

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

Administrator User Guide

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# Preface

The *Agile Product Lifecycle Management for Process Administrator User Guide* contains instructions for administering Agile Product Lifecycle Management (PLM) for Process.

This preface contains these topics:

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

## Audience

This user guide is intended for Agile PLM for Process administrators, including user administrators, group administrators, workflow administrators, and data administrators.

## 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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Software Availability

Oracle Software Delivery Cloud (OSDC) provides the latest copy of the core software. Note the core software does not include all patches and hot fixes. Access OSDC at: <http://edelivery.oracle.com>.

## Related Documents

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

- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*
- *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*
- *Agile Product Lifecycle Management for Process Document Reference Library User Guide*
- *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*
- *Agile Product Lifecycle Management for Process Supplier Portal User Guide*
- *Agile Product Lifecycle Management for Process New Product Development User Guide*
- *Agile Product Lifecycle Management for Process Product Quality Management User Guide*
- *Agile Product Lifecycle Management for Process Extensibility Guide*
- *Agile Product Lifecycle Management for Process Security Configuration 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
<b>boldface</b>	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 Administration

This chapter introduces the key responsibilities of an Agile Product Lifecycle Management for Process administrator. This chapter includes the following topic:

- [Administration Overview](#)

## Administration Overview

As an Agile PLM for Process administrator, you can perform the following duties:

**Group management** — Involves use of the User Group Management (UGM) application in Agile PLM for Process. In managing groups, you create new groups, edit existing groups, and assign roles and privileges to groups. Groups are simply a collection of users having the same functional purpose. Groups can be created according to business unit, geographical area, and so on. For details, see [Chapter 2, "Using UGM to Manage Groups"](#).

**User management** — Involves use of the User Group Management (UGM) application in Agile PLM for Process. In managing users, you create new users, edit existing users, and assign users to groups. For details, see [Chapter 3, "Using UGM to Manage Users"](#).

**Data management** — Involves use of the Manage Core Data (ADMN) application to manage core data. In managing data, you maintain data lists and data. For details, see [Chapter 4, "Using ADMN to Manage Core Data"](#) and [Chapter 5, "Using ADMN to Manage Custom Data"](#).

**Workflow management** — Involves use of the Workflow Administration (WFA) application in Agile PLM for Process. In managing workflows, you create and edit workflow process templates. This task involves creating workflow statuses, transitions, owners, signature requests, and notifications. For details, see [Chapter 6, "Using WFA to Manage GSM Workflows"](#), [Chapter 7, "Using WFA to Manage SCRM Workflows"](#), [Chapter 8, "Using WFA to Manage PQM Workflows"](#), and [Chapter 9, "Using WFA to Manage CSS Workflows"](#).

**Cache management** — Involves use of the Manage Data Caches (CACHE) application to manage data caches. In managing caches, you schedule cache flushes for various cache groups. For details, see [Chapter 10, "Using CACHE to Manage Caches"](#).

**Security management** — Involves use of object level security (OLS) to control access to securable objects within specifications and questionnaires. You can also control business unit security (GSM and SCRM). For details, see *Agile Product Lifecycle Management for Process Security Configuration Guide*.

**Performance logging** — Involves use of Performance Logging to troubleshoot performance issues. You can view detailed performance information about activities performed on the system, as described in [Chapter 11, "Using Performance Logging"](#).

For general information on using Agile PLM for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.



---

## Using UGM to Manage Groups

This chapter introduces the User Group Management (UGM) application and explains how to maintain groups within Agile PLM for Process. Topics in this chapter include:

- [Accessing UGM and Using Roles](#)
- [Managing Action Items](#)
- [Searching for Groups](#)
- [Creating a Change Request](#)
- [Using Group Approval Workflows](#)
- [Exporting and Importing Group Data](#)

### Accessing UGM and Using Roles

The User Group Management (UGM) application enables you to create, modify, search for, import, and export users and groups. This chapter discusses the group-related features of the UGM application.

---

**Note:** Perform group creation and modification tasks in a staging environment. Once you have set up your groups, you can export them to a production environment.

---

When you log in to Agile PLM for Process, you access the UGM application by clicking **UGM** in the left navigation panel. Agile PLM for Process displays a left navigation panel with the following user management options, most of which will be discussed in detail in this chapter:

- Action Items
- Users (see [Chapter 3, "Using UGM to Manage Users"](#))
- Groups
- Import
- Export

## Associated Roles

Three user roles are associated with UGM groups:

[PMA\_GLOBAL\_ADMIN]—Can see and use the Create User and Create User Group buttons and initiate user change requests.


[PMA\_USER\_ADMIN]—Can see and use the Create User button and initiate user change requests.

[UGM\_GROUP\_APPROVER]—Can approve UGM group change requests.

## Managing Action Items

When you click **Action Items**, the Action Items table displays, as [Figure 2–1](#) shows. This table lists your pending administrative tasks.

**Figure 2–1** Action Items



Action Items

▼ Action Items

	Type	Name	Created	Action	Status
1	User	NoSpecCreator	10/24/2012 01:13:34 AM	CREATE	Draft

The Action Items table contains a list of user and group profiles that you have created or edited or that are awaiting your final approval. The table contains the following fields:

- **Type** — Specifies if this is a user- or group-related action.
- **Name** — Specifies the user’s login name or the full name of the group.
- **Created** — Specifies the date and time when the create or change request was made.
- **Action** — Specifies if this is a create or edit action.
- **Status** — Specifies the status of the action. For example, “Review” indicates that this request is awaiting approval.

## Searching for Groups

Groups are simply collections of users and roles. You can create groups according to functional area, business unit, geographical area, and so on.

As an administrator, you will often need to search for groups. When you click **Groups** in the left navigation panel of the UGM application, the Groups search page displays group search options.

## Using Group Search Criteria

To search for groups, you will use a combination of three search criteria fields: key field, operator, and search criteria. Note that the default group search criteria is Name and Starts With, as shown in [Figure 2–2](#).

Figure 2–2 Group Profile Search page

The screenshot shows the 'Group Profile Search' interface. At the top, there's a header with a group icon and the title 'Group Profile Search'. Below this is a search bar area. On the left, there's a 'Search Criteria' dropdown menu. To its right are 'Load' and 'Save' buttons, and further right is a 'Recent Items' link. The main search area contains a 'Name' dropdown menu, a 'Starts With' dropdown menu, and a text input field. At the bottom right of the search area, there are 'Reset' and 'Search' buttons.

In the key field drop-down list, select your search criteria as follows:

- -- — Searches for all groups. It is the equivalent of using no search criteria.
- **Active** — If the second drop-down list (discussed below) is set to "Is TRUE", this option searches for only active groups. If the second drop-down list is set to "Is FALSE", this option searches for inactive groups.
- **Description** — Searches for groups based on the group description provided in the group profile.
- **Full Name** — Searches for groups based on the full name of the group (includes the parent/child hierarchy).
- **Last Updated**—Searches for groups based on a selected edit date.
- **Member Name** — Searches for groups based on the names of members in the group.
- **Most Recently Used** — Searches for users whose profile was most recently accessed or Searches for users based on a selected edit date.
- **Name** — Searches for groups based on the group name.
- **Role** — Searches for groups based on the roles assigned to the group.
- **Workflow Visibility Tags**—Searches for groups based on the visibility assigned to the group.

In the operator drop-down list, your options will be determined by the choice you made in the key field drop-down list. Selections may include:

- -- — Searches for all groups. It is the equivalent of using no search criteria.
- **Is True** — Searches for only values that are "True" (for example, "Active=True" will search for only active groups).
- **Is False** — Searches for only values that are "False" (for example, "Active=False" will search for only inactive groups).
- **Equals** — Used to quantify search criteria entered in the field to the right (for example, "Name Equals Global" will produce only groups with the name of Global).
- **Starts With** — Used for character searches, alphabetical, or numerical (for example, "Name Starts With W" will produce only groups with names that start with the letter "W").
- **Contains** — Used for character searches, alphabetical, or numerical (for example, "Description Contains Admin" will produce only groups with descriptions that contain the word "Admin").

- **Greater Than**—Used with "Last Updated" searches; will produce only dates after the selected date.
- **Less Than**—Used with "Last Updated" searches; will produce only dates before the selected date.

Use the empty search criteria field to the right of the operator drop-down list to qualify the selection you made in the other search fields. For example, if you are searching by "Name Starts With," you will enter the first letter(s) of the group name(s) for which you are searching. You can also enter the percent (%) sign to perform a wildcard search for a single character.

## Saving and Loading Searches

If you use certain search criteria often, you may wish to save search criteria for later reuse.

To save search criteria:


1. Click **Save**. A Save Search Criteria As dialog box displays.
2. Enter a name for the search.
3. Click **Save**.

To load a saved search:



1. Click **Load**, and then select **Load Saved Search** from the drop-down list. A Saved Searches for {your name} dialog box displays.
2. In the dialog box, click the hyperlinked name of a saved search. ADMN closes the dialog box and displays your saved search criteria in the fields of the search form.

## Running the Previous Search

To run the previous search

- Click **Load**, and then select **Run Previous Search** from the drop-down list. ADMN displays the search criteria and results from the last search you performed.
- Or,
- Click the run previous search action icon (  ). ADMN displays the search criteria and results from the last search you performed.

## More Search Options

- When searching for groups, you can add more search criteria by clicking the **more criteria** icon (  ). Once you have displayed more search criteria, the less criteria icon (  ) displays. Click it to remove a row of search criteria.
- Click **Search** to display your search criteria results.
- Click **Reset** to clear all search criteria fields and results.
- In the Search Results area, use the drop-down list to set the number of search results to display at one time. Click any column head to sort rows by that column head. Click again to reverse the order of the sort.

## Exporting Search Results

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

To export search results to a local Excel file:

1. Perform a search, as described earlier. Agile PLM for Process displays the search results.
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.
3. Click **Open** to view the file in Excel or click **Save** to save the file to a local drive.

## Creating a Change Request

To create a new group or make any changes to an existing group, you must initiate a change request and advance it through the workflow. See ["Creating Groups"](#) below and ["Editing Existing Groups"](#) on page 2-11 for more information.

## Creating Groups

To create a new group:

1. Click **New > Group Profile** in the action menu. UGM displays the Group Change Request page, as shown in [Figure 2-3](#).

**Figure 2-3** Group Change Request page

The screenshot shows the 'Group Change Request' page in a web application. At the top, there's a header with a logo and the text 'Group Change Request' and 'Draft'. Below the header are three tabs: 'General', 'Access', and 'Approval/Audit'. The 'General' tab is selected. The main content area is divided into two sections. The first section, 'Summary', contains fields for 'Name', 'Description', and 'Full Name', each with a text input box and a small globe icon. Below these is a checkbox labeled 'Active' which is checked. The second section, 'Related Groups', contains a 'Parent' field with a text input box and a search icon. Below this is a table for 'Child Groups' with columns 'Name' and 'Description'. The table has one row with dashes in both columns.

2. Enter information described in the following sections for the General, Access, and Approval/Audit tabs of the page.
3. Click **Save & Close**.

---

**Note:** Upon saving, UGM places the request in draft mode. You can continue to edit it until the change request is canceled or submitted for review.

---

4. Submit your change request for review by clicking **Workflow**. Agile PLM for Process displays the Workflow dialog box, as Figure 2–4 shows.

**Figure 2–4 Workflow dialog box**

The screenshot shows a 'Workflow' dialog box with a light blue header bar containing a 'Cancel' button. The main area is divided into two sections. The 'Next Action' section has a blue arrow icon and a dropdown menu currently set to 'Review'. The 'Status' section contains four labels with corresponding input fields: 'Approver Group' with a dropdown menu showing 'All UGM Approvers', 'Current Owner' with the text 'sadams', 'Current Status' with the text 'Draft', and 'Your Comments' with an empty text box.

5. In the Workflow dialog box, under Next Action, click the drop-down list and make your selection as follows:
  - **Review** — Submits the change request to the selected approver group for review and notifies the approver(s) by email. The email includes the comments that you entered in the workflow dialog box.
  - **Canceled** — Terminates the change request.
6. In the Approver Group drop-down list, select the group of users who will be reviewing your change request. The drop-down list contains all groups with the [UGM\_GROUP\_APPROVER] role. (This option is only available if you select Review for the Next Action.)
7. Click the move step forward icon (➡) to move the change request to the next step.
8. Once an approver reviews your request, UGM notifies you of the status of your request by email.

## General Tab

### Summary Section

Enter the following group information in the Summary section of the General tab.

**Figure 2–5 Summary section**

The screenshot shows a form titled 'Summary' with a dropdown arrow. It contains the following fields:

- Name:** A text input field with a globe icon to its right.
- Full Name:** A read-only text field.
- Description:** A text input field with a globe icon to its right.
- Active:** A checkbox that is currently checked, with a green checkmark icon to its right.

- **Name** — Click the set alternate language text icon (🌐) to display the translation dialog box. Next to the preferred language for this group, enter a group name in the provided text box. Click the apply changes icon (✅) to apply your changes. Select **Done** to close the dialog box and update the Name field. This is a required field.
- **Full Name** — This is a read only field. It contains the full name (or parent/child hierarchical path) for the group, as entered in the Related Groups section of the General tab.
- **Description** — Click the alternate language text icon (🌐) to display the translation dialog box. Click the edit icon (✎) next to the preferred language for this group, and then enter a group description in the provided text box. Click the apply changes icon (✅) to apply your changes. Select **Done** to close the dialog box and update the **Description** field.
- **Active** — Make the group active or inactive.

### Related Groups Section

Enter the following group information in the Related Groups section of the General tab.

**Figure 2–6 Related Groups section**

The screenshot shows a form titled 'Related Groups' with a dropdown arrow. It contains the following fields:

- Parent:** A field with a search icon (🔍) to its right.
- Child Groups:** A table with two columns: **Name** and **Description**. The table contains one row with dashes (-) in both columns.

- **Parent** — Click the search icon (🔍) to assign the group to a parent group. A dialog box displays for your selection. A group can belong to only one parent group. Parent groups are hierarchical.
- **Child Groups** — This is a read only field. The Child Groups table displays any child groups assigned to the group.

## Access Tab

**Figure 2–7 Access Tab**

**Group Change Request** Draft

General **Access** Approval/Audit

Assigned Users

Login Name	First Name	Last Name	Email Address	Active
-	-	-	-	-

Manage Users

Supplier Users

Login Name	First Name	Last Name	Email Address	Company/Facility Name	Active
-	-	-	-	-	-

Roles

Workflow Visibility Tags

Workflow Visibility Tags:

Access Privileges

Inherits Parent Privileges: ☒

Security Classification	Read

Add New

### Assigned Users Section

The Assigned Users section of the Access tab displays users assigned to the group. Click **Manage Users** to assign users to the group. Agile PLM for Process displays a user search page. Search for and select users to add to the group. The Active column displays the status of the user, which is set in the user profile.

You can also remove users from a group by selecting the delete icon (✖) next to each user you would like to remove.

---

**Note:** Users can also be assigned to groups individually through their user profile. See [Chapter 3, "Using UGM to Manage Users"](#) for more details.

---

### Supplier Users Section

The Supplier Users section of the Access tab displays the Supplier Portal users that have been assigned to this group. For more information see the *Agile Product Lifecycle Management for Process Supplier Portal Guide*.

### Roles Section


The Roles section of the Access tab displays all the roles assigned to the group. Roles provide access and privileges to the group. For example, the [SCRM\_COMPANY\_EDITOR] role allows all the users in the group to edit SCRM company profiles.

Click the search icon (🔍) to assign roles to the new group. Agile PLM for Process displays a dialog box listing available roles. A group can have more than one role



assigned to it; check the box next to each role to assign to the group. Roles are predefined system values that cannot be modified. For a list of predefined roles, see [Appendix A, "System-Based Roles"](#). Roles will also be inherited from parent groups.

**Workflow Visibility Tags Section**

The Workflow Visibility Tags section of the Access tab displays all the workflow visibility tags assigned to the group. Workflow Visibility tags filter EQT search results based on the specification’s workflow status. See ["Controlling Specification Visibility"](#) on page 6-29 for more information. Click the search icon (  ) to assign tags to the new group. A group can have more than one visibility tag assigned to it. Visibility tags are not inherited from parent groups.

**Access Privileges Section**

This section is displayed if Object Level Security (OLS) is enabled. A privilege consists of a security classification and an access level. You can add contextual and noncontextual security classifications to the privileges table by clicking **Add New**. Assigning classifications to groups allows users within the group to see certain secured objects on a specification or profile. Secured objects include: Extended Attributes, Sections, Sourcing Approvals, Attachments, and Supplier Documents. Refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide* for more information. The Access Privileges section contains the following:

- **Inherits Parent Privileges** — Check this field to inherit privileges from the parent group(s). For more information, refer to ["User Access Privilege Resolution"](#) on page 10-3.
- **Security Classification** — This table lists defined privileges, as [Figure 2–8](#) shows.

**Figure 2–8 Security Classification table**

Access Privileges

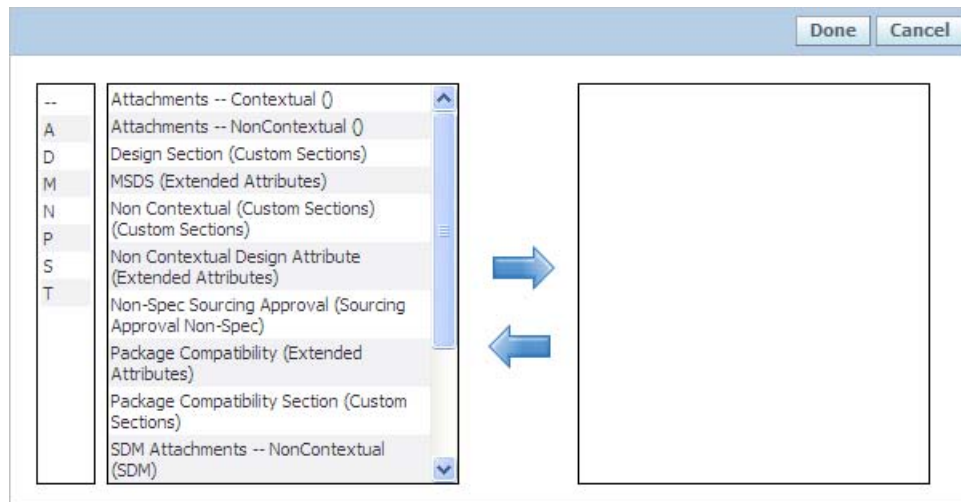
Inherits Parent Privileges: ☒

Security Classification	Read

Add New

To add a new classification privilege:

1. Click **Add New**. UGM opens a multiple selection dialog box, as [Figure 2–9](#) shows.

**Figure 2–9 Access classification dialog box**

2. Select the access classification(s) from the left and move them to the right using the add selected data icon (➡).
3. Click **Done**. You now must select the read access level for that classification in the read column.
4. Select an appropriate access level from the drop-down box.
5. Click the apply changes icon (✅) to apply your changes.

### Approval/Audit Tab

The information in the Approval/ Audit tab is read only and is for viewing purposes only.

**Figure 2–10 Approval/Audit tab**

General	Access	Approval/Audit								
<div> <div> Status </div> <div> <div> <div>Status: Draft</div> <div>Owner: Sarah Adams (User)</div> <div>Originator: Sarah Adams</div> <div>Action: CREATE</div> </div> <div> <div>Created: 3/1/2011 9:14:55 AM</div> <div>Last Workflow: 3/1/2011 9:14:55 AM</div> <div>Last Workflowed By: Sarah Adams</div> </div> </div> </div>										
<div> <div> Event History </div> <table border="1"> <thead> <tr> <th>Status</th> <th>User</th> <th>Time</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>Draft</td> <td>Sarah Adams</td> <td>3/1/2011 9:14:55 AM</td> <td></td> </tr> </tbody> </table> </div>			Status	User	Time	Comments	Draft	Sarah Adams	3/1/2011 9:14:55 AM	
Status	User	Time	Comments							
Draft	Sarah Adams	3/1/2011 9:14:55 AM								

### Status Section

The Status section of the Approval/ Audit tab contains the following information:

- **Status** — The group request status.
- **Owner** — The owner of the request.

- **Originator** — The UGM administrator who initiated the change request.
- **Action** — Displays whether the change request created a new group ("Create") or modified an existing group ("Edit").
- **Created** — The date and time when the request was made.
- **Last Workflow** — The date and time when the request was last workflowed (changed).
- **Last Workflowed By** — The person who last workflowed the request.

### Event History Section

The Event History section of the Approval/Audit tab contains a listing of workflow events that have occurred for the request. It includes the following information:

- **Status** — The group request status for this event.
- **User** — The person who recorded this event.
- **Time** — The time and date when the event was recorded.
- **Comments** — Any comments appended to this event.

## Editing Existing Groups

As an administrator, you will need to be able to edit existing groups.

To edit an existing group:


1. Click **Open > Group Profile** in the action menu and search for the group to modify.
2. Click the linked **Full Name** of the group in the search results provided to display the group profile.
3. In the action menu, click **Create Change Request** to initiate a change request.
4. Make edits to the group profile using the instructions provided in "[Creating Groups](#)" on page 2-5.
5. Click **Save & Close**.

---

**Note:** Upon saving, UGM places the request in draft mode. You can continue to edit it until the change request is canceled or submitted for review.

---

6. Click **Workflow** to move your change request to the next step or action.
7. In the Workflow dialog box, under Next Action, click the drop-down list and make your selection as follows:
  - **Review** — Submits the change request to the selected approver group for review and notifies the approver(s) by email. The email includes the comments that you entered in the workflow dialog box.
  - **Canceled** — Terminates the change request.
8. In the Approver Group drop-down list, select the group of users who will be reviewing your change request. The drop-down list contains all groups with the [UGM\_GROUP\_APPROVER] role. (This option is only available if you select **Review** for the Next Action.)

9. In the Workflow dialog box, click the move step forward icon (  ) to move the request to the next step.
10. Once an approver reviews your request, UGM notifies you by email of the status of your request.

## Using Group Approval Workflows


Depending on your configuration, all change requests need to be advanced through a workflow. The solution works in two modes:

- **Noncompliance Enforcement** — In this mode as an approver you can approve change requests that you have originated, including changes to your own profile.
- **Compliance Enforcement** — The compliance mode prevents you (as an approver) from approving your own requests or from making changes to your own profile.

## Approving a Request

To approve a group request, you must belong to a group with the role of [UGM\_GROUP\_APPROVER]. When a change request is submitted for your approval, you will be notified by email and the change request will be added to your Action Items list (see "[Managing Action Items](#)" on page 2-2).

To approve a request:

1. Click the name of the group in the Action Items table to display the change request.
2. Review all data entered for the request in the General, Access, and Approval/Audit tabs. Refer to "[General Tab](#)" on page 2-7 through "[Approval/Audit Tab](#)" on page 2-10 for more information.
3. When you are ready to advance the request in the workflow, click **Workflow** in the action menu to display the Workflow dialog box.
4. In the Workflow dialog box, under Next Action, click the drop-down list and make your selection as follows:
  - **Approved** — Approves the change request and notifies the originator by email. The email includes the comments that you entered in the workflow dialog box.
  - **Not approved** — Sends the change request back to the originator for modification and sends an email notification. The email includes the comments that you entered in the workflow dialog box.
  - **Canceled** — Terminates the change request and notifies the originator by email.
5. In the Workflow dialog box, click the move step forward icon (  ) to move the change request to the next step.
6. If the change request was approved, the user cache group needs to be flushed before the changes will be available. See "[Scheduling Data Cache Flushes](#)" on page 10-1 for more information.

## Exporting and Importing Group Data

As an administrator, you perform all group creation and editing tasks in a staging environment. As a result, once you have made final group request approvals, you must export these profiles from the staging environment and then import them into the production environment, making the changes live.

### Exporting Groups from Your Staging Environment

To export group data from your staging environment:

1. Log in to your staging environment.
2. Click **Export** in the action menu.
3. Click **Add New** in the Users to Export section. UGM displays a search page to assist you in searching for groups to export.
4. Use the search page to search for groups to export.

---

**Note:** To search for groups that were edited on a certain date, select the "Last Updated" option from the key field drop-down list, and then use the other search fields to select a date.

---

5. From the search results, click each group name to export. The names that you clicked appear in the Selected Items box at the bottom of the search page.
6. When you have made your selections, click **Done** at the bottom right of the page. The page closes and your group selections display in the Groups to Export table.
7. Click **Export** at the bottom of the page. A dialog box appears, allowing you to select the location on your hard drive to export the user data to.
8. Click **Save**. A Save As dialog box displays.
9. Click **Save**. Agile PLM for Process encrypts the selected groups in a single file, closes the dialog box, and saves the encrypted file to your local drive.

### Importing Groups into Your Production Environment

To import group data into your production environment:

1. Log in to your production environment.
2. Click **Import** in the action menu. UGM displays the Import page, as shown in [Figure 2-11](#).

**Figure 2–11 Import page**

**Import**

☒ Import Users and Groups

Select which actions you would like to perform during import.

User Profiles	Group Profiles
<input type="checkbox"/> Replace Password	<input type="checkbox"/> Exclude User Associations
<input type="checkbox"/> Replace Contact Information	

3. Click **Browse** to locate and select the encrypted file that you exported from the staging environment.
4. Optionally, select other actions to perform during import:
  - **Replace Password**—Check this option to overwrite the user’s password. By default this field is unchecked.
  - **Replace Contact Information**—Check this option to overwrite the user’s contact information. By default this field is unchecked.
  - **Exclude User Associations**—By default all group to user associations go with your import. If you do not want to carry over user associations, click **Exclude User Associations**. Checking this option will import your group without its assigned user list. This is valuable when you are making a non-user change to a group and still want to maintain your import environment’s current membership list.
5. Click **Import**.
6. In the production environment, flush the user cache group, as described in "[Using the Cache Application](#)" on page 10-3.

---

## Using UGM to Manage Users

This chapter explains how to manage user data within Agile Product Lifecycle Management for Process. Topics in this chapter include:

- [Accessing UGM and Using Roles](#)
- [Managing Action Items](#)
- [Searching for Users](#)
- [Creating a Change Request](#)
- [Using User Approval Workflows](#)
- [Exporting and Importing User Data](#)

### Accessing UGM and Using Roles

The User Group Management (UGM) application allows you to create, modify, search for, import, and export users and groups. This chapter discusses the user-related features of the UGM application.

---

**Note:** Perform user creation and modification tasks in a staging environment. Once you have set up your users, you can export them to a production environment.

---

When you log in to Agile PLM for Process, you access the UGM application by clicking **UGM** in the left navigation panel. A new left navigation panel is displayed with the following user management options, most of which are discussed in detail in this chapter:

- Action Items
- Users
- Groups (see [Chapter 2, "Using UGM to Manage Groups"](#))
- Import
- Export

## Associated Roles

Three user roles are associated with UGM users:

[PMA\_GLOBAL\_ADMIN]—Can see and use the Create User and Create User Group buttons

[PMA\_GROUP\_ADMIN]—Can see and use the Create User Group button and initiate user change requests.

[UGM\_USER\_APPROVER]—Can approve user change requests.

## Managing Action Items

When you click Action Items, the Action Items table displays. This table lists your pending administrative tasks.

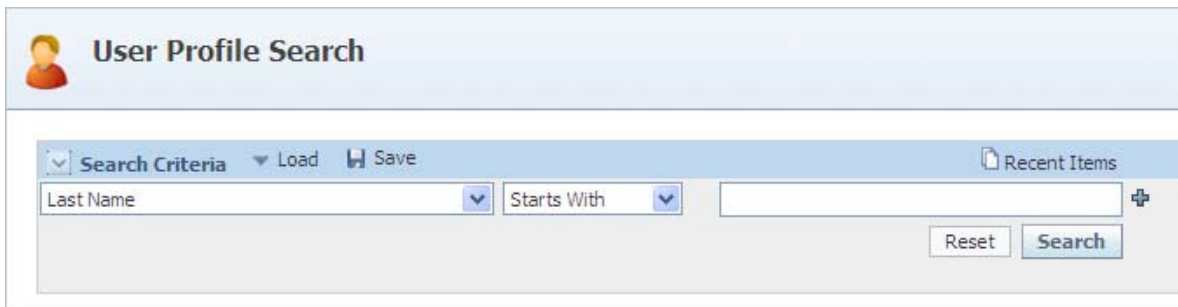
The Action Items table contains a list of user and group profiles that you have created/edited or that are awaiting your final approval. The table contains the following fields:

- **Type** — Specifies if this is a user- or group-related action.
- **Name** — Specifies the user's login name or the full name of the group.
- **Created** — Specifies the date and time when the create or change request was made.
- **Action** — Specifies if this is a create or edit action.
- **Status** — Specifies the status of the action. For example, "Review" indicates this request is awaiting approval.

