

**Oracle® Agile Product Lifecycle Management for
Process**

Getting Started Guide

Release 6.1.0.3

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Preface

The *Agile Product Lifecycle Management for Process Getting Started Guide* gives a high-level view of the Oracle Agile Product Lifecycle Management (PLM) for Process solution. The preface includes these topics:

- [Audience](#)
- [Variability of Installations](#)
- [Documentation Accessibility](#)
- [Related Documents](#)
- [Conventions](#)

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

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Related Documents

For more information, see the following documents in the Agile PLM for Process Release 6.1.0.2 documentation set:

- *Agile Product Lifecycle Management for Process Administrator User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

<http://www.oracle.com/technetwork/documentation/agile-085940.html#plmprocess>

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introducing 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:

- [Solution Overview](#)
- [Agile Product Lifecycle Management for Process Applications](#)

Solution Overview

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

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

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

Agile Product Lifecycle Management for Process Applications

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

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 materials 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.

Table 1–1 Agile Product Lifecycle Management for Process applications


Application	Description
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 Ordering	Provides the ability to create complex 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.
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

This chapter describes the user interface for Agile Product Lifecycle Management (PLM) for Process. Topics include:

- [Resizing the Screen](#)
- [Navigating the Page](#)
- [Working with Dialog Boxes](#)
- [Accessing an Application](#)
- [Working with a Page](#)

When you first log in, the Agile PLM 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.
- Using the browser's print function.

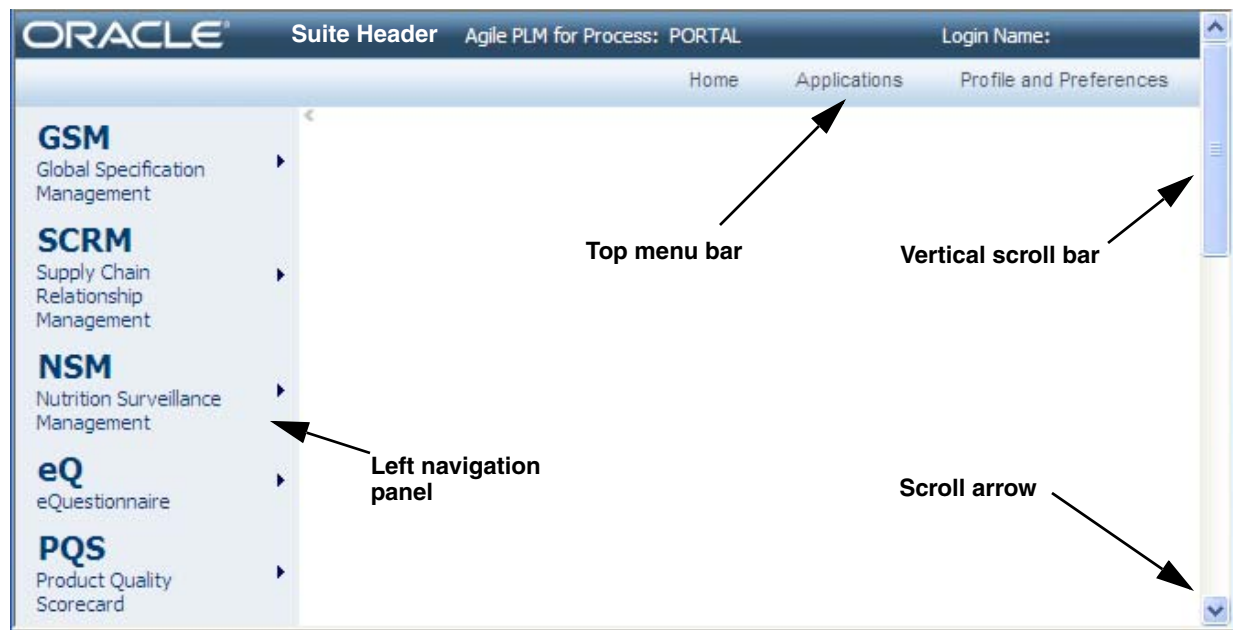
Resizing the Screen

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.

Navigating the Page

The basic page consists of many elements, as [Figure 2-1](#) shows. 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 2–1 Home page



Refer to [Chapter 4, "Defining Your Profile and Preferences"](#) for more information on managing your profile and preferences.

Suite Header

[Figure 2–2](#) shows the application suite header. The dark blue title bar contains:

- Brand name
- Active object name (in this example, spice oil specification) preceded by the most recently used menu, which is described in more detail in ["Most Recently Used Menu"](#) on page 2-15
- Login name

The action bar (in lighter blue) contains:

- Action menu, described in more detail in ["Using the Action Menu"](#) on page 2-8
- Action icons, described in more detail in ["Action Icons, Tabs, and Sections"](#) on page 2-12
- Home menu
- Applications menu, as shown in [Figure 2–9](#)
- Profile and Preferences menu, described in more detail in [Chapter 4, "Defining Your Profile and Preferences"](#)

Figure 2–2 Application suite header



Header within an Object

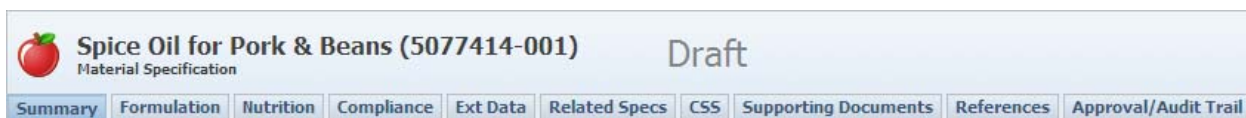
Within an application, when you are working with a business object, such as a specification or company, the object header contains the following, as shown in [Figure 2-3](#):

- Icon representing the object, if applicable
- Object name and number (if applicable). Depending on your configuration, GSM and SCRM display the object's cross reference number. If a cross reference is not found, the Agile PLM for Process system number is displayed.

Note: The header displays the first cross reference that is found using the user's preferred cross reference system. On an SCRM specification-related sourcing approval, the related specification's cross reference number is displayed.

- Object subtype, if applicable. In the example below, "Material Specification" is the subtype.
- Status of object, if applicable. In the example below, "Draft" is the status. If an object is in a red state this status will display in red text.

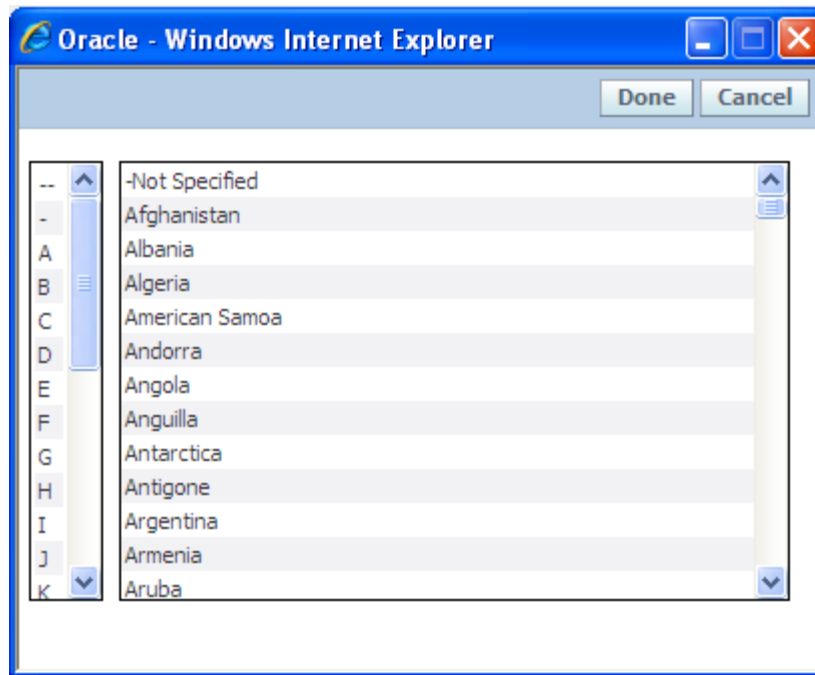
Figure 2-3 Object header




Working with Dialog Boxes

Dialog boxes, as shown in [Figure 2-4](#) through [Figure 2-7](#), are commonly used throughout Agile PLM for Process applications. Dialog boxes appear when the user takes action, such as selecting a link, clicking a 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.

To navigate to selections alphabetically, click on the corresponding letter in the leftmost column.

Figure 2–4 Single select dialog box

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 the ["Action Icons, Tabs, and Sections"](#) on page 2-12 for more information on action buttons.


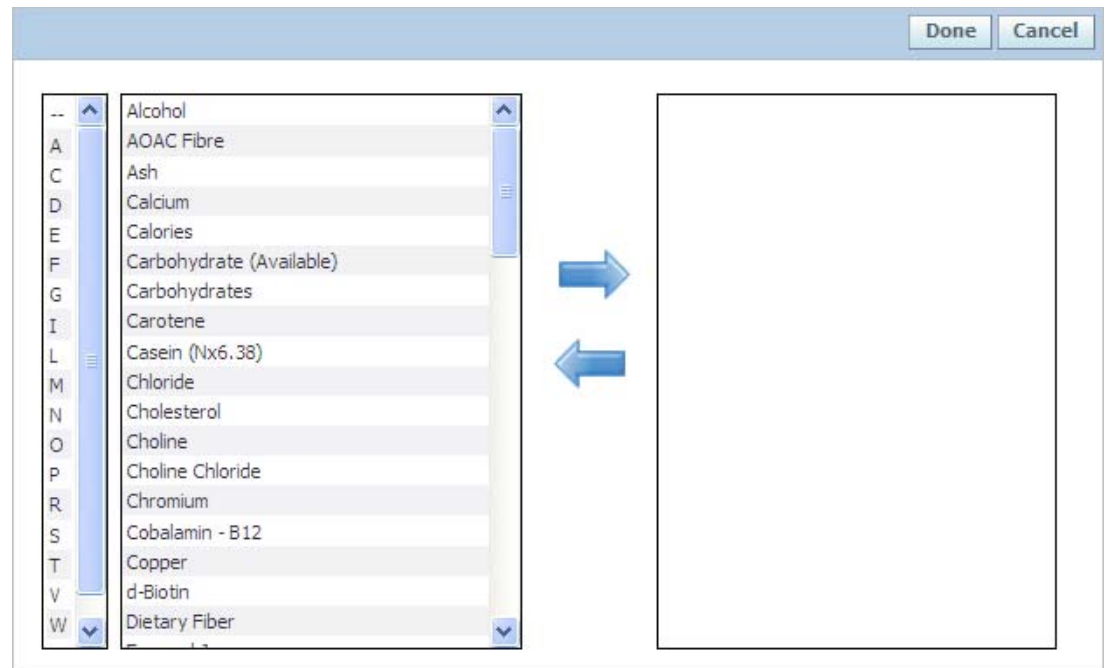
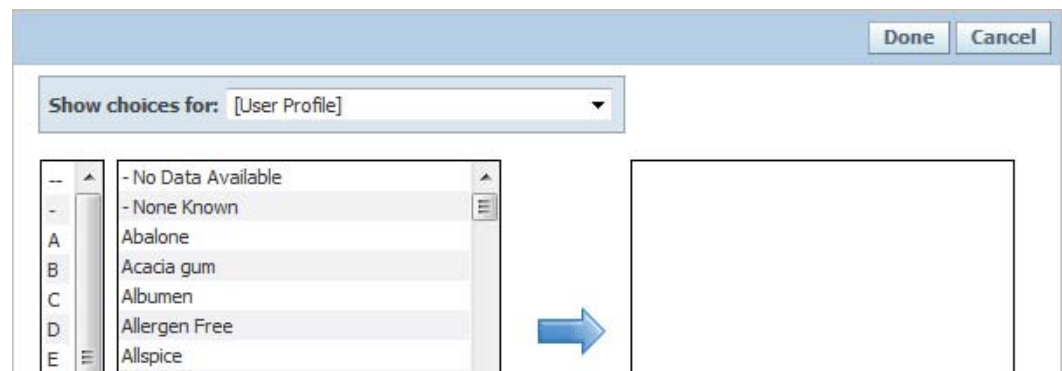
[Figure 2–5](#) shows a multi-select dialog box. To make a selection, click a row in the left column, then click the add selected data icon () to move your selection to the right column. You can make multiple selections from the left column by holding the **Ctrl** key as you select rows.

