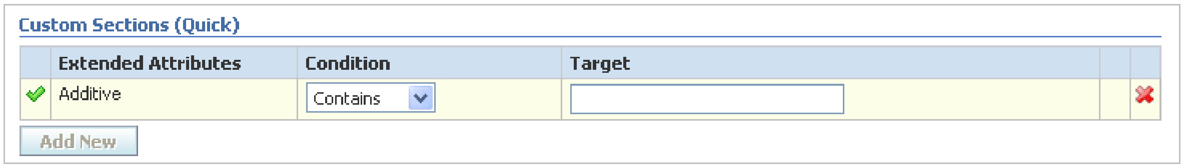


A multiple-select popup window appears.

2 Select extended attribute names to search for, and then click **Done**. Your selections display in the Custom Sections (Quick) table.

3 Click the edit icon ( ) displayed to the left of the added row. The row displays in edit mode, as figure 1-28 shows below.

Figure 1-28: Defining the custom section value

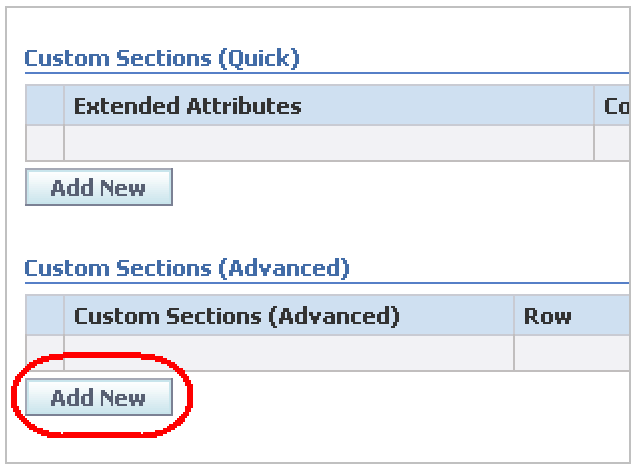


4 Define the extended attribute value, by specifying the **Condition** and **Target** values.
5 Click the apply changes icon ( ).
6 Click **Done**. The search criteria are added to the search page.

To perform an advanced search for values in a custom section:

1 In the Custom Sections (Advanced) section, click **Add New**, as shown in figure 1-29 below.

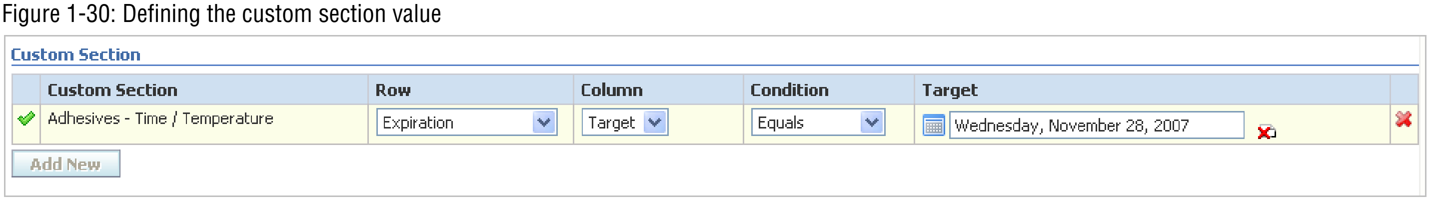
Figure 1-29: Custom Sections (Advanced), Add New button



A multiple-select popup window appears.

2 Select the custom section to search in, then click **Done**. Your selections display in the Custom Section table.
3 Click the edit icon ( ) displayed to the left of the added row. The row displays in edit mode, as figure 1-28 shows below.

Figure 1-30: Defining the custom section value

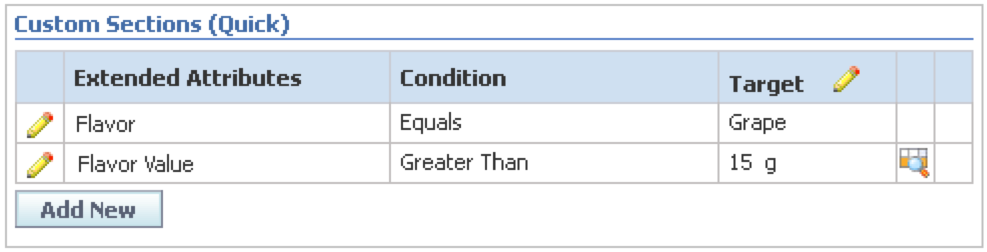


4 To further define the custom section value, you must select the **Row** and **Column** where the value may exist. Once the row and column are selected, you can define the **Condition** and **Target** values. Target fields will vary based on the section + row + column combination that you have selected.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

Searching within a Row

Quick and Advanced custom section searches feature the ability to search within a row. Figure 1-31 below shows a Quick search using the search within row icon ( ).

Figure 1-31: Search within a row

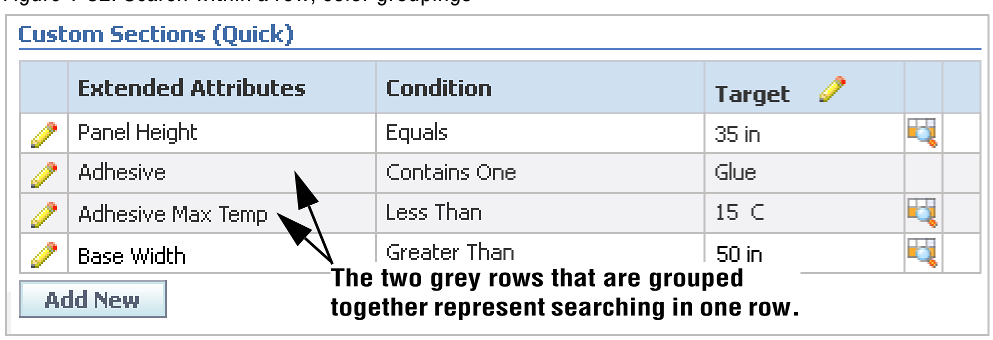


In this example, the user can find all specifications where the extended attributes “Flavor” and “Flavor Value” are in the same row of a custom section and matching the conditions and target values specified.

Searching for Multiple Attributes in One Custom Section Row

Clicking the search within row icon ( ) adds a new row to your grid. Each added row represents an additional attribute in the same custom section row. The row colors are alternated to help distinguish the sets, as demonstrated in figure 1-32 below.