## Searching for Users

As an administrator, you will often need to search for users. When you click **Users** in the left navigation panel of the UGM application, the User Profile Search page displays user search options, as [Figure 3–3](#) shows.

**Figure 3–1** User Profile Search page





## User Search Criteria

To search for users, you will use a combination of three search criteria fields: key field, operator, and search criteria. Note that the default user search criteria is Last Name and Starts With.

In the key field drop-down list, select your search criteria as follows:

- **--** — Searches for all users. It is the equivalent of using no search criteria.
- **Active** — If the second drop-down list (discussed below) is set to "Is TRUE," this option searches for only active users. If the second drop-down list is set to "Is FALSE," this option searches for inactive users.
- **Country** — Searches for users in a certain country.
- **Email Address** — Searches for users by their email address.
- **Facility** — Searches for users by the facility in which they are located.
- **First Name** — Searches for users by their first name.
- **GSM Business Unit (+ Children)** — Searches for users containing a certain GSM business unit as well as the children of that business unit.
- **GSM Business Unit (Exact Match)** — Searches for users containing a specific GSM business unit.
- **GSM Business Unit (Hierarchical)** — Performs a hierarchical GSM business unit search for users.
- **Last Name** — Searches for users by their last name.
- **Last Updated** — Searches for users based on a selected edit date.
- **Login Name** — Searches for users by their login name.
- **Most Recently Used** — Searches for users whose profile was most recently accessed or Searches for users based on a selected edit date.
- **Role** — Searches for users based on their assigned role.
- **SCRM Business Unit (+ Children)** — Searches for users containing a certain SCRM business unit as well as the children of that business unit.
- **SCRM Business Unit (Exact Match)** — Searches for users containing a specific SCRM business unit.
- **SCRM Business Unit (Hierarchical)** — Performs a hierarchical SCRM business unit search for users.
- **User Group** — Searches for users within a certain user group.

In the operator drop-down list, your options will be determined by the choice that you made in the key field drop-down list. Selections may include:

- **Null {empty field}** — Searches for all users. It is the equivalent of using no search criteria.
- **Is True** — Searches for only values that are "True" (for example, "Active=Is True" will search for only active users).
- **Is False** — Searches for only values that are "False" (for example, "Active=Is False" will search for only inactive users).
- **Equals** — Used to evaluate search criteria entered in the field to the right (for example, "First Name Equals John" will produce only users whose first name is "John").

- **Starts With**—Used for character searches, alphabetical or numerical (for example, "Last Name Starts With K" will produce only users whose last name starts with the letter "K").
- **Contains**—Used for character searches, alphabetical or numerical (for example, "Login Name Contains 02" will produce only users whose login name contains the characters "02").
- **Greater Than**—Used with "Last Updated" searches, will produce only dates after the selected date.
- **Less Than**—Used with "Last Updated" searches, will produce only dates before the selected date.

Use the empty search criteria field to the right of the operator drop-down list to qualify the selection you made in the other search fields. For example, if you are searching by "First Name Starts With", you will enter the first letter(s) of the first name(s) for which you are searching. You can also enter the percent (%) sign to perform a wildcard search for a single character.

---

**Note:** Click any column head to sort rows by that column head. Click again to reverse the order of the sort.

---

For more search options, see ["More Search Options"](#) on page 2-4. For guidance on saving and loading searches, see ["Saving and Loading Searches"](#) on page 2-4. For instructions on exporting search results, see ["Exporting Search Results"](#) on page 2-4.

## Creating a Change Request

To create a new user or make changes to an existing user, you must initiate a change request and advance it in the workflow.

### Creating a User

To create a new user:

1. Click **New > User Profile** in the action menu. UGM displays a User Change Request page with empty fields, as [Figure 3-2](#) shows.

Figure 3–2 User Change Request page

**User Change Request** Draft

**General** | Access | Approval/Audit

**Logins**

Login Name:  New Password:   
 Active: ☐ Repeat Password:   
☐ Force user to reset password.

**eSignature Passphrase**

Enable Passphrase for eSignatures: ☐

**Contact Information**

First Name:  User Facility:   
 Last Name:  Street:   
 Email:   
 Phone:  City / State:    
 Fax:  Zip Code:   
 Job Title:  Country:

**Business Unit(s)**

GSM Business Unit(s):    
 SCRM Business Unit(s):

**User Available Languages**

Available UI Languages:    
 Proactive Translation Languages:

**User Preferences**

UI Language:   
 Free Text Language:   
 Global Spec UOM:

2. Enter information described in the following sections for the General, Access, and Approval/Audit tabs.

---

**Note:** Required information/fields are indicated by red text throughout the various UGM sections and tabs.

---

3. Click **Save & Close**.

---

**Note:** Upon saving, UGM places the request in draft mode. You can continue to edit it until the change request is canceled or submitted for review.

---

4. Click **Workflow** to move the change request to the next step/action.

5. In the Workflow dialog box, under Next Action, click the drop-down list and make your selection as follows:
  - **Review** — Submits the change request to the selected approver group for review and notifies the approver(s) by email. The email includes the comments that you entered in the workflow dialog box.
  - **Canceled** — Terminates the change request.
6. In the Approver Group drop-down list, select the group of users who will be reviewing your change request. The drop-down list contains all groups with the [UGM\_USER\_APPROVER] role.
7. Click the move step forward icon ( ➡ ) to move the request to the next step.
8. Once an approver reviews your request, UGM notifies you of the status of your request by email.

## General Tab

### Logins Section

Enter the following user information in the Logins section of the General tab, as shown in [Figure 3–3](#).

**Figure 3–3 Logins section**

The screenshot shows a form titled "Logins" with a dropdown arrow. It contains the following fields and controls:

- Active:** A checkbox.
- Login Name:** A text input field.
- New Password:** A text input field.
- Repeat Password:** A text input field.
- Force user to reset password:** A checkbox.

- **Active** — Specify if the user is an active user.
- **Login Name** — Enter a login name for the user to access Agile PLM for Process. This is a required field.
- **New Password** — Enter a new password for the user to access Agile PLM for Process.
- **Repeat Password** — Re-enter the user password for verification purposes.
- **Force user to reset password** — Forces a user to change password upon next login.

### eSignature Passphrase Section

Specification, sourcing approval, and signature document workflows can be configured to require re-authentication from a user before the user can transition the object to a specific status. (See ["eSignature"](#) on page 6-15 and on page 7-13 for more information.) Use the eSignature Passphrase section to allow the user to enter a passphrase when transitioning a GSM specification, SCRM sourcing approval, or PQM object to a certain status, or when transitioning a signature document to a Go or No Go status. [Figure 3–4](#) shows this section. If a passphrase is not enabled for a user, the user will not be allowed to re-authenticate when workflowing an object.

Users manage their passphrase in Profiles and Preferences. For more information, refer to the Profiles and Preferences section in the *Agile Product Lifecycle Management for Process Getting Started Guide*.

**Figure 3–4 eSignature Passphrase section**

☒ **eSignature Passphrase**  
 Enable Passphrase for eSignatures: ☒  
 Clear current passphrase: ☐

- **Enable Passphrase for Signatures** — When checked, the user is allowed to re-authenticate when workflowing an object and the passphrase option displays in the user's Profiles and Preferences.
- **Clear current passphrase** — This field is displayed when the Enable Passphrase for Signatures field is checked. When checked, the user's passphrase is cleared and the user will be prompted to reset it when opening Profile and Preferences or when asked to re-authenticate while workflowing an object. This is typically used when a user forgets the passphrase he or she set up.

#### Contact Information Section

Enter general user information in the Contact Information section of the General tab. First Name, Last Name, and Email are required fields. The User Facility field is only available if your installation includes the SCRM application. [Figure 3–5](#) shows the Contact Information section.

**Figure 3–5 Contact Information section**



☒ **Contact Information**  

First Name: <input type="text"/>	User Facility: <input type="text"/>
Last Name: <input type="text"/>	Street: <input type="text"/>
Email: <input type="text"/>	<input type="text"/>
Phone: <input type="text"/>	City / State: <input type="text"/> <input type="text"/>
Fax: <input type="text"/>	Zip Code: <input type="text"/>
Job Title: <input type="text"/>	Country: <input type="text" value="-Not Specified"/>

#### Business Unit(s) Section

In GSM and SCRM, a user can belong to more than one business unit. Business units are hierarchical. You can assign the user to one area within a certain business unit by drilling down, or you can assign a user to the entire business unit and all its children by selecting the top level business unit. [Figure 3–6](#) shows the Business Unit(s) section.

**Figure 3–6 Business Unit(s) section**

- **GSM Business Unit(s)** — Click the search icon (  ) to grant the user access to a GSM business unit (or units). A dialog box is available for your selection.  
  
Business units control the user's visibility to GSM specifications. For example, if you assign the BU of North America > United States to a user, when the user performs a search for specifications, the search will only return specifications tied to the explicit North America BU, North America > United States BU, or any children business units under United States.
- **SCRM Business Unit(s)**—Click the search icon (  ) to grant the user access to an SCRM business unit (or units). A dialog box is available for your selection. This section displays if SCRM business security is enabled. This field is required if the user has site access to SCRM.

Business units control the user's visibility and read access to SCRM company and facility profiles. For example, if you assign the BU of North America > United States to a user, when the user performs a search for companies, the search will only return companies that include the explicit North America BU, North America > United States BU, or any children business units under United States. Depending on your configuration, SCRM business unit security is tied to the status of the business unit.

---


**Note:** Which business units you can select will be filtered by your UGM Administrator rights. See "[UGM Admin Privileges Section](#)" on page 3-12 for more details.

---

### User Available Languages Section

The user available languages section defines what languages the user has access to, as [Figure 3–7](#) shows.

**Figure 3–7 User Available Languages sections**

- **Available Languages** — Use the search icon (  ) to select the user's available languages. The available UI Languages field defines what languages the user is able to see the user interface in. This language setting allows the user to see field labels, selection lists, and free text fields in that selected language. Only approved NLS languages are supported here and the NLS packs must be installed before you can see other choices for this field. Refer to the *Agile Product Lifecycle Management for Process Install/Upgrade Guide* for more information about NLS. The

languages added here will be available to the user through their profile and preferences dialog. English (United States) is the default.

- **Proactive Translation Languages**— Use the search icon (🔍) to select the user's proactive translation languages. Throughout Agile PLM for Process, translatable free text fields are available. Translatable free text fields are recognized by the set alternate language text icon (🌐) shown to the right of the field. This icon allows the user to enter additional values assigned to other languages.

The languages listed in the alternate language popup include the user's available UI languages as well as the proactive translation languages added here. Proactive translation languages only appear in the alternate language popup and are used for data capture only. These languages do not affect the UI or free text language drop-downs in Profile and Preferences. Languages must be activated before you can see these options. Please refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for how to configure options here.

### User Preferences Section

Enter the following user information in the User Preferences section of the General tab, as [Figure 3–8](#) shows.

**Figure 3–8 User Preferences section**

The screenshot shows a 'User Preferences' dialog box with a blue header. Below the header, there are three settings, each with a label and a dropdown menu:

- UI Language:** The dropdown menu is open, showing 'English (United States)' as the selected option.
- Free Text Language:** The dropdown menu is open, showing 'ENGLISH' as the selected option.
- Global Spec UOM:** The dropdown menu is open, showing an empty selection.

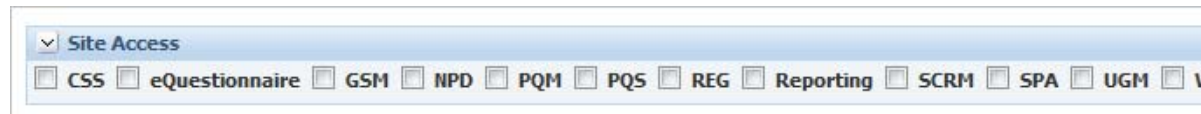
- **UI Language** —Select the user's preferred user interface language from the drop-down list. This list is filtered by the User Available Languages selection above. This is the language and culture used when displaying user interface labels, headers, and navigation elements. The culture pairing decides how dates are displayed as well as which decimal separator is supported.
- **Free Text Language** — Select the user's preferred free text language by using the drop-down list. This list is filtered by the Available Languages selection above. This is the language used when the user fills out text fields (for example, specification name and description). The language selected here needs to match your UI Language selection. For example, If English (United States) is selected for the UI language, English should be selected from Free Text Language. An odd language pairing is not supported. For example, English (United States) UI language and Chinese Free Text Language.
- **Global Spec UOM** — This sets the user's default UOM (unit of measure), which is used in selected areas of Agile PLM for Process applications.

## Access Tab

### Site Access Section

In the Site Access section of the Access tab, select all those Agile PLM for Process applications to which the user will be granted user access, as [Figure 3–9](#) shows.

**Figure 3–9** Site Access section



- **CSS**—Content Synchronization and Syndication (CSS)
- **eQuestionnaire**—eQuestionnaire (eQ)
- **GSM**—Global Specification Management (GSM)
- **NPD**—New Product Development (NPD)
- **PQM**—Product Quality Management (PQM)
- **PQS**—Product Quality Scorecarding (PQS)
- **Reporting**—Reporting (RPT)
- **SCRM**—Supply Chain Relationship Management (SCRM)
- **SPA**—Supplier Portal Administration (SPA)
- **WFA**—Workflow Administration (WFA)
- **UGM**—User Group Management (UGM)
- **REG**—Computer-Aided Compliance Screening, (CACS), Nutrition Surveillance Management (NSM), extended attributes administration, sections administration, and Component Catalog

This guide explains the WFA and UGM applications, as well as extended attributes and sections. For more information on the other applications listed above, refer to the applicable Agile PLM for Process user guide.

### Group Membership Section

Use this section to add the user to a group (or groups). A user can belong to more than one group. Click **Manage Groups** to display a dialog box listing available groups. For information on creating groups, see [Chapter 2, "Using UGM to Manage Groups"](#).

---

**Note:** Group membership can also be defined by the group profile. See [Chapter 2, "Using UGM to Manage Groups"](#) for more information.

---



**Figure 3–10 Group Membership section**


Group Membership	
Full Name	Description
Global/GSM	GSM
Global/GSM/Spec Creators Parent Group/Material Specification	Material Specification
Global/SCRM/Company Editor Creator	company editor
Global/SCRM/Company Reader	company reader
Global/SCRM/Facility Editor Creator	facility editor & creator
Global/SCRM/Facility Reader	facility reader
Manage Groups	

**Resolved Roles Section** This section lists all of the resolved roles the user is associated with. This section is not available on a user change request; it is only available on an approved user profile.

**Figure 3–11 Resolved Roles section**

Resolved Roles	
<b>Roles:</b>	[COMPANY_CREATOR] [FACILITY_CREATOR] [SCRM_COMPANY_EDITOR] [SCRM_COMPANY_READER] [SCRM_FACILITY_EDITOR] [SCRM_FACILITY_READER] [SPEC_CREATOR_1004]

### DRL Catalogs Section

Use this section to grant user visibility to various document reference library (DRL) catalogs. These catalogs serve as a repository for business documents. A user can have access to more than one DRL catalog. Click the search icon (  ) to display a dialog box listing available catalogs.

**Figure 3–12 DRL Catalogs section**

DRL Catalogs	
Catalog(s):	<input type="text"/> 

Refer to the *Agile Product Lifecycle Management for Process Document Reference Library User Guide* for more information.

### Access Privileges Section

This section is read-only and is displayed if object level security is enabled. Object level security privileges are group-defined, so this section displays once a group is added and saved to the user profile. A privilege consists of a security classification and an access level. Refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide* for more information.

**Figure 3–13 Access Privileges section**

Access Privileges		
Security Classification	Read	
Package Compatibility Section (Custom Sections)	Highly Restricted (500)	
Spec-Related Sourcing Approval (Sourcing Approval)	Has Access (100)	
Non Contextual Design Attribute (Extended Attributes)	Has Access (100)	
Attachments -- NonContextual ()	Has Access (100)	
Attachments -- Contextual ()	Highly Restricted (500)	
SDM Attachments -- NonContextual (SDM)	Has Access (100)	
Non Contextual (Custom Sections) (Custom Sections)	Has Access (100)	
Design Section (Custom Sections)	Highly Restricted (500)	
Package Compatibility (Extended Attributes)	Highly Restricted (500)	
Non-Spec Sourcing Approval (Sourcing Approval Non-Spec)	Has Access (100)	

**UGM Admin Privileges Section**

This section should only be used if the user you are managing is a UGM administrator. Use the UGM Admin Privileges section to limit which business units the UGM administrator has rights to assign. For example, if North America is added to the GSM Business Units field, the UGM administrator would only be able to assign the North America business unit and its children to UGM users they manage or create.

---

**Note:** Depending on your configuration this section may not appear.

---

**Figure 3–14 UGM Admin Privileges section**

UGM Admin Privileges

GSM Business Unit(s) : CPI Antarctica

SCRM Business Unit(s) : CPI Vendors

To specify which GSM business units the administrator can assign to users:

1. Click the **GSM Business Unit(s)** link. ADMN displays a dialog box listing available GSM business units.
2. Select the checkboxes of the business units the administrator can assign, and then click **Done**. Your selections populate the GSM Business Units grid.
3. Click **Save**.

Repeat these steps by clicking the SCRM Business Unit(s) link to assign SCRM business users.

## Approval/Audit Tab

The information in the Approval/ Audit tab is read only and is for viewing purposes only.

**Figure 3–15 Approval/Audit tab**

Approval/Audit											
<div> <div>Status</div> <div> <div>Status: Draft</div> <div>Owner: Sarah Adams (User)</div> <div>Originator: Sarah Adams</div> <div>Action: CREATE</div> </div> <div> <div>Created: 3/1/2011 9:14:55 AM</div> <div>Last Workflow: 3/1/2011 9:14:55 AM</div> <div>Last Workflowed By: Sarah Adams</div> </div> </div>											
<div> <div>Event History</div> <table border="1"> <thead> <tr> <th>Status</th> <th>User</th> <th>Time</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>Draft</td> <td>Sarah Adams</td> <td>3/1/2011 9:14:55 AM</td> <td></td> </tr> </tbody> </table> </div>				Status	User	Time	Comments	Draft	Sarah Adams	3/1/2011 9:14:55 AM	
Status	User	Time	Comments								
Draft	Sarah Adams	3/1/2011 9:14:55 AM									

### Status Section

The Status section of the Approval/ Audit tab contains the following information:

- **Status** — Displays the user request status.
- **Owner** — Displays the owner of the request.
- **Originator** — Displays the UGM administrator that initiated the change request.
- **Action** — Indicates whether the change request created a new user ("Create") or modified an existing user ("Edit").
- **Created** — Displays the date and time when the request was made.
- **Last Workflow** — Displays the date and time when the request was last workflowed.
- **Last Workflowed By** — Displays the person who last workflowed the request.

### Event History Section

The Event History section of the Approval/Audit tab contains a listing of events that have occurred for the request. It includes the following information:

- **Status** — Displays the user request status for this event.
- **User** — Displays the person who recorded this event.
- **Time** — Displays the time and date when the event was recorded.
- **Comments** — Displays any comments appended to this event.

## Editing Users

To edit a user:

1. Click **Open > User Profile** in the action menu and search for the user to modify.
2. Click the login name of the user in the returned search results to display the user profile.
3. In the action menu, click **Create Change Request** to initiate a change request.
4. Make edits to the user profile by following the instructions starting with step 2 of ["Creating a User"](#) on page 3-4.
5. Click **Save & Close**.

---

---

**Note:** Upon saving, UGM places the request in draft mode. You can continue to edit it until the change request is canceled or submitted for review.

---

---

6. Click **Workflow** to submit your change request for review and follow the workflow instructions as listed in step 5 of ["Creating a User"](#) on page 3-4.

## Copying a User Profile

You can create a new user profile by copying an existing one. The copied data includes business units, available languages, user preferences, and the access information defined on the Access tab.

To copy a user profile:

1. Click **Open > User Profile** in the action menu and search for the user profile to copy.
2. Click the login name of the user in the returned search results to display the user profile.
3. In the action menu, click **Copy**.
4. Enter/review information in the General, Access, and Approval/Audit tabs. Refer to ["General Tab"](#) on page 3-6 through ["Approval/Audit Tab"](#) on page 3-13 for more information.
5. Click **Save & Close**.

---

---

**Note:** Upon saving, UGM places the request in draft mode. You can continue to edit it until the change request is canceled or submitted for review.

---

---

6. Click **Workflow** to submit your change request for review and follow the workflow instructions as listed in step 5 of "[Creating a User](#)" on page 3-4.

## Using User Approval Workflows

Depending on your configuration, all change requests need to be workflowed. The approval workflow process is the basis for ensuring compliance and auditing. The solution works in two modes:

**Noncompliance Enforcement** — In this mode an approver can approve change requests that they have originated, including changes to their own profile.

**Compliance Enforcement** — The compliance mode prevents approvers from approving their own requests or making changes to their own profiles.

## Approving a Request

To approve a request, you must belong to a group with the role of [UGM\_USER\_APPROVER]. When a change request is submitted for your approval, you will be notified by email and the change request will be in your Action Items list (see "[Managing Action Items](#)" on page 3-2).

To approve a request:

1. Click the name of the user in your Action Items list to display the change request.
2. Review all data entered for the request in the General, Access, and Approval/Audit tabs. For details on how to use the General, Access, and Approval/Audit tabs, see "[Creating a User](#)" on page 3-4.
3. When you are ready to transition the workflow, click **Workflow** in the action menu to display the Workflow dialog box.
4. In the Workflow dialog box, under Next Action, click the drop-down list and make your selection as follows:
  - **Approved** — Approves the change request and notifies the originator by email.
  - **Not approved** — Sends the change request to the originator for modification and notifies originator by email.
  - **Canceled** — Terminates the change request and notifies the originator by email.

---

**Note:** Any of the emails sent in the above three options will include the comments that you entered in the Workflow dialog box.

---

5. In the Workflow dialog box, click the move step forward icon (→) to move the change request to the next step.
6. If the change request was approved, flush the user cache group in CACHE management. See [Chapter 10, "Using CACHE to Manage Caches"](#) for more information.

## Exporting and Importing User Data

As an administrator, you perform all user creation and edit tasks in a staging environment. As a result, once you have made final user request approvals, you must export these out of the staging environment. You will then import them into the production environment, making the changes active.

---

---

**Warning:** Before exporting users, you must export all groups associated with those users.

---

---

### Exporting Users from Your Staging Environment

To export user data from your staging environment:

Log in to your staging environment.

1. Click **Export** in the action menu. UGM displays the Export page.
2. Click **Add New** in the Users to Export section. UGM displays a search page to assist you in searching for various users to export.
3. Use the search page to search for users to export.

---

---

**Note:** To search for users that were edited on a certain date, select the "Last Updated" option from the key field drop-down list, and then use the other search fields to select a date.

---

---

4. From the search results, click each user name to export. The names that you clicked appear in the Selected Items box at the bottom of the search page.
5. When you have made your selections, click **Done** at the bottom right of the page. The dialog box closes and your group selections display in the Users to Export section.
6. Click **Export** at the bottom of the page. A dialog box appears, allowing you to select the location on your hard drive to export the user data to.
7. Click **Save**. A Save As dialog box displays.
8. Click **Save**. Agile PLM for Process encrypts the selected user data in a single file, closes the dialog box, and saves the encrypted file to your local drive.

### Importing Users into Your Production Environment

To import data into your production environment:

1. Log in to your production environment.
2. Click **Import** in action menu. UGM displays the Import page, as [Figure 3-16](#) shows.

Figure 3–16 Import page

**Import**

☒ Import Users and Groups

Select which actions you would like to perform during import.

User Profiles	Group Profiles
<input type="checkbox"/> Replace Password	<input type="checkbox"/> Exclude User Associations
<input type="checkbox"/> Replace Contact Information	

3. Click **Browse** to locate and select the encrypted file that you exported from the staging environment.
4. Optionally, select other actions to perform during import:
  - **Replace Password**—Check this option to overwrite the user’s password. By default this field is unchecked.
  - **Replace Contact Information**—Check this option to overwrite the user’s contact information. By default this field is unchecked.
  - **Exclude User Associations**—By default all group to user associations go with your import. If you do not want to carry over user associations, click **Exclude User Associations**. Checking this option will import your group without its assigned user list. This is valuable when you are making a non-user change to a group and still want to maintain your import environment’s current membership list.
5. Click **Import** at the bottom of the page.
6. In the production environment, flush the user cache group, as described in ["Using the Cache Application"](#) on page 10-3.





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## Using ADMN to Manage Core Data

This chapter introduces the Manage Core Data (ADMN) application and explains how to maintain Agile Product Lifecycle Management for Process core data. Topics in this chapter include:

- [Types of Core Data](#)
- [Custom Data](#)
- [Custom Portal](#)
- [Global Data](#)
- [Global Specification Management Common Data](#)
- [Global Specification Management Compliance Data](#)
- [Global Specification Management FSIS Data](#)
- [New Product Development Data](#)
- [Product Quality Management Data](#)
- [Product Quality Scorecard Data](#)
- [Supply Chain Relationship Management Data](#)
- [Workflow Administration Data](#)
- [Spec Category](#)
- [Activities](#)

### Types of Core Data

Agile PLM for Process administrators use the Manage Core Data (ADMN) application to maintain core data. The types of core data that you maintain include:

**Custom data:**

- Custom section column tags
- Custom section row tags
- Custom section tags
- Extended attribute groups
- Extended attribute tags

**Custom Portal:** Custom portals and custom portal views

**DRL (Document Reference Library) data:** Catalogs and classifications

**Global data:**

- Countries
- Cross-references
- Cross-reference statuses
- Restrictions
- Substitute restrictions
- Units of measure

**GSM (Global Specification Management) Common data:**

- Brands (GSM)
- Business units (GSM)
- Classifications
- Concepts
- Data groups
- Environmental waste
- Formulation classifications
- Formulation tags
- Label claims
- Label claims classifications
- Label owners
- Menu item classes
- Menu item standards
- Nutrient profile special attributes
- Nutrient sources
- Packaging types
- Packaging item type
- Printed packaging languages
- Shelf life types
- Storage and shipping requirements
- Storage requirements (trade specifications)
- Substitute material tags
- Trade item types
- Trade tax types/rates
- Trade UNSPSC codes
- Trading companies
- UDEX classifications

**GSM Compliance data:**

- Additives
- Allergens
- Complies with
- Intolerances

**GSM FSIS data:**

- Application statuses
- CFIA approval types
- CFIA payment methods
- CFIA product types
- USDA HACCP categories

**NPD (New Product Development) data:**

- Brands (NPD)
- Business units (NPD)
- Channels
- Consumer value perceptions
- Demographic categories
- Enabling technologies
- Functional areas (NPD)
- Global categories
- Metrics (basis, category, fiscal year, and phase)
- Priorities
- Project type categories
- Project types
- Project visibilities
- Risks

**PQM (Product Quality Management) data:**

- Action types
- Audit results
- Audit types
- Customers
- Failure types
- Issue types
- Product lines
- Resolutions
- Severities

**PQS (Product Quality Scorecard) data:**

- Lot samples quantity units of measure
- Sample types
- Scorecard qualifications

**SPA (Supplier Portal Administration) data:** Tags**SCRM (Supply Chain Relationship Management) data:**

- |                         |                  |                               |
|-------------------------|------------------|-------------------------------|
| ■ Business units (SCRM) | ■ Classes        | ■ Company special attributes  |
| ■ Contact categories    | ■ Document types | ■ Facility special attributes |
| ■ Protocols             | ■ SDM statuses   | ■ Sourcing types              |

**Specification Categories**

**WFA (Workflow Administration) data:** Functional areas (WFA) and tags

---

**Note:** For the managing data using the Data submenu, refer to [Chapter 5, "Using ADMN to Manage Custom Data"](#).

---

**Statuses**

Many types of core data contain statuses that are defined as follows:

- **New** — The data is not yet ready to become available to Agile PLM for Process applications. When an item has a status of "new," its values remain editable.
- **Active** — The data is ready to become available (searchable and consumable) for use in Agile PLM for Process applications.
- **Inactive** — The data should no longer be used. All existing references to this item remain. The item is no longer available for assignment but is still searchable.
- **Archive** — The item is no longer available for searching or assignment. All existing references to this item remain.
- **System** — Used by the system. This item cannot be edited or removed.