Figure 2–5 Multi-select dialog box

Depending on the list, some dialog boxes contain a Show choices for dropdown list, enabling you to further narrow displayed data.

Figure 2–6 Show choices for dropdown on multi select dialog box

As [Figure 2–7](#) shows, a field is displayed prompting you to enter a search filter to narrow results. This option displays when the list you are requesting exceeds the maximum number of results. The maximum number of results depends on your configuration.

Figure 2-7 Field to filter search results

The maximum number of results (500) has been exceeded. Please narrow your search results by entering a search filter below.

Search for:

Show choices for:

Accessing an Application

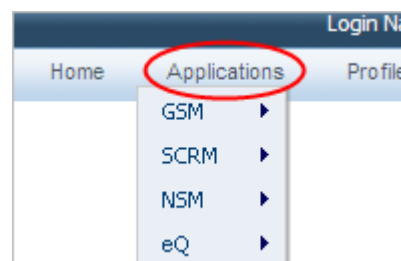
From the portal Home page, you can access an application and its features using the left navigation panel or the Applications choice on the top menu bar. The left navigation panel, shown in [Figure 2–8](#), is only available from the main portal page.

Figure 2–8 Main portal page, left navigation panel, GSM application, submenu options



[Figure 2–9](#) shows the Applications menu.

Figure 2–9 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 2–10](#). Click it again to show the navigation panel.

Figure 2–10 Hide navigation panel icon



Using the Action Menu



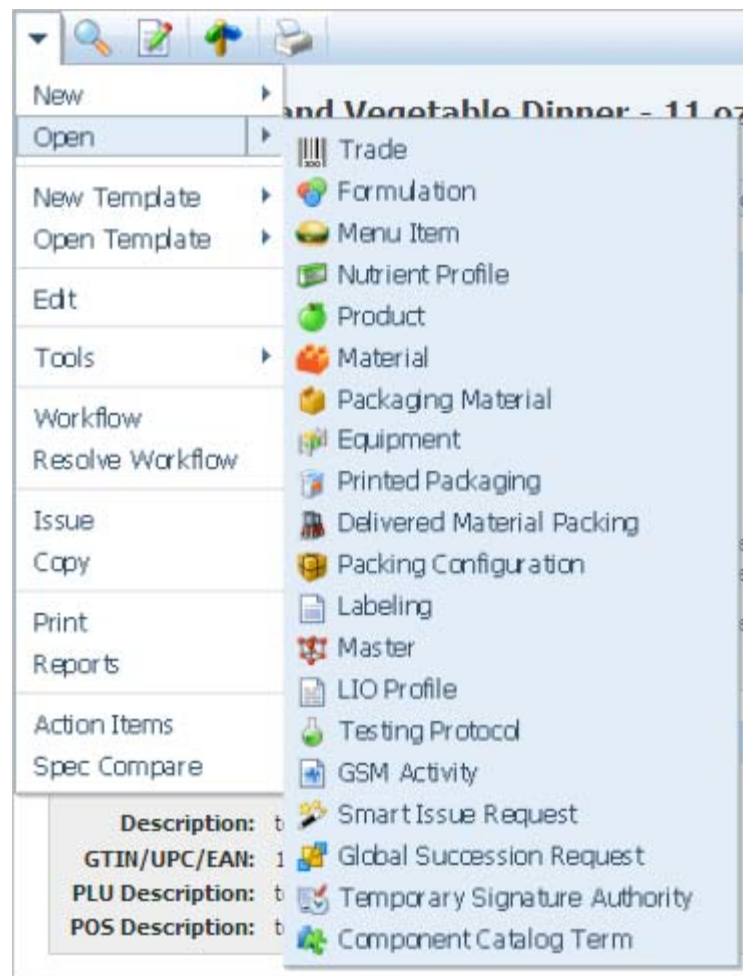
You will find the action menu within each application. To access the menu, click on the action menu arrow () shown in [Figure 2–11](#). This icon is located below the suite header. A menu appears with all of the action and navigation options for that application. Some options contain submenus, represented by the expand icon (). [Figure 2–12](#) shows an example of a submenu in GSM.

Figure 2–11 Action menu, GSM



Figure 2–12 GSM submenu**Common Actions**

New—Creates a new specification or object. In GSM and SCRM you can create a new object from **blank** or **from template**, as [Figure 2–13](#) shows.

Figure 2–13 GSM New submenu, formulation specification, Blank and From Template options

Open—Opens a specification or object.

New Template—For GSM or SCRM, creates a new template.

Open Template—For GSM or SCRM, opens a template.

Edit—Opens the specification or object for edit.

Save—Saves a specification or object.

Save and Close—Saves and closes a specification or object.

Cancel—Cancels changes to the specification or object made since the last save.

Action Items—Displays action items for the application.


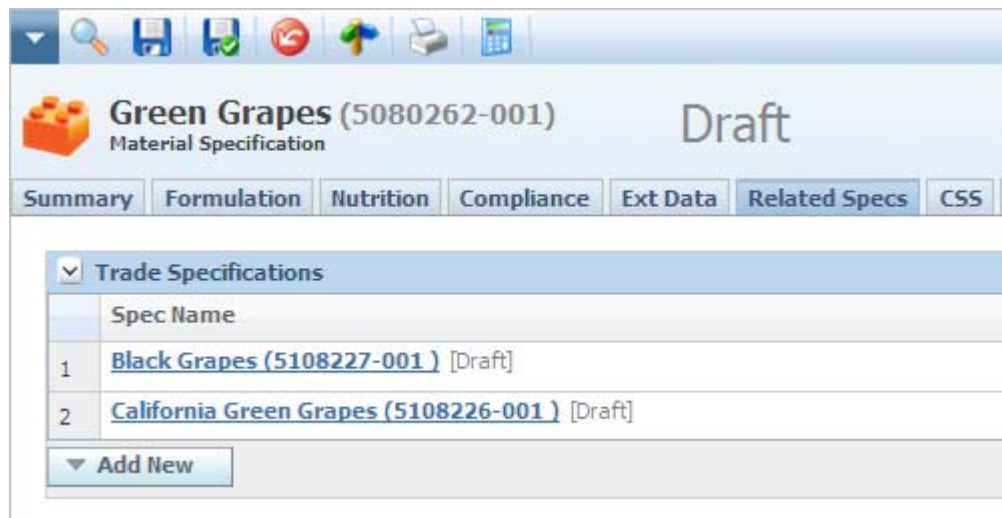
When you select **Edit** from the action menu or click the edit action icon (), the page redisplay in edit mode. Note that the action icons change, and additional buttons and icons may display on the page. Use these additional buttons to perform tasks in the appropriate section.

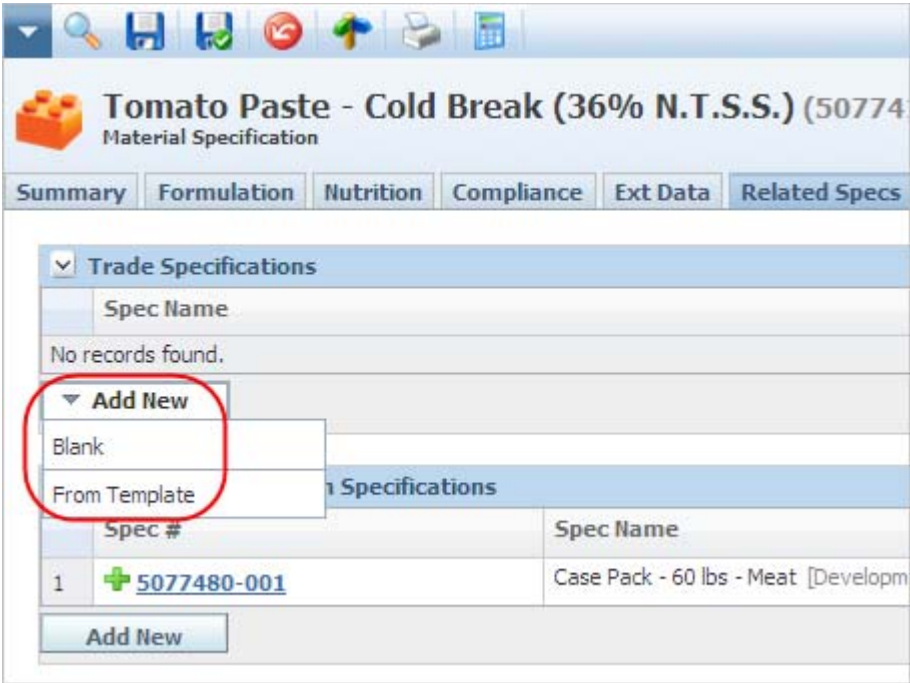
Figure 2–14 shows the Related Specs tab of a material specification in edit mode. Note that the **Edit** action icon has been replaced by the **Save** and **Save & Close** action icons. Within the page, the **Add New** button displays below tables, indicating that you can add information. For more information on modifying data in a table, see "Tables" on page 2-18.

Figure 2–14 Page in edit mode



Some buttons within a page display submenus, as Figure 2–15 shows. Those buttons contain an arrow (▼) to the left of the button name. When you click on this button, a panel appears, as Figure 2–17 shows. You can then select an action.

Figure 2–15 Submenu on button

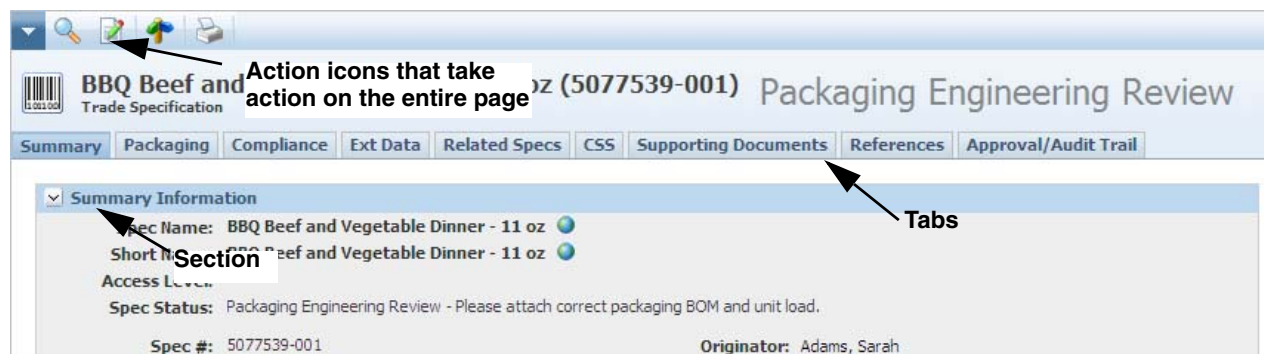


Working with a Page

When you select **Open > [Object Type]**, often the first page you see is a basic search page. Refer to "[Understanding the Search Page](#)" on page 3-1 for more information on performing searches.

Once you have selected an item to work with, such as a trade specification in the Global Specification Management (GSM) application, the page consists of several elements that are common across all applications, as [Figure 2-16](#) shows.

Figure 2-16 Page functions

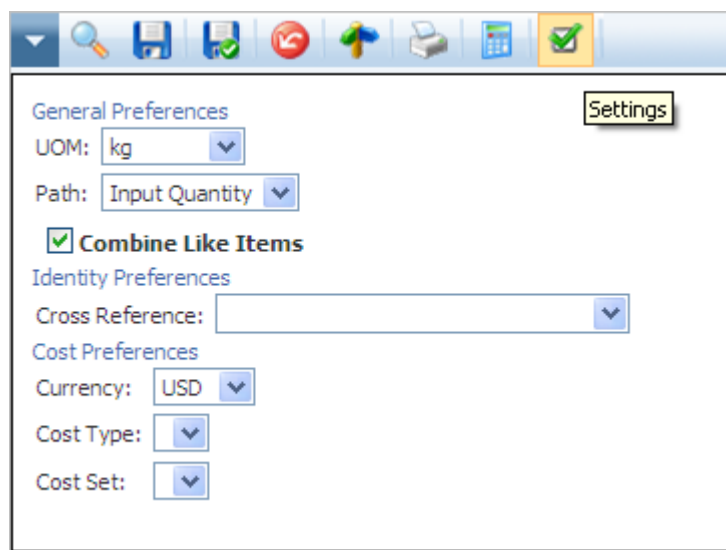


Action Icons, Tabs, and Sections

- Action Icons** — Use the icons to the right of the action menu to take quick actions that affect the entire page, such as save, edit, and create new. The icons that are displayed vary based on such things as your assigned role and permissions and the current state of the item. Each action represented by an icon is also listed as a choice in the action menu.