Figure 1-32: Search within a row, color groupings

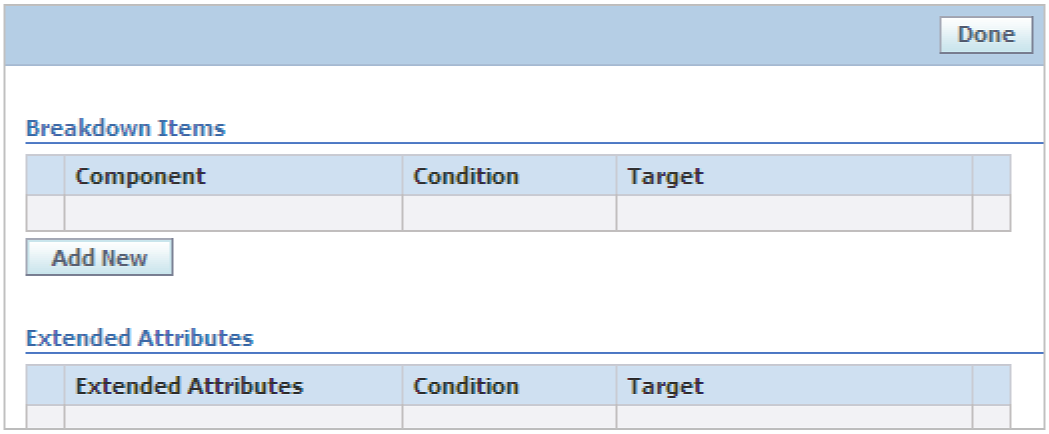


In the complex example shown in figure 1-32, the user will find all specifications that contain multiple attributes Panel Height, Base Width, Adhesive, and Adhesive Max Temp. However, noticed that Adhesive and Adhesive Max Temp will only return a positive result if both attributes are together in the same row of a custom section. Conversely, Panel Height and Base Width can be located anywhere within any custom section.

Searching Breakdown Items

For trade, product, and ingredient specifications, the Breakdown Items section displays in the additional attributes dialog box, as figure 1-33 shows below. This section allows you to search specifications by specifying one or more breakdown component/value pairs.

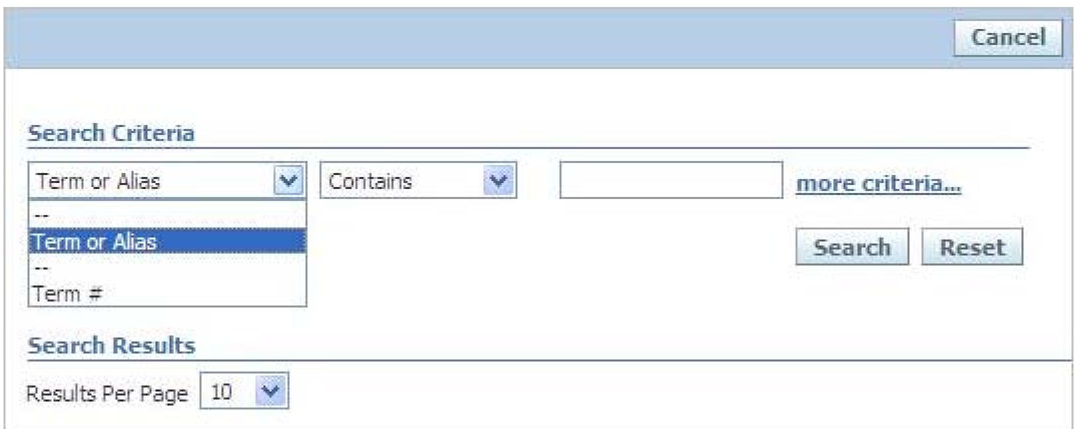
Figure 1-33: Additional attributes dialog box, Breakdown Items section



To perform a search for breakdown items:

1 In the Breakdown Items section, click **Add New**. A component search page displays.

Figure 1-34: Breakdown items search page, drop-down list



2 Select a component type from the drop-down menu (depending on your configuration).

Note Depending on your configuration, a drop-down list will appear at the top of the page allowing you to search for ingredient specifications used as components. Searching for free text components is not supported by this control.

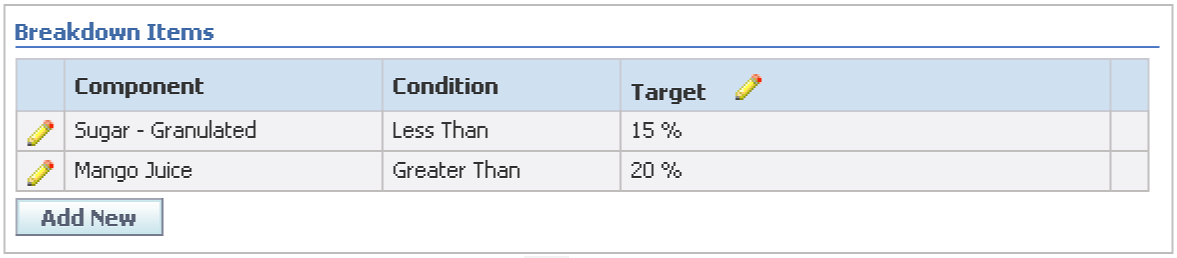
3 Enter search criteria in the key field, operator, and search term fields.

4 Click **Search**. Components matching the search criteria display in the Search Results table, as described in *Search Results* on page 1-28.

5 Click components to add as search criteria. Your selected components display in the Selected Items section.

6 Click **Done**. The search page closes, and the selected components display in the Breakdown Items section, as figure 1-35 shows below.