**Administrative Roles**

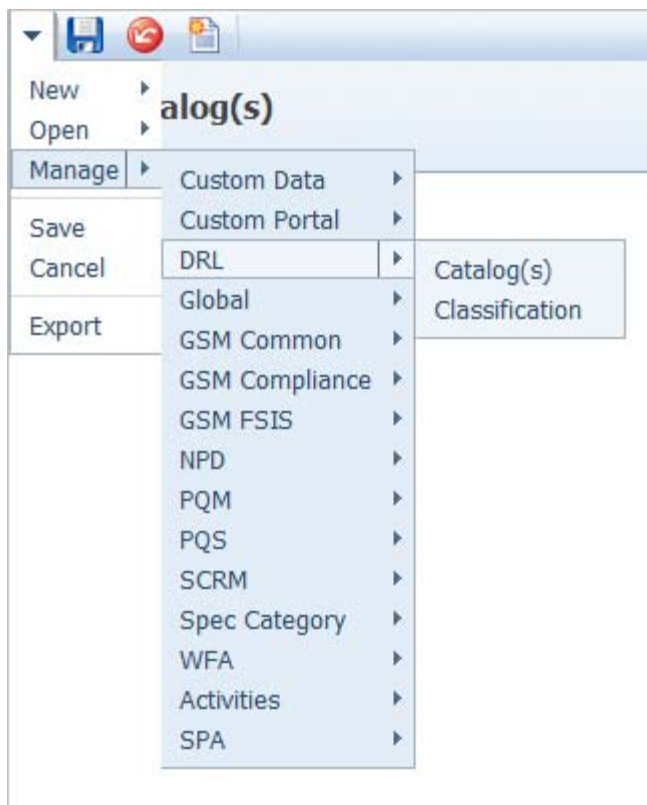
There are two user roles associated with ADMN:

**[DATA\_ADMIN]** — Users with the role of [DATA\_ADMIN] can add new items, but Data Administrators can only edit the status of an item once the item has been activated.

**[SUPER\_DATA\_ADMIN]** — Users with the role of [SUPER\_DATA\_ADMIN] can edit items regardless of the item's status. This role should be used with caution.

**Navigating Core Data**

Within ADMN, you can navigate core data using the **Manage** option in the action menu.

**Figure 4–1** Manage option

## Maintaining Simple Lists

Simple lists consist of tables that contain the core data. Some tables contain multiple columns, which may include linked column headings. To re-sort data, click any linked column head and the data re-displays sorted on that column. Click any column head a second time to reverse the sort order based on that column. [Figure 4–2](#) shows a simple list.

**Figure 4–2** Sample simple list of core data



Countries				
	Country Name	Country ID	ISO Code	Status
	Afghanistan	AFG		Active
	Albania	ALB	AL	Active
	Algeria	DZA	DZ	Active
	American Samoa	ASM		
	Andorra	AND		

Click the column name to sort the list by that column


To maintain data in a simple list:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. A table containing information is displayed. Depending on your assigned user role, you can add, edit, or reorder core data as described below.

To add data to a simple list:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. A table containing information is displayed.
2. Click **Add** from the action menu, or select the add action icon (  ).
3. Enter the fields as described on the following pages.
4. If applicable, using the **Status** drop-down list, set the status for the data.
5. Click the apply changes icon (  ) to apply your changes.
6. Click **Save** to save your work.
7. Flush the administrator data cache group, as described in ["Using the Cache Application"](#) on page 10-3.


To edit a simple list:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. A table containing information is displayed.
2. Click the edit icon (  ) to the left of the row to edit.
3. Enter your changes.

---

**Note:** What you are allowed to edit will depend on your user role as well as the status of the item. These rules are described in ["Statuses"](#) on page 4-3 and ["Administrative Roles"](#) on page 4-3.

---

4. Click the apply changes icon (  ) to apply your changes.
5. Click **Save** to save your work.
6. Flush the administrator data cache group, as described in ["Using the Cache Application"](#) on page 10-3.

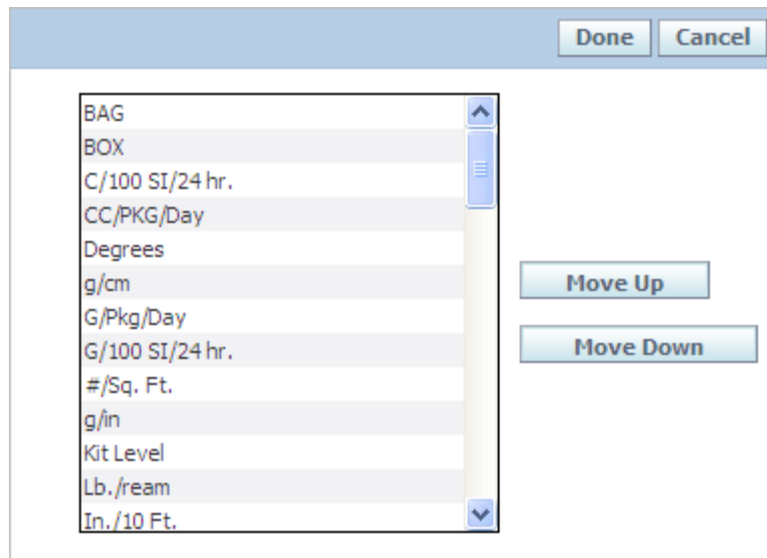
To reorder data in a simple list:

---

**Note:** Only users with the role [SUPER\_DATA\_ADMIN] can reorder lists.

---

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. A table containing information is displayed.
2. Click **Reorder**. Agile PLM for Process displays a dialog box containing the items in the list, as [Figure 4-3](#) shows:

**Figure 4–3 Reorder dialog box**

3. Select a list item, and then click **Move Up** and **Move Down** to set the preferred order.
4. Repeat as necessary to set the list order.
5. Click **Done**.
6. Click **Save** to save your work.
7. Flush the administrator data cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Working with Data Groups

Several GSM simple lists can be organized with data groups, which are represented on the Data Groups tab, shown in [Figure 4-4](#). Throughout Agile PLM for Process, these groups are used to filter the lists during selection.

**Figure 4-4** Data Groups tab



Items	Data Groups
	Data Group      Status      Items
	Asia      Active      258
	Australia      Active      272
	Canada      Active      272

## Key Fields

**Table 4-1** Data Groups tab key fields

Name	Description
Data Group	The name of the group
Status	The assigned status for the country. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.
Items	The number of items assigned to each group

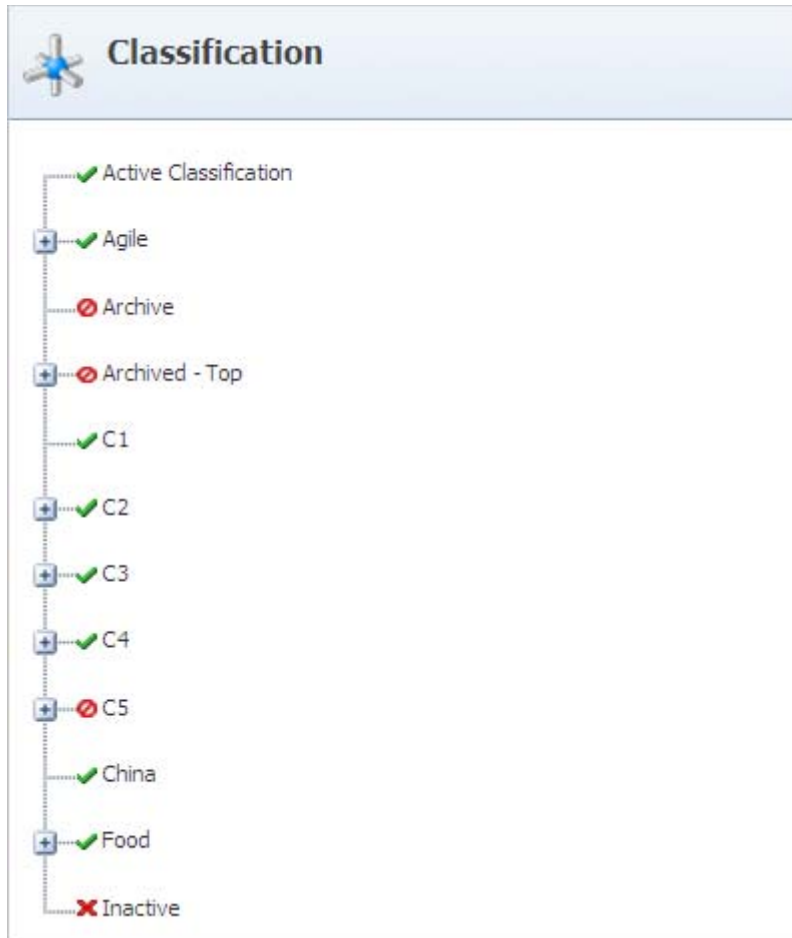
## Editing Rules



Click the **Add** to add items to the data group. For more information on using the Group Filter option in GSM, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

## Maintaining Tree Lists

Tree lists present core data in a hierarchal view. This view enables you to see the structure of the core data, including parent and child relationships, as [Figure 4–5](#) shows.

**Figure 4–5** Core data in tree lists



Each piece of data is represented by a node. Click the expand node icon (  ) to view child nodes. Click the collapse node icon (  ) to collapse the node.

All nodes contain an icon indicating their status:

- (  )—Active item
- (  )—New item
- (  )—Inactive item
- (  )—Archived item

### Drag and Drop Feature

Only users with the role of [SUPER\_DATA\_ADMIN] are allowed to move nodes that have been activated. Users with the role of [DATA\_ADMIN] can only move nodes with a "New" status.



**Figure 4–6 Dragging a node**

## Editing Actions


You can view available actions by right-clicking on a node, as [Figure 4–7](#) shows.

**Figure 4–7 Sample tree list of core data, right-click menu for users with the role of [SUPER\_DATA\_ADMIN]**




To add a root node:


1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays the tree list for the core data you selected.
2. Select **Add** from the action menu. A dialog box displays, as [Figure 4–8](#) shows.

**Figure 4–8 Add root node dialog box**


The dialog box has a light blue header bar with 'Save' and 'Cancel' buttons on the right. Below the header, there are three text input fields labeled 'Name:', 'External ID:', and 'Alias:'. Below the 'Alias:' field is a 'Generate Alias' button.

3. Enter a name for the item (required) in the **Name** field.
4. Enter an external ID in the **External ID** field.
5. Enter an alias for the item (required) in the **Alias** field. This can be an abbreviation; for example, "NA" for North America. You can also auto generate this alias by clicking **Generate Alias**.
6. Click **Save** to add the item. The page refreshes and the new root node is added to the list in alphabetical order. The new node icon () displays next to the node.
7. Right-click on the new node to display the submenu.
8. Click **Make Active**.
9. Click **Save**.
10. Flush the taxonomy cache option, as described in ["Using the Cache Application"](#) on page 10-3.

To add a child node:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays the tree list for the core data you selected.
2. Expand or collapse nodes as needed to determine the location of the new node.
3. Right-click on the node that you are adding a child to. Agile PLM for Process displays a submenu with available choices.
4. Click **Add Node**. A dialog box displays.
5. Enter a name for the item (required) in the **Name** field.
6. Enter an external ID in the **External ID** field.
7. Enter an alias for the item (required) in the **Alias** field. This can be an abbreviation; for example, "NA" for North America. You can also auto generate this alias by clicking **Generate Alias**.
8. Click **Save** to add the item. The page refreshes and the new node is added, as indicated by the new node icon ()
9. Right-click on the new node to display the submenu.
10. Click **Make Active**.
11. Click **Save**.

To edit a node:

---

---

**Note:** Users with the role of [SUPER\_DATA\_ADMIN] can edit a node. The node must have a status of "New."

---

---

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays a tree list for editing purposes.
2. Right-click on the node to edit. Agile PLM for Process displays a submenu with available choices.
3. Click **Edit Node**. A dialog box displays current node properties.
4. Make needed changes to the **Name**, **External ID**, and **Alias** fields.
5. Click **Save**.
6. Flush the taxonomy cache option, as described in ["Using the Cache Application"](#) on page 10-3.

To make a node active:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays a tree list for editing purposes.
2. Right-click on the node to edit. Agile PLM for Process displays a submenu with available choices.
3. Click **Make Active**. The page refreshes and the node displays in active status, as indicated by the active node icon (✓).
4. Click **Save**.
5. Flush the taxonomy cache option, as described in ["Using the Cache Application"](#) on page 10-3.

To make a node inactive:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays a tree list for editing purposes.
2. Right-click on the node to edit. Agile PLM for Process displays the submenu with available choices.

---

---

**Note:** You can only inactivate nodes with "Active" or "Archived" status.

---

---

3. Click **Make Inactive**. The page refreshes and the node is inactivated, as indicated by the inactive node icon (✗).
4. Click **Save**.
5. Flush the taxonomy cache option, as described in ["Using the Cache Application"](#) on page 10-3.

To archive a node:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays a tree list for editing purposes.
2. Right-click on the node to edit. Agile PLM for Process displays a submenu with available choices.


---

---

**Note:** You can only archive nodes with "Active" or "Inactive" status.

---

---

3. Click **Mark as Archived**. The page refreshes and the node is archived, as indicated by the archived node icon (  ).
4. Click **Save**.
5. Flush the taxonomy cache option, as described in ["Using the Cache Application"](#) on page 10-3.






## Custom Data

Customer-specific data, or custom data, is available in Agile PLM for Process in the form of custom sections and extended attributes. As an administrator, you can maintain custom data lists using the ADMN application. For more information about setting up custom sections and extended attributes, see [Chapter 5, "Using ADMN to Manage Custom Data"](#).

### Custom Section Column Tags

Use the Custom Section Column Tags list in ADMN to maintain custom section columns tags, as [Figure 4-9](#) shows.

**Figure 4-9 Custom Section Column Tags list**

 Custom Section Column Tags			
	Name	Behavior ID	Status
	Column Tags - Active	1026	Active
	Column Tags - Archive	1028	Archive
	Column Tags - Inactive	1027	Inactive
	Column Tags - New	1025	New
	Do Not Publish To Supplier	1	System
	Supplier eQ - Create	8	System
	Suppress Printing	2	System

### Key Fields

**Table 4-2 Custom Data, Custom Section Column Tags key fields**

Name	Description
Name	The custom section column tag name
Behavior ID	The system-assigned column tag ID
Status	The assigned status for the custom section column tag. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Section Column Tags list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Custom Section Order

Use the Custom Section Order list in ADMN to maintain the order of custom sections, as [Figure 4–10](#) shows. For instructions on setting order, see ["Custom Section Order"](#) on page 5-46.

**Figure 4–10** Custom Section Order list

Order	Name	Status
1	Apple Qualities	Active
2	Flavors	Active

### Key Fields

**Table 4–3** Custom Data, Custom Section Order key fields

Name	Description
Order	Order of custom sections
Name	The custom section name
Status	The assigned status for the custom section. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Hide Inactive & Archived Statuses

Click this link to hide inactive and archived statuses; click it again to show the inactive and archived statuses.

### Editing Rules

For instructions on editing the Custom Section Order list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Custom Section Row Tags

Use the Custom Section Row Tags list in ADMN to maintain custom section row tags, as [Figure 4–11](#) shows.

**Figure 4–11** Custom Section Row Tags list

	Name	Behavior ID	Status
	Do Not Publish To Supplier	1	System
	Hide Header	6	System
	Repeatable	7	System
	Row Tags - Active	1021	Active
	Row Tags - Archive	1023	Archive
	Row Tags - Inactive	1022	Inactive
	Row Tags - New	1020	New
	Supplier eQ - Create	9	System
	Suppress Printing	2	System

### Key Fields

**Table 4–4** Custom Data, Custom Section Row Tags key fields

Name	Description
Name	The custom section row tag name
Behavior ID	The system-assigned custom section row tag ID
Status	The assigned status for the custom section row tag. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Section Row Tags list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Custom Section Tags

Use the Custom Section Tags list in ADMN to maintain custom section tags, as [Figure 4–12](#) shows.

**Figure 4–12 Custom Section Tags list**

 Custom Section Tags			
	Name	Behavior ID	Status
	Do Not Publish To Supplier	1	System
	Insert Page Break - Above	4	System
	Insert Page Break - Below	5	System
	Landscape Printing	3	System
	Suppress Printing	2	System
	Custom Section Tags - Active	1011	Active
	Custom Section Tags - Archive	1013	Archive
	Custom Section Tags - Inactive	1012	Inactive
	Custom Section Tags - New	1010	New
	CS Inactive Tag	1057	Inactive
<a href="#">1</a> <a href="#">2</a>			

### Key Fields

**Table 4–5 Custom Data, Custom Section Tags key fields**

Name	Description
Name	The custom section tag name
Behavior ID	The system-assigned custom section tag ID
Status	The assigned status for the custom section tag. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Section Tag list, see ["Maintaining Simple Lists"](#) on page 4-4.





## Extended Attribute Groups

Use the Extended Attribute Groups list in ADMN to maintain extended attribute groups, as [Figure 4–13](#) shows.

**Figure 4–13** *Extended Attribute Groups list*



	Name	Status
	Boolean	Active
	Calculated EAs	Active
	Calculated Numeric	Active
	Child Nutrition	Active
	Compliance Information	Active

### Key Fields

**Table 4–6** *Custom Data, Extended Attribute Groups key fields*

Name	Description
Name	The extended attribute group name
Status	The assigned status for the extended attribute group. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.


### Editing Rules

For instructions on editing the Extended Attribute Group list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Extended Attribute Tags

Use the Extended Attribute Tags list in ADMN to maintain extended attribute tags, as [Figure 4–14](#) shows.

**Figure 4–14** *Extended Attribute Tags list*

 <b>Extended Attribute Tags</b>			
	<b>Name</b>	<b>Behavior ID</b>	<b>Status</b>
	Bold	1	System
	Do Not Publish To Supplier	5	System
	ERP_Owner		System
	ERP_Owning_Org		System
	Is Design Attribute	2	System
	Is Distinct	4	System
	IS_ERP_ENGINEERING_ITEM		System
	Italic	6	System
	Packaging_Height		System
	Packaging_Length		System
	Packaging_Volume		System
	Packaging_Width		System

### Key Fields

**Table 4–7** *Custom Data, Extended Attribute Tags key fields*

<b>Name</b>	<b>Description</b>
<b>Name</b>	The extended attribute tag name
<b>Behavior ID</b>	The system-assigned extended attribute tag ID
<b>Status</b>	The assigned status for the extended attribute tag. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Extended Attribute Tag list, see ["Maintaining Simple Lists"](#) on page 4-4.





## Custom Portal

The Custom Portal is an extension of the Oracle Agile PLM for Process application suite. It allows customers to implement various integration solutions that leverage the PLM for Process data and capabilities without using the core application. Its primary usage is to provide a framework for searching, filtering, and displaying PLM for Process data, and gives solution implementers the ability to customize each of those aspects.

### Custom Portals

Use the Custom Portals list in ADMN to maintain custom portals, as [Figure 4-15](#) shows.

**Figure 4-15 Custom Portals list**

 Custom Portals			
	Name	Cache Timeout (minutes)	Status
	CP - Active	10	Active
	CP - Archive	20	Archive
	CP - Inactive	15	Inactive
1			

### Key Fields

**Table 4-8 Custom Portal, Custom Portals key fields**

Name	Description
Name	The custom portal name
Cache Timeout (minutes)	The number of minutes that the search results are cached
Status	The assigned status for the custom portal. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.




### Editing Rules

For instructions on editing the Custom Portals list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Custom Portal Views

Use the Custom Portal Views list in ADMN to maintain custom portal views, as [Figure 4–16](#) shows.

**Figure 4–16** Custom Portal Views list

Custom Portal Views						
	Name	Search Plugin	Rendering Plugin	Filter Control	Open New Window	Status
	CP Views - Active	active search plugin	active rendering plugin	active filter control	<input checked="" type="checkbox"/>	Active
	CP Views - Archive	archive search plugin	archive rendering plugin	archive filter control	<input checked="" type="checkbox"/>	Archive
	CP Views - Inactive	inactive search plugin	inactive rendering plugin	inactive filter control	<input type="checkbox"/>	Inactive
1						

### Key Fields

**Table 4–9** Custom Portal, Custom Portal Views key fields

Name	Description
Name	The custom portal view name
Search Plugin	Name of the search plugins used to display portal views
Rendering Plugin	Name of the rendering plugin configured for the view
Filter Control	Name of the filter control for the view
Open New Window	If checked, the view opens in a new window. If unchecked, it opens in the same window.
Status	The assigned status for the custom portal view. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Portal Views list, see ["Maintaining Simple Lists"](#) on page 4-4.

See the *Agile Product Lifecycle Management for Process Custom Portal Implementation Guide* for more information about plugins.

## Document Reference Library Data

The Document Reference Library (DRL) is a repository for business documents. As an administrator, you can control the catalog and classification lists using the ADMN application. For more information about DRL, see the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

### Catalogs

Catalogs are used to organize DRL documents. Once the catalog is defined, it can be used within the Document Reference Library and other Agile PLM for Process applications that use DRL. Catalogs are also used to control a user or supplier's visibility to DRL documents. For example, a user may only have rights to see documents in the "Public" catalog, not the "Classified" catalog.

Documents are associated with catalogs on the DRL document object. Use the Catalogs tree list in ADMN to maintain the data, as [Figure 4-17](#) shows.

**Figure 4-17** Catalogs tree list



### Editing Rules

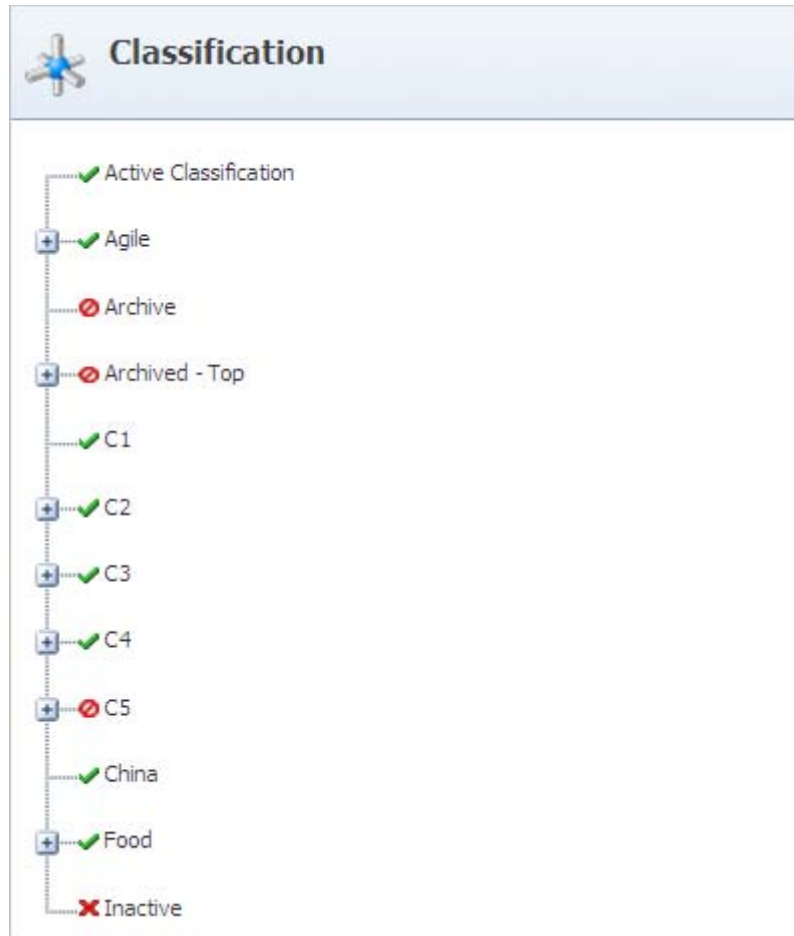
For instructions on editing the Catalogs tree list, see ["Maintaining Tree Lists"](#) on page 4-8.

## Classifications

A DRL document can be associated with multiple classification values. The classification value is just for informational purposes.

Classifications are assigned on the DRL document object. Use the Classification list in ADMN to maintain the data, as [Figure 4–18](#) shows.

**Figure 4–18** *Classifications tree list*



### Editing Rules

For instructions on editing the Classification tree list, see "[Maintaining Tree Lists](#)" on page 4-8.

## Global Data

Administrators maintain global data—data that is consumed throughout Agile PLM for Process by the various applications. This data includes countries, cross- references, restrictions, substitute restrictions, and units of measure.

### Countries

Use the Countries list in ADMN to maintain the data, as [Figure 4–19](#) shows.

**Figure 4–19** Countries list



	Country Name	Country ID	ISO Code	Status
	Afghanistan	AFG	AF	Active
	Albania	ALB	AL	Active
	Algeria	DZA	DZ	Active
	American Samoa	ASM	AS	Active
	Andorra	AND	AD	Active

1 2 3 4 5 6 7 8 9 10 ...

### Key Fields

**Table 4–10** Global, Countries key fields

Name	Description
Country Name	The country name
Country ID	The commonly recognized three-letter country ID
ISO Code	The commonly recognized two-letter ISO code for the country
Status	The assigned status for the country. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Countries list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Cross References

The Cross References section lists external systems containing equivalent numbers that can be referenced.







Administrators maintain the cross-references and can set whether the cross reference is managed by an external system, as [Figure 4–20](#) shows. When the Managed Externally Default box is checked, the corresponding system name will be read only on the specifications.

---

**Note:** Depending on configuration settings, this list may display as a tree list. The Available In field can be turned on or off using a configuration setting. Refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for more information.

---

**Figure 4–20** Cross References list

 Cross References					
	Available In	System Name	System Code	Managed Externally Default	Status
	CPI USA	BPCS System	USBPCS	<input type="checkbox"/>	Active
	China	FS System	TSFS	<input type="checkbox"/>	Active
	CPI USA	Inactive	Inactive	<input type="checkbox"/>	Inactive
	CPI USA	JDE System	USJDE	<input type="checkbox"/>	Active
	CPI USA	Oracle System	USORACLE	<input type="checkbox"/>	Active

### Key Fields

**Table 4–11** Global, Cross References key fields

Name	Description
Available In	Used to associate a system name to a Business Unit taxonomy
System Name	The name of the system
System Code	The code assigned to the system during integration
Managed Externally Default	Check the box if you want external systems to provide the cross-reference equivalent number. If the box is checked, a GSM user cannot edit the Cross Reference field unless the GSM user has the role of [EXTERNALLY_MANAGED_CROSS_REF_ADMIN]. This field may not display based on configuration settings.
Status	The assigned status for the cross-reference. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

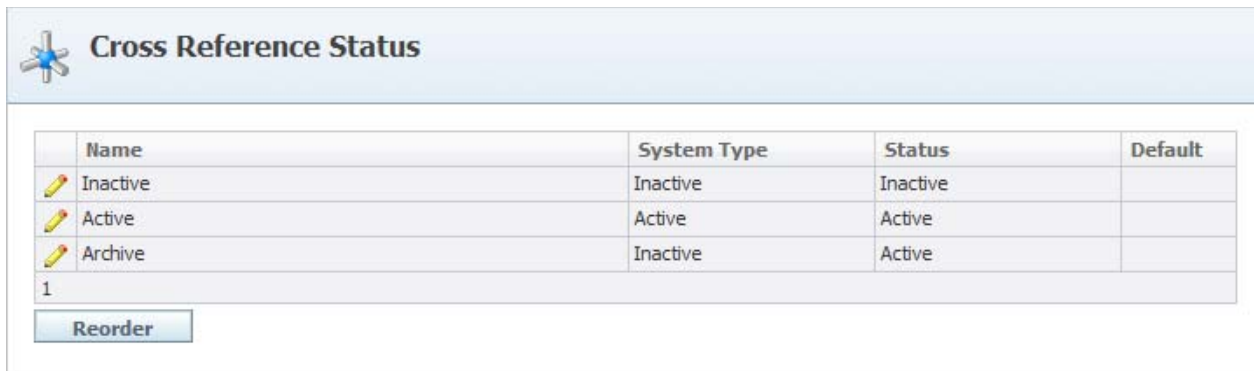
For instructions on editing the Cross Reference list, see ["Maintaining Simple Lists"](#) on page 4-4 (simple list display) or ["Maintaining Tree Lists"](#) on page 4-8 (tree list display). For more information on user roles, refer to [Appendix A, "System-Based Roles"](#).






## Cross Reference Statuses

The Cross Reference Status section lists statuses of systems that can be cross referenced, as [Figure 4-21](#) shows.