Some action icons display panels. When you click on this button, a panel will appear, as [Figure 2-17](#) shows.

Figure 2-17 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 2-18](#) shows.

Figure 2-18 Formulation specification, subtabs

Material	Qty	G/L	Yld	% Step
+ Granulated Sugar (Sucrose) (5077415-001)	50.00000 lb	1.00000	50.00000 lb	50.00000
+ Water - Carbonated (5077462-001)	50.00000 lb	1.00000	50.00000 lb	50.00000
Total	100.00000 lb		100.00000 lb	100.00000

Buttons: Add New, Consume from Step, Order Items, Calculate

- **Sections** — Each page consists of sections, which group related information. [Figure 2-19](#) shows two sections on a page. To collapse a section, click the icon () or anywhere else in the section header. Click it again to display the section. When you collapse a section, it's state will be remembered even when you log out and log back into the system. Some sections are not collapsible; when they are not collapsible, you will see a disabled expanded section icon ().

Note: Because of the type of data displayed, there are some locations that do not remember the collapsed state of a section when you log out but will remember the collapsed state within your session; for example, WFA process templates.

Figure 2–19 Sections within a page

ABC Food Ingredients Co. (5010731)
Company Profile

Company Information | Ext Data | Supporting Documents | Supp

▼ **Company Information**

Company # : 5010731
 Company Name: ABC Food Ingredients Co.
 Street Address: 2090 Main Street
 Suite 100
 City: Sandia
 State/Province: CA
 Postal Code: 99999
 Country: USA
 Website: www.abcfoods.com
 Phone: 555-111-2222
 Fax: 555-111-3333
☐ Postal Address not same as Street Address

▼ **Administrative Information**

Originator: Amy Bales
 Special Attributes:
 Special Notes:

System-Generated Messages

System generated messages appear either at the top of the page, as [Figure 2–20](#) shows, 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 2–20 System-generated messages

(0002391)
Nutrient Analysis

Summary | Related Specs

Error
Specification needs to be specified.

▼ **Summary Information**

Analysis Number: 0002391
 Specification:

Most Recently Used Menu

Click the most recently used menu icon (▼), displayed in the suite header, to view a list of recently viewed objects, such as specifications, questionnaires, or companies, as Figure 2–21 shows. You can click any item in the list to return to it. The most recently used menu is available in most applications. This menu shows the most recently viewed items within that application. For example, when in GSM you see most recently viewed specifications. When in NPD you see most recently viewed projects, activities etc.

You can also access your most recently viewed items from search screens, as shown in Figure 3–1.

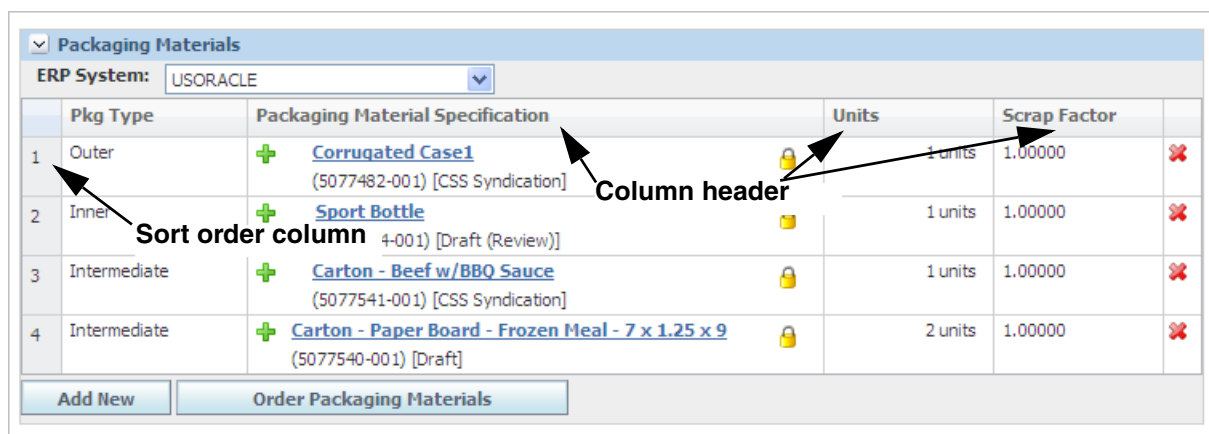
Figure 2–21 Most recently used menu, GSM



Grids

Many sections in GSM and SCRM contain grids, as Figure 2–22 shows. These grids include rows which allow for enhanced grouping of data. You can add and delete rows as you work with the data, and edit the content of rows by clicking in cells.

Figure 2–22 Grid, trade specification



Adding and Deleting Rows

As Figure 2–22 shows, when a grid is in edit mode, you can add rows by clicking **Add New**. To delete a row, click the delete icon (✖). Agile PLM for Process displays a confirmation message. Click **OK** to confirm the deletion, or click **Cancel** to cancel the deletion.

Using the Sort Order Column

For sortable grids, the first column is the sort order column. The sort order column displays a sequence number for each row. This indicates the order the grid will display in for first views and printing. The sort order column does not print.

Resizing Columns

You can resize most columns except the sort order column and icon columns. To resize a column, hover near the right border of a header, as Figure 2–23 shows. The cursor changes to a drag cursor. Click and drag to resize the column. See Figure 2–24 for an example. Content in the column wraps when possible.

If you resize a column, the width you chose remains until you log out. The chosen column width appears on every like grid in the application. For example, if you resize the Supporting Documents Document column on a material specification, then go to a packaging specification, the column remains the same size.

Figure 2–23 Grid, default width

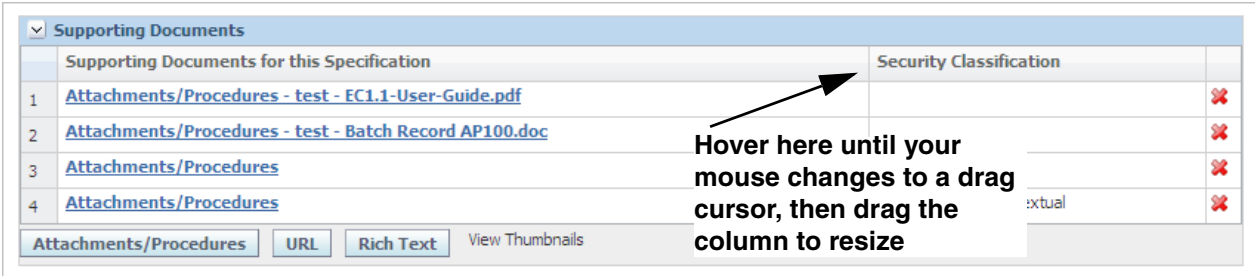
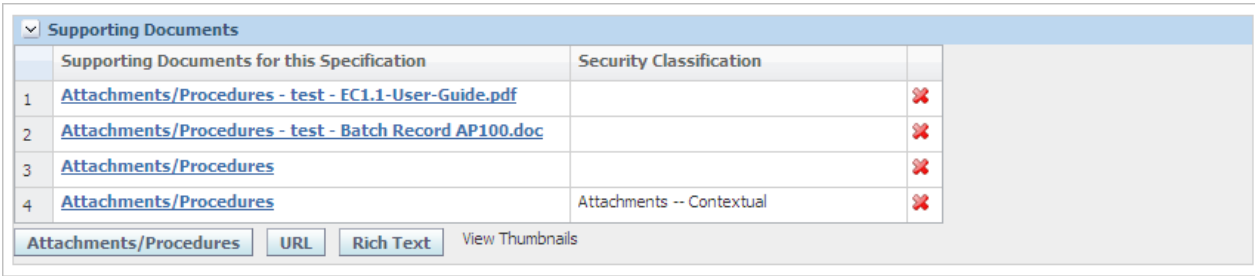


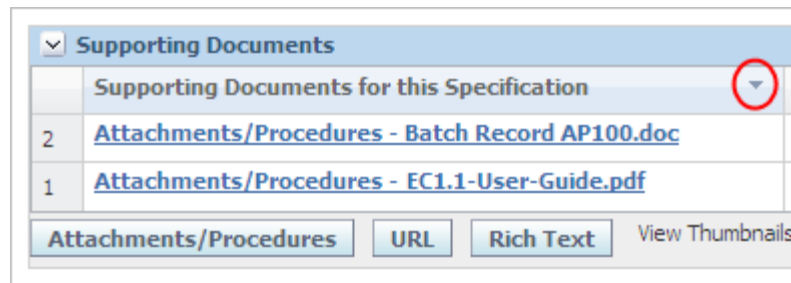
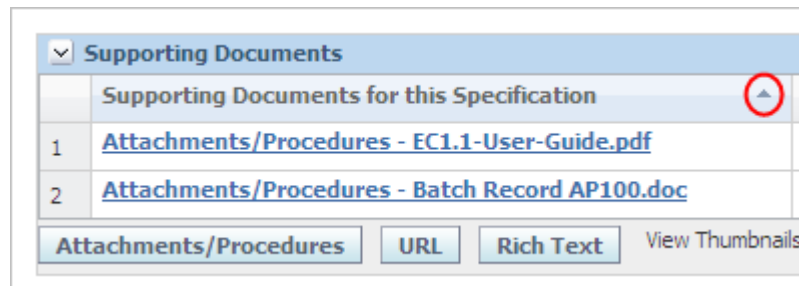
Figure 2–24 Grid, resized column



Sorting Columns

Most columns in grids are sortable. To sort, click on the header. The header changes colors indicating the grid is sorted by that column. An arrow icon (▼) appears in the right side of the header, as Figure 2–25 shows. It displays a down arrow indicating descending order, and an up arrow indicating ascending order. The sort order will remain on every like grid within the application until you log out.

To return to the original grid order, click on the sort order header.

Figure 2–25 Column, sorted in ascending order**Figure 2–26** Column, sorted in descending order

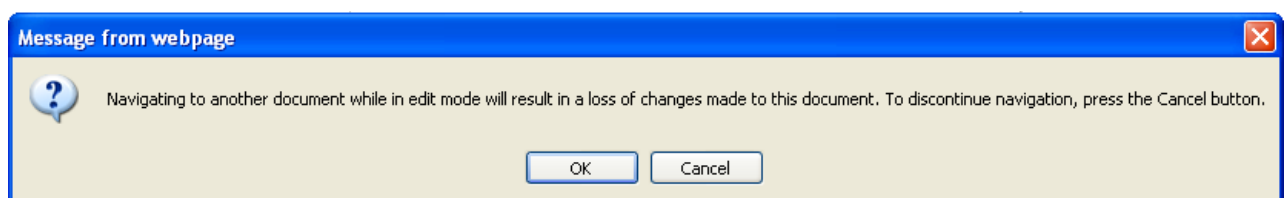
The print function does not respect column sorting.

Editing Cells

Many cells in grids are editable. You can edit cells in grids using the following techniques:

- **Mouse**—Click on an editable field, and the cell displays in edit mode. Enter text or make selections. When you click on another cell or outside the grid, your edits are accepted and the cell becomes read-only.
- **Keyboard**—Once you are in an editable cell you can use the **Tab** key to move to the next editable cell. Depending on the type of cell you are editing you can also use the up/down/right/left arrow keys to navigate the grid as well as the **Enter** key to take a cell into or out of edit mode.


Remember to save your edits before moving to another specification or object. If you click on a link to another object, such as a specification, while in edit mode, the following message is displayed:

Figure 2–27 Navigation message

Linking to Other Objects

When a grid is in read mode, any row containing single links to other objects are fully linked. This means that when you hover in the row, the row is highlighted and you can click anywhere in the row to navigate to that link. If a row contains multiple links, you must click the link directly to navigate to that link.

Tables

Tables group related data and are used on some pages in the Agile PLM for Process suite. Tables in all other applications besides GSM and SCRM and custom data are only editable by putting rows or columns into edit mode by selecting the edit icon (). 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 redisplay in edit mode.

Figure 2–28 GSM material specification, Ext Data tab in edit mode

Extended Attributes

	Extended Attributes		Notes	
	Brightness	target: 5 min: 2 max: 6 %	Shade of paste	
	Countries Sold To	Spain	Preference for country	

Add New


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 2–29](#) shows.