Figure 1-35: Added breakdown items



7 Click the edit icon ( ) displayed to the left of the added row. The row displays in edit mode.

8 Define the **Condition** and **Target** values for the breakdown item.

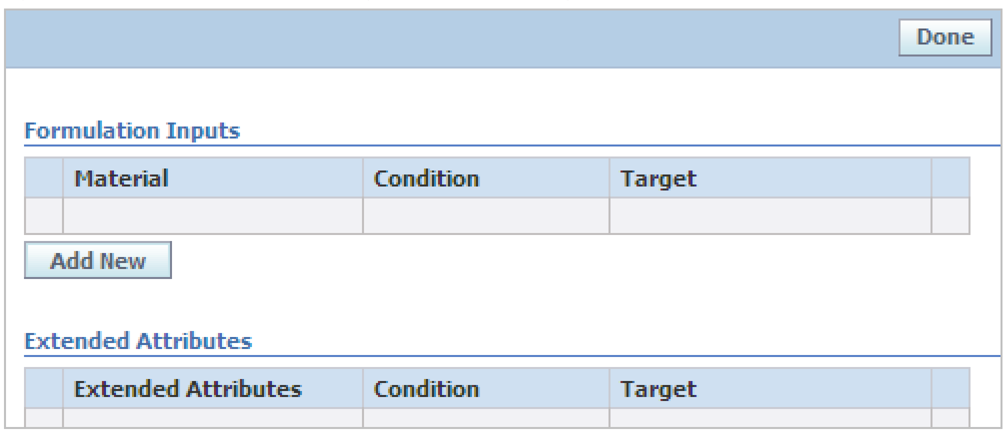
9 Click the apply changes icon ( ).

10 Click **Done**. The breakdown items are added to the search page.

Searching Formulation Items

For formulation specifications, the Formulation Inputs section displays in the additional attributes dialog box, as figure 1-36 shows below. This section allows you to search specifications by specifying one or more ingredient specification/ value pairs used in the formulation.

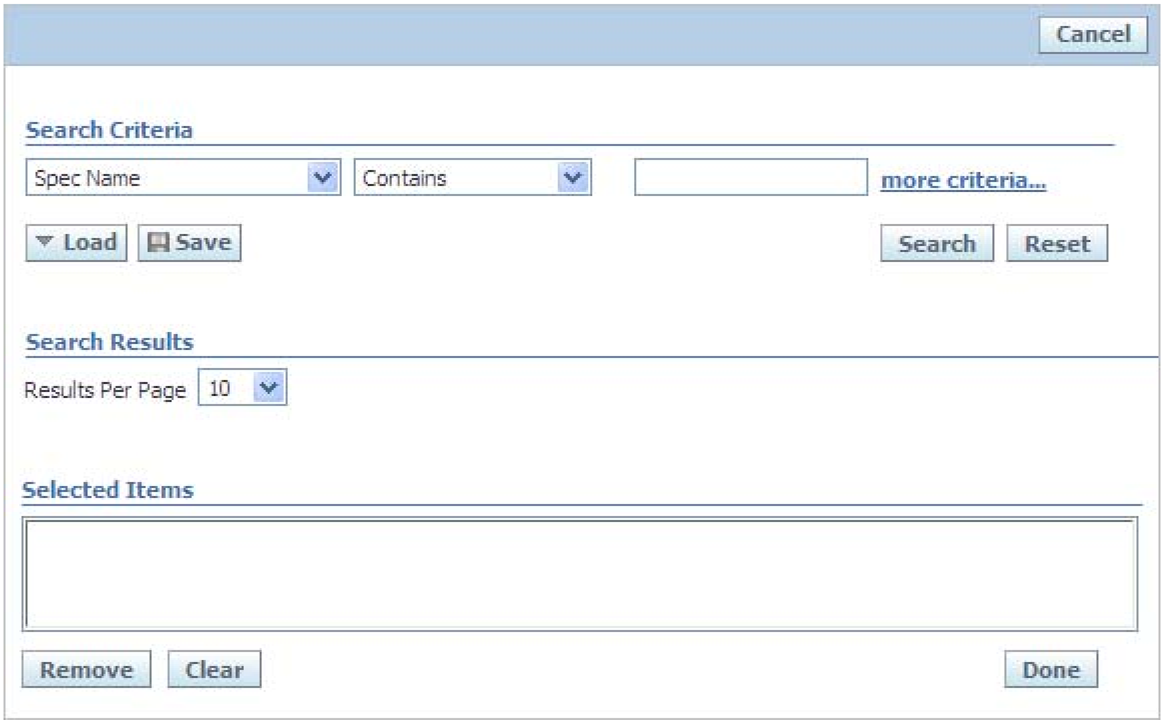
Figure 1-36: Additional attributes dialog box, Formulation Inputs section



To perform a search for formulation inputs:

1 In the Formulation Inputs section, click **Add New**. An ingredient specification search page displays, as figure 1-37 shows below.

Figure 1-37: Specifications search page



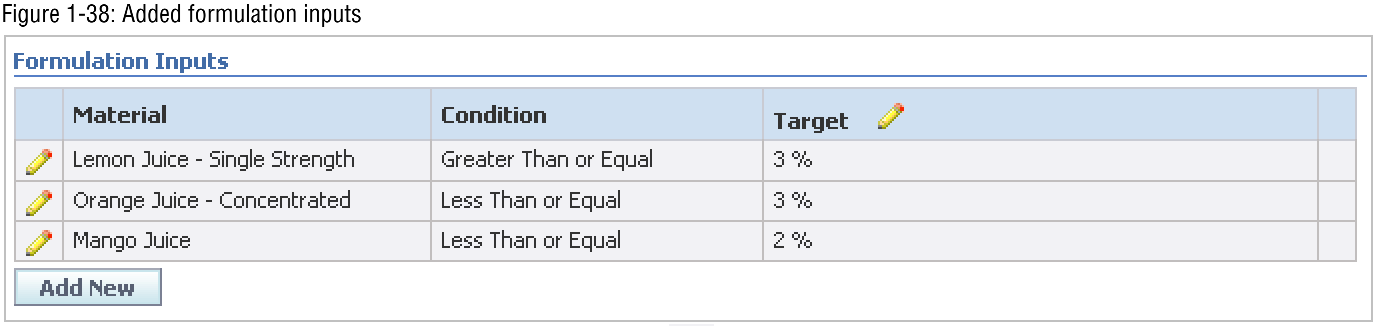
2 Enter search criteria in the key field, operator, and search term fields.

3 Click **Search**. Ingredients matching the search criteria display in the Search Results table, as described in *Search Results* on page 1-28.

4 Click specifications to add as search criteria. Your selected specifications display in the Selected Items section.

5 Click **Done**. The search page closes, and selected specifications display in the Formulation Inputs section, as figure 1-38 shows below.