**Figure 4-21** Cross Reference Status list



Name	System Type	Status	Default
 Inactive	Inactive	Inactive	
 Active	Active	Active	
 Archive	Inactive	Active	

1

[Reorder](#)

### Key Fields

**Table 4-12** Global, Cross Reference Status key fields

Name	Description
System Name	The name of the cross reference status
System Type	The code assigned to the system during integration. Choices are Inactive and Active. This tells system how to treat the cross reference. This is a required field.
Status	The assigned status for the cross-reference status. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.
Default	Indicates the default cross reference status.

### Editing Rules

For instructions on editing the Cross Reference list, see ["Maintaining Simple Lists"](#) on page 4-4.

### Reordering Cross Reference Statuses

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder cross reference statuses. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

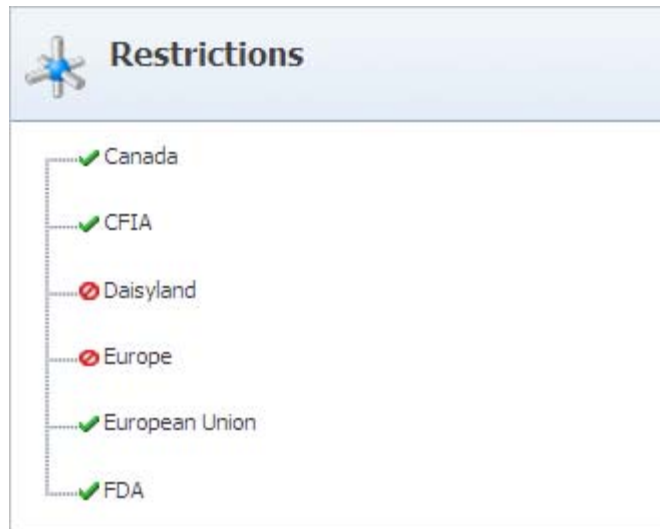
## Restrictions

Restrictions data includes food restrictions by agency. For example, restrictions might include the following:

- CFIA (Canadian Food Inspection Agency) restrictions
- EU (European Union) restrictions
- FDA (Food and Drug Administration) restrictions
- USDA (United States Department of Agriculture) restrictions

Use the Restrictions tree list in ADMN to maintain the data, as [Figure 4–22](#) shows.

**Figure 4–22** *Restrictions tree list*



### Editing Rules

For instructions on editing the Restrictions tree list, see "[Maintaining Tree Lists](#)" on page 4-8.

## Substitute Restrictions

Use the Substitute Restrictions list in ADMN to maintain substitute restrictions, as [Figure 4–23](#) shows.

**Figure 4–23** *Substitute Restrictions list*



	Name	Status
	Simple Rounding	Active
	United States - NLEA	Inactive
	Australia - FSANZ	Archive
	Europe	Archive
	Canada - CFIA	Archive

Reorder

### Key Fields

**Table 4–13** *Global, Substitute Restrictions key fields*

Name	Description
Name	Name of the substitute restriction
Status	The assigned status for the substitute restriction. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Substitute Restrictions list, see ["Maintaining Simple Lists"](#) on page 4-4.


### Reordering Substitute Restrictions

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder substitute restrictions. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

# UOM

Use the UOM (Units of Measure) list in ADMN to maintain UOMs in the Other category, as [Figure 4–24](#) shows.

Figure 4–24 UOM list

 **UOM**

UOM Category

Category: Other

UOMs

Name	Abbreviation	ID	ISO Code	Status
<a href="#">Bag</a>	BAG	BAG	BA	Active
<a href="#">Box</a>	BOX	BOX	BX	Active
<a href="#">CC/100 SI/24 hr.</a>	C/100 SI/24 hr.	CC100SID	C1	Active
<a href="#">CC/PKG/Day</a>	CC/PKG/Day	CCPKGDAY	CP	Active
<a href="#">Degrees</a>	Degrees	DEGREES	DD	Active
<a href="#">Grams Per Centimeter</a>	g/cm	G.CM	a2	Active
<a href="#">G/Pkg/Day</a>	G/Pkg/Day	GPKGDAY	GD	Active
<a href="#">G/100 SI/24 hr.</a>	G/100 SI/24 hr.	G100SID	G1	Active
<a href="#">#/Sq. Ft.</a>	#/Sq. Ft.	LB-SQ.FT	FP	Active
<a href="#">Grams Per Inch</a>	g/in	GM-IN	GG	Active
<a href="#">Kit Level</a>	Kit Level	KITLEVEL	KT	Active
<a href="#">Lb./ream</a>	Lb./ream	LB.REAM	LR	Active
<a href="#">In./10 Ft.</a>	In./10 Ft.	IN.10FT	I1	Active
<a href="#">Lb./Inch</a>	Lb./Inch	LB-INCH	LI	Active

## Key Fields

Table 4–14 Global, UOM key fields

Name	Description
Category	The unit of measure category. Currently, Other is the only category available.
Name	The name of the unit of measure. This is a translatable field.
Abbreviation	The commonly used two-letter abbreviation for the unit of measure. This is a translatable field.
ID	The unit of measure identification number.
ISO Code	The commonly recognized two-letter ISO code for the unit of measure.
Status	The assigned status for the unit of measure. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

To add a unit of measure:

1. Click **Add**. Agile PLM for Process displays the UOM Summary page, shown in [Figure 4-25](#).

**Figure 4-25 UOM page**

2. Provide data in the fields described in [Table 4-14](#) above.
3. Click **Save & Close**. The new unit of measure is added to the data list.
4. Flush the administrator data cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Reordering UOMs

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder UOMs. See ["To reorder data in a simple list:"](#) on page 4-5 for instructions on setting the order of UOM data.

# Global Specification Management Common Data

Using the ADMN application, you can modify data that is common in Global Specification Management (GSM).

## Brands - (GSM)

Use the Brands - (GSM) list in ADMN to maintain the data, as [Figure 4-26](#) shows.

Figure 4-26 Brands - (GSM) list

 Brands - (GSM)		
	Name	Status
	Accent	Active
	Ades	Active
	Alhambra	Active
	Alive	Active
	Almdudler	Active
	Ambasa	Active
	American	Active
	Andifrut	Active
	Appletiser	Active
	Aqaris	Active
	Aquactive	Active
	Aquana	Active
	Aquapure	Active
	Aquarius	Active
	Aqvaris	Active
1 2 3 4 5 6 7 8 9 10 ...		

### Key Fields

Table 4-15 GSM Common, Brands - (GSM) key fields

Name	Description
Name	Name of the brand in GSM
Status	The assigned status for the brand. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

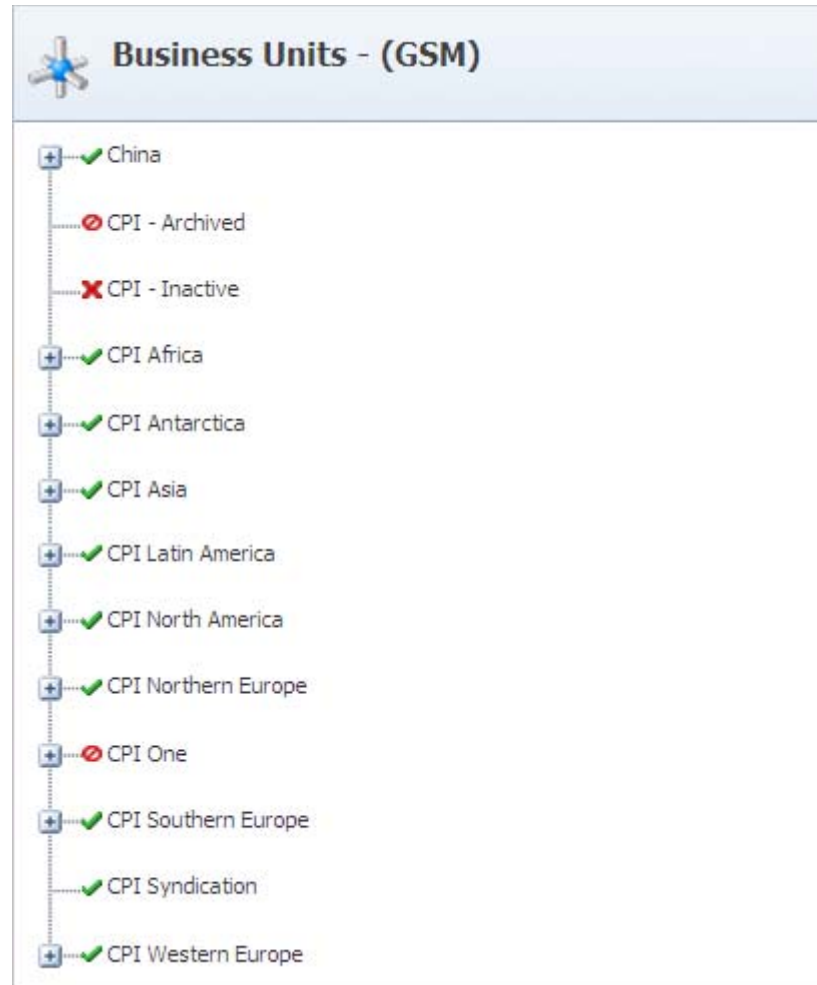
### Editing Rules

For instructions on editing the Brands - (GSM) list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Business Units - (GSM)

Use the Business Units - (GSM) tree list in ADMN to maintain the data, as [Figure 4-27](#) shows.

**Figure 4-27** *Business Units - (GSM) tree list*











### Editing Rules

For instructions on editing the Business Units - (GSM) tree list, see "[Maintaining Tree Lists](#)" on page 4-8.

# Classification

Use the Classification list in ADMN to maintain the data, as [Figure 4–28](#) shows.

**Figure 4–28** Classification list

 Classification		
	Name	Status
	Baby Food Ingredient	Active
	Critical	Active
	High Acid	Active
	Low Acid	Active
	Medium Acid	Active
	Micro Sensitive	Active
	Mild Acid	Active

## Key Fields

**Table 4–16** GSM Common, Classification key fields

Name	Description
Name	Name of the classification
Status	The assigned status for the classification. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

## Editing Rules

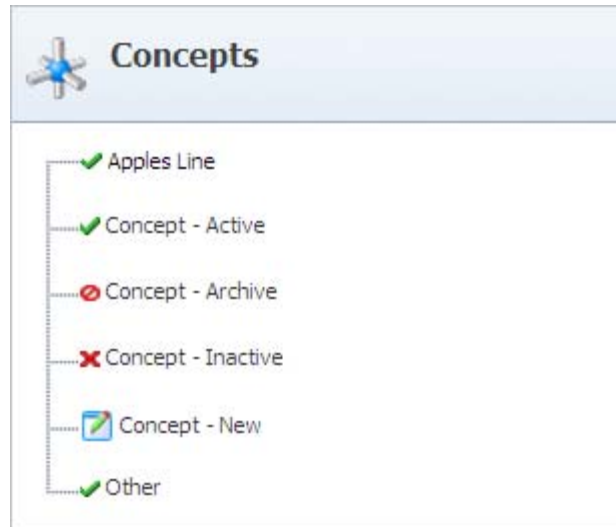
For instructions on editing the Classification list, see "[Maintaining Simple Lists](#)" on page 4-4.



## Concepts

Use the Concepts tree list in ADMN to maintain the data, as [Figure 4-29](#) shows.

**Figure 4-29** *Concepts tree list*



### Editing Rules

For instructions on editing the Concepts tree list, see "[Maintaining Tree Lists](#)" on page 4-8.

# Data Groups

Data groups are used to organize and filter select data lists in consumption. To add items to these groups, see ["Working with Data Groups"](#) on page 4-7. Use the Data Group list in ADMN to maintain the data, as [Figure 4–30](#) shows.

Figure 4–30 Data Groups list

 Data Groups		
	Name	Status
	Asia	Active
	Australia	Active
	Canada	Active
	European Union	Active
	Japan	Active
	Mexico	Active

## Key Field

Table 4–17 GSM Common, Data Groups key field

Name	Description
Name	Name of the data group
Status	The assigned status for the data group. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.
















## Editing Rules

For instructions on editing the Data Groups list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Environmental Waste

Use the Environmental Waste list in ADMN to maintain the data, as [Figure 4–31](#) shows.

**Figure 4–31** *Environmental Waste list*

 Environmental Waste		
	Name	Status
	ALUMINIUM	Active
	BLUE GLASS	Active
	BROWN GLASS	Active
	CLEAR GLASS	Active
	GREEN GLASS	Active
	HDPE	Active
	LDPE	Active
	OTHER GLASS	Active
	OTHER PACKAGING MATERIAL	Active
	OTHER PLASTIC	Active
	PAPER/BOARD	Active
	PET	Active
	PP	Active
	PS	Active
	PVC	Active
	RED GLASS	Active
	STEEL	Active
1 2		

### Key Field

**Table 4–18** *GSM Common, Environmental Waste key fields*

Name	Description
Name	Name of the environmental waste
Status	The assigned status for the environmental waste. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Environmental Waste list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Formulation Classification

Formula classifications are used to secure % breakdowns on material, product, and trade specifications. Use the Formula Classification list in ADMN to maintain the data, as [Figure 4-32](#) shows.

**Figure 4-32** *Formula Classifications list*

 <b>Formulation Classification</b>			
	Name	Group(s)	Status
	All GSM Users	GSM Spec Viewer, Testing Protocol Admin, Spec Editor	Active
	Internal Private	Internal Private	Active
	External Private	External Private	Active

### Key Fields

**Table 4-19** *GSM Common, Formula Classification key fields*

Name	Description
Name	Name of the formula classification
Group(s)	User groups that have access to the formula classification. User groups are managed using UGM. For more information, refer to <a href="#">Chapter 2, "Using UGM to Manage Groups"</a> .
Status	The assigned status for the formula classification. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.







### Editing Rules

For instructions on editing the Formula Classification list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Formulation Tags

Use the Formulation Tags list in ADMN to maintain the data, as [Figure 4–33](#) shows.

**Figure 4–33** *Formulation Tags list*

 <b>Formulation Tags</b>				
	Name	Behaviors	Available In	Status
	611	Moisture, Solids, Material	Formulation Packaging Inputs, Formulation Material Inputs, Breakdown	Active
	Active	Moisture, Solids, Material	Formulation Packaging Inputs, Formulation Material Inputs, Breakdown	Active
	Archive	Moisture, Solids, Material	Formulation Packaging Inputs, Formulation Material Inputs, Breakdown	Archive
	Inactive	Moisture, Solids, Material	Formulation Packaging Inputs, Formulation Material Inputs, Breakdown	Inactive
	New	Material	Formulation Packaging Inputs, Formulation Material Inputs, Breakdown	New
1				

### Key Fields

**Table 4–20** *Formulation Tags key fields*

Name	Description
Name	Name of the substitute material tag
Behaviors	The specific attribute that is being targeted for loss
Available In	The output that the formulation will be available in. This is a required field.
Status	The assigned status for the formulation tag. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.













### Editing Rules

For instructions on editing the Formulation Tags list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Label Claims

Use the Label Claims list in ADMN to maintain the data, as [Figure 4–34](#) shows.

**Figure 4–34** *Label Claims list*

 Label Claims			
Items	Data Groups		
	Name	Is Calculatable	Status
	100% Fat Free	<input type="checkbox"/>	Active
	Calorie Free	<input type="checkbox"/>	Active
	Calories (Free)	<input checked="" type="checkbox"/>	Inactive
	Calories (Reduced/Fewer)	<input checked="" type="checkbox"/>	Inactive
	Cholesterol (Free)	<input checked="" type="checkbox"/>	Active
	Cholesterol (Low)	<input checked="" type="checkbox"/>	Active
	Cholesterol (Reduced/Less)	<input checked="" type="checkbox"/>	Active
	Cholesterol Free	<input type="checkbox"/>	Active
	Fat Free	<input type="checkbox"/>	Active
	Light in Sodium	<input type="checkbox"/>	Active
	Lite or Light	<input checked="" type="checkbox"/>	Active

### Key Fields

**Table 4–21** *GSM Common, Label Claims key fields*

Name	Description
Name	Name of the label claim
Is Calculatable	Indicates whether the label claim is associated to a label claim determination rule. This flag is not editable through ADMN and must be scripted in.
Status	The assigned status for the label claim. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Label Claims list, see ["Maintaining Simple Lists"](#) on page 4-4. You can assign label claims to a data group using the Data Groups tab. For instructions on how to assign data groups, see ["Working with Data Groups"](#) on page 4-7.

## Label Claims Classifications

Use the Label Claims Classifications list in ADMN to maintain label claims classifications, as [Figure 4–35](#) shows.

**Figure 4–35** *Label Claims Classifications list*



Label Claims Classifications	
Name	Status
Dietary Supplement	System
Individual Food	System
Main Dish	System
Meal	System
 v52 Active	Active
 v52 Archive	Archive
 v52 Inactive	Inactive

### Key Fields

**Table 4–22** *GSM Common, Label Claims Classifications key fields*

Name	Description
Name	Name of the label claim classification
Status	The assigned status for the label claim classification. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Label Claims Classifications list, see ["Maintaining Simple Lists"](#) on page 4-4.

# Label Owner

Use the Label Owner list in ADMN to maintain the label owner data, as [Figure 4–36](#) shows.

Figure 4–36 Label Owner list

 Label Owner		
	Name	Status
	Active - Label Owner	Active
	Archive - Label Owner	Archive
	Branded Manufacturer Label	System
	Distributor/Wholesaler Branded Own Label	Active
	Distributor/Wholesaler Own Label	Active

## Key Fields

Table 4–23 GSM Common, Label Owner key fields

Name	Description
Name	Name of the label owner
Status	The assigned status for the label owner. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

## Editing Rules









For instructions on editing the Label Owner list, see "[Maintaining Simple Lists](#)" on page 4-4.



## Menu Item Class

Use the Menu Item Class list in ADMN to maintain the menu item classifications, as [Figure 4-37](#) shows.

**Figure 4-37** *Menu Item Class list*

 Menu Item Class		
	Name	Status
	AOW Emerging "Brand Identified"	Active
	AOW Optional Products	Active
	AOW Required Products	Active
	Brand Identified (Core) Optional	Active
	Brand Identified (Core) Required	Active
	Permanent	Active
	Promotional	Active

### Key Field

**Table 4-24** *GSM Common, Menu Item Class key field*

Name	Description
Name	Name of the menu item class
Status	The assigned status for the menu item class. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Menu Item Class list, see ["Maintaining Simple Lists"](#) on page 4-4.

# Menu Item Standard

Use the Menu Item Standard list in ADMN to maintain the menu item standards, as [Figure 4–38](#) shows.

Figure 4–38 Menu Item Standard list

 Menu Item Standard				
	Locality	Compliance	Name	Status
	Global	Target	Global - Target "Gold" Standard	Active
	Local	Non	Local - Not Standard	Active
	Local	Target	Local - Reference Standard	Active
	Local	Meets	Local - Meets Regional Standard	Active
	Local	Meets	Local - Meets Global Standard	Active
	Local	Alternative	Local - Acceptable Alternative	Active

## Key Fields

Table 4–25 GSM Common, Menu Item Standard key fields

Name	Description
Locality	The region that the menu item standard applies to. This field is for administrative informational purposes only.
Compliance	The compliance value for the menu item standard. This field is for administrative informational purposes only.
Name	Name of the menu item standard
Status	The assigned status for the menu item standard. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.









## Editing Rules

For instructions on editing the Menu Item Standard list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Nutp Special Attributes

Use the Nutrient Profile Special Attributes list in ADMN to maintain the data, as [Figure 4–39](#) shows.

**Figure 4–39** *Nutrient Profile Special Attributes list*

 <b>Nutrient Profile Special Attributes</b>		
	<b>Name</b>	<b>Status</b>
	Five a Day Portion - 1 per Can	Active
	Five a Day Portion - 2 per Can	Active
	Five a Day Symbol- 2 Petal	Active
	Five a Day Symbol - 1 Petal	Active
	Five a Day Symbol - 3 Petal	Active
	Five a Day Symbol - 4 Petal	Active
	Five a Day Symbol - 5 Petal	Active

### Key Fields

**Table 4–26** *GSM Common, Nutrient Profile Special Attributes key fields*

<b>Name</b>	<b>Description</b>
Name	Name of the nutrient profile special attribute
Status	The assigned status for the nutrient profile special attribute. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

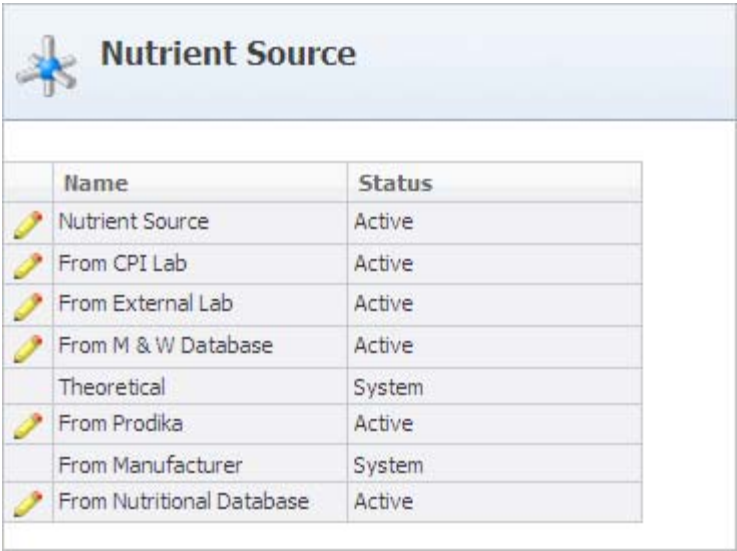
### Editing Rules







For instructions on editing the Nutrient Profile Special Attributes list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Nutrient Source

Use the Nutrient Source list in ADMN to maintain the data, as [Figure 4–40](#) shows.

**Figure 4–40** Nutrient Source list



Nutrient Source	
Name	Status
 Nutrient Source	Active
 From CPI Lab	Active
 From External Lab	Active
 From M & W Database	Active
Theoretical	System
 From Prodika	Active
From Manufacturer	System
 From Nutritional Database	Active

### Key Fields

**Table 4–27** GSM Common, Nutrient Source key fields

Name	Description
Name	Name of the nutrient source
Status	The assigned status for the nutrient source. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Nutrient Source list, see ["Maintaining Simple Lists"](#) on page 4-4.




















### Reordering Nutrient Sources

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder nutrient sources. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

## Packaging Type

Use the Packaging Type list in ADMN to maintain the data, as [Figure 4-41](#) shows.

**Figure 4-41 Packaging Type list**

 <b>Packaging Type</b>			
	Name	ISO Code	Status
	Aerosol	AE	Active
	Ampoule-non-protected	AM	Active
	Ampoule-protected	AP	Active
	Atomizer	AT	Active
	Bag	BG	Active
	Bag-multiply	MB	Active
	Bale-compressed	BL	Active
	Bale-non-compressed	BN	Active
	Balloon-non-protected	BF	Active
	Balloon-protected	BP	Active
	Bar	BR	Active
	Barrel	BA	Active
	Bars-in bundle/bunch/truss	BZ	Active
	Basket	BK	Active
	Bin	BI	Active
	Board	BD	Active
	Board-in bundle/bunch/truss	BY	Active
	Bobbin	BB	Active

### Key Fields

**Table 4-28 GSM Common, Packaging Type key fields**

Name	Description
Name	Name of the packaging type
ISO Code	Name of the related ISO code. For more information, see " <a href="#">ISO Codes</a> " on page B-4.
Status	The assigned status for the packaging type. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.










### Editing Rules

For instructions on editing the Packaging Type list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Packaging Item Type

Use the Packaging Item Type list in ADMN to maintain the data, as [Figure 4-42](#) shows.

**Figure 4-42** Packaging Item Type list

 Packaging Item Type			
	Name	Status	Default
	1111	Active	
	Packaging Material	Active	
	Packaging Material Archived	Archive	
	Packaging Material Inactive	Inactive	
	Packaging Material New	New	
	Pkg Material	Inactive	
	Printed Material	Active	
1			

### Key Fields

**Table 4-29** GSM Common, Packaging Item Type key fields

Name	Description
Name	Name of the packaging item type
Status	The assigned status for the packaging item type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.
Default	Indicates which packaging item type is set as default















### Editing Rules

For instructions on editing the Packaging Item Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Printed Packaging Languages

Use the Printed Packaging Languages list in ADMN to maintain the data, as [Figure 4-43](#) shows.

**Figure 4-43** Printed Packaging Languages list

 Printed Packaging Languages		
	Name	Status
	(Afan)Oromo	Active
	Abkhazian	Active
	Afar	Active
	Afrikaans	Active
	Albanian	Active
	Amharic	Active
	Arabic	Active
	Armenian	Active
	Assamese	Active
	Aymara	Active
	Azerbaijani	Active
	Bangla	Active
	Bashkir	Active
	Basque	Active

### Key Fields

**Table 4-30** GSM Common, Printed Packaging Languages key fields

Name	Description
Name	Name of the printed packaging language
Status	The assigned status for the printed packaging language. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.




### Editing Rules

For instructions on editing the Printed Packaging Languages list, see ["Maintaining Simple Lists"](#) on page 4-4.

# Shelf Life Type

Use the Shelf Life Type list in ADMN to maintain the data, as [Figure 4-44](#) shows.

Figure 4-44 Shelf Life Type list

 Shelf Life			
	Name	ID	Status
	Preferred Shelf Life	PreferredShelfLife	System
	To Be Inactive Shelf Life	ToBeInactiveShelfLife	Inactive
	To Be Archived Shelf Life	ToBeArchivedShelfLife	Archive

## Key Fields

Table 4-31 GSM Common, Shelf Life Type key fields

Name	Description
Name	Name of the shelf life type
ID	Unique identifier for the shelf life type
Status	The assigned status for the shelf life type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the Shelf Life Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Reordering Shelf Life Types

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder shelf life types. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.



## Storage and Shipping Requirements











Use the Storage and Shipping Requirements list in ADMN to maintain the data, as [Figure 4-45](#) shows.

---

**Note:** This list controls the material specification's Storage Requirements field inside the shelf life grid as well as the product specification's Shipping Conditions field.

---

**Figure 4-45** Storage and Shipping Requirements list

 <b>Storage and Shipping Requirements</b>		
	Name	Status
	Ambient	Active
	Away from garbage	Active
	Away from Strong Odors	Active
	Chilled	Active
	Cool	Active
	Dark	Active
	Dry	Active
	Frozen	Active
	Not Exposed to Sunlight	Active
	Refrigerated	Active

### Key Fields

**Table 4-32** GSM Common, Storage and Shipping Requirements key fields

Name	Description
Name	Name of the storage and shipping requirement
Status	The assigned status for the storage and shipping requirement. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Storage and Shipping Requirements list, see ["Maintaining Simple Lists"](#) on page 4-4.

# Storage Requirements (Trade Specs)

Use the Storage Requirements (Trade Specs) list in ADMN to maintain the data, as [Figure 4–46](#) shows.

**Note:** This list controls the trade specification’s Storage Requirements field.

Figure 4–46 Storage Requirements (Trade Specs) list

 Storage Requirements		
	Name	Status
	Ambient	Active
	Away from Strong Odors	Archive
	Chilled	Active
	Cool	Active
	Dark	Active
	Dry	Active
	Frozen	Active
	Inactive	Inactive
	Not Exposed to Sunlight	Active
	Refrigerated	Active
	Sanitary Conditions	Active

## Key Fields

Table 4–33 GSM Common, Storage Requirements (Trade Specs) key fields

Name	Description
Name	Name of the trade specification storage requirement
Status	The assigned status for the trade specification storage requirement. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the Storage Requirements (Trade Spec) list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Substitute Material Tags

Use the Substitute Material Tags list in ADMN to maintain the data, as [Figure 4-47](#) shows.

**Figure 4-47** *Substitute Material Tags list*



	Name	Status
	rgs tag 3	Archive
	rgs tag Archive	Archive
	rgs tag Inactive	Inactive
	rgs tag2	Inactive
	rgs tag 1	Active

Reorder

### Key Fields

**Table 4-34** *Substitute Material Tags key fields*

Name	Description
Name	Name of the substitute material tag
Status	The assigned status for the substitute material tag. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Substitute Material Tags list, see "[Maintaining Simple Lists](#)" on page 4-4.

















### Reordering Substitute Material Tags

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder substitute material tags. For instructions on setting the order, see "[To reorder data in a simple list:](#)" on page 4-5.

## Trade Item Type

Use the Trade Item Type list in ADMN to maintain the Item Type field on a GSM trade specification. This list allows you to customize the Item Type name shown and tie it to a system type. The System type controls which sections and fields are shown on the trade specification. This list is shown in [Figure 4-48](#) below.