Figure 2–29 GSM material specification, Ext Data tab in edit mode row in edit mode


Extended Attributes

	Extended Attributes					Notes					
<div> <div></div> <div></div> </div>	Brightness	target:	5	min:	2	max:	6	%	<div></div>	Shade of paste	<div></div>


[Table 2–1](#) defines icons that are commonly used in tables:

Table 2–1 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**.

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 2–30](#) shows. Agile PLM for Process displays each field in the column in editable mode.

Figure 2–30 Edit icon in column heading and at table level

▼	daisy land		
	Test Type	Target 	Min 
	color	%	%
	length	%	%
	Moisture	%	%
	pH	%	%
	size	%	%
	smell		
	touch	%	%
	width	%	%
<div> Add Row Add Column Remove Column </div>			

On other tables, as in the one above, 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.

Fields

There are several types of editable fields throughout the application suite:


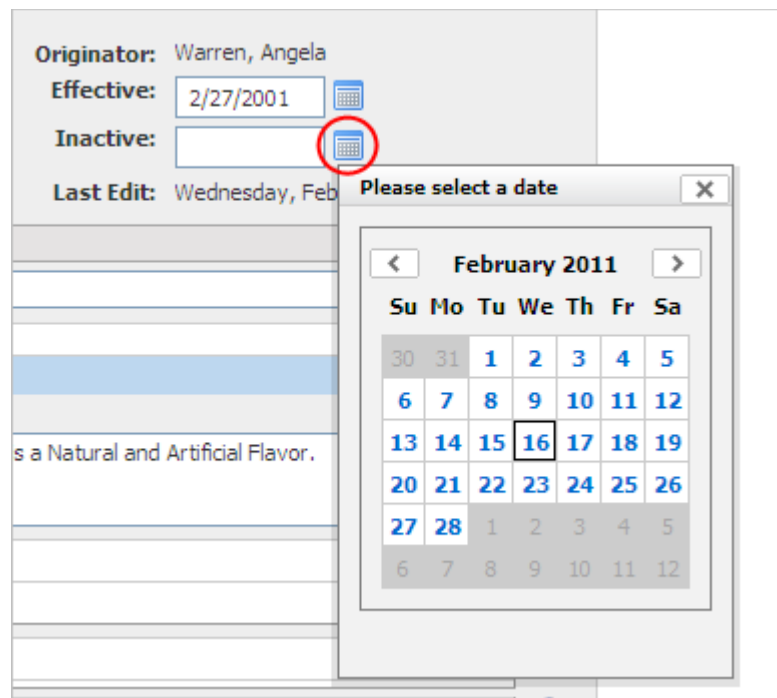
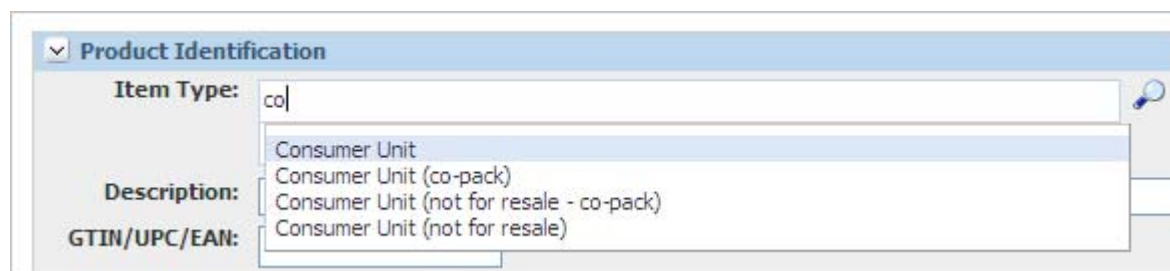
- **Date**—For date fields you can type in a date value using the format MM/DD/YYYY. Alternatively, you can enter a date by clicking the calendar icon (), as shown in [Figure 2–31](#).

Figure 2–31 Date popup window

Dates entered incorrectly or in an invalid format will display in red.

- **Single Select**—You can type a value directly into single select fields, which are fields where one selection is allowed. As you type, the field finds the closest match and displays a selection list below, as [Figure 2–32](#) shows. Click the desired value to populate the field. Alternatively, you can click the search icon (🔍) to display the dialog box used to make a selection.

Figure 2–32 Single select field

As shown in [Figure 2–33](#), the item selected displays below the field. You can delete the item by clicking the delete icon (✕) next to the item, by highlighting the item and pressing **Delete**, or by using the search icon to display the dialog box and delete the selection.

Figure 2–33 Selected item

- **Multi-Select**—Multi-select fields function the same way as single-select fields, except you can select multiple items. [Figure 2–34](#) shows a multi-select field. When deleting multiple items, you can click the delete icon (✕), or use the search icon to display the dialog box and delete the selections. When using your keyboard, you can highlight multiple items using the **Ctrl** key and clicking each item, then press the **Delete** key.

Figure 2–34 Multi-select field, items selected using Shift key

The screenshot shows a form with two fields. The first field, labeled 'Country Of Origin:', contains a list of countries: United Kingdom, Cayman Islands, Bulgaria, Bosnia and Herzegovina, Belgium, Barbados, Austria, Aruba, and Antarctica. Each country name is followed by a small 'x' icon for deletion. The second field, labeled 'Tax Type/Rate:', is empty.

- **Free Text**—The user can enter any free text value into this field. Some free text fields are translatable, shown by the set alternate language text icon (🌐) shown to the right of the field. If the field is translatable the values entered into this field by the user will be stored in the user's language. Additional values can be assigned to other languages by using the alternate language text icon.

Figure 2–35 Translatable free text field

The screenshot shows a form with a section titled 'Summary Information'. Below this title is a label 'Spec Name:' followed by a text input field containing the text 'Lite Beef & BBQ Dinner'. To the right of the input field is a small globe icon (🌐) indicating that the field is translatable.

- **Numeric**—Users can only enter numbers in the numeric field. Some of these fields contain Unit of Measure drop-down selections.

Figure 2–36 Numeric field, Shelf Life field, trade specification

The screenshot shows a form with a section titled 'Shelf Life'. Below this title is a label 'Shelf Life:' followed by a numeric input field containing the value '365'. To the right of the input field is a drop-down menu showing the unit 'days'.

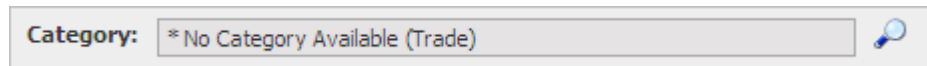
- **Search Fields** (multi and single select)—These fields are populated by the user using a specification or object search tool. The user can not directly type into this field.

Figure 2–37 Search field, Facility field on a sourcing approval in SCRM

The screenshot shows a search dialog box. At the top right are 'Done' and 'Cancel' buttons. Below them is a section titled 'Search Criteria' with a 'Load' button and a 'Save' button. The main area contains a search criteria table with two columns: 'Facility Name' and 'Contains'. The 'Facility Name' column has a drop-down menu. The 'Contains' column has a text input field. Below the table are 'Reset' and 'Search' buttons. A 'Recent Items' button is also visible in the top right corner.

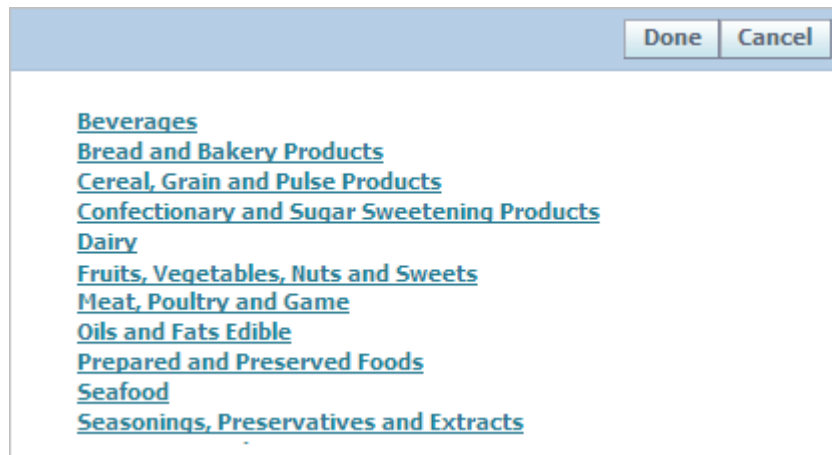
Hierarchy Fields (multi and single select)—These fields are populated by the user using the hierarchy selection tool. The user can not directly type into this field.

Figure 2–38 *Single select hierarchy field, trade specification, category field*



The image shows a user interface element for selecting a category. It consists of a label "Category:" followed by a text box containing the text "* No Category Available (Trade)". To the right of the text box is a magnifying glass icon, indicating a search or selection tool.

Figure 2–39 *Category dialog box*



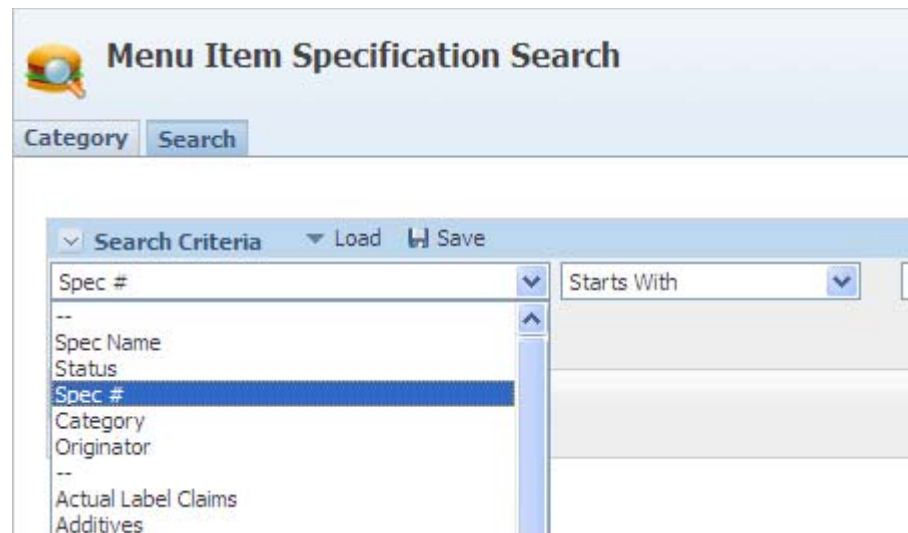
The image shows a dialog box titled "Category dialog box". It has a blue header bar with "Done" and "Cancel" buttons. The main area contains a list of food categories, each preceded by a blue underlined link icon. The categories are: Beverages, Bread and Bakery Products, Cereal, Grain and Pulse Products, Confectionary and Sugar Sweetening Products, Dairy, Fruits, Vegetables, Nuts and Sweets, Meat, Poultry and Game, Oils and Fats Edible, Prepared and Preserved Foods, Seafood, and Seasonings, Preservatives and Extracts.

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 2–40](#) shows. 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 2–40 Spec # selected using keystroke shortcut



Finding Data

This chapter provides explains techniques for finding data in Agile Product Lifecycle Management (PLM) for Process. It includes the following topics:

- [Understanding the Search Page](#)
- [Searching Custom Data](#)
- [Searching Breakdown Items](#)
- [Saving Search Criteria](#)
- [Exporting Search Results](#)
- [Running the Previous Search from the Search Page](#)
- [Running the Previous Search from a Data Object](#)
- [Understanding the Category Tab](#)

Understanding the Search Page

There are two basic ways of locating information in Agile PLM 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 3-17.

The initial screen in most applications of Agile PLM 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 3-1](#) 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 the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

Figure 3–1 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 3-17). 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 3–1](#) and defined in [Table 3–1](#), these fields are:

- **Key field**
- **Operator**
- **Search term**

The main search page includes the following buttons, as shown in [Figure 3–1](#) above:

- **Reset** — Clears all search criteria fields and results.
- **Search** — Displays your search results in the Search Results section.

Additional options on the search page are defined below:

- **Load** — Loads a saved search and allows you to run your last search. [Figure 3–2](#) shows these options. For more information on running a saved search, see ["To retrieve a saved search:"](#) on page 3-13.

Figure 3–2 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 3-13).
- **Recent Items** — Displays a listing of recent search results in the Search Results section.

Search Field Definitions

Table 3–1 contains descriptions of search fields that appear on the main search page. 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 3–1**) is the default value.

Table 3–1 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. This value can be adjusted using Profile and Preferences, as explained in "Results Per Page Section" on page 4-4.