Figure 1-38: Added formulation inputs



Formulation Inputs

	Material	Condition	Target
	Lemon Juice - Single Strength	Greater Than or Equal	3 %
	Orange Juice - Concentrated	Less Than or Equal	3 %
	Mango Juice	Less Than or Equal	2 %

Add New

6 Click the edit icon ( ) displayed to the left of the added row. The row displays in edit mode.

7 Define the **Condition** and **Target** values for the formulation input.

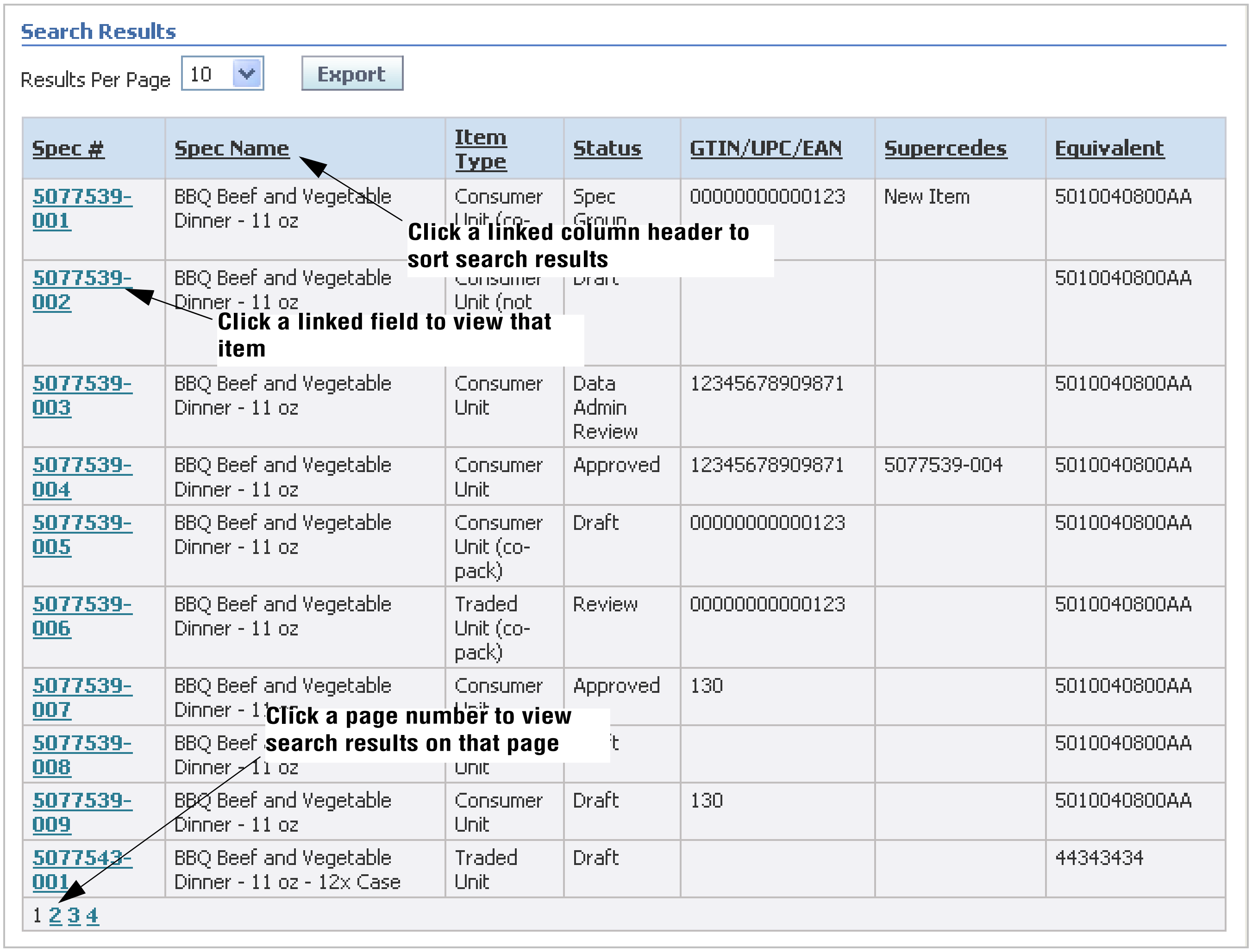
8 Click the apply changes icon ( ).

9 Click **Done**. The input items are added to the search page.

Search Results

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

Figure 1-39: Search results



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.

Note You can now include additional attribute search criteria in saved searches.

To save search criteria:

1 Enter your search criteria as described in *Understanding the Search Page* on page 1-18.

2 Click **Save**, as shown in figure 1-40. A Save Search Criteria As dialog box displays, as shown in figure 1-41.

Figure 1-40: Search page showing Save Search button

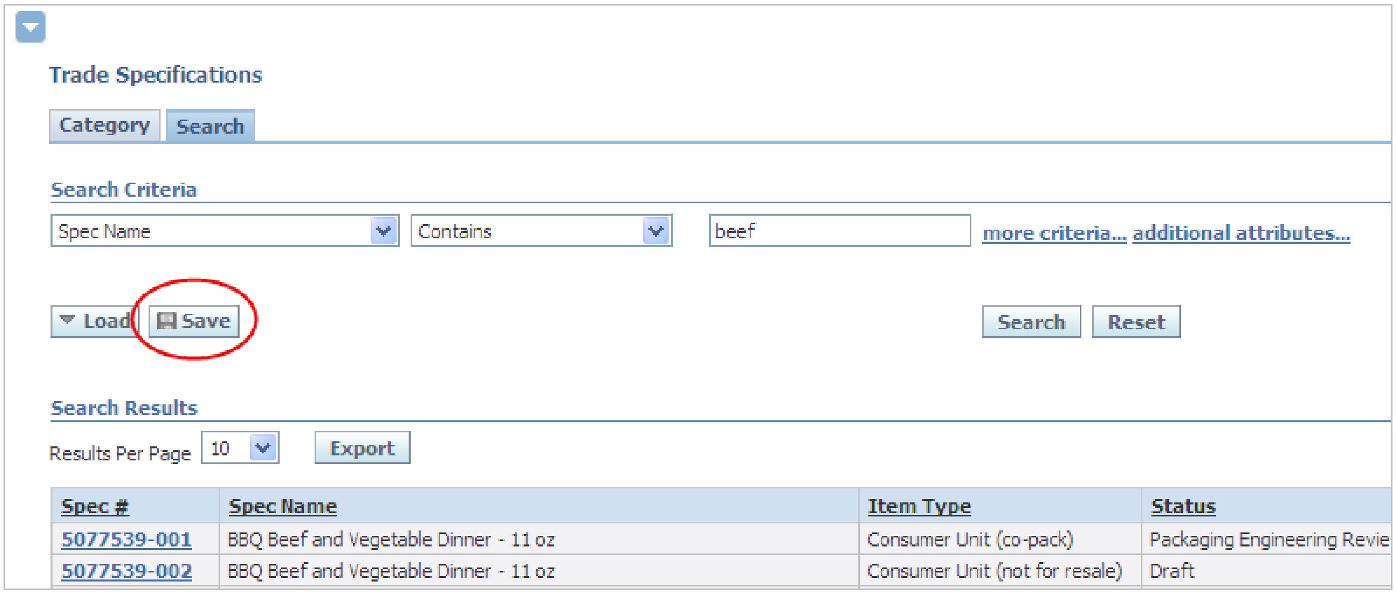
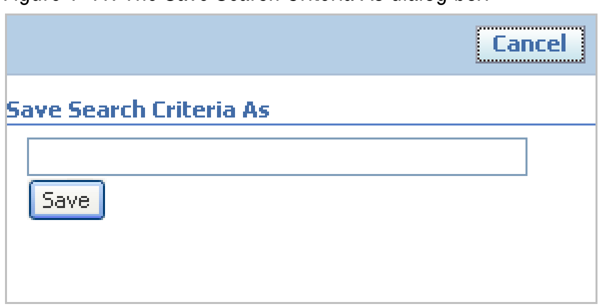


Figure 1-41: The Save Search Criteria As dialog box



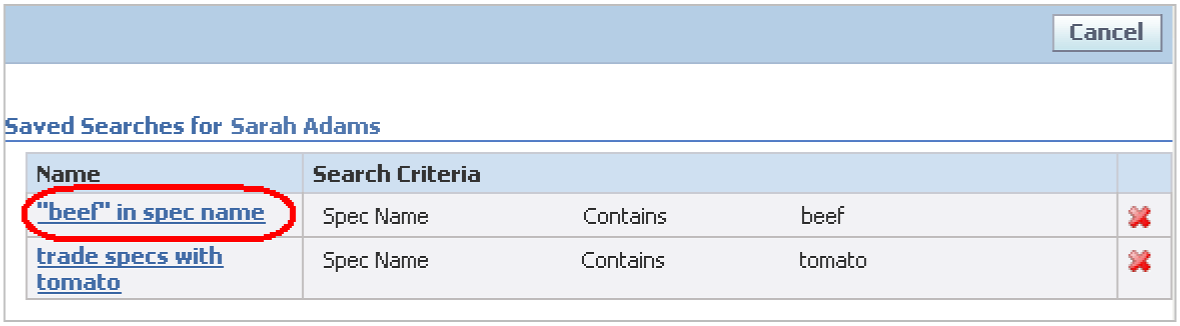
3 Type a descriptive name for the search criteria to save and click **Save.** The dialog box closes, and the search criteria are saved with the name that you provided.

To retrieve a saved search:

1 On any search page, click **Load.**

2 Select **Load Saved Search** from then drop-down list. A dialog box displays, showing a list of all of the searches that you have saved for a particular business object (specification, company, etc.), as shown in figure 1-42.

Figure 1-42: Saved Searches for [Your Name] dialog box



3 Click the hyperlinked name of the saved search to load as shown in figure 1-43 below.

Figure 1-43: Saved search criteria, loaded into the main search page

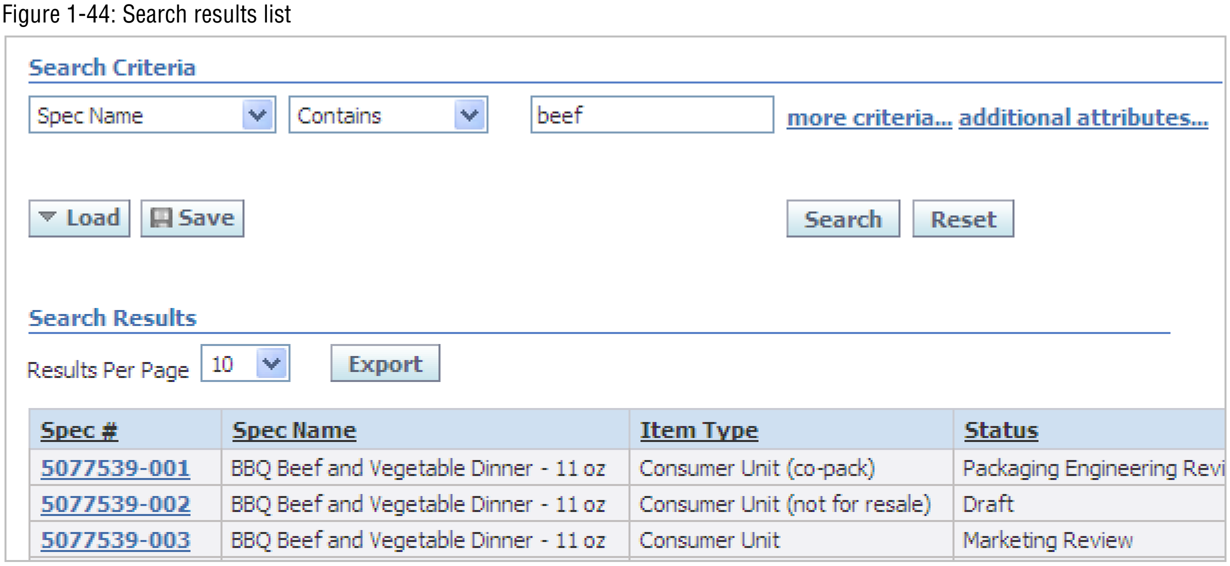
Exporting Search Results

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

To export search results to a local Excel file:

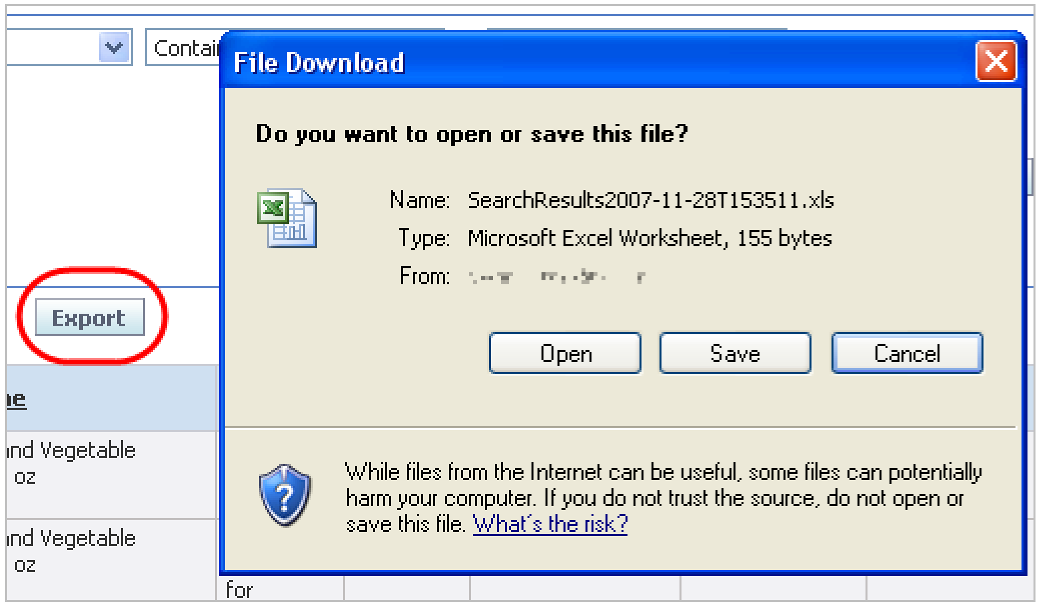
1 Perform a search. The system displays the search results, as shown in figure 1-44.

Figure 1-44: Search results list



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

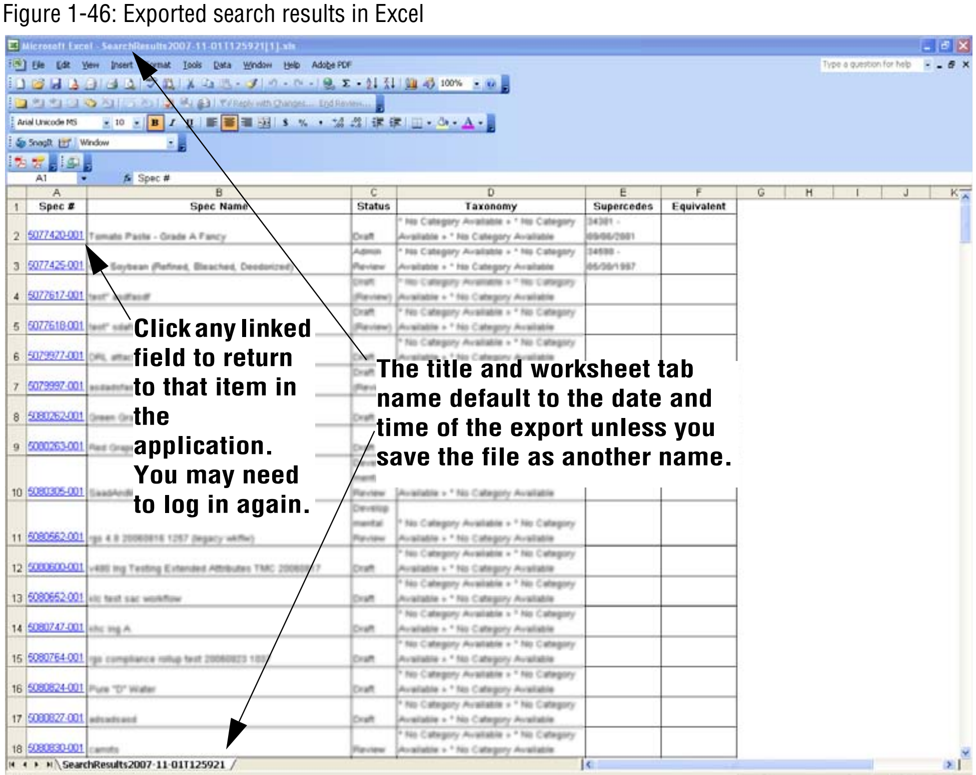
Figure 1-45: Click Export to export search results to a file



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

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

Figure 1-46: Exported search results in Excel

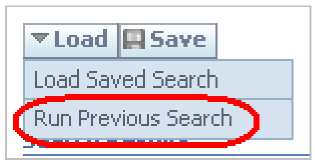


4 You can now format the data in Excel.

Running the Previous Search from the Search Page

The last run search is automatically saved for each object type (ingredient specification, trade specification, company profile, etc.). You can return to the previous search by selecting **Run Previous Search** from the Load drop-down list, as figure 1-47 shows below. This feature is available for the current session only.

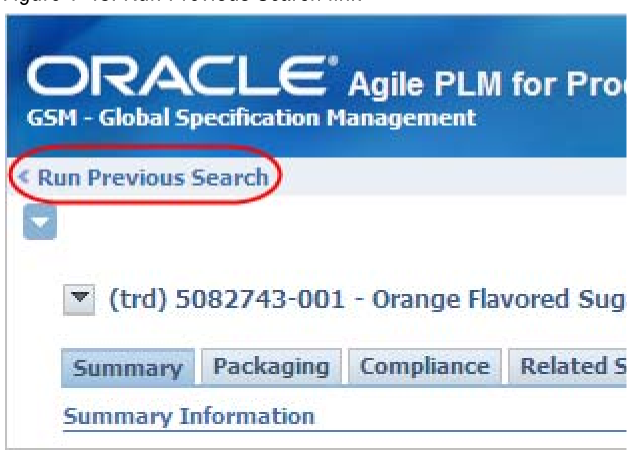
Figure 1-47: Run Previous Search option



Running the Previous Search from a Data Object

After you run a search and select an object from the Search Results list, a Run Previous Search link is displayed at the top of the left navigation panel, as shown in figure 1-48 below. Clicking **Run Previous Search** returns you to the search page of your last search and automatically re-runs it.