Figure 4-48 Trade Item Type list

 Trade Item Type					
	Name	Is Discrete	System Type	Status	Default
	Consumer Unit	<input type="checkbox"/>	Consumer Unit	Active	
	Consumer Unit (co-pack)	<input type="checkbox"/>	Consumer Unit (co-pack)	Active	
	Consumer Unit (not for resale - co-pack)	<input type="checkbox"/>	Consumer Unit (not for resale - co-pack)	Active	
	Consumer Unit (not for resale)	<input type="checkbox"/>	Consumer Unit (not for resale)	Active	
	Discrete Active	<input checked="" type="checkbox"/>	Consumer Unit (co-pack)	Active	
	Discrete Archive	<input checked="" type="checkbox"/>	Consumer Unit	Archive	
	Discrete CU Active	<input checked="" type="checkbox"/>	Consumer Unit (not for resale - co-pack)	Active	
	Discrete Inactive	<input checked="" type="checkbox"/>	Traded Unit	Inactive	
	Discrete New	<input checked="" type="checkbox"/>	Traded Unit (no children)	New	
	Discrete TU	<input checked="" type="checkbox"/>	Traded Unit (co-pack)	Active	
	Traded Unit	<input type="checkbox"/>	Traded Unit	Active	
	Traded Unit (co-pack)	<input type="checkbox"/>	Traded Unit (co-pack)	Active	
	Traded Unit (no children - co-pack)	<input type="checkbox"/>	Traded Unit (no children - co-pack)	Active	
	Traded Unit (no children)	<input type="checkbox"/>	Traded Unit (no children)	Active	

### Key Fields

Table 4-35 Trade Item Type key fields

Name	Description
Name	Name of the trade item type that will display to the user.
Is Discrete	When an item type is flagged with isDiscrete, the trade specification will hide the Nutrient Profile section, Related Material Specification section, and the Compliance, Allergens, Intolerances, Additives sections. Discrete always shows suppliers regardless of system type selected.
System Type	This type controls which fields are available on the trade specification when a trade item type is selected. Refer to <a href="#">Figure 4-49</a> detailing what each system type shows.
Status	The assigned status for the trade item type. Refer to "Statuses" on page 4-3 for status descriptions.

**Table 4–35 Trade Item Type key fields**

Name	Description
Default	The trade type that is automatically selected when a blank trade specification is created.

Figure 4–49 shows which sections and fields are displayed based on the system type selected. CU = Consumer Unit and TU = Traded Unit

**Figure 4–49 System Types**

System Types	CU Packaging Attributes	TU Packaging Attributes	Trade Children	% Breakdown	Suppliers	GTIN/UPC/EAN	
CU	Shown	Hidden	Shown	Hidden	Hidden	Shown	
CU (not for resale)	Shown	Hidden	Shown	Hidden	Hidden	Hidden	
TU	Hidden	Shown	Shown	Hidden	Hidden	Shown	
TU (no children)	Shown	Shown	Hidden	Hidden	Hidden	Shown	
CU (co-pack)	Shown	Hidden	Shown	Shown	Shown	Shown	
CU (co-pack) (not for resale)	Shown	Hidden	Shown	Shown	Shown	Shown	
TU (co-pack)	Hidden	Shown	Shown	Shown	Shown	Shown	
TU (co-pack) (no children)	Shown	Shown	Hidden	Shown	Shown	Shown	
System Types	PLU Description	POS Description	Brand Description	Product Name	UNSPSC Code	Tax Type	Stacking Height
CU	Shown	Shown	Shown	Shown	Shown	Shown	Hidden
CU (not for resale)	Hidden	Hidden	Shown	Shown	Hidden	Hidden	Hidden
TU	Shown	Shown	Hidden	Hidden	Shown	Shown	Shown
TU (no children)	Shown	Shown	Shown	Shown	Hidden	Shown	Shown
CU (co-pack)	Shown	Shown	Shown	Shown	Hidden	Shown	Hidden
CU (co-pack) (not for resale)	Shown	Shown	Shown	Shown	Hidden	Hidden	Hidden
TU (co-pack)	Shown	Shown	Hidden	Hidden	Shown	Shown	Shown
TU (co-pack) (no children)	Shown	Shown	Shown	Shown	Hidden	Shown	Shown
* Coding and Variable Weight fields are always on all Trade Types. If the Packaging Attributes TU section exists they appear within this section, else they appear in the Packaging Attributes CU section.							






### Editing Rules

For instructions on editing the Trade Item Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Trade Tax Type/Rate

Use the Trade Tax Type/Rate list in ADMN to maintain the trade tax type/rate, as [Figure 4–50](#) shows.

**Figure 4–50 Trade Tax Type/Rate list**

 Trade Tax Type/Rate		
	Name	Status
	Trade Tax Type/Rate - Active	Active
	Trade Tax Type/Rate - Archive	Archive
	Trade Tax Type/Rate - Inactive	Inactive
	Trade Tax Type/Rate - New	New
1		

### Key Fields

**Table 4–36 GSM Common, Trade Tax Type/Rate key fields**

Name	Description
Name	Name of the trade tax type/rate
Status	The assigned status for the trade tax type/rate. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Trade Tax Type/Rate list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Trade UNSPSC Code

Use the Trade United Nations Standard Products and Services Code (UNSPSC) (UNSPSC) Code list in ADMN to maintain the list, as [Figure 4-51](#) shows.

**Figure 4-51** Trade UNSPSC Code list



### Key Fields

**Table 4-37** GSM Common, Trade UNSPSC Code key fields

Name	Description
Name	Name of the trade UNSPSC code
Status	The assigned status for the trade UNSPSC code. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Trade UNSPSC Code list, see ["Maintaining Tree Lists"](#) on page 4-8.

## Trading Company

Use the Trading Company list in ADMN to maintain the fields, as [Figure 4–52](#) shows.

**Figure 4–52** *Trading Company list*

 Trading Company			
	Name	GLN	Status
	5000169000007	5000169000007	Active
	5000192072224	5000192072224	Active
	5010251000006	5010251000006	Active
	5010482000004	5010482000004	Active
	5013546057662	5013546057662	Active
	5024231000009	5024231000009	Active
	5024333099994	5024333099994	Active
	5027615000022	5027615000022	Active
	7867458908462	7867458908462	Active
	Asda Stores Ltd	5015715444440	Active
	Co-Operative Group Ltd	5000128000013	Active
	CPI Company Ltd	5000157000002	Active

### Key Fields

**Table 4–38** *GSM Common, Trading Company key fields*

Name	Description
Name	Name of the trading company
GLN	The Global Location Number, a globally unique 13-digit number that identifies physical location, legal entity, and functional entity of the trading company
Status	The assigned status for the trading company. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

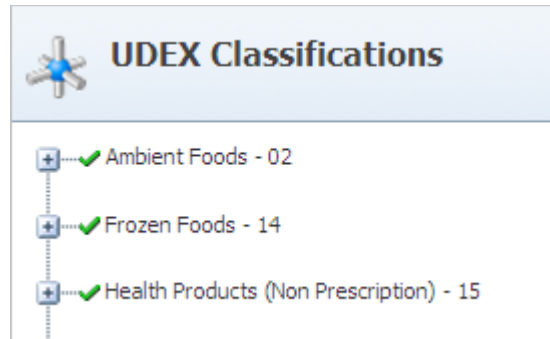
For instructions on editing the Trading Company list, see ["Maintaining Simple Lists"](#) on page 4-4.



## UDEX Classifications

Use the UDEX Classifications list in ADMN to maintain the data, as [Figure 4–53](#) shows.

**Figure 4–53** *GSM Common, UDEX Classifications tree list*



### Editing Rules


For instructions on editing the UDEX Classifications tree list, see "[Maintaining Tree Lists](#)" on page 4-8.

# Global Specification Management Compliance Data

## Additives

Use the Additives list in ADMN to maintain the data, as [Figure 4-54](#) shows.








Figure 4-54 Additives list



Additives

Items

Data Groups

	Name	External Id	Status
	Acacia Gum	ACACIA_GUM	Active
	Acesulfame K	ACESULFAME_K	Active
	Acetic Acid	ACETIC_ACID	Active
	Acetic Acid Esters of Mono- and Diglycerides of Fatty Acids	ACETIC_ACID_ESTERS_OF_MONO - _AND_DIGLYCERIDES_OF_FATTY_ACIDS	Active
	Acetone	ACETONE	Active
	Acetone peroxide	ACETONE_PEROXIDE	Active
	Acetylated Distarch Adipate	ACETYLATED_DISTARCH_ADIPATE	Active

### Key Fields

Table 4-39 GSM Compliance, Additives key fields

Name	Description
Name	Name of the additive
External Id	Unique identification for the additive
Status	The assigned status for the additive. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.











### Editing Rules

For instructions on editing the Additives list, see ["Maintaining Simple Lists"](#) on page 4-4. You can assign additives to a data group using the Data Groups tab. For more information on data groups, see ["Working with Data Groups"](#) on page 4-7.

## Allergens

Use the Allergens list in ADMN to maintain the data, as [Figure 4–55](#) shows.

**Figure 4–55 Allergens list**

Allergens			
Items		Data Groups	
	Name	External Id	Status
	Abalone	ABALONE	Active
	Acacia gum	ACACIA_GUM	Active
	Albumen	ALBUMEN	Active
	Allergen Free	ALLERGEN_FREE	Active
	Allergen TMC Archive	ALLERGEN_TMC_ARCHIVE	Archive
	Allspice	ALLSPICE	Active
	Amaranth	AMARANTH	Archive
	Amaranth dye	AMARANTH_DYE	Active
	Anise	ANISE	Active
	Annatto	ANNATTO	Active

### Key Fields

**Table 4–40 GSM Compliance, Allergens key fields**

Name	Description
Name	Name of the allergen
External Id	Unique identification for the allergen
Status	The assigned status for the allergen. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.













### Editing Rules

For instructions on editing the Allergens list, see "[Maintaining Simple Lists](#)" on page 4-4. You can assign allergens to a data group using the Data Groups tab. For more information on data groups, see "[Working with Data Groups](#)" on page 4-7.

## Complies With

Use the Complies With list in ADMN to maintain the data, as [Figure 4–56](#) shows.

**Figure 4–56 Complies With list**

Complies With			
Items	Data Groups		
	Name	Is Negative	Status
	Coeliac	<input type="checkbox"/>	Active
	Halal	<input type="checkbox"/>	Active
	Identity Preserved	<input type="checkbox"/>	Active
	ISO9000 compliant	<input type="checkbox"/>	Active
	Kosher	<input type="checkbox"/>	Active
	Kosher - Meat	<input type="checkbox"/>	Active
	Kosher - Mehadrin	<input type="checkbox"/>	Active
	Kosher - Mehadrin Passover	<input type="checkbox"/>	Active
	Kosher - Parve	<input type="checkbox"/>	Active
	Kosher - Passover	<input type="checkbox"/>	Active
	Kosher - Pulses (Kitniot)	<input type="checkbox"/>	Active
	Kosher (dairy)	<input type="checkbox"/>	Active

### Key Fields

**Table 4–41 GSM Compliance, Complies With key fields**

Name	Description
Name	Name of the compliance item
Is Negative	Indicates whether the item is negative. This flag is used when complies with items are rolled up during formulation. If an item is marked as Negative it will roll up as present if it appears at all in the group of formulation inputs. If an item is not marked as Negative, then it will only rollup as present if all formulation inputs contain the complies with item.
Status	The assigned status for the compliance item. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.













### Editing Rules

For instructions on editing the Complies With list, see ["Maintaining Simple Lists"](#) on page 4-4. You can assign Complies With information to a data group using the Data Groups tab. For more information on data groups, see ["Working with Data Groups"](#) on page 4-7.

## Intolerances

Use the Intolerances list in ADMN to maintain the data, as [Figure 4–57](#) shows.

**Figure 4–57** *Intolerances list*

 <b>Intolerances</b>			
Items		Data Groups	
	Name	External Id	Status
	Abalone	ABALONE	Active
	Acacia gum	ACACIA_GUM	Inactive
	Albumen	ALBUMEN	Active
	Allergen Free	ALLERGEN_FREE	Active
	Allspice	ALLSPICE	Active
	Amaranth dye	AMARANTH_DYE	Active
	Amaranth2	AMARANTH2	Active
	Anise	ANISE	Active
	Annatto	ANNATTO	Active
	Apple	APPLE	Active
	Arachis oil	ARACHIS_OIL	Active

### Key Fields

**Table 4–42** *GSM Compliance, Intolerances key fields*

Name	Description
Name	Name of the intolerance
External Id	Unique identification for the intolerance
Status	The assigned status for the intolerance. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules







For instructions on editing the Intolerances list, see ["Maintaining Simple Lists"](#) on page 4-4. You can assign Intolerances to a data group using the Data Groups tab. For more information on data groups, refer to ["Working with Data Groups"](#) on page 4-7.

# Global Specification Management FSIS Data

## Application Status

Use the Application Status list in ADMN to maintain the data, as [Figure 4–58](#) shows.

**Figure 4–58** Application Status list

 Application Status		
	Name	Status
	Draft	Active
	Pending	Active
	Failed	Active
	Approved	Active
	Rescinded	Active

## Key Fields

**Table 4–43** GSM FSIS, Application Status key fields

Name	Description
Name	Name of the FSIS application status
Status	The assigned status for the FSIS application status. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the Application Status list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Reordering Application Statuses

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder application statuses. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

## CFIA Approval Type

Use the CFIA Approval Types list in ADMN to maintain approval types, as [Figure 4–59](#) shows.

**Figure 4–59** CFIA Approval Types list

 CFIA Approval Type		
	Name	Status
	Approved	Active
	Draft	Active
	Failed	Inactive
	Pending	Archive
	Rescinded	Archive
	Final	System
<div>Reorder</div>		

### Key Fields

**Table 4–44** GSM FSIS, CFIA Approval Type key fields

Name	Description
Name	Name of the FSIS CFIA approval type
Status	The assigned status for the FSIS CFIA approval type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the CFIA Approval Type list, see ["Maintaining Simple Lists"](#) on page 4-4.


### Reordering CFIA Approval Types

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder CFIA approval types. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

## CFIA Payment Method

Use the CFIA Payment Method list in ADMN to maintain payment methods, as [Figure 4–60](#) shows.

**Figure 4–60** CFIA Payment Method list

 CFIA Payment Method		
	Name	Status
	CFIA Account No.	Active
	Immediate Payment	Active
	Credit Card	Active
	CFIA Payment - Active	Active
	CFIA Payment - Inactive	Inactive
	CFIA Payment - Archived	Archive
<div>Reorder</div>		

### Key Fields

**Table 4–45** GSM FSIS, CFIA Payment Method key fields

Name	Description
Name	Name of the FSIS CFIA payment method
Status	The assigned status for the FSIS CFIA payment method. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the CFIA Payment Method list, see "[Maintaining Simple Lists](#)" on page 4-4.

### Reordering CFIA Payment Methods

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder CFIA payment methods. For instructions on setting the order, see "[To reorder data in a simple list:](#)" on page 4-5.



# CFIA Product Type

Use the CFIA Product Type list in ADMN to maintain the product type data, as [Figure 4–61](#) shows.

**Figure 4–61** CFIA Product Type list

 CFIA Product Type		
	Name	Status
	Processed Products	Active
	Processed Meat Products	Active
	CFIA Product Type - Active	Active
	CFIA Product Type - Inactive	Inactive
	CFIA Product Type - Archived	Archive
<div>Reorder</div>		

## Key Fields

**Table 4–46** GSM FSIS, CFIA Product Type key fields

Name	Description
Name	Name of the FSIS CFIA product type
Status	The assigned status for the FSIS CFIA product type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the CFIA Product Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Reordering CFIA Product Types

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder CFIA product types. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

# USDA HACCP Category

Use the USDA HACCP Category list in ADMN to maintain the data, as [Figure 4-62](#) shows.

Figure 4-62 USDA HACCP Category list

USDA HACCP Category		
	Name	Status
	Raw product - not ground	Active
	Thermally processed - commercially sterile	Active
	Not heat treated - shelf stable	Active
	USDA Category - Active	Active
	USDA Category - Inactive	Inactive
	USDA Category - Archived	Archive

## Key Fields

Table 4-47 GSM FSIS, USDA HACCP Category key fields

Name	Description
Name	Name of the USDA HACCP category
Status	The assigned status for the USDA HACCP category. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the USDA HACCP list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Reordering USDA HACCP Categories




Only users with the role of [SUPER\_DATA\_ADMIN] can reorder USDA HACCP categories. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

# New Product Development Data

## Brands - (NPD)

Use the Brands - (NPD) list in ADMN to maintain the data, as [Figure 4-63](#) shows.

Figure 4-63 Brands - (NPD) list

 Brands - (NPD)		
	Name	Status
	Animal Treats	Active
	Dog Treats	Active

### Key Fields

Table 4-48 NPD, Brands - (NPD) key fields

Name	Description
Name	Name of the brand in NPD
Status	The assigned status for the brand. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

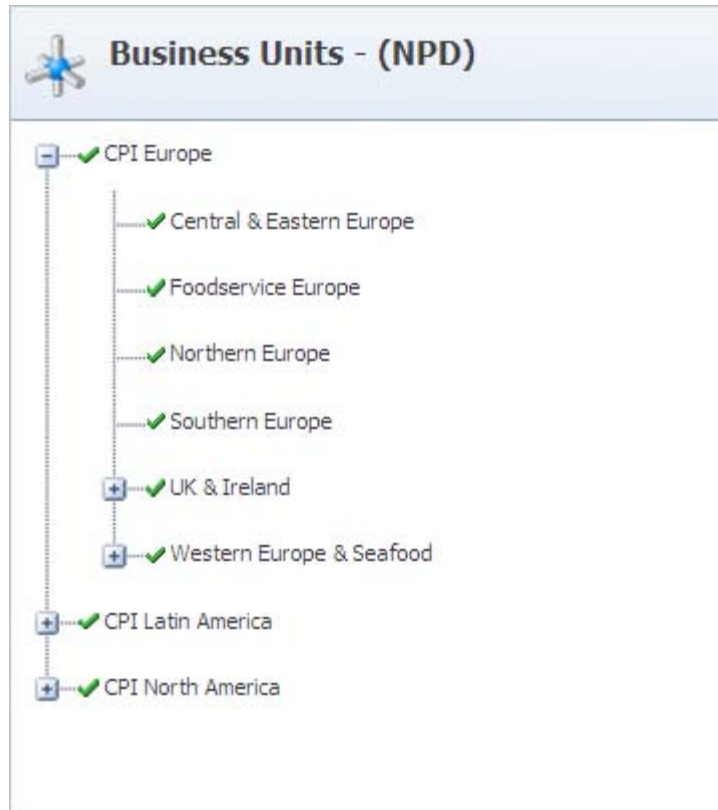
### Editing Rules

For instructions on editing the Brands - (NPD) list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Business Units - (NPD)

Use the Business Units - (NPD) tree list in ADMN to maintain the data, as [Figure 4-64](#) shows.

**Figure 4-64** *Business Units - (NPD) tree list*



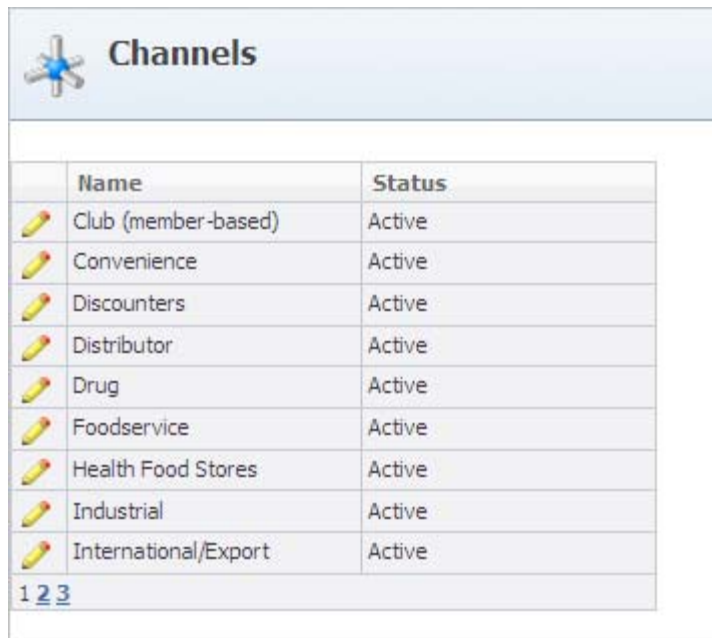
### Editing Rules







For instructions on editing the Business Units - (NPD) tree list, see "[Maintaining Tree Lists](#)" on page 4-8.

## Channels

Channels are used to define distribution strategies in projects and strategic briefs. Use the Channels list in ADMN to maintain the data, as [Figure 4–65](#) shows.

**Figure 4–65** Channels list



Channels	
Name	Status
 Club (member-based)	Active
 Convenience	Active
 Discounters	Active
 Distributor	Active
 Drug	Active
 Foodservice	Active
 Health Food Stores	Active
 Industrial	Active
 International/Export	Active
1 2 3	

### Key Fields

**Table 4–49** NPD, Channels key fields

Name	Description
Name	Name of the channel
Status	The assigned status for the channel. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.






### Editing Rules

For instructions on editing the Channels list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Consumer Value Perception

Use the Consumer Value Perception list in ADMN to maintain the data, as [Figure 4–66](#) shows.

**Figure 4–66** Consumer Value Perception list

 Consumer Value Perception		
	Name	Status
	High	Active
	Low	Active
	Med	Active
	None	Active

### Key Fields

**Table 4–50** NPD, Consumer Value Perception key fields

Name	Description
Name	Name of the consumer value perception
Status	The assigned status for the consumer value perception. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.



### Editing Rules

For instructions on editing the Consumer Value Perception list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Demographic Categories

Demographics are used when defining projects and strategic briefs. Use the Demographics list in ADMN to maintain the data, as [Figure 4-67](#) shows.

**Figure 4-67** Demographics list

 Demographics		
	Name	Status
	Age 0-2 Infant	Active
	Age 13-17 Teens	Active
	Age 18-25 Young Adults	Active
	Age 2-6 Toddler	Active
	Age 25 - 54	Active
	Age 25+ Adults	Active
	Age 6-12 Kids	Active
	All Ethnic Groups	Active
	American Indian	Active
	Asian	Active

### Key Fields

**Table 4-51** NPD, Demographics key fields

Name	Description
Name	Name of the demographic category.
Status	The assigned status for the demographic category. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.






### Editing Rules

For instructions on editing the Demographics list, see ["Maintaining Simple Lists"](#) on page 4-4.

# Enabling Technology

Use the Enabling Technology list to maintain the data, as [Figure 4–68](#) shows.

**Figure 4–68** *Enabling Technology list*

 Enabling Technology		
	Name	Status
	High	Active
	Low	Active
	Med	Active
	None	Active

## Key Fields

**Table 4–52** *NPD, Enabling Technology key fields*

Name	Description
Name	Name of the enabling technology
Status	The assigned status for the enabling technology. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the Enabling Technology list, see ["Maintaining Simple Lists"](#) on page 4-4.



## Functional Area - (NPD)

Use the Functional Area - (NPD) list in ADMN to maintain the data, as [Figure 4-69](#) shows.

**Figure 4-69 Functional Area - (NPD) list**

 <b>Functional Area - (NPD)</b>			
	Available In	Name	Status
	CPI Australasia - Consumer Products	FGI Data Controller	Active
	CPI Europe	Finance - Commercial	Active
	CPI Europe	Finance - Supply Chain	Active
	CPI Australasia - Consumer Products	Food Legislation/Nutrition	Active
	CPI Europe	Growth Council	Active
	CPI Australasia - Consumer Products, CPI Europe	HPC	Active
	CPI Australasia - Consumer Products	HPC Project Manager	Active
	CPI Europe	Human Resources	Active

### Key Fields

**Table 4-53 NPD, Functional Area - (NPD) key fields**

Name	Description
Available In	The NPD business unit that the functional area will be available in. This is a required field.
Name	Name of the functional area
Status	The assigned status for the enabling technology. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Functional Area - (NPD) list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Global Categories

Use the Global Categories list in ADMN to maintain the data, as [Figure 4–70](#) shows.

**Figure 4–70** *Global Categories list*



	Name	Status
	Foodservice	Active
	Frozen & Chilled	Active
	KC&S	Active
	Pet Food	Active
	Quick Service Meals	Active
	Seafood	Active

Add

### Key Fields

**Table 4–54** *NPD, Global Categories key fields*

Name	Description
Name	Name of the global category
Status	The assigned status for the global category. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.




### Editing Rules

For instructions on editing the Global Categories list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Metrics - Basis

Use the Metrics - Basis list to maintain the data, as [Figure 4-71](#) shows.

**Figure 4-71 Metrics - Basis list**

 Metrics - Basis				
	Name	Description	Code	Status
	Absolute	Ignores cannibalization	ABS	Active
	Incremental	Takes cannibalization into consideration	INC	Active

### Key Fields

**Table 4-55 NPD, Metrics - Basis key fields**

Name	Description
Name	Name of the metrics basis
Description	Description of the metrics basis
Code	Alphanumeric code assigned to the metrics basis
Status	The assigned status for the metrics basis. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.









### Editing Rules

For instructions on editing the Metrics - Basis list, see ["Maintaining Simple Lists"](#) on page 4-4.

# Metrics - Category

Use the Metrics - Category list to maintain the data, as [Figure 4-72](#) shows.

Figure 4-72 Metrics - Category list

 Metrics - Category		
	Name	Status
	Capital	Active
	Consumer Testing	Active
	Expense	Active
	Other	Active
	Product	Active
	Resources	Active
	Revenue	Active

## Key Fields

Table 4-56 NPD, Metrics - Category key fields

Name	Description
Name	Name of the metrics category
Status	The assigned status for the metrics category. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the Metrics - Category list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Metrics - Fiscal Year

Use the Metrics - Fiscal Year list to maintain the data, as [Figure 4-73](#) shows.

**Figure 4-73** Metrics - Fiscal Year list

 Metrics - Fiscal Year				
	Name	Description	Code	Status
	FY04	Fiscal Year 2004	FY04	Active
	FY05	Fiscal Year 2005	FY05	Active
	FY06	Fiscal Year 2006	FY06	Active
	FY07	Fiscal Year 2007	FY07	Active
	FY08	Fiscal Year 2008	FY08	Active
	FY09	Fiscal Year 2009	FY09	Active
	FY10	Fiscal Year 2010	FY10	Active
	FY11	Fiscal Year 2011	FY11	Active
	FY12	Fiscal Year 2012	FY12	Active
	FY13	Fiscal Year 2013	FY13	Archive

### Key Fields

**Table 4-57** NPD, Metrics - Fiscal Year key fields

Name	Description
Name	Name of the metrics fiscal year
Description	Description of the metrics fiscal year
Code	Alphanumeric code assigned to the metrics fiscal year
Status	The assigned status for the fiscal year. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.




### Editing Rules

For instructions on editing the Metrics - Fiscal Year list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Metrics - Phase

Use the Metrics - Phase list to maintain the data, as [Figure 4-74](#) shows.

**Figure 4-74** Metrics - Phase list

 Metrics - Phase				
	Name	Description	Code	Status
	Post-Launch	Occurring/Forecasted post-launch	POST	Archive
	Pre-Launch	Occurring/Forecasted before launch	PREL	Active

### Key Fields

**Table 4-58** NPD, Metrics - Phase key fields

Name	Description
Name	Name of the metrics phase
Description	Description of the metrics phase
Code	Alphanumeric code assigned to the metrics phase
Status	The assigned status for the metrics phase. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Metrics - Phase list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Priorities

Use the Priorities list in ADMN to maintain the data, as [Figure 4–75](#) shows.

**Figure 4–75** *Priorities list*

 Priority		
	Name	Status
	High	Active
	Inactive Priority	Inactive
	Low	Active
1		

### Key Fields

**Table 4–59** *Priorities key fields*

Name	Description
Name	Name of the priority
Status	The assigned status for the priority. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Priorities list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Project Type Categories

Use the Project Type Categories tree list in ADMN to maintain the data, as [Figure 4–76](#) shows.

**Figure 4–76** NPD Project Type Categories list



### Editing Rules








For instructions on editing the Project Type Categories list, see "[Maintaining Tree Lists](#)" on page 4-8.



## Project Types

Use the Project Types list in ADMN to maintain the data, as [Figure 4–77](#) shows.