More Criteria and Less Criteria

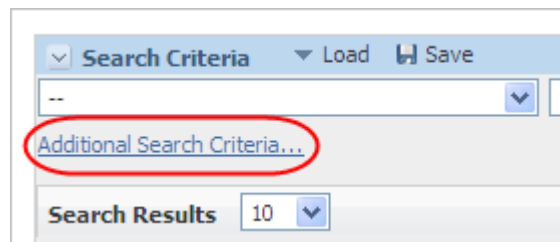
The more criteria icon (+) displays to the right of the search term field. When clicked, more criteria creates another row of the main three search fields. You can use additional rows to enter additional search parameters. For example, you can search for all specification names that contain "Milk" that are in the "Approved" status.

This less criteria icon (−) appears when additional search rows are added using the more criteria link.

Additional Search Criteria Link

In addition to the basic entry fields on the search page — key field list, operator, and search term — the Additional Search Criteria action link may appear, as shown in **Figure 3–3**. Like other linked fields, action links perform an action.

Figure 3–3 Additional Search Criteria link on the main search page



The Additional Search Criteria link 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 material specifications.

3. **Formulation inputs**—The dialog box includes the Formulation Inputs section for formulation specifications.

Figure 3–4 The additional attributes dialog box

This section appears only for specification types that include breakdowns

Breakdown Items

Component	Condition	Target

Add New

Extended Attributes

Extended Attributes	Condition	Target

Add New

Custom Sections (Quick)

Extended Attributes	Condition	Target

Add New

Custom Sections (Advanced)

Custom Section	Row	Column	Condition	Target

Add New

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 3–5](#), 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 3–5 Defining the attribute

Extended Attributes			
Extended Attributes	Condition	Target	
✓ Calories	Equals	100	✗

Add New

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

You can add multiple extended attributes as search criteria.

Custom Sections

Custom sections are configurable sets of extended attributes. 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**. 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 3–6 shows.

Figure 3–6 Defining the custom section value

Custom Sections (Quick)			
Extended Attributes	Condition	Target	
✓ Child Nutrition Amount	Equals	<input type="text"/> mm	✗

Add New

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**. A multiple-select popup window appears.


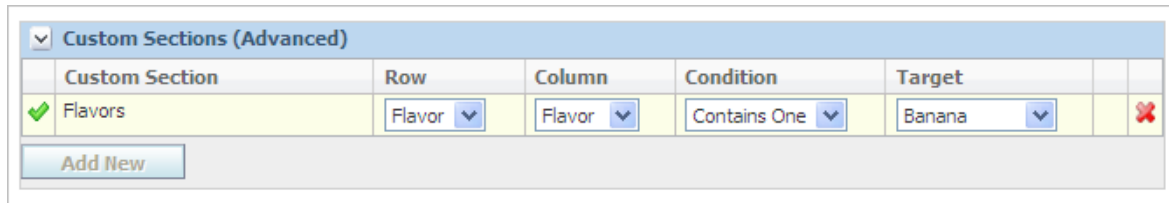





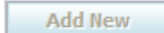

2. Select the custom section to search in, then click **Done**. Your selections display in the Custom Section table.
3. Click the edit icon () to the left of the added row. The row displays in edit mode, as [Figure 3-7](#) shows.

Figure 3-7 Defining the custom section value



Custom Sections (Advanced)					
	Custom Section	Row	Column	Condition	Target
	Flavors	Flavor 	Flavor 	Contains One 	Banana 
					

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


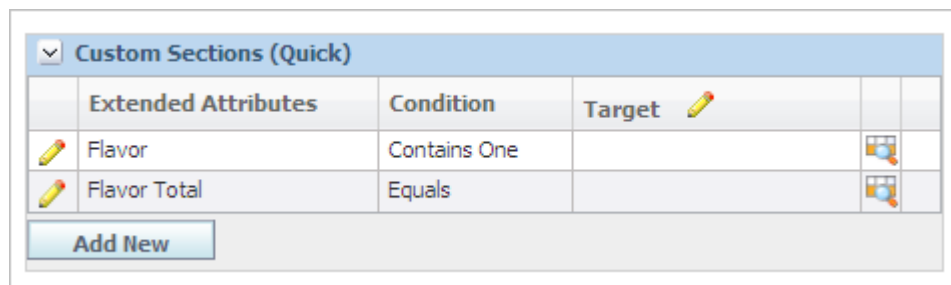





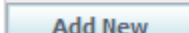
Quick and Advanced custom section searches feature the ability to search within a row. [Figure 3-8](#) shows a Quick search using the search within row icon ().

Figure 3-8 Search within a row



Custom Sections (Quick)			
	Extended Attributes	Condition	Target 
	Flavor	Contains One	
	Flavor Total	Equals	
			

In this example, the user can find all specifications where the extended attributes "Flavor" and "Flavor Total" 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


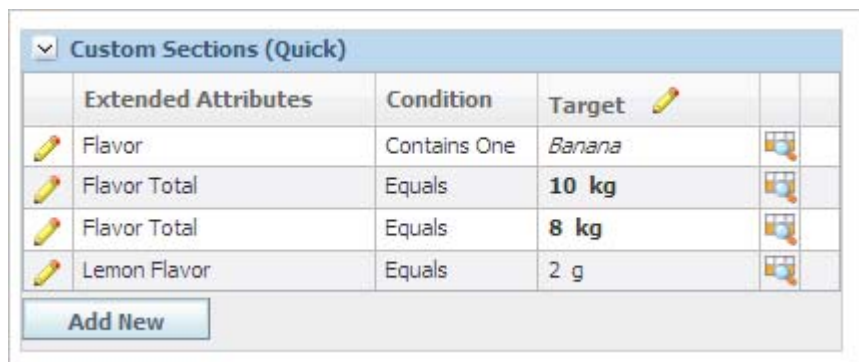





Clicking the search within row icon () adds a new row to your grid. Each added row represents an additional attribute in the same custom section row. The row colors are alternated to help distinguish the sets, as demonstrated in [Figure 3–9](#).

Figure 3–9 Search within a row, color groupings



Custom Sections (Quick)			
	Extended Attributes	Condition	Target 
	Flavor	Contains One	Banana
	Flavor Total	Equals	10 kg
	Flavor Total	Equals	8 kg
	Lemon Flavor	Equals	2 g

Add New

In the complex example shown in [Figure 3–9](#), the user will find all specifications that contain multiple attributes Flavor, Flavor Total, and Lemon Flavor. However, notice that Flavor Total = 10 kg and Flavor Total = 8kg will only return a positive result if both attributes are together in the same row of a custom section. Conversely, Flavor and Lemon Flavor can be located anywhere within any custom section.

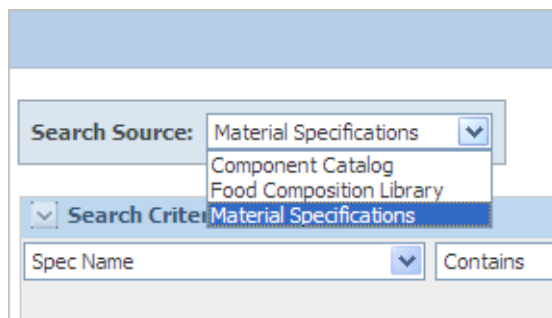
Searching Breakdown Items

For trade, product, and material specifications, the Breakdown Items section displays in the additional attributes dialog box. This section allows you to search specifications by specifying one or more breakdown component/value pairs.

To perform a search for breakdown items:

1. In the Breakdown Items section, click **Add New**. A component search page displays.
2. Select a search source from the drop-down menu (depending on your configuration).

Figure 3–10 Breakdown items search page, drop-down list



Search Source: Material Specifications ▼

Component Catalog

Food Composition Library




Search Criteria: Material Specifications ▼



Spec Name Contains

Note: Depending on your configuration, a drop-down list will appear at the top of the page allowing you to search for material 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 3-12.
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 3-11 shows.

Figure 3-11 Added breakdown items

Breakdown Items			
	Component	Condition	Target 
	Spice Oil for Pork & Beans	Equals	0 %
	Vinegar - Distilled - White - 100 Grain	Equals	0 %
Add New			

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 3-12](#) shows. This section allows you to search specifications by specifying one or more material specification/value pairs used in the formulation.

Figure 3-12 Additional attributes dialog box, Formulation Inputs section

Material	Condition	Target

Below the table is an **Add New** button.

To perform a search for formulation inputs:

1. In the Formulation Inputs section, click **Add New**. A material specification search page displays, as [Figure 3-13](#) shows.

Figure 3-13 Specifications search page

Search Criteria:

Search **Reset**

Selected Items

Remove **Clear** **Done**

2. Enter search criteria in the key field, operator, and search term fields.
3. Click **Search**. Materials matching the search criteria display in the Search Results table, as described in ["Search Results"](#) on page 3-12.
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 3-14](#) shows.

Figure 3–14 Added formulation inputs

Material	Condition	Target
Lemon Juice - Single Strength	Equals	0 %
Mango Juice	Equals	0 %
Orange Juice - Concentrated	Equals	0 %

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.

Dialog Box Searches

Throughout the application suite there are many places that require you to search for a specification or an object. These searches are shown in dialog boxes.

Single Select Search—Use these dialog boxes to run the search and select an item.

Figure 3–15 Single select search, sourcing approval, Facility field

Search Criteria Load Save Recent Items

Facility Name Contains

Reset Search

Done Cancel

Multi-Select Search—After clicking **Search**, matching items display in Search Results. As you click on an object, the selected item is placed in the Selected Items "bucket". You can select multiple objects.

Figure 3–16 Multi select search, trade specification, Related Specs tab, Packaging Configuration Specification field

Done Cancel

Search Criteria Load Save Recent Items

Spec Name Contains case +

Reset Search

Search Results

Spec #	Spec Name	Status	Supercedes
5087757-001	Case - 10x10 lb sack	Draft	
5087759-001	Case - 5x30 lb sack	Draft	
5087758-001	Case - 8x20 lb sack	Draft	
5077480-001	Case Pack - 60 lbs - Meat	Developmental	

Selected Items

Case - 5x30 lb sack
Case - 8x20 lb sack

Remove Clear Done

Figure 3–17 Selections made

Packing Configuration Specifications					
	Spec #	Spec Name	Equivalent	Comments	
1	+ 5087759-001	Case - 5x30 lb sack [Draft]			✖
2	+ 5087758-001	Case - 8x20 lb sack [Draft]			✖
Add New					

Multi-Model Search—Some searches allow you to search multiple object types. You select the type of object you would like to search for using the Search Source dropdown above the search control, as shown in [Figure 3–18](#).

Figure 3–18 Multi-model search, selecting packaging material specification to add for a trade specification

Search Source:

Packaging Material Specification

Packaging Material Specification

Printed Packaging Specification

Search Criteria

Load

Save

Spec Name

Contains

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 page numbers to view the additional pages. Click anywhere in a row to view the associated item.

Figure 3–19 Search results

Search Results

Export

10

12345678910...50

Spec #	Spec Name	Short Name	Status	Category	Supersedes	Equivalent
5077414-001	Spice Oil for Pork & Beans	jw	Draft	Food Additives » Flavors/Bases » Other	012433	
5077415-002	Granulated Sugar (Sucrose)	xx	Draft	Pulses » Navy Beans » Canned	5077415-001	
5077415-003	Granulated Sugar (Sucrose)	xx	Draft	Pulses » Navy Beans » Canned	5077415-002	
5077417-001	Tomato Paste - Cold Break (36% N.T.S.S.)		Draft	Tomato Products » Tomatoes » Cold Break Paste	018078 - 09/21/2001	2331441
5077420-001	Tomato Paste - Grade A Fancy	asdfs	Approved	* No Category Available (ing) » * No Category Available » * No Category Available	34381 - 09/06/2001	
5077421-001	Lemon Juice - Single Strength	Lemon Juice - Single Strength	Admin Review	Fruit/Nut Products » Lemons » Juices/Concentrates	34462 - 04/29/1997	
5077423-001	Sugar (Sucrose) - Granulated - Extra Fine	rt	Draft	Sweeteners » Sugar » Dry	34484 - 07/19/1994	
5077424-001	Caramel Color - Acid Proof - Single Strength	1	Developmental	Food Additives » Colors » Natural	34493 - 10/15/1993	
5077425-001	Oil - Soybean (Refined, Bleached, Deodorized)	Oil - Soybean (Refined, Bleached, Deodorized)	Admin Review	* No Category Available (ing) » * No Category Available » * No Category Available	34590 - 05/30/1997	
5077427-001	Unsulphured Molasses - Imported	Unsulphured Molasses - Imported	Draft	Sweeteners » Other » Other	34969 - 11/08/1991	

The maximum number of 500 records has been exceeded.