Figure 1-48: Run Previous Search link



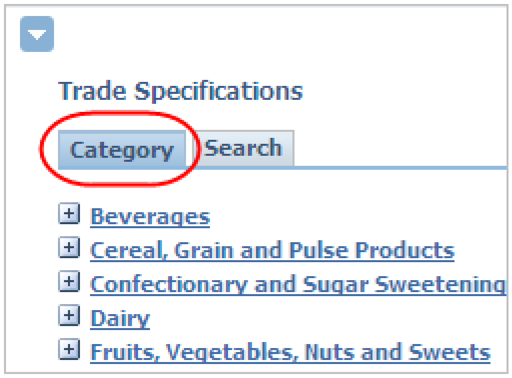
Sorting Search Results

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

Understanding the Category Tab

The second method of finding data within Agile Product Lifecycle Management for Process uses the Category tab, which resides on the same screen as the main search page for certain applications (see figure 1-49). The Category tab allows you to navigate through a set of business objects based on their categorization. Visibility of items in the category search may be limited based on user privileges.

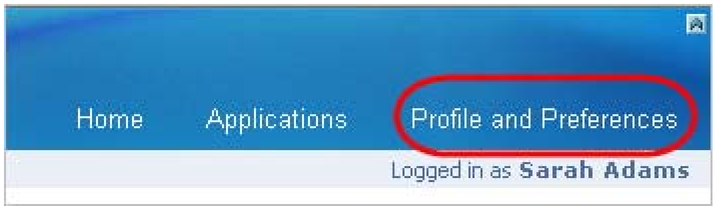
Figure 1-49: Category tab, as seen from the main search page tab



Defining Your Profile and Preferences

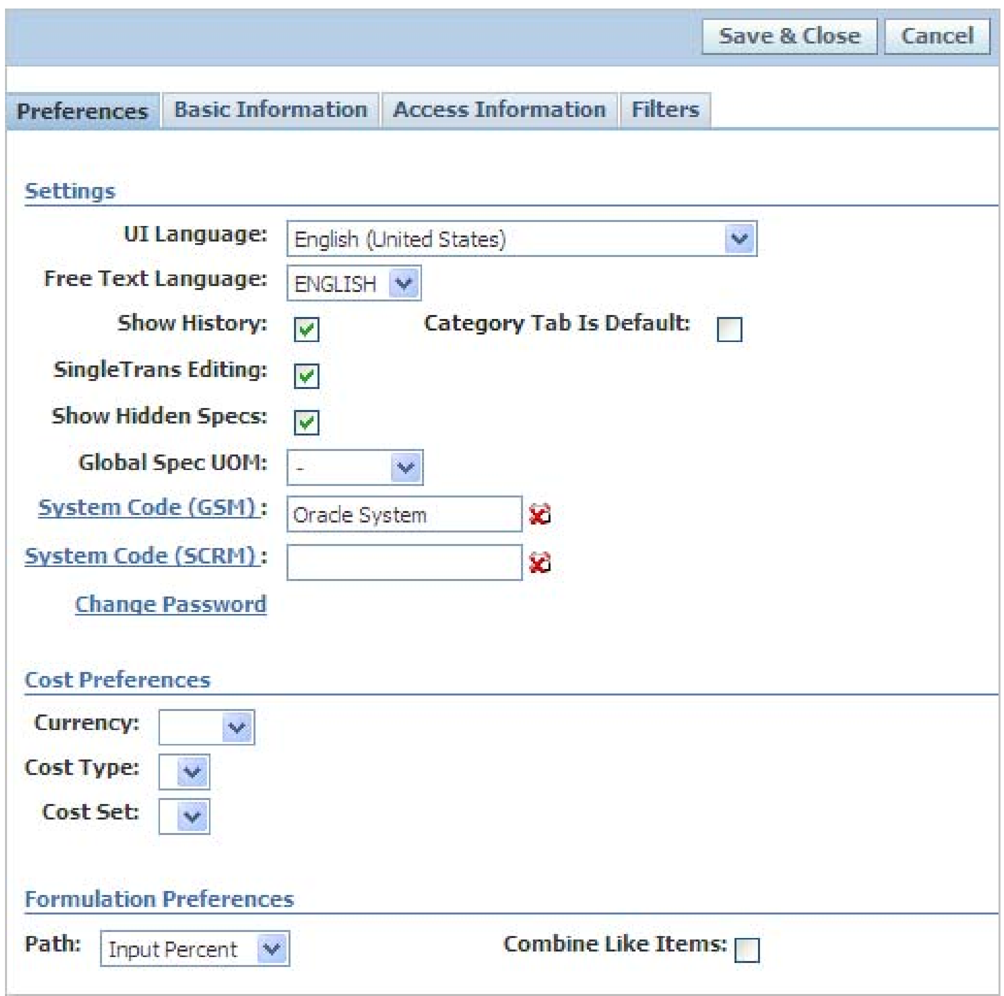
Use Profile and Preferences to edit and view your settings that span select applications. In the user preferences dialog box, you update your basic information, set your application preferences, view your access information, and modify your usability filters. To access this dialog box, click **Profile and Preferences** on the top menu, as shown in figure 1-50 below.

Figure 1-50: Location of the Profile and Preferences menu item



The user preferences dialog box displays, as shown in figure 1-51 below.

Figure 1-51: The User Preferences dialog box, Preferences tab



Legend:

UI	User interface
UOM	Unit of measure

Preferences Tab

The Preferences tab consists of three sections: Settings, Cost Preferences, and Formulation Preferences.

Settings Section

The Settings section contains language settings and key default values.

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

Free Text Language—Denotes your preferred language for data you enter into the system.

Show History—Shows the specification title and history drop-down list in Global Specification Management (GSM), as shown in figure 1-52, below.

Figure 1-52: History drop-down list in GSM

Category Tab Is Default—Sets the Category tab as the default tab that displays when you go to a search page.

SingleTrans Editing—Closes free-text editable fields after you have made a single translation. This applies to all translated fields in all applications of Agile PLM for Process.

Show Hidden Specs—Show GSM specifications tagged as “hidden.”

Global Spec UOM—Represents the default unit of measure for steps in a formulation specification.

System Code (GSM)—Designates which cross references system equivalent to use for searching. This field will be the equivalent number that displays in the GSM search results. Setting a default system code also serves as the first step in picking a cost book.