**Figure 4–77** Project Types list

 Project Types		
	Available In	Name
	New CPI Brand » Existing CPI Product Category (for This Business Unit)	Alternate Supplier/New Supplier
	Current Brand » Existing CPI Product Category (for This Business Unit) » Cost Avoidance (reactive)	Alternate Supplier/New Supplier
	New Brand » Existing Product Category (for This Business Unit)	Artwork Revision
	Current Brand » New Middle Node » New Third Node	Artwork Revision
	Proprietary Brand (Private Label) » Existing CPI Product Category (for This Business Unit) » Cost Savings	asd
	New Brand	CJ-NPD-PT

### Key Fields

**Table 4–60** NPD, Project Types key fields

Name	Description
Available In	Category that the project type will be available in
Name	Name of the project type

### Editing Rules

For instructions on editing the Project Types list, see ["Maintaining Simple Lists"](#) on page 4-4.

# Project Visibilities

Use the Project Visibility list in ADMN to maintain the data, as [Figure 4-78](#) shows.

Figure 4-78 Project Visibility list

 Project Visibility		
	Name	Status
	BBQ Sauce	Active
	Blue Cheese Dressing	Active
	Business Unit(s)	Archive
	Cake	Inactive
	Canned Soup	Active
	Cheesecake	Active
	Chili Sauce	Active
	Chocolate	Active
	Club Stores	Active

## Key Fields

Table 4-61 NPD, Project Visibility key fields

Name	Description
Name	Name of the project visibility
Status	The assigned status for the project visibility. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the Project Visibility list, see "[Maintaining Simple Lists](#)" on page 4-4.

Risk

Use the Risk list in ADMN to maintain the data, as [Figure 4-79](#) shows.

Figure 4-79 Risk list

 Risk		
	Name	Status
	Archive Risk	Archive
	Inactive Risk	Inactive
	New Risk	New
	Risk 1	Active
	Risk 2	Active
	Risk 3	Active
1		

Key Fields

Table 4-62 Risk key fields

Name	Description
Name	Name of the risk
Status	The assigned status for the risk. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

Editing Rules

For instructions on editing the Risk list, see ["Maintaining Simple Lists"](#) on page 4-4.


# Product Quality Management Data




Using the ADMN application, you can modify certain Product Quality Management (PQM) data.

## Action Type

Use the Action Type list in ADMN to maintain action types for PQM, as [Figure 4–80](#) shows.

Figure 4–80 Action Type list

 **Action Type**

	Name	Abbreviation	System Code	Status
	Corrective and Preventative Action	CAPA	Corrective and Preventative Action	Active
	Product Recall	PRDRCLL	Corrective and Preventative Action	Active
	Supplier Corrective Action Request	SCAR	Corrective and Preventative Action	Active
1				

### Key Fields

Table 4–63 PQM, Action Type key fields

Name	Description
Name	Name of the action type
Abbreviation	Abbreviation for the action type
System Code	The system type assigned to the action type. This system type controls which core fields are displayed to the user when this type is selected. Only one system type of actions is available: Corrective and Preventative Action.
Status	The assigned status for the action type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.




### Editing Rules

For instructions on editing the Action Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Audit Result

Use the Audit Result list in ADMN to maintain audit results for PQM, as [Figure 4–81](#) shows.

**Figure 4–81**    *Audit Result list*

 <b>Audit Result</b>			
	<b>Name</b>	<b>External Id</b>	<b>Status</b>
	Fail	Fail	Active
	Pass	Pass	Active

### Key Fields

**Table 4–64**    *PQM, Audit Result key fields*

Name	Description
Name	Name of the audit result
External Id	Unique identification for the audit result
Status	The assigned status for the audit result. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.





### Editing Rules

For instructions on editing the Audit Result list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Audit Type

Use the Audit Type list in ADMN to maintain audit types for PQM, as [Figure 4–82](#) shows.

**Figure 4–82** Audit Type list

 Audit Type				
	Name	Abbreviation	System Code	Status
	Facility Audit	FA	Audit	Active
	General Audit	GA	Audit	Active
	Product Audit	PA	Audit	Active
1				

### Key Fields

**Table 4–65** PQM, Audit Type key fields

Name	Description
Name	Name of the audit type
Abbreviation	Abbreviation for the audit type
System Code	The system type assigned to the audit type. This system type controls which core fields are displayed to the user when this type is selected. Only one system type of Audit is available: Audit.
Status	The assigned status for the audit type. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.













### Editing Rules

For instructions on editing the Audit Type list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Customer

Use the Customer list in ADMN to maintain customers for PQM, as [Figure 4–83](#) shows.

**Figure 4–83 Customer list**

 Customer			
	Name	External Id	Status
	Pinnacle Foods	35	Active
	Kellogg Co	34	Active
	General Mills	33	Active
	Kraft Foods	32	Active
	Nestle	31	Active
	Rite Aide	30	Active
	CVS Caremark	29	Active
	Walgreens	28	Active
	Outback Steakhouse	27	Active
	Red Robin	26	Active
	Applebee's	25	Active
	Olive Garden	24	Active
	Chili's	23	Active
	Speedway Super America	22	Active
	Casey's General Stores	21	Active
	7-Eleven	20	Active

## Key Fields

**Table 4–66 PQM, Customer key fields**

Name	Description
Name	Name of the customer
External Id	Unique identification for the customer
Status	The assigned status for the customer. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.















## Editing Rules

For instructions on editing the Customer list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Failure Type

Use the Failure Type list in ADMN to maintain failure types for PQM, as [Figure 4–84](#) shows. Failure types are associated to an affected item on an issue, action or audit.

**Figure 4–84** Failure Type list

 Failure Type			
	Name	External Id	Status
	Packaging Material Non-Conformance	10	Active
	Improper Shipping Conditions	9	Active
	Improper Equipment Settings	8	Active
	Improper Loading	7	Active
	Metal Detector Malfunction	6	Active
	Equipment Failure	5	Active
	Freezer Temperature NC	3	Active
	Storage Temperutur NC	2	Active
	Improper Scaling/Mixing	1	Active
	Shipping Conditions	4	Inactive
	Outer Pack	outerpkg	Inactive
	Material Non-Conformance	nc	Active
	Inner Pack	pkg	Inactive

### Key Fields

**Table 4–67** PQM, Failure Type key fields

Name	Description
Name	Name of the failure type
External Id	Unique identification for the failure type
Status	The assigned status for the failure type. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

### Editing Rules







For instructions on editing the Failure Type list, see "[Maintaining Simple Lists](#)" on page 4-4.



## Issue Types


Use the Issue Type list in ADMN to maintain issue types for PQM, as [Figure 4–85](#) shows.

**Figure 4–85** Issue Type list

 Issue Type				
	Name	Abbreviation	System Code	Status
	Consumer Complaint	CNC	Problem Report	Active
	Customer Complaint	CP	Problem Report	Active
	Injury Report	INJ	Problem Report	Active
	Non-Conformance Report	NCR	Non Conformance Report	Active
	Problem Report	PR	Problem Report	Active
1				

### Key Fields

**Table 4–68** PQM, Issue Type key fields

Name	Description
Name	Name of the issue type
Abbreviation	Abbreviation for the issue type
System Code	The system type assigned to the issue type. This system type controls which core fields are displayed to the user when this type is selected. Only two system types of Issues are available: Problem Report and Non Conformance Report. Non Conformance Reports contain extra fields. These fields are shown by selecting the non conformance icon (  ) in the Affected Items grid. See <a href="#">Figure 4–86</a> below.
Status	The assigned status for the issue type. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

**Figure 4–86** *Affected Items grid*

The screenshot shows a software window titled "Non-conformance Details" with a "Done" button in the top right corner. The form contains the following fields and controls:

- Affected Spec:** 5113830-001: Cajun Creamy Spread [Approved]
- Conformance Specification:** A text input field with a magnifying glass icon on the right.
- Serial/Lot Number:** A text input field.
- Total Quantity Suspect:** A text input field followed by a dropdown arrow.
- Quantity Checked:** A text input field followed by a dropdown arrow.
- Quantity Affected:** A text input field followed by a dropdown arrow.
- Containment Actions:** A text input field with a globe icon on the right.
- RMA Number:** A text input field.
- Conforming Material Date:** A text input field followed by a calendar icon.

















### Editing Rules

For instructions on editing the Issue Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Product Line

Use the Product Line list in ADMN to maintain product lines for PQM, as [Figure 4-87](#) shows.

**Figure 4-87** *Product Line list*

 <b>Product Lines</b>			
	<b>Name</b>	<b>External Id</b>	<b>Status</b>
	Seeds/Nuts	15	Active
	Fruits	14	Active
	Natural Snacks	13	Active
	Pastries	12	Active
	Cookies	11	Active
	Noodles	10	Active
	Doughy/Floury	9	Active
	Chips/Crisps	8	Active
	Cheese	7	Active
	Bread/Sandwiches	6	Active
	Cracker Snack Packs	5	Inactive
	Mixed Nuts	4	Inactive
	Spreads	3	Inactive
	Crackers	2	Active
	Snacks - Chips and Pretzels	1	Inactive

## Key Fields

**Table 4-69** *PQM, Product Line key fields*

<b>Name</b>	<b>Description</b>
<b>Name</b>	Name of the product line
<b>External Id</b>	Unique identification for the product line
<b>Status</b>	The assigned status for the product line. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.












## Editing Rules

For instructions on editing the Product Line list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Resolution

Use the Resolution list in ADMN to maintain resolutions for PQM, as [Figure 4–88](#) shows. This list controls the resolution options found on a PQM issue.

**Figure 4–88** Resolution list

 Resolution			
	Name	External Id	Status
	Replaced Material	10	Active
	Replaced Packaging	9	Active
	Retrained Employees	8	Active
	Replaced Supplier	7	Active
	Modified Equipment PM Plan	6	Active
	Modified Product Specification	5	Active
	Change Shipping Temperature	4	Active
	Supplier Evaluation	3	Active
	Replace Inner Packaging	1	Inactive
	Replace Output Packaging	2	Inactive

### Key Fields

**Table 4–70** PQM, Resolution key fields

Name	Description
Name	Name of the resolution
External Id	Unique identification for the resolution
Status	The assigned status for the resolution. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.





### Editing Rules

For instructions on editing the Resolution list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Severity

Use the Severity list in ADMN to maintain severities for PQM, as [Figure 4–89](#) shows.

**Figure 4–89** Severity list

 Severity			
	Name	External Id	Status
	S1	S1	Active
	S2	S2	Active
	S3	S3	Active
	S4	S4	Active

### Key Fields

**Table 4–71** PQM, Severity key fields

Name	Description
Name	Name of the severity
External Id	Unique identification for the severity
Status	The assigned status for the severity. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Severity list, see "[Maintaining Simple Lists](#)" on page 4-4.


# Product Quality Scorecard Data

Using the ADMN application, you can modify certain Product Quality Scorecard (PQS) data.

## Lot Samples Quantity UOMs

Use the Lot Samples Quantity UOMs list in ADMN to maintain units of measure for lot sample quantities, as [Figure 4–90](#) shows.

Figure 4–90 Lot Samples Quantity UOMs list

 Lot Samples Quantity UOMs		
	Name	Status
	Cases	Active
	Cartridges	Active
	Pieces	Active
	mg	Active
	kg	Active
	g	Active
	oz	Active
	lb	Active
	L	Active
<div>Reorder</div>		

### Key Fields

Table 4–72 PQS, Lot Samples Quantity UOMs key fields

Name	Description
Name	Name of the lot sample quantity unit of measure
Status	The assigned status for the lot sample quantity unit of measure. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Lot Samples Quantity UOMs list, see ["Maintaining Simple Lists"](#) on page 4-4.

### Reordering Lot Samples Quantity UOMs

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder lot sample quantity UOMs. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

## Sample Types

Use the Sample Type list in ADMN to maintain sample types, as [Figure 4-91](#) shows.

**Figure 4-91** Sample Type list

 Sample Type			
	Name	ID	Status
	Dome Type	DT	Active
	Experimental (R&D Prototypes)	EX	Active
	Factory Production	FP	Active
	Incoming Material	IM	Active
	Inactive Type	ip	Inactive

### Key Fields

**Table 4-73** PQS, Sample Type key fields

Name	Description
Name	Name of the sample type
ID	Unique identification assigned to the sample type
Status	The assigned status for the sample type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Sample Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Scorecard Qualifications

Use the Scorecard Qualifications list in ADMN to maintain scorecard qualifications, as [Figure 4–92](#) shows.

**Figure 4–92** *Scorecard Qualifications list*

 Scorecard Qualifications		
	Name	Status
	Archive Score	Archive
	Inactive Score	Inactive
	Active Score	Active
	Final Score	Active
	Demo Score	Active
	Training	Active
	Certified Evaluation	Active
<div>Reorder</div>		

### Key Fields

**Table 4–74** *PQS, Scorecard Qualifications key fields*

Name	Description
Name	Name of the scorecard qualification
Status	The assigned status for the scorecard qualification. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Scorecard Qualifications list, see ["Maintaining Simple Lists"](#) on page 4-4.

### Reordering Scorecard Qualifications

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder scorecard qualifications. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.



## Supply Chain Relationship Management Data

Using the ADMN application, you can modify certain Supply Chain Relationship Management (SCRM) data.

### Business Units - (SCRM)

Use the Business Units - (SCRM) tree list in ADMN to maintain the data, as [Figure 4–93](#) shows.

**Figure 4–93** *Business Units - (SCRM) tree list*



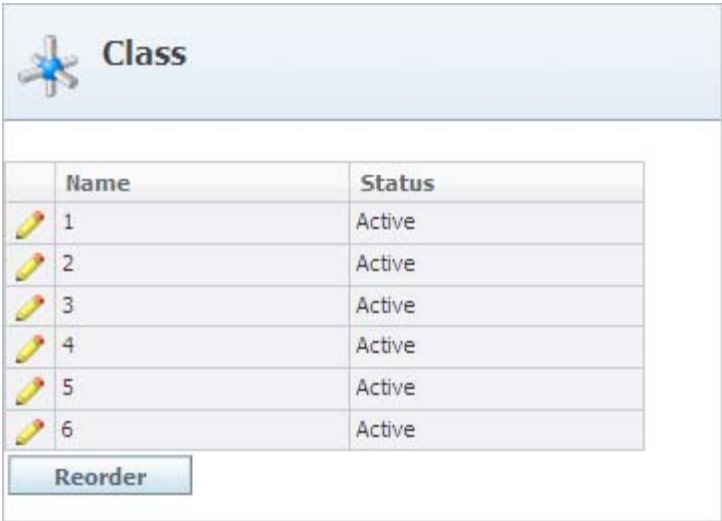
### Editing Rules

Use the instructions provided for editing tree lists provided in ["Maintaining Tree Lists"](#) on page 4-8.

# Class

Use the Class list in ADMN to maintain the data, as [Figure 4–94](#) shows.

**Figure 4–94** Class list



## Key Field

**Table 4–75** SCRM, Class key field

Name	Description
Name	Name of the class
Status	The assigned status for the class. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the Class list, refer to ["Maintaining Simple Lists"](#) on page 4-4.

## Reordering Classes

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder classes. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 4-5.

## Company Special Attributes

Use the Company Special Attributes list in ADMN to maintain the data, as [Figure 4–95](#) shows.

**Figure 4–95** *Company Special Attributes list*

 Company Special Attributes		
	Name	Status
	Food	Active
	ISO9000	Active
	MWOB	Active

### Key Field

**Table 4–76** *SCRM, Company Special Attributes key field*

Name	Description
Name	Name of the special attribute for companies
Status	The assigned status for the special attribute for companies. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.













### Editing Rules

For instructions on editing the Company Special Attributes list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Contact Category

Contact categories for company and facility profiles are maintained in the ADMN Contact Category list, as [Figure 4–96](#) shows.

**Figure 4–96** Contact Category list

 Contact Category		
	Name	Status
	Audit Remittance	Active
	Business Contact	Active
	Corporate QA	Active
	eQ	Active
	Order	Active
	Other	Active
	Plant QA	Active
	R&D	Active
	Remittance	Active
	Sales/Service	Active
	Shipping	Active

### Key Field

**Table 4–77** *SCRM, Contact Category key field*

Name	Description
Name	Name of the contact category
Status	The assigned status for the contact category. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.









### Editing Rules

For instructions on editing the Contact Category list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Document Type

Use the Document Type list in ADMN to maintain the data, as [Figure 4–97](#) shows.

**Figure 4–97** Document Type list

 Document Type		
	Name	Status
	A New Type 11/30	Active
	Audit	Active
	Business Relationship Agreement (BRA)	Active
	Code of Conduct	Active
	Confidentiality Agreement	Active
	HR Documents	Active
	Insurance	Active

### Key Field

**Table 4–78** SCRM, Document Type key field

Name	Description
Name	Name of the document type
Status	The assigned status for the document type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.



### Editing Rules

For instructions on editing the Document Type list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Facility Special Attributes

Use the Facility Special Attributes list in ADMN to maintain the data, as [Figure 4-98](#) shows:

**Figure 4-98 Facility Special Attributes list**

 Facility Special Attributes		
	Name	Status
	Environment	Active
	Equipment	Active
	Food	Active
	ISO 14000 Certified	Active
	ISO 22000 Certified	Active
	ISO 9000 Certified	Active
	ISO9000	Active
	MWOB	Active
	MWOB - African American	Active
	MWOB - Asian	Active
	MWOB - Female	Active
	MWOB - Hispanic	Active
	MWOB - Native American	Active
	Operations Suppliers	Active
	Paper and Packaging	Active
	Sanitation Audit/GMP Audit	Active
	Service Providers	Active
1 2		

### Key Field

**Table 4-79 SCRM, Facility Special Attributes key field**

Name	Description
Name	Name of the facility special attribute
Status	The assigned status for the facility special attribute. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Facility Special Attributes list, see ["Maintaining Simple Lists"](#) on page 4-4.

## Protocol

Use the Protocol list in ADMN to maintain the data, as [Figure 4-99](#) shows.

**Figure 4-99** Protocol list

 Protocol		
	Name	Status
	A	Active
	B	Active
	C	Active
	D	Active

### Key Field

**Table 4-80** SCRM, Protocol key field

Name	Description
Name	Name of the protocol
Status	The assigned status for the protocol. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.



### Editing Rules

For instructions on editing the Protocol list, see ["Maintaining Simple Lists"](#) on page 4-4.

# SDM Status

Use the SDM Status list in ADMN to maintain the data, as [Figure 4–100](#) shows.

**Figure 4–100** *SDM Status list*

 <b>SDM Status</b>		
	<b>Name</b>	<b>Status</b>
	New Supplier	Active
	In Progress	Active
	1st Notice	Active
	2nd Notice	Active
	Compliant	Active
	Non-compliant	Active
	Not Applicable	Active
	Archived	Inactive
<b>Reorder</b>		

## Key Field

**Table 4–81** *SCRM, SDM Status key field*

Name	Description
Name	Name of the Supplier Document Management (SDM) status
Status	The assigned status for the SDM status. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

## Editing Rules

For instructions on editing the SDM Status list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Reordering SDM Statuses

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder SDM statuses. For instructions on setting the order, see "[To reorder data in a simple list:](#)" on page 4-5.



## Sourcing Type

Use the Sourcing Type list in ADMN to maintain the data, as [Figure 4–101](#) shows.

**Figure 4–101** Sourcing Type list

 Sourcing Type		
	Name	Status
	Agent	Active
	Co-Packer	Active
	Distributor	Active
	Export test	Active
	Licensees	Active
	Other	Active
	Producer	Active
	Reworker	Active
	Sorter	Active

### Key Field

**Table 4–82** SCRM, Sourcing Type key field

Name	Description
Name	Name of the sourcing type
Status	The assigned status for the sourcing type. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

### Editing Rules

For instructions on editing the Sourcing Type list, see ["Maintaining Simple Lists"](#) on page 4-4.


# Supplier Portal Administration Data













Using the ADMN application, you can modify Supplier Portal Administrator (SPA) tags.

## Tags

Supplier Portal Administration (SPA) uses tags to give suppliers access to specific print templates and control the supplier view of the specification. Please refer to *Agile Product Lifecycle Management for Process Print Extensibility Guide* for more details. Use the Tags list in ADMN to maintain the data, as [Figure 4-102](#) shows.

Figure 4-102 Tags list

 **Tags**

	Name	Type	Behavior ID	Status
	Active Extension	Extension	18	Active
	Active Print Template	Print Template	14	Active
	Archive Extension	Extension	20	Archive
	Archive Print Template	Print Template	16	Archive
	Default	Print Template	1	System
	Inactive Extension	Extension	19	Inactive
	Inactive Print Template	Print Template	15	Inactive
	Long Form	Print Template	11	Active
	Material Everything Checked	Print Template	26	Active
	New Extension	Extension	17	New
	New Print Template	Print Template	13	New
	Proprietary	Extension	21	Active
	Short Form	Print Template	12	Active
1				

### Key Fields

Table 4-83 SPA, Tags key fields

Name	Description
Name	Name of the tag

**Table 4–83 SPA, Tags key fields**

Name	Description
Type	<p>Type of tags are as follows:</p> <p><b>Workflow Action</b>—Tags in this group apply to general actions that should happen when the specification reaches a certain status. For example, Hide Specs will flag the specification as hidden so the specification will not appear in search results for all users. Other workflow actions include tags that are used by outside systems. For example, IsApproved is used signify that the specification must be in an "Approved" status to kick off integration processes.</p> <p><b>Feature</b> —Tags in this group apply to specific feature behavior. For example, when the designable tag is present in a formulation specification’s workflow, certain design tools will appear within the UI.</p> <p><b>Supplier Action</b>—Tags in this group apply to specific supplier related actions that should happen when the specification reaches a certain status. For example, Publish to Supplier Portal is used when the specification should be available to suppliers.</p> <p><b>Visibility</b>—Tags in this group are used to specify visibility rules. Visibility tags are used to filter specifications from search results in GSM. See the WFA chapters of this guide to learn more about visibility tags.</p> <p>More information on specific tags can be found in the WFA chapters of this guide.</p>
Behavior ID	The unique behavior ID that is defined by the system
Status	The assigned status for the tag. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.

# Workflow Administration Data

Using the ADMN application, you can modify Workflow Administration (WFA) functional areas and system actions.

## Functional Area - (WFA)

The Functional Area - (WFA) list is used when evaluating workflow participants in WFA. Global Specification Management (GSM), Supply Chain Relationship Management (SCRM), and Product Quality Management (PQM) organize workflow participant selection by functional area. Functional areas are defined according to the needs of each customer. Functional areas may be divided according to company departments (Human Resources, Marketing, Sales, and so on). Use the Functional Area list in ADMN to maintain the data, as [Figure 4–103](#) shows.

Figure 4–103 Functional Area - (WFA) list

 Functional Area - (WFA)		
	Name	Status
	Analytical Services	Active
	Approver	Active
	Comms	Active
	Data Admin	Active
	Dept Head	Active
	Director	Active
	Division Product Leads	Active
	Division QA Leads	Active
	DQA	Active
	DQA/DPL	Active
	Engineering	Active

## Key Field

Table 4–84 WFA, Functional Area - (WFA) key fields

Name	Description
Name	Name of the functional area in WFA
Status	The assigned status for the functional area. Refer to <a href="#">"Statuses"</a> on page 4-3 for status descriptions.



## Editing Rules

For instructions on editing the Functional Area - WFA list, see ["Maintaining Simple Lists"](#) on page 4-4.

Tags

Global Specification Management (GSM), Supply Chain Relationship Management (SCRM), and Product Quality Management (PQM) workflow templates use tags as part of defining steps in workflows. Use the Tags list in ADMN to maintain the data, as [Figure 4-104](#) shows.

Figure 4-104 Tags list

 Tags						
	Name	Type	Behavior ID	Is Distinct	Available In	Status
	All Users	Visibility	101	<input type="checkbox"/>		System
	Designable	Feature	102	<input type="checkbox"/>	GSM	System
	Hide Specs	Workflow Action	1	<input type="checkbox"/>	GSM	System
	Initial Load	Workflow Action	10	<input checked="" type="checkbox"/>	GSM, SCRM	System
	Is Approved	Workflow Action	4	<input type="checkbox"/>	GSM	System
	Is Developmental	Workflow Action	3	<input type="checkbox"/>	GSM	System
	Publish Template	Feature	103	<input type="checkbox"/>	GSM, SCRM	System
	Publish To Supplier Portal	Supplier Action	2	<input type="checkbox"/>	GSM, SCRM	System
	R&D	Visibility	1054	<input type="checkbox"/>	GSM	Active

Key Fields

Table 4-85 WFA, Tags key fields

Name	Description
Name	Name of the tag

**Table 4–85 WFA, Tags key fields**

Name	Description
Type	<p>Type of tags are as follows:</p> <p><b>Workflow Action</b>—Tags in this group apply to general actions that should happen when the specification reaches a certain status. For example, Hide Specs will flag the specification as hidden so the specification will not appear in search results for all users. Other workflow actions include tags that are used by outside systems. For example, IsApproved is used signify that the specification must be in an "Approved" status to kick off integration processes.</p> <p><b>Feature</b> —Tags in this group apply to specific feature behavior. For example, when the designable tag is present in a formulation specification's workflow, certain design tools will appear within the UI.</p> <p><b>Supplier Action</b>—Tags in this group apply to specific supplier related actions that should happen when the specification reaches a certain status. For example, Publish to Supplier Portal is used when the specification should be available to suppliers.</p> <p><b>Visibility</b>—Tags in this group are used to specify visibility rules. Visibility tags are used to filter specifications from search results in GSM. See the WFA chapters of this guide to learn more about visibility tags.</p> <p>More information on specific tags can be found in the WFA chapters of this guide.</p>
Behavior ID	The unique behavior ID that is defined by the system
IsDistinct	If a tag is flagged as Is Distinct, the tag can only be applied to one Active workflow step per WFA workflow template.
Available In	Select which WFA templates these tags should be available in. Options are GSM WFA templates and/or SCRM WFA templates and/or PQM WFA templates. <b>Note:</b> Visibility tags are not supported in SCRM.
Status	The assigned status for the tag. Refer to " <a href="#">Statuses</a> " on page 4-3 for status descriptions.

### Editing Rules

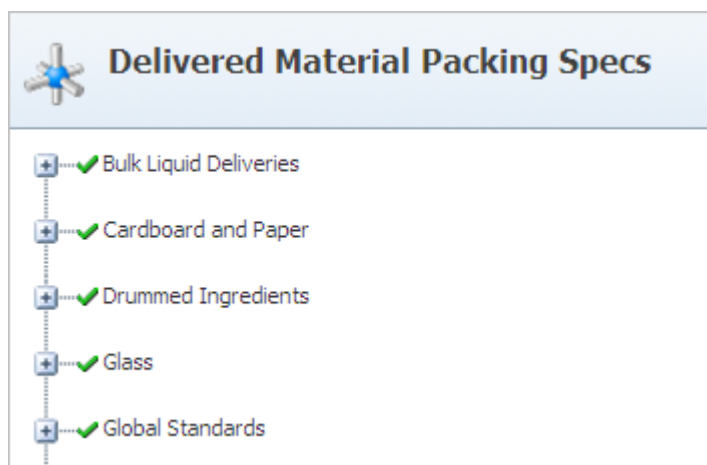
For instructions on editing the Tags list, see "[Maintaining Simple Lists](#)" on page 4-4.

## Spec Category

A specification category is a hierarchy used to group Global Specification Management (GSM) specifications. To edit a specification category in ADMN, select the specification category by clicking **ADMN > Spec Category > {name of specification}** from the left navigation panel. Specification categories exist for the following specification types:

- Delivered material packing specifications
- Formulation specifications
- Master specifications
- Menu item specifications
- Packaging material specifications
- Printed packaging specifications
- Trade specifications
- Equipment specifications
- Labeling specifications
- Material specifications
- Nutrient profiles
- Packing configuration specifications
- Product specifications

**Figure 4–105** Selected specification category



Using the ADMN application, you can modify these specification categories, as explained in the following sections. The procedure is the same for all specification categories.

---

**Note:** When the specification category is consumed in other applications, the displayed specification category is limited to 200 characters for all three levels combined.

---

## Node Statuses

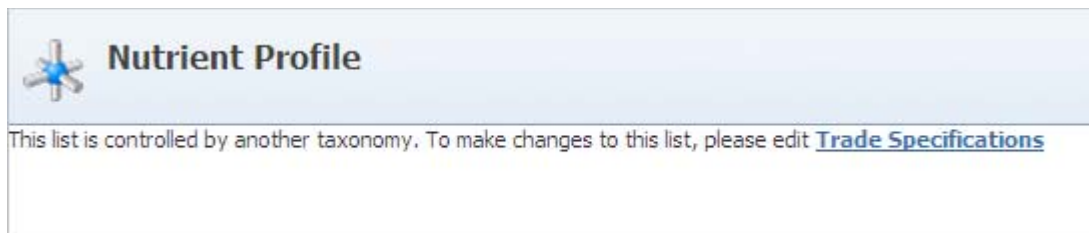
Like other tree lists, specification category nodes contain an icon indicating their status:

- (✓)—Active item
- (✎)—New item
- (✗)—Inactive item
- (⊘)—Archived item

## Editing Specification Categories

For information on adding and editing specification categories, see ["Editing Actions"](#) on page 4-9. Depending on your configuration, some lists may be controlled by another specification category. These lists are called referenced lists. If you select a referenced list, Agile PLM for Process displays an information message, shown in [Figure 4-106](#).