10

12345678910...50

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.

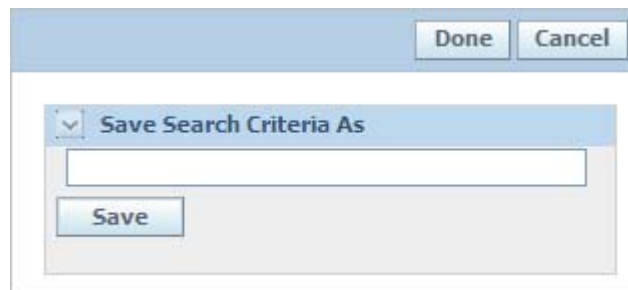
To save search criteria:

1. Enter your search criteria as described in ["Understanding the Search Page"](#) on page 3-1.
2. Click **Save**, as shown in [Figure 3-20](#). A Save Search Criteria As dialog box displays, as shown in [Figure 3-21](#).

Figure 3-20 Search page showing Save Search button



Figure 3-21 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:

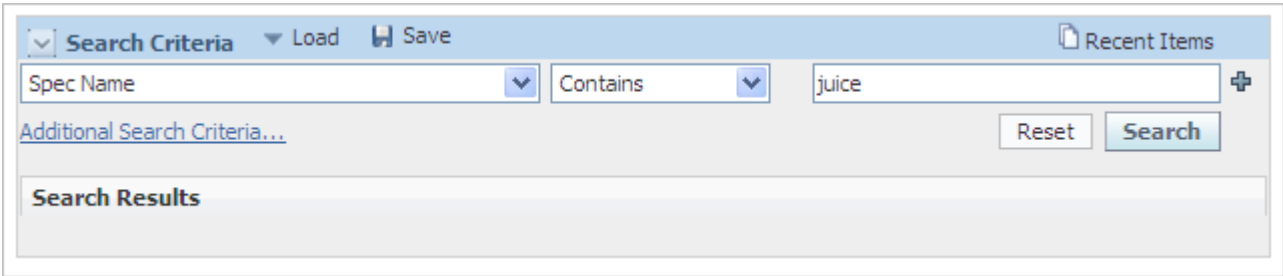
1. On any search page, click **Load**.
2. Select **Load Saved Search** from the drop-down list. A dialog box displays, showing a list of all of the searches that you have saved for a particular business object (specification, company, etc.), as shown in [Figure 3-22](#).

Figure 3–22 Saved Searches for [Your Name] dialog box



3. Click the hyperlinked name of the saved search to load as shown in Figure 3–23.

Figure 3–23 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:

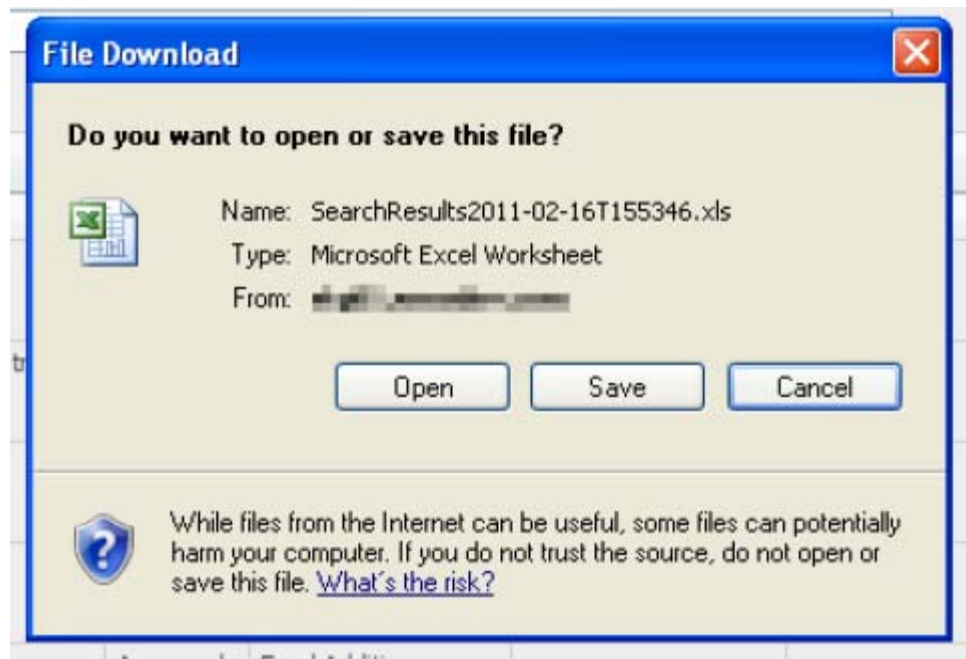
1. Perform a search. The system displays the search results, as shown in Figure 3–24.

Figure 3–24 Search results list and Export link

Spec #	Spec Name	St
5080165-001	Nutrient Profile: Orange A	Ap
5080184-001	Nutrient Profile: Orange C	Ap
5080217-001	Nutrient Profile: Orange A	Ap
5080533-001	Nutrient Profile: Orange Juice	Ap

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 3–25 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 3–26 Exported search results in Excel

Click any linked field to return to that item in the application. You may need to log in again.

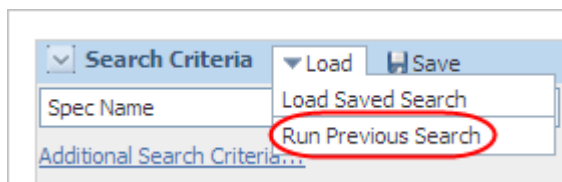
The title and worksheet tab name default to the date and time of export unless you save the file to another name.

Spec #	Spec Name	Short Name	Status	Category	Supersedes	Equivalent
5080091-001	Orange Flavor 123	orange flavor	Draft (Review)	Food Additives > Flavors/Bases > Fruit		
5080156-001	Orange Juice - Concentrated	Orange Juice - Concentrated	Draft	Fruit/Nut Products > Oranges > Juices/Concentrates		
5080166-001	Orange Flavor 4487	Orange Flavor 4487	Draft	Food Additives > Flavors/Bases > Fruit		
5080167-001	Orange Flavor 3399	Orange Flavor 3399	Inactive	Food Additives > Flavors/Bases > Fruit		
5080178-001	Orange Flavor 336	Orange Flavor 336				
5080842-001						
5081328-001		Orange Tea	Draft	Category Available > No Category Available		
5081426-001	Concentrated Orange Juice (DWB Test)	Concentrated Orange Juice	Admin Review	Fruit/Nut Products > Oranges > Juices/Concentrates		
5082757-001	Concentrated Orange Juice (DWB Recon/Equiv Test)	Concentrated Orange Juice	Admin Review	Fruit/Nut Products > Oranges > Juices/Concentrates		
5082828-001	Orange Flavor 236 - test	Orange Flavor 236	Draft	Food Additives > Flavors/Bases > Fruit		
5082829-001	Orange Flavor 236 - test 2	Orange Flavor 236	Draft	Food Additives > Flavors/Bases > Fruit		
5082835-001	Orange Flavor 236	Orange Flavor 236 fdsrds	Draft	Food Additives > Flavors/Bases > Fruit		
5084079-001	daisy oranges	daisy oranges	Draft	* No Category Available (ing) > * No Category Available > * No Category Available		
5084601-001	Orange Juice Mix	Orange Juice	Draft	* No Category Available (ing) > * No Category Available > * No Category Available		

- 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 (material 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 3–27](#) shows. This feature is available for the current session only.

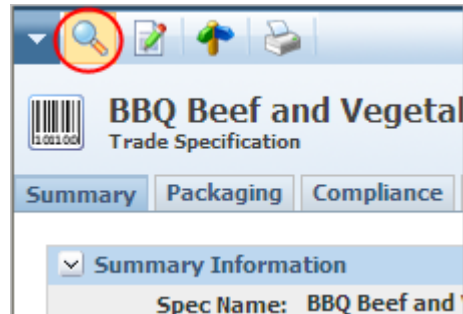
Figure 3–27 Run Previous Search option

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 action icon is displayed next to the action menu, as shown in [Figure 3–28](#).

Clicking **Run Previous Search** returns you to the search page of your last search and automatically re-runs it. If no previous search exists, Agile PLM for Process returns you to the search page for the object type you are on.

Figure 3–28 Run Previous Search link



Sorting Search Results

In Agile PLM for Process, search results display in ascending order by default. To re-sort results, click any column head and the data redisplayed 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 PLM for Process uses the Category tab, which resides on the same screen as the main search page for certain applications (see [Figure 3–29](#)). 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 3–29 Category tab, as seen from the main search page tab



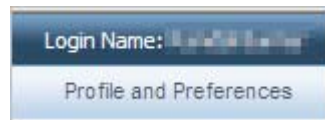
Defining Your Profile and Preferences

This chapter explains how to use Profile and Preferences to edit and view your settings that span select applications. This chapter contains the following topics:

- [Preferences Tab](#)
- [Basic Information Tab](#)
- [Access Information Tab](#)
- [Filters Tab](#)

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 4-1](#).

Figure 4-1 Location of the Profile and Preferences menu item



The user preferences dialog box displays, as shown in [Figure 4-2](#).

Figure 4–2 The User Preferences dialog box, Preferences tab

The screenshot shows the 'User Preferences' dialog box with the 'Preferences' tab selected. The dialog has a title bar with 'Save & Close' and 'Cancel' buttons. The 'Preferences' tab is active, showing various settings. The 'Settings' section includes 'UI Language' (English (United States)), 'Free Text Language' (ENGLISH), 'Category Tab is Default' (unchecked), 'Show Hidden Specs' (checked), 'Global Spec UOM' (-), 'System Code (GSM)' (Oracle System), and 'System Code (SCRM)' (empty). There are links for 'Change Password' and 'Manage Passphrase'. The 'Results Per Page' section has 'Action Items' and 'Search Result' both set to 10. The 'Cost Preferences' section has 'Currency' (USD), 'Cost Type' (empty), and 'Cost Set' (empty). The 'Formulation Preferences' section has 'Path' (Input Quantity) and 'Combine Like Items' (checked).

Save & Close **Cancel**

Preferences **Basic Information** **Access Information** **Filters**

Settings

UI Language: English (United States) ▼

Free Text Language: ENGLISH ▼

Category Tab is Default: ☐

Show Hidden Specs: ☒

Global Spec UOM: - ▼

System Code (GSM): Oracle System ✖ 🔍

System Code (SCRM): ✖ 🔍

[Change Password](#)

[Manage Passphrase](#)

Results Per Page

Action Items: 10 ▼

Search Result: 10 ▼

Cost Preferences

Currency: USD ▼

Cost Type: ▼

Cost Set: ▼

Formulation Preferences

Path: Input Quantity ▼ **Combine Like Items:** ☒

Legend:

UI—User interface

UOM—Unit of measure

Preferences Tab

The Preferences tab consists of three sections: Settings, Results Per Page, 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 and culture. 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. This language must be the same language selected for your UI language.
- **Category Tab Is Default** — Sets the Category tab as the default tab that displays when you go to a search page.
- **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 **Change Password**. A 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.
- **Manage Passphrase** — Displayed when the logged in user has been set up to have eSignature enabled in UGM. When a user needs to establish a new passphrase or manage an existing passphrase upon logging in to Profile and Preferences, one of the following messages displays:

"Your passphrase has expired, please update your passphrase."

"Your passphrase has not been established, please setup your passphrase. "

To manage your passphrase:

1. Click **Manage Passphrase**. A Manage Password dialog box opens.
2. Type your **Old Passphrase** and type your new passphrase in the **New Passphrase** and **Confirm Passphrase** fields.

3. Click **Submit**. The new passphrase takes effect after you have saved the revised user profile.

Results Per Page Section

The Results Per Page section contains settings for action items and search results.

- **Action Items** — Sets the default number of action items displayed per page.
- **Search Results** — Sets the default number of search results displayed per page.

Cost Preferences Section

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 Section

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 4-3](#).