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

Change Password—Changes password if password management is enabled by the administrator.

To change your password:

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

Cost Preferences

The Cost Preferences section defines cost settings. You must have a GSM cross reference assigned above before you will see attributes in the cost preferences drop-down lists.

Currency—Sets the default currency.

Cost Type—The type associated with the cost set.

Cost Set—The actual set of costs that will be used for the bill of material (BOM) items added to the formulation specification.

Note The available options for the Cost Type and Cost Set fields are determined by the values that are loaded by the customer using the cost application programming interface (API). For more information, refer to the *Agile Product Lifecycle Management for Process Application Programming Interface User Guide*.

Formulation Preferences

The Formulation Preferences section defines your default preferences for formulations.

Path—Sets the default calculation path to use when creating formulation specifications.

Combine Like Items—Combines like input items when viewing the formulation specification in read mode.

For more information about each of these options see the “Formulation Specifications” chapter of the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Basic Information Tab

The Basic Information tab contains contact information, as shown in figure 1-53 below.

Figure 1-53: Basic Information tab

Contact Information

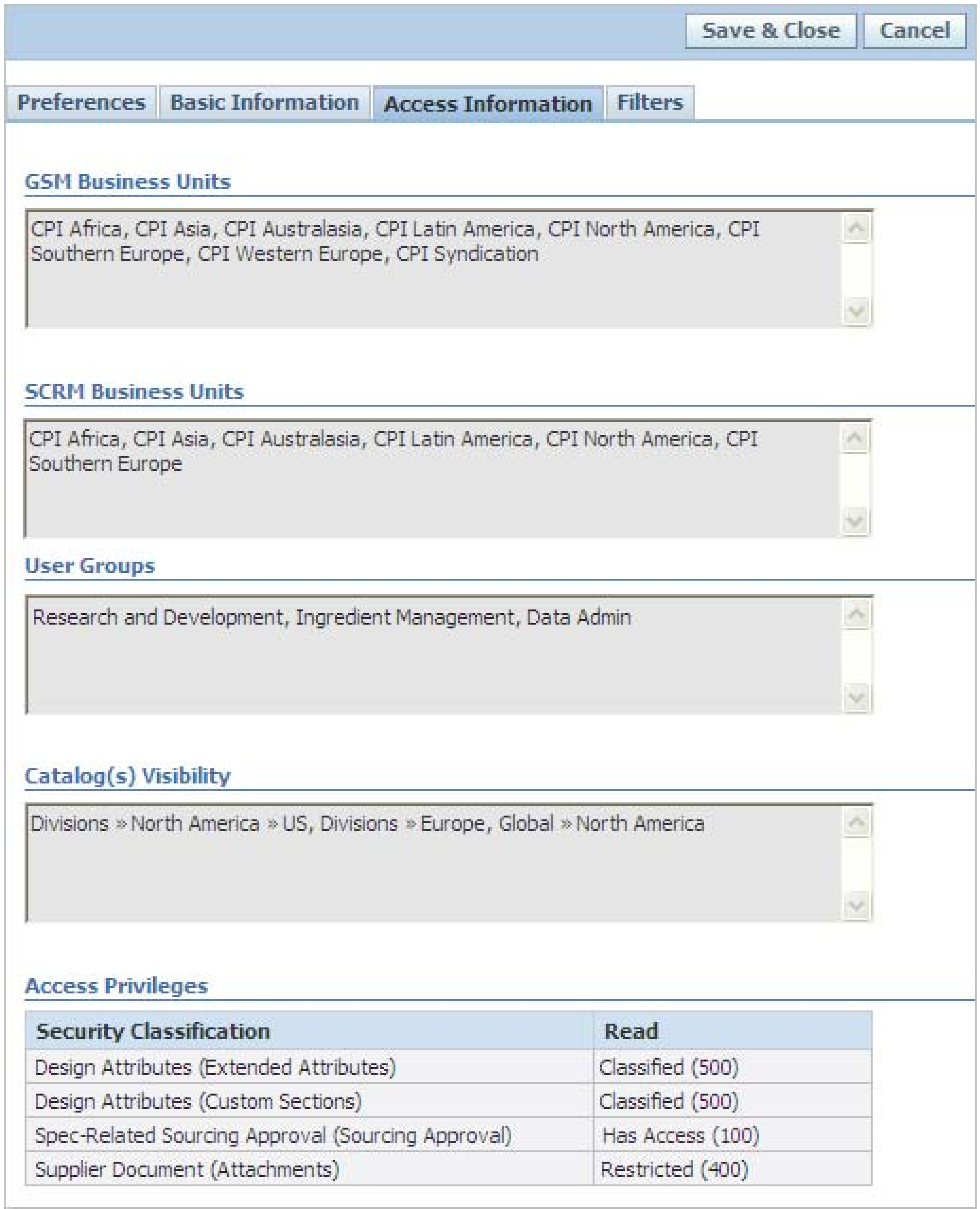
You can update your contact information using the fields below:

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

Access Information Tab

The Access Information tab, shown in figure 1-54 below, contains a read only view of the GSM and SCRM business units, user groups, and DRL catalogs that you have access to. It also contains your Object Level Security access privileges.

Figure 1-54: Access Information tab



GSM Business Units

This is a read only view of the GSM business units you have access to. You can view only those specifications that have the business unit listed here. Your system administrator assigns business units.

SCRM Business Units

Depending on your configuration, this section shows a read only view of the SCRM business units you have access to. You can view only those companies and facilities that have the business unit listed here. Your system administrator assigns business units.

User Groups

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

Catalog(s) Visibility

A read-only field that displays which DRL catalogs you have access to.

Access Privileges

Depending on your configuration, this section is displayed if object level security (OLS) is enabled. IF OLS is enabled, you can view access privileges. OLS privileges are group defined. A privilege consists of a security classification and an access level. For more information, refer to the "Implementing Security" in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Filters Tab

Filters are a usability helper that reduces your GSM search results (BU Filter) and your selection options (Group Filter). The Filters tab sets business unit and group filters, as shown in figure 1-55 below.

Figure 1-55: Filters tab

BU Filter—Filters GSM search results based on business unit.

Group Filter—Filters group-defined attributes such as allergens, intolerances, additives, and Complies With lists.