**Figure 4-106** Referenced list redirect message

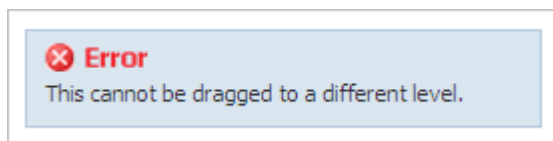


## Parent-Child Relationship Guidelines

Use the following guidelines when working with specification categories:

- Relationship rules between the states of parents and children within a specification category must be respected. Once a node has been activated it must remain in the same level of the hierarchy. For example, if the node is a third level position, it can only be dragged to another third level position. If you attempt to drag an item to a location that disrupts the hierarchy, an error message displays, as [Figure 4-107](#) shows:

**Figure 4-107** Drag and drop warning



As an administrator, you have the ability to reorganize categories and add items to categories. Users with the role [SUPER\_DATA\_ADMIN] can drag and drop items regardless of the item's status. Users with the role [DATA\_ADMIN] can drag and drop new items only.

A parent node in an "Inactive" or "Archived" state must have all child nodes in an "Inactive" or "Archived" state. When you inactivate or archive a node, its child nodes will automatically be inactivated or archived as well.

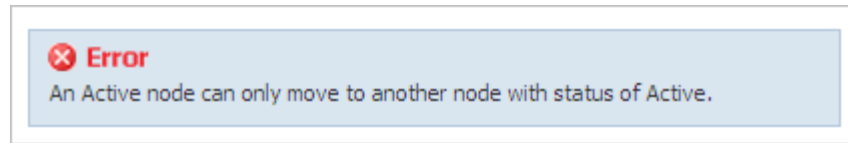
---

**Warning:** All specification categories must have three active levels as indicated by the active node symbol (✓).

---

- You can move an active node only to another node with a status of "Active." If you attempt to move an active node to an inactive or archived node, the error message shown in [Figure 4-108](#) displays.



**Figure 4–108 Active node movement to non-active node warning**


---

**Note:** The environment names and position in the process are set in the configuration files.

---

## Activities

The import/export activities include "tokens" as a synchronization tool that allows you to import/export multiple types of data between the staging and target environments. The process is reliant on a "staging/target" relationship. There is one staging environment where data is created or changed, and one to many target environments (Production, Testing, QA).

### Generate Token

"Token Section" on page 4-114 explains how tokens are used for exporting data.

To generate a token:

1. Log in to the target environment.
2. Access the **ADMN** application in the left navigation panel.
3. Click **Activities > Generate Token** on the left navigation panel. ADMN displays the Generate Token page, as [Figure 4–109](#) shows.

**Figure 4–109 Generate Token page**

4. Click **Generate**. A File Download dialog box displays the token file name.
5. In the File Download dialog box, click **Save**.
6. Navigate to the local folder to store the token.
7. In the Save As dialog box, click **Save**.

---

**Warning:** The file extension for the token must be .tok

---

## Export

You can export data from a centralized export page in the staging environment. A user can access the page by selecting **ADMN > Activities > Export** from the left navigation panel or by clicking Export at the top of each individual data type page. The Export page, shown in [Figure 4-110](#), contains fields for uploading a token from a target environment and a drop-down list to select data types.

**Figure 4-110** Export page

### Token Section

Tokens are generated from a target environment. If there are multiple target environments, each one must generate its own token for import. Tokens help the system decide which data to include in the export package.

**Update Token** — Tokens must be uploaded into the staging environment before a data type can be packaged for export. Use this field to select a token.

---

**Note:** A new token should be generated when the data in your target environment has changed.

---

To upload a token:

1. Click **Browse**. A dialog box displays.
2. Select the token to upload.

---

**Note:** The file extension for the token must be .tok

---

3. Click **Open**. The file you selected displays in the Update Token field.
4. Click **Upload Token** to upload the token. The token, once uploaded, displays the target environment name and the date that the token was generated.

## Export Data Section

Select the data to package and export using this section.

**Data** — This drop-down list contains each export data type. Each selected data type creates an export package. The package is an encrypted file that contains the exported data.

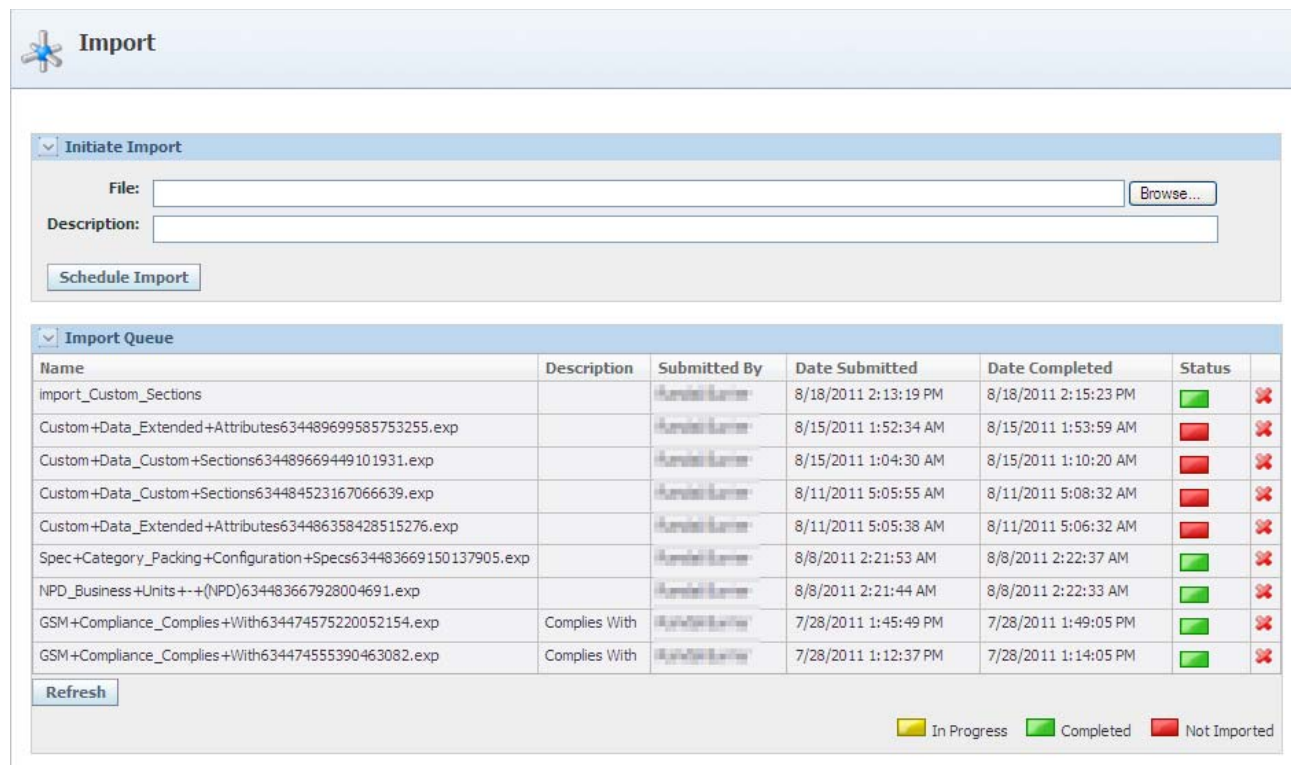
To export data from a staging environment into the target environment:

1. Log in to the staging environment and generate a token as explained in "[To generate a token:](#)" on page 4-113.
2. Log in to the staging environment.
3. Access the **ADMN** application in the left navigation panel.
4. Click **Activities > Export** in the ADMN left navigation panel. The Export page displays.
5. Click **Browse** to locate the folder that contains the token.
6. Navigate to the folder that contains the token.
7. Click **Open** and then click **Upload Token**.
8. Select the data types from the **Data** drop-down list.
9. Click **Export**. A dialog box displays with the file name of the export package.
10. Click **Save**.
11. Navigate to a local folder to store the export packages.
12. Click **Save** again.
13. Repeat steps 5 through 12 for as many data types as needed.

## Import

You import data from a centralized import page in a target environment. You can access the import page from selecting **ADMN > Activities > Import** from the left navigation panel. [Figure 4-111](#) shows the Import page.

Figure 4–111 Import page





















**Import**




**Initiate Import**

File:

Description:

**Import Queue**

Name	Description	Submitted By	Date Submitted	Date Completed	Status	
Import_Custom_Sections		Arvid Larner	8/18/2011 2:13:19 PM	8/18/2011 2:15:23 PM		
Custom+Data_Extended+Attributes634489699585753255.exp		Arvid Larner	8/15/2011 1:52:34 AM	8/15/2011 1:53:59 AM		
Custom+Data_Custom+Sections634489669449101931.exp		Arvid Larner	8/15/2011 1:04:30 AM	8/15/2011 1:10:20 AM		
Custom+Data_Custom+Sections634484523167066639.exp		Arvid Larner	8/11/2011 5:05:55 AM	8/11/2011 5:08:32 AM		
Custom+Data_Extended+Attributes634486358428515276.exp		Arvid Larner	8/11/2011 5:05:38 AM	8/11/2011 5:06:32 AM		
Spec+Category_Packing+Configuration+Specs634483669150137905.exp		Arvid Larner	8/8/2011 2:21:53 AM	8/8/2011 2:22:37 AM		
NPD_Business+Units+--+(NPD)634483667928004691.exp		Arvid Larner	8/8/2011 2:21:44 AM	8/8/2011 2:22:33 AM		
GSM+Compliance_Complies +With634474575220052154.exp	Complies With	Arvid Larner	7/28/2011 1:45:49 PM	7/28/2011 1:49:05 PM		
GSM+Compliance_Complies +With634474555390463082.exp	Complies With	Arvid Larner	7/28/2011 1:12:37 PM	7/28/2011 1:14:05 PM		

 In Progress  Completed  Not Imported

### Initiate Import Section

Select and name a file to import using this section.

**File** — Click the **Browse** button to locate your export package.

**Description** — Provide a description in this text field.

Click **Schedule Import** to schedule the import. The file you selected displays in the table in the Import Queue section.

### Import Queue Section

This section contains a table showing imports that are queued. The table contains the following fields:

- **Name** — The package name
- **Description** — The package description
- **Submitted By** — The name of the user who submitted the package
- **Date Submitted** — The date that the package was submitted
- **Date Completed** — The date that the import was completed
- **Status** — A green, amber or red status icon. The green icon indicates "Completed." The amber icon indicates "In Progress." The red icon indicates "Not Imported." "Not Imported" indicates that there was an error during import. The red status icon links to the error. Once a package is imported, the system emails the person who scheduled the import and flushes the associated cache group.

Click the delete icon (✖) to delete an import package's reference in the queue. This action does not cancel the import; it only removes the record in the queue.

To import data into your target environment:

1. Log in to your production environment.
2. Access the **ADMN** application in the left navigation panel.
3. Click **Activities > Import** in the left navigation panel.
4. Click **Browse** to locate the export package that you exported from the staging environment and select the file.
5. Click **Open**.
6. Enter a description for the export package.
7. Click **Schedule Import**. The package is added to the import queue.
8. Repeat Steps 4-7 to add more export packages to your queue.



---

## Using ADMN to Manage Custom Data

This chapter explains how to maintain custom data using the Manage Core Data (ADMN) application. Topics in this chapter include:

- [Introducing Custom Data](#)
- [Extended Attribute Groups](#)
- [Creating or Editing Extended Attribute Groups](#)
- [Extended Attributes](#)
- [Creating an Extended Attribute](#)
- [Custom Sections](#)
- [Creating a Custom Section](#)
- [Creating a Table](#)
- [Previewing a Custom Section](#)
- [Copying a Custom Section](#)
- [Custom Section Order](#)

### Introducing Custom Data

Agile Product Lifecycle Management (PLM) for Process administrators use the ADMN (Manage Core Data) application to maintain data lists and extended attributes that are used across Agile PLM for Process applications. In addition to maintaining core data, you can define custom data (customer-specific data). This chapter explains how to create and maintain custom data. [Chapter 4, "Using ADMN to Manage Core Data"](#), explains how to create and maintain core data within Agile PLM for Process.

### Custom Data Types

There are two types of custom data that administrators create:

- **Extended attributes** — Customer-defined and maintained fields that are available on some business objects. Customers use extended attributes to capture custom information and elements that are unique to their business. Extended attributes can capture textual, numeric, boolean, calculated, date, and range data.
- **Custom sections** — Custom sections are configurable sets of extended attributes. Custom sections allow you to organize a group of extended attributes in table format.

The **ADMN > Custom Data** submenu lists available custom data types, as [Figure 5–1](#) shows, along with other options:

**Figure 5–1 Custom Data menu**



## Statuses

Custom data contain statuses that are defined as follows:

- **New** — The data is not yet ready to become available to Agile PLM for Process applications. When an item has a status of "New," its values remain editable.
- **Active** — The data is available (searchable and available for assignment) for use in Agile PLM for Process applications.
- **Inactive** — The data should no longer be used. All existing references to this item remain. The item is no longer available for assignment but is still searchable.
- **Archive** — The item is no longer available for searching or assignment. All existing references to this item remain.

## Administrative Roles

There are several user roles associated with ADMN:

**[DATA\_ADMIN]** — Can add and edit new items, but edit rights are limited.

**[SUPER\_DATA\_ADMIN]** — Can edit most items regardless of the item's status.

**[EA\_SECTION\_CREATOR]** — Can see the Create New and Edit buttons on custom sections.

**[CUSTOM\_SECTION\_DENORM\_ENABLER]** — The user must have this role to include a custom section in the de-normalization process.

**[DENORMALIZED\_CUSTOM\_SECTION\_EDITOR]** — Once a custom section has been activated (status of active, inactive, archived) and is flagged as **Include in De-normalization** a user needs this role to make any edits to the custom section.



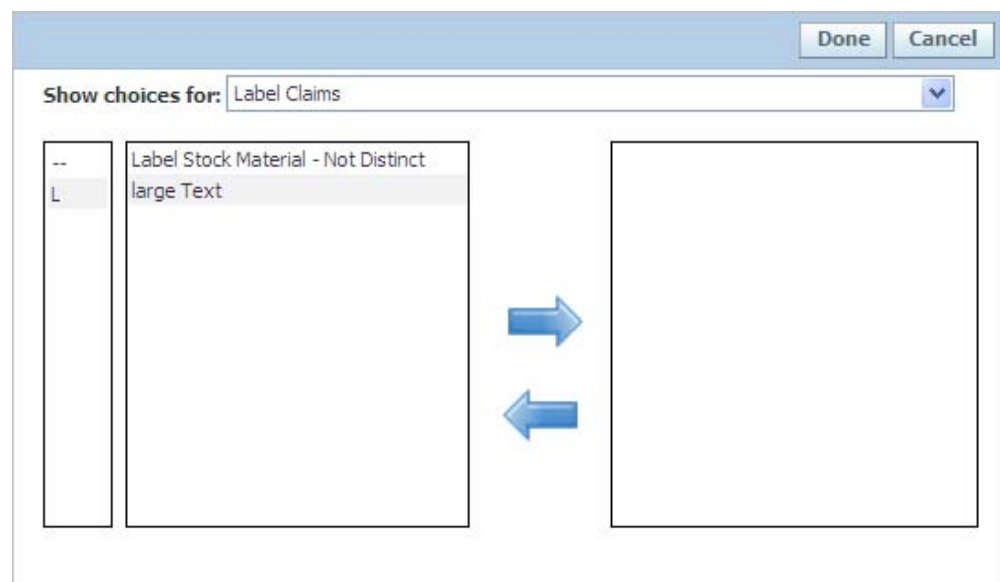
If the user doesn't have this role they will not see the Edit action button and instead sees the following information panel message. "This section has been marked for inclusion in the de-normalization process. You do not have the proper privileges to edit this Custom Section."

These roles are explained more later in this chapter.

## Extended Attribute Groups

Extended attribute groups are used to organize attributes. These groups can be used to filter available extended attributes during consumption. For example, when users are adding attributes in GSM they can filter the extended attributes list by group name. See [Figure 5-2](#) showing the extended attributes dialog box in GSM filtered by the group "Label Claims."

**Figure 5-2** Extended attributes filtered by "Label Claims" group



An extended attribute cannot be saved unless its been assigned to a group. If you do not have any extended attribute groups defined in Agile PLM for Process, you must create these prior to creating extended attributes.



## Creating or Editing Extended Attribute Groups

To create extended attribute groups:

1. Click **ADMN > Custom Data > Extended Attribute Groups**. Extended attribute groups display in the Extended Attribute Groups list, as [Figure 5-3](#) shows:

**Figure 5-3** Custom Data, Extended Attribute Groups list



Extended Attribute Groups		
	Name	Status
	Boolean	Active
	Calculated EAs	Active
	Calculated Numeric	Active
	Child Nutrition	Active
	Compliance Information	Active

2. Optionally, choose one of the following:
  - **Add a new extended attribute group** — Click **Add** at the bottom of the page. A new row displays at the top of the Extended Attribute Groups list. Enter the new extended attribute group name in the empty text field. Click the apply changes icon (✓) to apply your change.

---

**Note:** Only a user with the role [ADD\_EXT\_ATT] can add an extended attribute group. For more information on roles, see ["Creating Groups"](#) on page 2-5 and [Appendix A, "System-Based Roles"](#).

---

- **Edit an existing extended attribute group** — Click the edit icon (✎) to the left of the group name and edit the extended attribute group name in the provided text field. Click the apply changes icon (✓) to apply your change.

---

**Note:** Only a user with the role [SUPER\_DATA\_ADMIN] can edit an existing extended attribute group. For more information on roles, see ["Creating Groups"](#) on page 2-5 and [Appendix A, "System-Based Roles"](#).

---

3. Click **Save**.
4. Flush the administrator data cache, as described in ["Using the Cache Application"](#) on page 10-3.

## Extended Attributes

You can create new extended attributes using the ADMN application. Extended attributes are found in the following objects:

### GSM

- Activities
- Equipment specifications
- Formulation specifications
- Master specifications
- Material specifications
- Menu item specifications
- Nutrient profiles
- Output items
- Packing configuration specifications
- Packaging material specifications
- Printed packaging specifications
- Product specifications
- Smart Issue requests
- Testing protocols
- Trade specifications

NPD — Projects

PQM — Issues, actions, and audits

SCRM—Companies, facilities, and sourcing approvals

eQ—Material, packaging, printed packaging, product questionnaires, and trade questionnaires

CSS—Publications

Figure 5–4 shows the Extended Attribute Template page.

**Figure 5–4** Extended Attribute Template page

The screenshot shows the 'New' page for creating an 'Extended Attribute Template'. The page has a light blue header with a 'New' title and a 'Summary' tab. Below the header is the 'Attribute Configuration' section, which contains several input fields and dropdown menus for defining a new attribute.


**Attribute Configuration**

- Attribute Name:** [Text input field]
- Attribute ID:** [Text input field]
- Type:** [Dropdown menu]
- Status:** [Dropdown menu, currently set to 'New']
- Distinct:** [Checkbox, currently unchecked]
- Available In:** [Text input field with a search icon]
- Class:** [Text input field with a search icon]
- Tags:** [Text input field with a search icon]
- Group(s):** [Text input field with a search icon]
- Security Classification:** [Dropdown menu]

## Summary Tab

### Attribute Configuration Section

Enter the following information in the Attribute Configuration section.

**Attribute Name** — Name for the extended attribute. This field is required. This value is a multi-lingual value. Use the set alternate language text icon () to edit or add additional language values. This icon will not be visible until the attribute is saved. This will be the name displayed when the attribute is added to the extended attributes section. This name can also be used when searching for extended attributes and custom sections.

**Attribute ID** — A unique identifier. This is a required field. This ID is used to reference the extended attribute during calculations and integrations.

**Distinct** — Select to indicate that this extended attribute is intended to occur only once (a single cell instance) within a specification or profile. An attribute must be distinct to be rolled up during formulation. This flag cannot be edited once the attribute has been activated. If the attribute will be accessed during reporting or integration, it is ***strongly recommended*** you make the attribute distinct. This flag will keep the attribute unique per specification and increase performance when accessing it.

**Available In** — Click the link to display a selection dialog box containing a list of areas where you can make the attribute available. This field is required.

---

**Note:** eQuestionnaire extended attribute availability is based on the related GSM specification type. For example, when creating a material questionnaire you will only be allowed to add attributes that are available in material specifications.

---

**Class** — Class indicates if you plan on using the attribute in a custom section and/or the simple extended attribute list. An attribute can be made available to both. This field is required. Click the link to display a selection dialog box containing the following options:

- **Custom Sections** — Makes the attribute available for assignment to a custom section. For more information, see "[Custom Sections](#)" on page 5-25.
- **Simple** — Makes the attribute available to the extended attribute lists.

**Tags** — Tags allow you to apply special behaviors to your attribute. Multiple tags can be attached to an attribute. Click the link to display a selection dialog box containing the following options:

- **Bold** — Extended attribute will be bolded anywhere it appears in consumption.
- **Do Not Publish to Supplier** — Extended attribute will not be published to Supplier Portal and will be unavailable in eQuestionnaire.
- **Is Design Attribute**—Extended attribute will be automatically added to a formulation output item. This happens when the attribute is marked as distinct and present on one of the formulation inputs. This is a usability helper only, keeping the user from having to manually add attributes to the formulation output item. This tag does not control roll ups.
- **Italic** —Extended attribute will be italicized anywhere it appears in consumption.

- **Suppress Printing** — Extended attribute will not be included in the specification print out.

**Groups** — Click the link to display a selection dialog box containing a list of extended attribute groups, as defined in ["Extended Attribute Groups"](#) on page 5-3. Attributes can be added to multiple groups. This is a required field.

**Status** — Click the drop-down list to assign a status to the extended attribute with one of the following:

- **New** — The extended attribute is not yet ready to become available to Agile PLM for Process applications. When an extended attribute has a status of "new", its values remain editable.
- **Active** — The extended attribute is ready to become available for use in Agile PLM for Process applications.
- **Inactive** — The extended attribute should no longer be used. Inactive extended attributes are no longer available for assignment, however, they are not removed from existing objects that reference them. Inactive extended attributes are still available for searching.
- **Archived** — The extended attribute is not available for searching or assignment. Archived extended attributes are not removed from existing objects that reference them.

**Security Classification** — This field is only available if Object Level Security is enabled. A classification can be used to limit access to the extended attribute in Agile PLM for Process applications. Refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide* for more information.

## Type

Use the Type field to assign a type to the extended attribute. This is a required field. The type of extended attribute decides what interface is displayed to users. For example, the "Free Text" type displays a text area to the user. The choice you make in the type field determines which additional options display under it. The type cannot be changed once the attribute is activated.

Select one of the following choices for the Type field. These are defined further on the following pages.

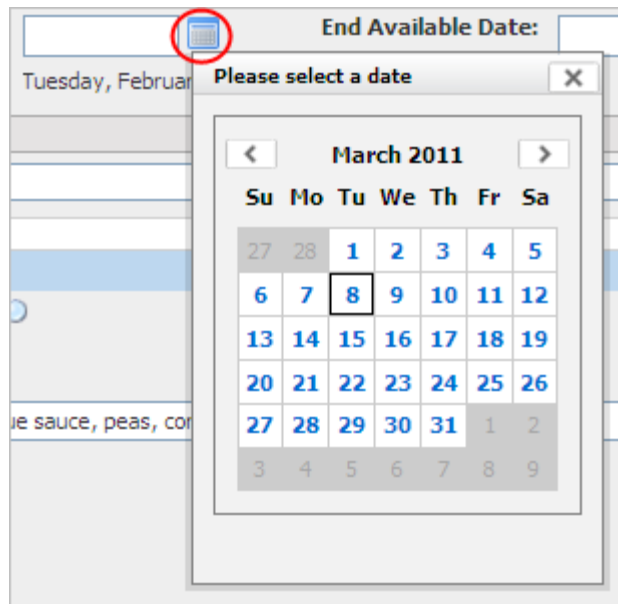
- |                                      |  |                                      |
|--------------------------------------|--|--------------------------------------|
| ■ <a href="#">Boolean</a>            | ■ <a href="#">Calculated Boolean</a>     | ■ <a href="#">Calculated Numeric</a> |
| ■ <a href="#">Calculated Text</a>    | ■ <a href="#">Date</a>                   | ■ <a href="#">Free Text</a>          |
| ■ <a href="#">Numeric</a>            | ■ <a href="#">Qualitative</a>            | ■ <a href="#">Qualitative Lookup</a> |
| ■ <a href="#">Quantitative Range</a> | ■ <a href="#">Quantitative Tolerance</a> |                                      |

**Date** This type allows the user to enter a date, as [Figure 5-5](#) shows. The user will be provided a calendar control to help select the appropriate date, as [Figure 5-6](#) shows.

**Figure 5-5 Type field, Date**



The image shows a user interface element for the 'Type' field. It consists of a label 'Type:' followed by a text box containing the word 'Date' and a small blue downward-pointing arrow icon, indicating a dropdown menu.

**Figure 5–6** Date extended attribute

**Free Text** This type allows the user to enter free text, as [Figure 5–7](#) shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. [Figure 5–8](#) shows an example of what the user might see.

**Figure 5–7** Type field, Free Text

Type:

Status:

Distinct: ☐

Available In:

Class:

Tags:

Group(s):

Security Classification:

Multi-line: ☐

**Figure 5–8** Free text extended attribute (multi-line)

This attribute is a multi-line free text field and can be used to capture 1,024 characters (including spaces).

**Numeric** Provide a numeric field for the extended attribute, as [Figure 5–9](#) shows.

**Figure 5–9** *Type field, Numeric*

The screenshot shows a configuration form for a 'Numeric' type. The 'Type' dropdown is set to 'Numeric'. The 'Status' dropdown is set to 'New'. There is an unchecked 'Distinct' checkbox. Below are empty text fields for 'Available In', 'Class', 'Tags', and 'Group(s)'. The 'UOM Category' dropdown is set to 'None'. Below it is an empty 'Available UOMs' field. The 'Default UOM' is represented by a dropdown arrow. Under 'Decimal Precision', the 'As Entered' radio button is selected, and the 'Specified Precision' radio button is unselected with a value of '1' in a small dropdown next to it.

[Figure 5–10](#) shows what this type looks like when assigned.

**Figure 5–10** *Numeric extended attribute*

The screenshot shows a simple text input field with a light blue border, containing the number '11'.

Additional options associated with this type are:

**UOM Category** — Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs in the category of "Other" can be extended by editing the UOM list discussed on page 4-28. Select "None" to not display a UOM option next to the numeric field.

**Available UOMs** — Choose the unit of measure options that you want to be available to the user.

**Default UOM** — Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list will be selected as the default.

**Decimal Precision** — Set the decimal precision as follows:

- **As Entered** — The user entered value will not be altered.
- **Specified Precision** — The user entered value will be altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros will be appended to the value. If the user exceeds the number of decimals the value will be rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value will be altered to "1.6."

**Quantitative Range** Provide a quantitative range of fields for the extended attribute, as Figure 5–11 shows.

**Figure 5–11** Type field, Quantitative Range

The screenshot shows a configuration form for a 'Quantitative Range' attribute. The fields are as follows:

- Type:** Quantitative Range (dropdown)
- Status:** New (dropdown)
- Distinct:** ☐
- Available In:** (text field)
- Class:** (text field)
- Tags:** (text field)
- Group(s):** (text field)
- UOM Category:** None (dropdown)
- Available UOMs:** (text field)
- Default UOM:** (dropdown)
- Decimal Precision:**
  - ☒ As Entered
  - ☐ Specified Precision 1 (dropdown)
- Range Values:**
  - ☐ Target
  - ☐ Min
  - ☐ Max

Figure 5–12 shows what this type looks like when assigned.

**Figure 5–12** Quantitative range extended attribute

The screenshot shows the 'Quantitative range extended attribute' with the following fields:

- target:** (text field)
- min:** (text field)
- max:** (text field)
- (dropdown menu)

Additional options are:

**UOM Category** — Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs in the category of "Other" can be extended by editing the UOM list discussed on page 4-28. Select "None" to not display a UOM option next to the numeric field.