Figure 4-3 Basic Information tab

The screenshot shows a web interface for a user profile. At the top, there are two buttons: "Save & Close" and "Cancel". Below these are four tabs: "Preferences", "Basic Information" (which is highlighted), "Access Information", and "Filters". The "Basic Information" tab contains a form with the following fields and values:

First Name:	Sarah
Last Name:	Adams
Job Title:	Vice President
Business Phone:	555-111-2222
Fax:	555-111-3333
Email:	sadams@globalfoods.com
Street Address:	100 Main Street
	Suite 100
City:	Dallas
State/Province:	TX
Postal Code:	55555
Country:	USA

Basic 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 4-4](#), contains a read only view of the access you have throughout the application suite.

Figure 4-4 Access Information tab

The screenshot shows a software interface with a top bar containing 'Save & Close' and 'Cancel' buttons. Below this is a tabbed menu with 'Preferences', 'Basic Information', 'Access Information' (selected), and 'Filters'. The main content area is divided into five sections, each with a title and a list of accessible items:

- GSM Business Units:** CPI Syndication, CPI Northern Europe, CPI Antarctica, CPI North America, CPI Western Europe
- SCRM Business Units:** CPI Northern Europe, CPI Antarctica, CPI North America, CPI Western Europe
- User Groups:** Global, All UGM Approvers, German Translators, ComplianceReviewer, Global TIP Admin
- Catalog(s) Visibility:** Prodika, Prodika » xeno, Agile
- Roles:** [ACCESS_LEVEL_EDITOR], [ADD_CUSTOM_SECTION], [ADD_EXT_ATT], [ARCHIVED_DWB_SPEC_CREATOR], [ARCHIVED_DWB_TO_GSM_SPEC_EXPORTER], [CACHE_ADMIN], [CAN_RERESOLVE_WORKFLOWS], [CAN_RERESOLVE_WORKFLOWS_SCRM], [COMPANY_CREATOR], [COMPLIANCE_REVIEWER], [CSS_ADMIN], [DATA_ADMIN], [DRL_EDITOR], [DRL_VIEWER], [EA_SECTION_CREATOR], [SUPER_DATA_ADMIN], [TESTING_PROTOCOL_ADMIN], [TSA_ADMIN], [UGM_GROUP_APPROVER], [UGM_USER_APPROVER], [WFA_ADMIN], [WFA_GLOBAL_ADMIN]

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. Your system administrator assigns DRL catalogs.

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 *Agile Product Lifecycle Management for Process Security Configuration Guide*.

Roles

A read-only field that displays which roles you have been assigned to. Your system administrator assigns roles.

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 4-5](#).

Figure 4-5 *Filters tab*



The screenshot shows a software window titled "Filters" with a tabbed interface. The tabs are "Preferences", "Basic Information", "Access Information", and "Filters", with "Filters" being the active tab. At the top right of the window are two buttons: "Save & Close" and "Cancel". The main content area is titled "Filters" and contains two sections: "BU Filter:" and "Group Filter:". Each section has a text input field and a magnifying glass icon to its right. The "BU Filter:" field contains the text "CPI North America". The "Group Filter:" field contains the text "USA, Japan, Netherlands".

- **BU Filter** — Filters GSM search results based on business unit. For example, you may have access to Europe, North America, and South America business units. You can set your filter to contain a subset of these business units (North America) and your search results will only contain items assigned to the North America BU.
- **Group Filter** — Filters group-defined attributes such as allergens, intolerances, additives, and Complies With lists.

Working with Extended Data

This chapter describes how to work with extended data once it has been consumed in applications in Agile Product Lifecycle Management for Process. The topics covered include:

- [Overview of Extended Data](#)
- [Ext Data Tab](#)
- [Adding a Custom Section](#)
- [Editing a Custom Section](#)
- [Deleting a Custom Section](#)

Overview of Extended Data

As mentioned earlier in this guide, 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.

Custom sections are configurable sets of extended attributes.

Roles

There are several roles associated with extended data. Your system administrator assigns these roles, which are detailed in Appendix A of the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Setting Up Extended Data

Extended data must first be set up by your administrator before it can be "consumed" in various applications. For more information, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Searching for Extended Data

There are certain techniques for searching for extended data, as described "[Searching Custom Data](#)" on page 3-4.

Ext Data Tab

Applications such as GSM and SCRM contain business objects (specifications, companies and facilities) for which you can set up extended attributes or custom sections using the Ext Data tab. The Ext Data page, shown in [Figure 5–1](#), consists of two sections:

- Extended Attributes
- Custom Sections

Note: The extended attribute fields and custom sections that can be added here are maintained by your administrator.

Figure 5–1 Ext Data tab, Company profile in SCRM

The screenshot displays the 'Ext Data' tab for 'Global Foods (5012280)'. The page has a navigation bar with tabs: Company Information, Ext Data (selected), Supporting Documents, Supply Categories, DRL Catalog, Facilities, Contacts, and Audit Trail. Below the navigation bar, there are three main sections:

- Extended Attributes:** A table with columns 'Extended Attributes' and 'Notes'. It contains one row with the value 'Countries Sold To' and a green checkmark icon. There are '+' and '-' icons for adding and removing rows.
- Adhesives - Time / Temperature:** A section with a 'Target' field set to '25 February 2011' and an 'Expiration' field. There is an 'Edit Section' button.
- Manage Custom Sections:** A section with 'Add Sections' and 'Remove Sections' buttons.

Extended Attributes Section

Extended attributes define specific characteristics about the company. You can build these attributes to meet specific needs. Two roles are associated with extended attributes:

- [ADD_EXT_ATT] — Users with this role can see and use the Add New button to add extended attributes.
- [REMOVE_EXT_ATT] — Users with this role can see and use the Delete column of the Extended Attributes grid to remove extended attributes.

Note: These roles are added to your user profile by your administrator using UGM.

Custom Sections Section

Custom sections are configurable sets of extended attributes. The custom data you enter is displayed in a table at the bottom of the page. Two roles are associated with custom sections:

- [ADD_CUSTOM_SECTION] — Users with this role can see and use the Add Section button to add custom sections.
- [REMOVE_CUSTOM_SECTION] — Users with this role can see and use the Remove Section button to remove custom sections.

Note: These roles are added to your user profile by your administrator using UGM.

Note: Distinct attributes can only be added to a company profile one time. For more information, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.

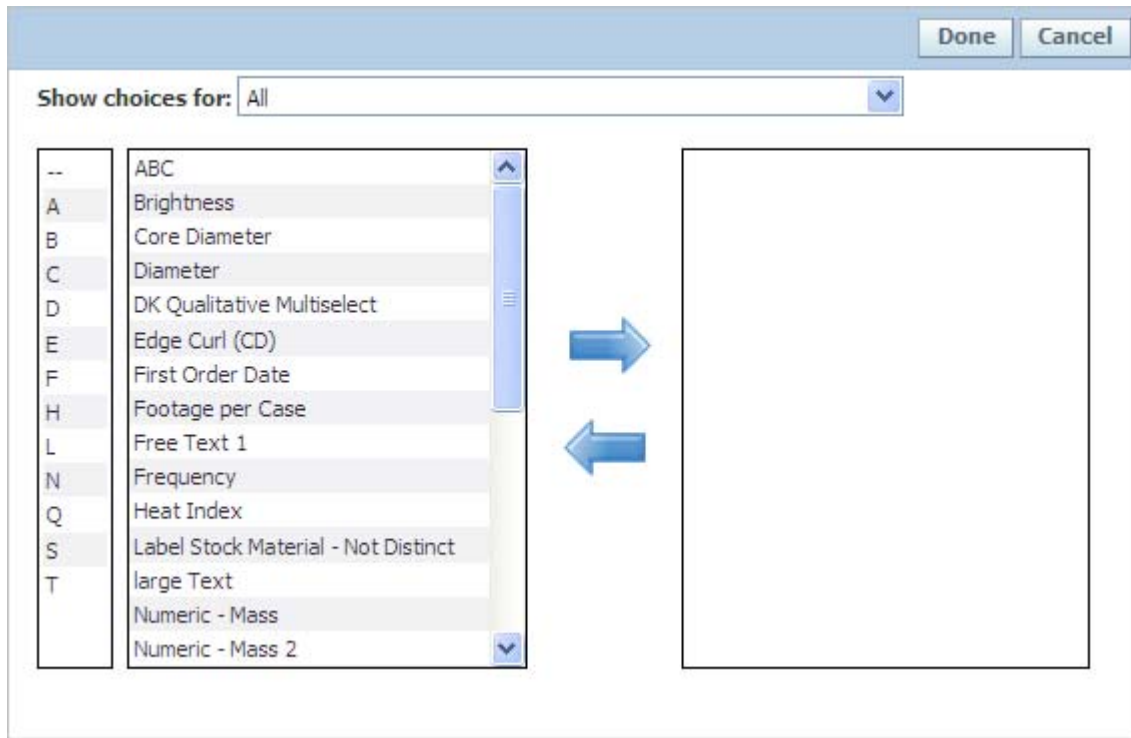
Warning: If you remove a custom section or extended attribute, the system deletes the data that you entered. Delete data with caution, because it cannot be retrieved.

Adding Extended Attributes

To add extended attributes:

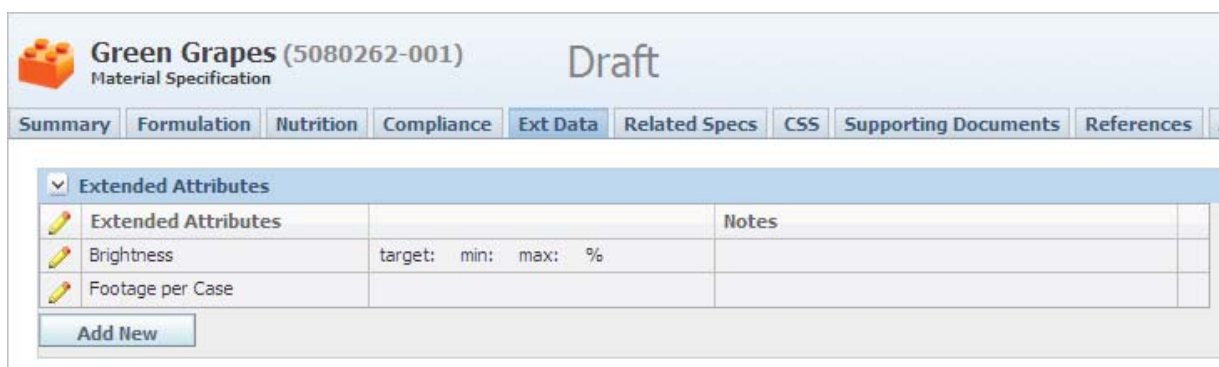
1. Click **Add New** in the Extended Attributes section. A dialog box opens, as shown in [Figure 5-2](#).

Figure 5-2 Extended attributes dialog box



2. Select the attribute to add and then click the add selected data icon (➡). Select more than one attribute by holding down the **Shift** or the **Control** key on your keyboard and clicking the mouse on the attributes to include. Remove attributes from the list by clicking on the attribute name in the right column and clicking the remove selected data icon (⬅).
3. Once you have selected all the attributes to add, click **Done** to return to the object page. The selected attributes are added to the list, as [Figure 5-3](#) shows. You can now define the values for the extended attributes.

Figure 5-3 Extended Attributes list



Defining Values to the Extended Attributes

There are two ways to add values to the extended attributes. You can edit each row individually or edit the entire extended attributes grid.





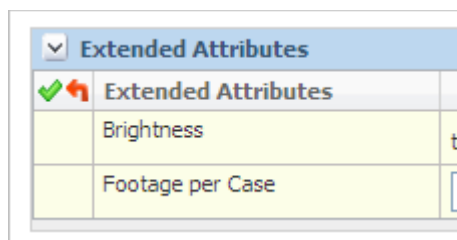
- To edit an individual row, select the edit icon () on the left side of the row you want to edit. Add the desired value and any notes. Click the apply changes icon () to confirm your change.
- To edit the entire grid, click the edit icon () in the top left corner of the grid and all extended attribute values will be available for editing. Once you have entered the desired values and notes, click the apply changes icon () to confirm your changes. [Figure 5-4](#) shows the edit grid option.

Figure 5-4 *Extended Attributes grid in edit mode*



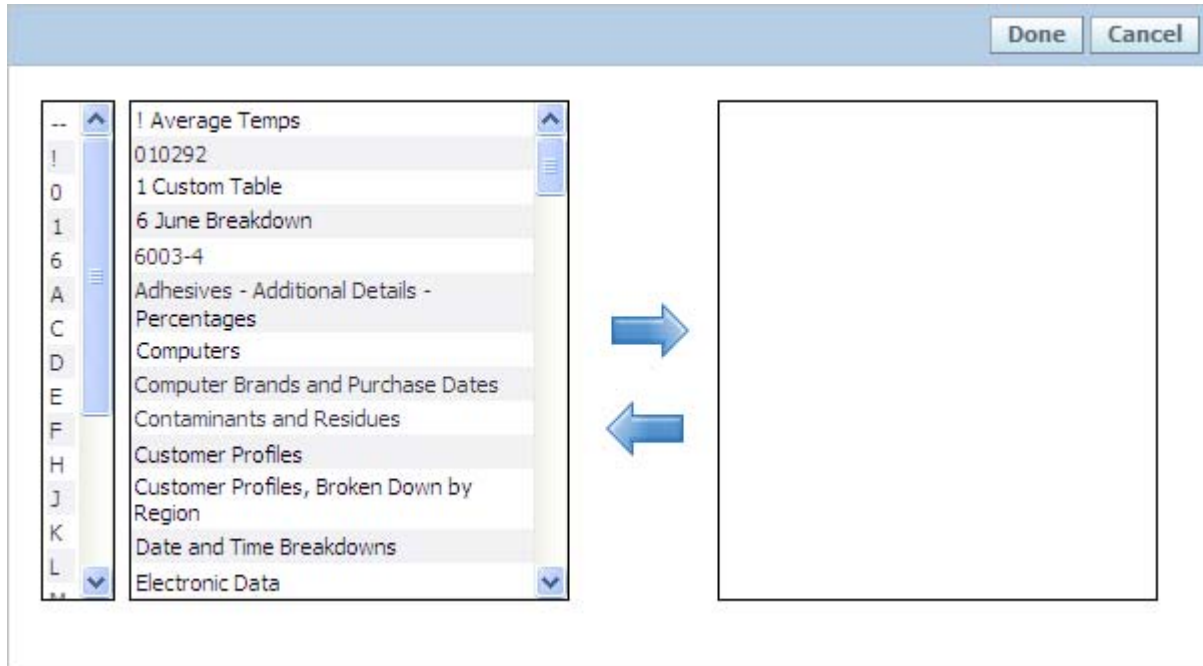
After you have entered the desired extended attribute information, click **Save** to save your data.

Adding a Custom Section

To add a custom section:

1. With the page in edit mode, click **Add Section**. A dialog box listing available custom sections is displayed, as [Figure 5-5](#) shows.

Figure 5-5 Custom section selection dialog box



2. Select a section name, and then click **Done**. The custom section is added to the business object. You can make multiple selections.

Editing a Custom Section

To edit a custom section table, row, or column:






1. To add values to the custom section, click **Edit Section**. A dialog box displays the custom section in edit mode, as [Figure 5-6](#) shows. The edit icon () displays for every editable row and column. It also displays in the upper left corner of the table, indicating you can edit the entire section. Depending on the size of your custom section, editing the entire section may not be available.

Figure 5-6 Custom section in edit mode



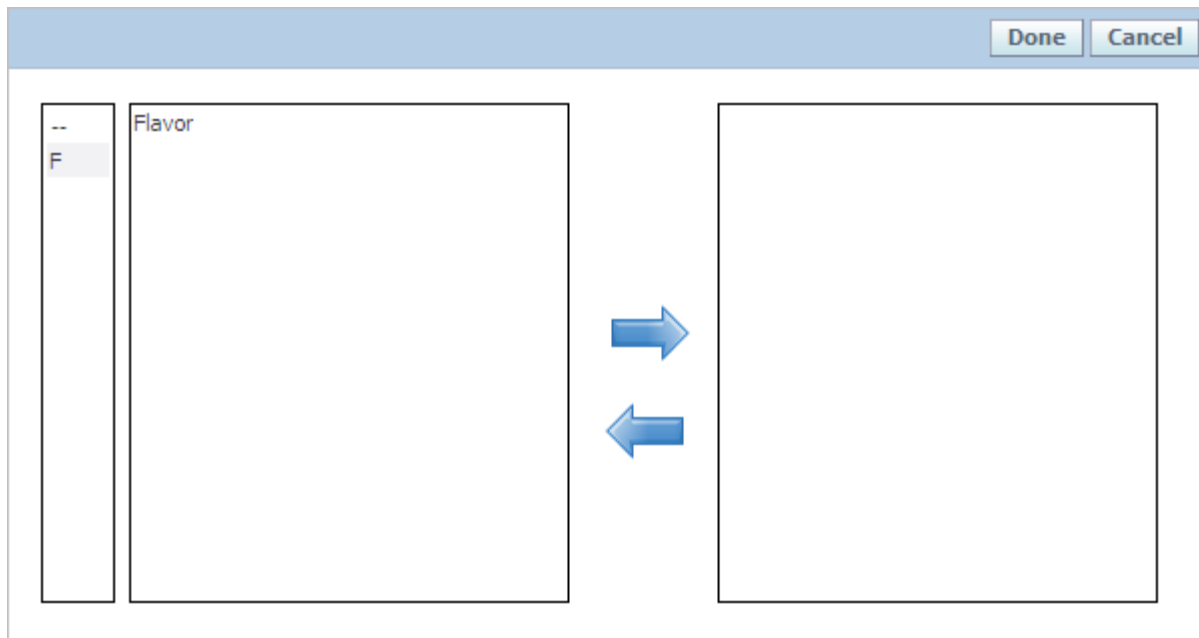
Flavors	Flavor	Target
	Cherry	2 g
	Grape	3 g
	Watermelon	5 g
	Lime	3 g
Total	---	100 kg

Buttons: Add Row, Add Column, Remove Column

2. Click the edit icon () and make appropriate changes to the table, row, or column. For rows marked with the "Repeatable" tag in ADMN, the add row icon () displays to the right of the edit icon. Use this icon to quickly add repeatable rows to the table. You can then set the row order using the reorder row icons ().
3. Click the apply changes icon ().
4. Click **Done**.
5. Click **Save**.

To add a row:

1. With the custom section in edit mode, click **Add Row**. A dialog box listing rows that can be added is displayed, as [Figure 5-7](#) shows:

Figure 5–7 Available rows dialog box

2. Select a row, and then click the add selected data icon (➡).
3. Repeat step 2 to add additional rows.
4. Click **Done**. The dialog box is closed, and the added rows display in the table.
5. Click **Save**.

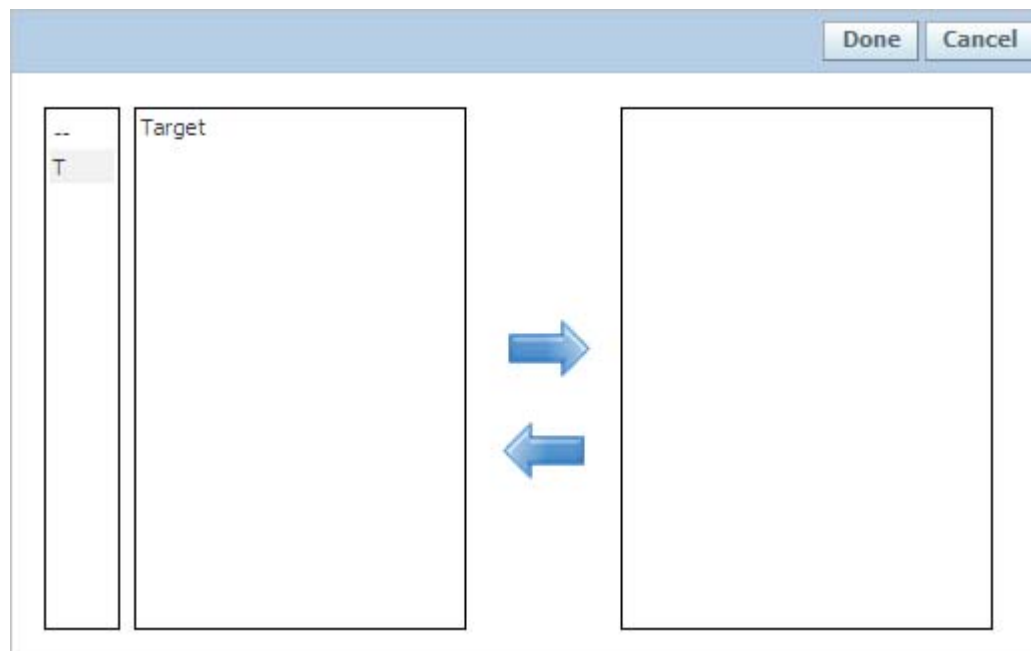
To delete a row:

1. With the custom section in edit mode, click the edit icon (✎) on the row you want to delete.
2. Click the delete row icon (✖). The row is deleted from the table.
3. Click **Save**.

To add a column:

1. With the custom section in edit mode, click **Add Column**. A dialog box listing columns that can be added is displayed, as [Figure 5–8](#) shows:

Figure 5–8 Available columns dialog box



2. Select a column, and then click the add selected data icon (➡).
3. Repeat step 2 to add additional columns.
4. Click **Done** to close the dialog box. The added columns display in the table.
5. Click **Save**.

To delete a column:

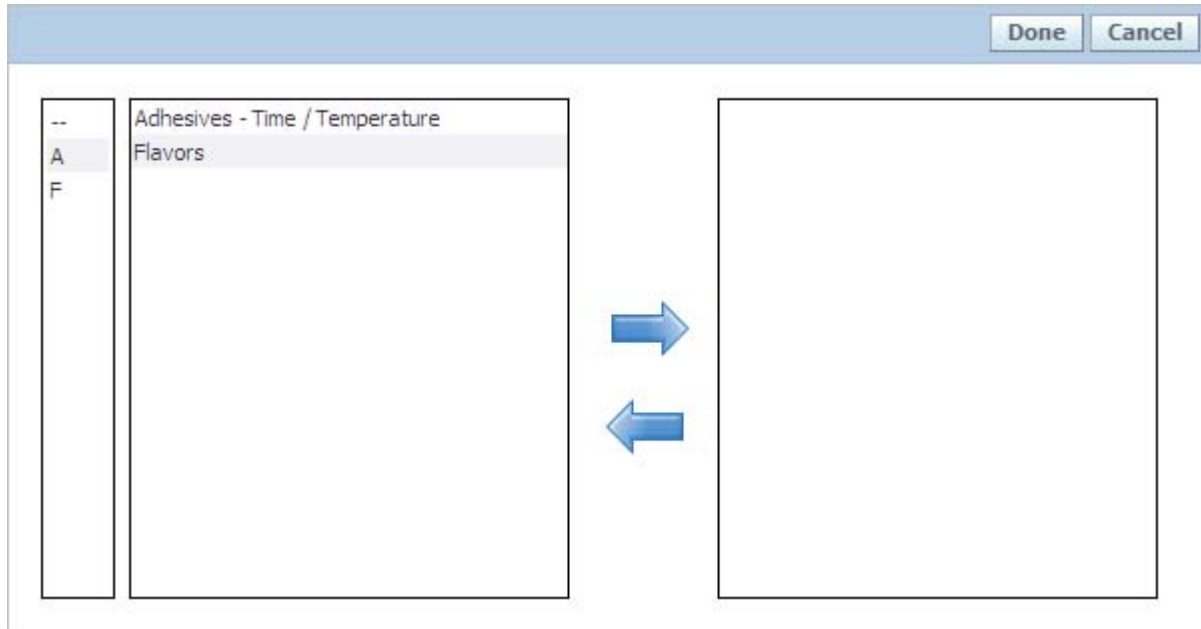
1. With the custom section in edit mode, click **Remove Column**. A dialog box listing columns that can be deleted is displayed, as [Figure 5–8](#) shows above.
2. Select a column, and then click the add selected data icon (➡).
3. Repeat step 2 to delete additional columns.
4. Click **Done** to close the dialog box. The selected columns no longer appear in the table.
5. Click **Save**.

Deleting a Custom Section

To remove a custom section:

1. With the page in edit mode, click **Remove Sections**. A dialog box listing all custom sections is displayed, as [Figure 5-9](#) shows.

Figure 5-9 Available sections dialog box



2. Select a custom section, and then click **Done**. The custom section is removed.
3. Click **Save**.