**Available UOMs** — Choose the unit of measure options that you want to be available to the user.

**Default UOM** — Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list will be selected as the default.

**Decimal Precision** — Set the decimal precision as follows:

**As Entered** — The user entered value will not be altered

**Specified Precision** — The user entered value will be altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros will be appended to the value. If the user exceeds the number of



decimals the value will be rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value will be altered to "1.6."

**Range Values** — Check the range value of Target, Min, and/or Max. This selection determines which fields the user will see.

**Quantitative Tolerance** Set up a quantitative tolerance extended attribute to provide tolerance fields to the user, as [Figure 5–13](#) shows.

**Figure 5–13** *Type field, Quantitative Tolerance*

The screenshot shows a configuration form for a 'Quantitative Tolerance' attribute. The fields are as follows:

- Type:** A dropdown menu set to 'Quantitative Tolerance'.
- Status:** A dropdown menu set to 'New'.
- Distinct:** An unchecked checkbox.
- Available In:** An empty text field.
- Class:** An empty text field.
- Tags:** An empty text field.
- Group(s):** An empty text field.
- UOM Category:** A dropdown menu set to 'None'.
- Available UOMs:** An empty text field.
- Default UOM:** A dropdown menu with a downward arrow.
- Decimal Precision:** Two radio buttons: 'As Entered' (selected) and 'Specified Precision' (unselected). Next to 'Specified Precision' is a dropdown menu set to '1'.

[Figure 5–14](#) shows what this type looks like when assigned.

**Figure 5–14** *Quantitative tolerance extended attribute*

The screenshot shows a user interface for a quantitative tolerance field. It consists of a text input box, followed by a tolerance symbol (±), another text input box containing the value '0', and a unit of measure dropdown menu set to 'oz'.

Additional options are:

**UOM Category** — Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs in the category of "Other" can be extended by editing the UOM list discussed on page 4-28. Select "None" to not display a UOM option next to the numeric field.

**Available UOMs** — Choose the unit of measure options that you want to be available to the user.

**Default UOM** — Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list will be selected as the default.

**Decimal Precision** — Set the decimal precision as follows:

**As Entered** — The user entered value will not be altered.

**Specified Precision** — The user entered value will be altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros will be appended to the value. If the user exceeds the number of decimals the value will be rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value will be altered to "1.6."

**Qualitative** Set up a qualitative extended attribute to display selectable options to the user, as [Figure 5–15](#) shows.

**Figure 5–15** Type field, Qualitative, Checkboxes option

The screenshot shows a configuration form for a Qualitative attribute. The fields are as follows:

- Type:** A dropdown menu set to "Qualitative".
- Status:** A dropdown menu set to "New".
- Distinct:** An unchecked checkbox.
- Available In:** An empty text field.
- Class:** An empty text field.
- Tags:** An empty text field.
- Group(s):** An empty text field.
- Style:** A dropdown menu set to "Multi Select - Checkboxes".
- Below the Style dropdown is a small table with 4 columns and 2 rows.
- At the bottom is a blue button labeled "Add New".

**Style** — Select the style you want to use to display your attribute options to the user. The following styles are available:

- **Multi Select - Checkboxes** — Display attribute options to the user in the form of checkboxes. This style is recommended when you have a small amount of options (1-3 items) and you want to give the user the opportunity to select multiple options. [Figure 5–16](#) shows how the user will see this style.

**Figure 5–16** Checkboxes style

The screenshot shows two checkboxes, each followed by a number: ☐ 1 and ☐ 2.

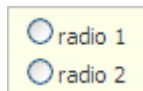
- **Single Select - Pull down** — Display attribute options to the user in the form of a pull down list. This style is recommended when you have a medium amount of options (3-25) and you want to restrict the user to a single selection. [Figure 5–17](#) shows how the user will see this style.

**Figure 5–17** Pull-down style

The screenshot shows a single-select pull-down menu with a blue border and a downward-pointing arrow on the right side.

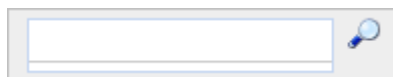
- **Single Select - Radio buttons** — Display attribute options to the user in the form of radio buttons. This style is recommended when you have a small amount of options (3-20 items) and you want to restrict the user to a single selection. [Figure 5-18](#) shows how the user will see this style.

**Figure 5-18 Radio buttons style**

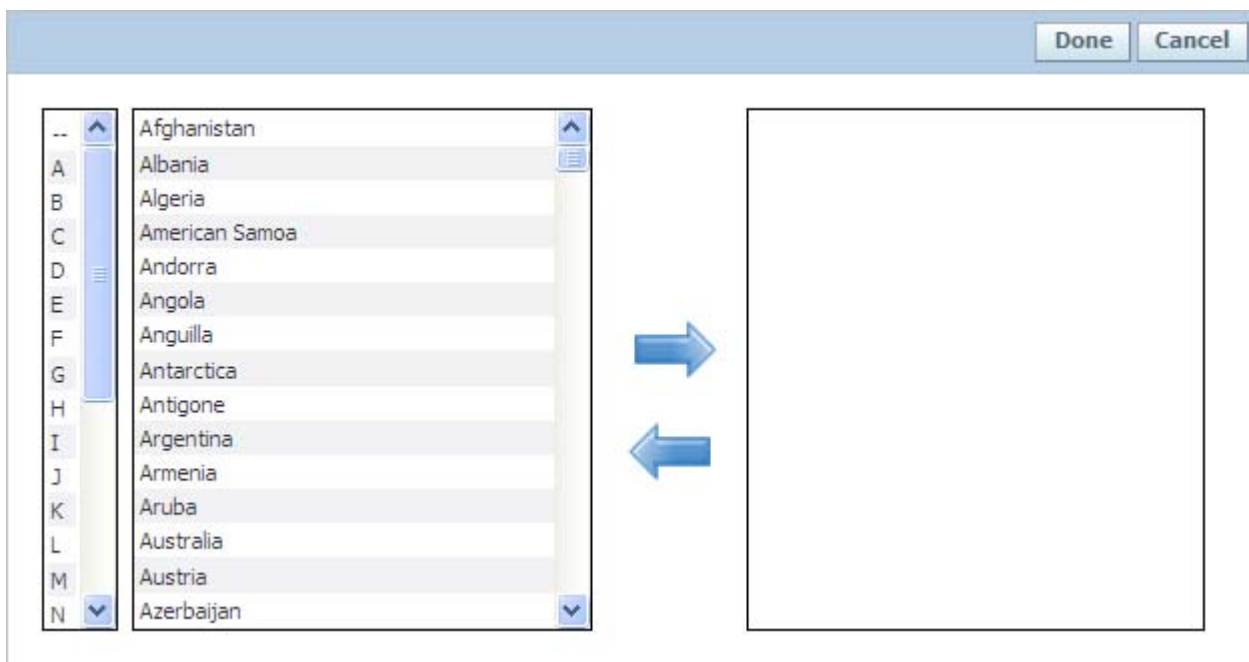


- **Multi Select - Dialog** — Display attribute options to the user in the form of a multi-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to give the user the opportunity to select multiple options. The multi-select dialog will automatically sort your options alphabetically. [Figure 5-19](#) and [Figure 5-20](#) show how the user will see this style.

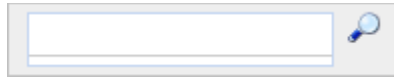
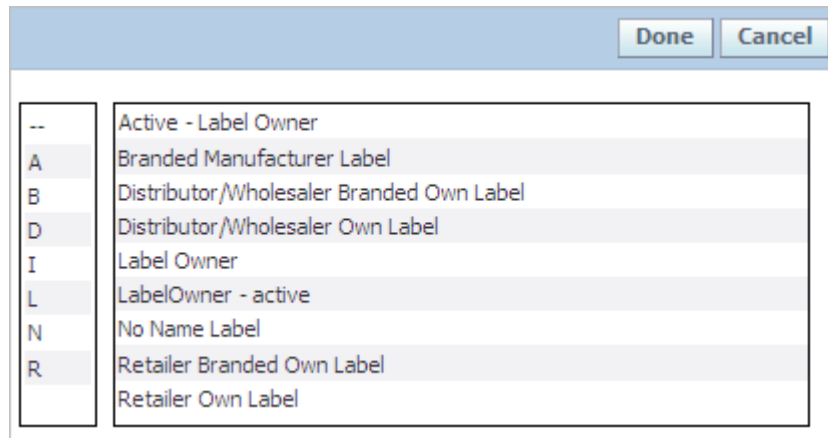
**Figure 5-19 Multi-select dialog style**



**Figure 5-20 Sample multi-select dialog box**

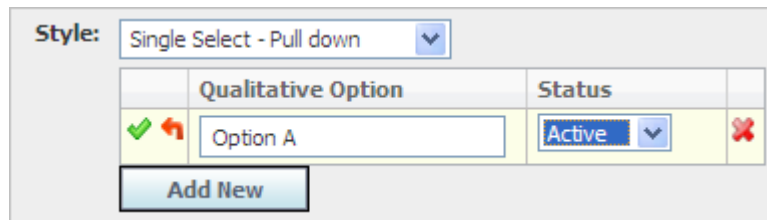


- **Single Select - Dialog** — Display attribute options to the user in the form of a single-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to restrict the user to a single selection. The single-select dialog will automatically sort your options alphabetically. [Figure 5-21](#) and [Figure 5-22](#) show how the user will see this style.

**Figure 5–21 Single select dialog style****Figure 5–22 Sample single-select dialog box**




To add options for the Qualitative type:

1. Select "Qualitative" from the **Type** drop-down list.
2. Select a style from the **Style** drop-down list. A table displays which you will use to define the options that will be available for the user upon consumption, as [Figure 5–23](#) shows.

**Figure 5–23 Checkboxes style, Add New**

3. Click **Add New**. The first row opens in edit mode.
4. In the Qualitative Option field, define a value for the option.
5. In the Status field, select **Active**.
6. Click the apply changes icon (✓).
7. Repeat step 3 through step 6 to add additional options. [Figure 5–24](#) shows what a completed table may look like:

**Figure 5–24 Qualitative type, Checkboxes options defined**

	Qualitative Option	Status	
	Option A	Active	
	Option B	Active	
	Option C	Active	
<b>Add New</b>		<b>Order Items</b>	

8. Optionally, click the **Order Items** button to set the order of item.





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
**Note:** The Order Items button is displayed when user has role [SUPER\_DATA\_ADMIN].

---

When you click **Order Items**, ADMN displays the Order Items dialog box:

**Figure 5–25 Order Items dialog box**

Order Items			Done	Cancel
Item	Status			
Option 1	Inactive			
Option 2	Inactive	 		
Option 3	Inactive			

- a. Use the reorder rows icons ( ) to set the order of the items.
  - b. Click **Done**. The items reflect the chosen order.
9. Click **Save**.

---

**Note:** Because of the larger number of items included in the list, the single and multi select styles list items alphabetically. This order is only respected when using checkboxes, radio buttons, and pull-downs.

---

**Qualitative Lookup** Set up a qualitative lookup extended attribute to create extended attributes that reference existing ADMN lists for core fields such as allergens, additives, or countries. Most common lookups are available. This type is also used when referencing a custom database table. Refer to *Agile Product Lifecycle Management for Process Data Administration Toolkit Guide* for instructions on creating a custom qualitative lookup. This attribute will display selectable options to the user, as [Figure 5–27](#) through [Figure 5–31](#) show.

**Figure 5–26 Type field, Qualitative Lookup**

The screenshot shows a configuration form for a 'Qualitative Lookup' type. The fields are as follows:

- Type:** Qualitative Lookup (dropdown)
- Status:** New (dropdown)
- Distinct:** ☐
- Available In:** (text field)
- Class:** (text field)
- Tags:** (text field)
- Group(s):** (text field)
- Style:** Single Select - Pull down (dropdown)
- Category:** (text field with a search icon)

**Style** — Select the style you want to use to display your attribute options to the user. The following styles are available:

- **Multi Select - Checkboxes** — Display attribute options to the user in the form of checkboxes. This style is recommended when you have a small amount of options (1-3 items) and you want to give the user the opportunity to select multiple options. [Figure 5–27](#) shows how the user will see this style.

**Figure 5–27 Checkboxes style**

The screenshot shows two checkboxes, each followed by a number: ☐ 1 and ☐ 2.

- **Single Select - Pull down** — Display attribute options to the user in the form of a pull down list. This style is recommended when you have a medium amount of options (3-25) and you want to restrict the user to a single selection. [Figure 5–28](#) shows how the user will see this style.

**Figure 5–28 Pull-down style**

The screenshot shows a single select pull-down menu with a dropdown arrow on the right side.

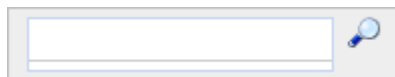
- **Single Select - Radio buttons** — Display attribute options to the user in the form of radio buttons. This style is recommended when you have a small amount of options (2-3 items) and you want to restrict the user to a single selection. [Figure 5–29](#) shows how the user will see this style.

**Figure 5–29 Radio buttons style**

The screenshot shows two radio buttons, each followed by a label: ☐ radio 1 and ☐ radio 2.

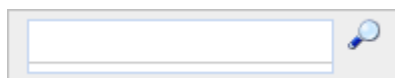
- **Multi Select - Dialog** — Display attribute options to the user in the form of a multi-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to give the user the opportunity to select multiple options. The multi-select dialog will automatically sort your options alphabetically. [Figure 5–30](#) shows how the user will see this style.


**Figure 5–30 Multi select dialog style**



- **Single Select - Dialog** — Display attribute options to the user in the form of a single-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to restrict the user to a single selection. The single-select dialog will automatically sort your options alphabetically. [Figure 5–31](#) shows how the user will see this style.

**Figure 5–31 Single select dialog style**



After setting the qualitative lookup style, click the search icon (  ) at the end of the **Category** field to set the category for the extended attribute. This category can be an existing common lookup category (allergens, additives, etc.) or can be a configured custom table. Refer to the *Agile Product Lifecycle Management for Process Data Administration Toolkit Guide* for more information on custom table implementation.

**Calculated Boolean** Set up Boolean extended attributes in which users will be provided a True/False drop-down.

**Figure 5–32 Type field, Calculated Boolean**

Type:   
 Status:   
 Distinct: ☐  
 Available In:   
 Class:   
 Tags:   
 Group(s):   
 Security Classification:   
 Display Text:   
 Default State:   
 Rollup Behavior: Rollup as true if the following condition is true.   
 Behaviors: ☐ Allow Nulls ☐ Show Error Details  
[Calculation Script:](#)  

Calculate

Calculation Result:

Figure 5–33 shows what this type looks like assigned.

**Figure 5–33 Calculated Boolean extended attribute**

Display Text: False

Additional options associated with this type are:

**Display Text** — Enter text to show before the drop-down. This field is optional.

**Default State** — Select the default state. Options are blank, 'True,' and 'False.'

**Rollup Behavior** — When Boolean attributes are set as distinct and included on formulation inputs, they can be rolled up. Define rollup behavior by selecting an option from the following drop-down list:

**Rollup as true if—**

- **All items are true** — This option will set the rolled up boolean extended attribute value to "True" if all attributes on the formulation input materials are set to "True." If any of the attributes are set to "False" the boolean will rollup as "False."
- **One item is true** — This option will set the rolled up boolean extended attribute value to "True" if one or more attributes on the formulation input



materials are set to "True." If this condition is not "True," the boolean will rollup as "False."

**Calculated Numeric** Calculated Numerics allow you to create a read-only extended attribute that displays results of a calculation to the user. [Figure 5–34](#) shows the options available when a calculated numeric type is selected.

**Figure 5–34** *Type field, Calculated Numeric*

The screenshot shows a configuration form for a 'Calculated Numeric' type. The 'Type' dropdown is set to 'Calculated Numeric'. The 'Status' dropdown is set to 'New'. There is an unchecked 'Distinct' checkbox. Below are four text input fields: 'Available In', 'Class', 'Tags', and 'Group(s)', each with a search icon to its right. The 'Security Classification' is a dropdown menu. 'UOM Category' is set to 'None'. 'Display UOM' has a search icon. 'Decimal Precision' has two radio buttons: 'As Entered' (selected) and 'Specified Precision' (with a value of '1' in a small dropdown). Under 'Behaviors', there are two unchecked checkboxes: 'Allow Nulls' and 'Show Error Details'. A 'Calculation Script' section has a large text area. At the bottom, there is a 'Calculate' button and a 'Calculation Result' field.

When this type is assigned the user will see a read-only view showing the results of the calculation.

Additional options are:

**UOM Category** — Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs in the category of "Other" can be extended by editing the UOM list discussed on page 4-28. Select "None" to not display a UOM option next to the numeric field.

**Display UOM** — Choose the unit of measure you want to display with the calculated attribute.

**Decimal Precision** — Set the decimal precision as follows:

- **As Entered** — The calculated value will not be altered.
- **Specified Precision** — The calculated value will be altered to match the specified number of decimal places. If the calculated value does not include the specified number of decimals, zeros will be appended to the value. If the calculated value exceeds the number of decimals the value will be rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value will be altered to "1.6."

**Behaviors** — Check the **Allow Nulls** box to calculate even when there is no user entered value for the referenced items.

When a calculation is performed and the system cannot find a referenced item or an error occurs, the warning icon (⚠) will appear next to the attribute. Check the **Show Error Details** box when the calculation is not sensitive information. When **Show Error Details** is selected, the end user will be able to click the warning icon (⚠) and see calculation error details. These details could include formulation details, referenced variable names, etc.

---

**Note:** Warnings can be turned off using methods during your calculation. For more information, refer to the “Calculated Attributes” section of the *Agile Product Lifecycle Management for Process Extensibility Guide*.

---

**Calculation Script** — Click the **Calculation Script** link to display the calculation dialog box for entering a calculation script. See the “Calculated Attributes” section of the *Agile Product Lifecycle Management for Process Extensibility Guide* for help in writing calculation scripts. Click **Calculate** to test your calculation.

**Calculated Text** This type allows the user to enter calculated free text, as Figure 5–35 shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. Figure 5–36 shows an example of what the user might see.

**Figure 5–35 Type field, Calculated Text**

The screenshot shows a configuration form for a 'Calculated Text' attribute. The form includes the following fields and controls:

- Type:** A dropdown menu set to 'Calculated Text'.
- Status:** A dropdown menu set to 'New'.
- Distinct:** An unchecked checkbox.
- Available In:** A text input field with a magnifying glass icon on the right.
- Class:** A text input field with a magnifying glass icon on the right.
- Tags:** A text input field with a magnifying glass icon on the right.
- Group(s):** A text input field with a magnifying glass icon on the right.
- Security Classification:** A dropdown menu.
- Behaviors:** Two checkboxes, 'Allow Nulls' and 'Show Error Details', both of which are unchecked.
- Calculation Script:** A link labeled 'Calculation Script:' followed by a large, empty text area for entering the script.
- Calculate:** A button located below the script text area.
- Calculation Result:** A text input field located to the right of the 'Calculate' button.

**Figure 5–36 Calculated text extended attribute (multi-line)**

The screenshot shows a single-line text field containing the text: 'Contains less than 2%'.

**Boolean** Set up Boolean extended attributes in which users will be provided a True/False drop-down.

**Figure 5–37 Type field, Boolean**

The screenshot shows a configuration form for a Boolean extended attribute. The fields are as follows:

- Type:** A dropdown menu set to "Boolean".
- Status:** A dropdown menu set to "New".
- Distinct:** An unchecked checkbox.
- Available In:** A text input field.
- Class:** A text input field.
- Tags:** A text input field.
- Group(s):** A text input field.
- Display Text:** A text input field.
- Default State:** A dropdown menu set to "False".
- Rollup Behavior:** A text input field containing "Rollup as true if the following condition is true." followed by a dropdown menu set to "All items are Selected".

Figure 5–38 shows what this type looks like assigned.

**Figure 5–38 Boolean extended attribute**

The screenshot shows a single field labeled "Optional Text?" with a dropdown menu set to "False".

Additional options associated with this type are:

**Display Text** — Enter text to show before the drop-down. This field is optional.

**Default State** — Select the default state. Options are blank, 'True,' and 'False.'

**Rollup Behavior** — When Boolean attributes are set as distinct and included on formulation inputs, they can be rolled up. Define rollup behavior by selecting an option from the following drop-down list:

**Rollup as true if—**

- **All items are true** — This option will set the rolled up boolean extended attribute value to "True" if all attributes on the formulation input materials are set to "True." If any of the attributes are set to "False" the boolean will rollup as "False."
- **One item is true** — This option will set the rolled up boolean extended attribute value to "True" if one or more attributes on the formulation input materials are set to "True." If this condition is not "True," the boolean will rollup as "False."

## Creating an Extended Attribute

To create an extended attribute:

1. On the left navigation panel click **New > Extended Attributes**. ADMN displays the Extended Attribute Template page, as shown in [Figure 5–39](#).

**Figure 5–39** Extended Attribute Template page

2. Enter extended attribute information, as described in ["Summary Tab"](#) on page 5-6 and ["Type"](#) on page 5-7.
3. Click **Save & Close**.
4. To make the attribute available, flush the extended attributes / custom sections cache, as described in ["Using the Cache Application"](#) on page 10-3.

## Editing an Extended Attribute

To edit an extended attribute:

1. On the left navigation panel click **ADMN > Custom Data > Extended Attributes**. ADMN displays the Extended Attribute Template Search page.
2. Using the search feature, search for and select the extended attribute to edit. (For instructions on the search feature, see ["Searching for Extended Attributes"](#) on page 5-23.) The Extended Attributes page displays.
3. In the action menu, click **Edit**. The Extended Attributes page reloads. Depending on your role and the attribute's status, the screen displays several fields in edit mode.
4. Edit extended attribute information in the Summary tab, as described in ["Summary Tab"](#) on page 5-6 and ["Type"](#) on page 5-7.
5. Click **Save & Close**.

6. To make your edits available, flush the extended attributes / custom sections cache, as described in ["Using the Cache Application"](#) on page 10-3.

## Searching for Extended Attributes

To search for extended attributes:

1. On the left navigation panel click **ADMN > Custom Data > Extended Attributes**. ADMN displays the Extended Attribute Template search page.
2. Enter search criteria for extended attributes:
  - a. In the key field drop-down list, select your search criteria as follows:
    - **--** — Searches for all extended attributes
    - **Attribute ID** — Searches for extended attributes by unique identifier
    - **Attribute Name** — Searches for extended attributes by name
    - **Available In** — Searches for extended attributes according to the specification, company/facility profile, publication, testing protocol, NPD project, or sourcing approval in which it is used
    - **Class** — Searches for extended attributes by class
    - **Group** — Searches for extended attribute by extended attribute group
    - **Most Recently Used** — Searches for the most recently used extended attributes
    - **Security Classification** — Searches for extended attribute by security classification.
    - **Status** — Searches for extended attribute by status
  - b. In the operator drop-down list, your options will be determined by the choice you made in the first drop-down list. Choices may include:
    - **Null {empty field}** — Searches for all extended attributes
    - **Contains** — Used for character searches, alphabetical, or numerical (for example, "Description Contains Admin" will produce only extended attributes with descriptions that contain the word "Admin").
    - **Equals** — Used to quantify search criteria entered in the field to the right (for example, "Attribute Name Equals Allergy" will produce only extended attributes with the name of Allergy).
    - **Is True** — Searches for extended attributes matching your selection. Used with Most Recently Used criterion.
    - **Starts With** — Searches for extended attributes that start with the character(s) you specify
    - **Contains All** — Searches for extended attributes that contain all of the values you specify. This options is used for character searches, alphabetical, or numerical (for example, "Attribute Name Contains Color Coding" will produce only extended attributes with names that contain the words "Color Coding").
    - **Contains One** — Used for character searches, alphabetical, or numerical (for example, "Attribute ID Contains 123456" will produce only the extended attribute containing the ID "123456").

- c. Use the empty search criteria field to the right of the operator drop-down list to qualify the selections you made above. For example, if you are searching by "Available In - Contains All," you will choose the specification type, such as "Equipment Specifications." All extended attributes with an available in value of "Equipment Attribute" will be provided in the search results. You can also enter the percent (%) sign to perform a wildcard search matching any one character.
3. Click **Search**. The Search Results table displays extended attributes matching the search criteria.

---

**Note:** Click any column head to sort rows by that column head. Click again to reverse the order of the sort.

---

For guidance on saving and loading searches, see ["Saving and Loading Searches"](#) on page 2-4 and ["More Search Options"](#) on page 2-4. For guidance on exporting search results, see ["Exporting Search Results"](#) on page 2-4.

## Custom Sections

Custom sections are essentially configurable sets of extended attributes. Custom sections are found in the following objects:

### GSM

- Activities
- Equipment specifications
- Material specifications
- Formulation specification
- Master specifications
- Menu item specifications
- Nutrient profiles
- Output items
- Packing configuration specifications
- Packaging material specifications
- Printed packaging specifications
- Product specifications
- Smart Issue requests
- Trade specifications

**PQM**—Issues, actions, and audits

**SCRM**—Companies, facilities, and sourcing approvals

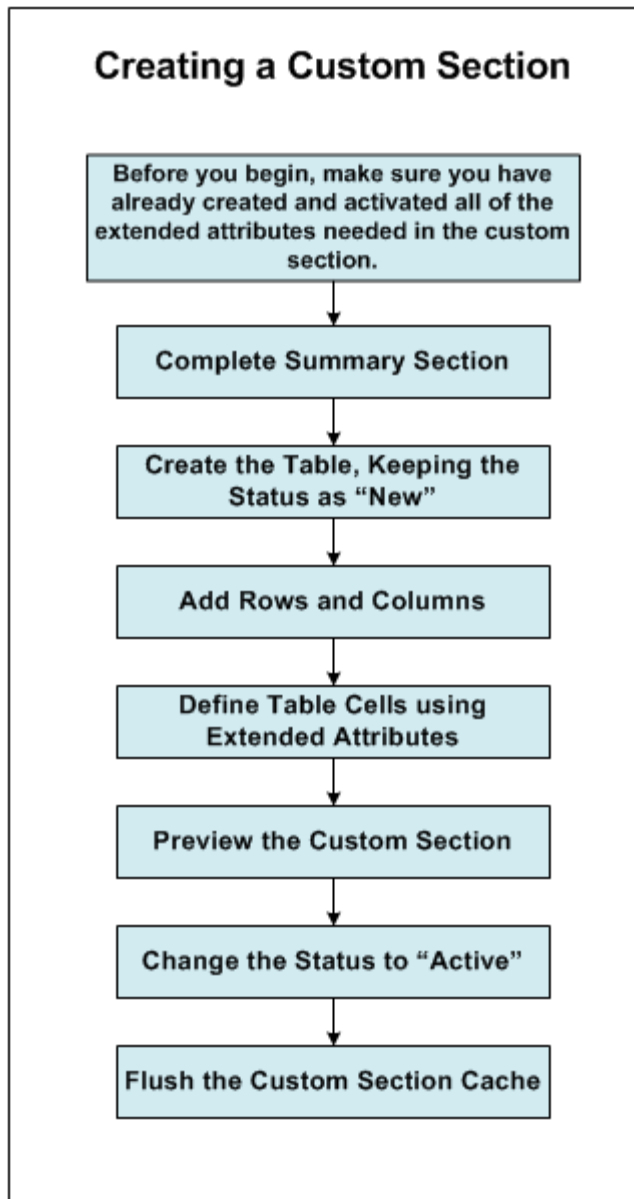
**eQ**—Material, packaging, printed packaging, product, and trade questionnaires

The following table is an example of the type of data that can be built as a custom section using extended attributes:

**Table 5–1 Data to be built as a custom section table using extended attributes**

	Amount	Soy Hydration Factor
<b>Min Soy Protein Isolate</b>	Numeric UOM% Extended Attribute	Numeric No UOM Extended Attribute
<b>Min Soy Protein Concentrate</b>	Numeric UOM% Extended Attribute	Numeric No UOM Extended Attribute

Figure 5–40 shows the steps required to build a custom section.

*Figure 5–40 Steps for creating a custom section*

Use the Custom Section Template page to build custom sections, as shown in [Figure 5–41](#).



Figure 5–41 Custom Section Template page

**(1000475) Custom Section Template** New

**Summary**

Section Number: 1000475

Section Name:

ID: 1000475

Hide Header: ☐

Status: New

Available In:

Tags:

**De-normalization Process**

Denorm Model:  [Add New](#)

[Section Alias](#):

Include In De-normalization: ☐

De-normalization Type: Direct Map [Show/Hide Data Types](#)

De-normalization Status: Will Not Be Included in the Denorm Process (-1)

**Custom Section**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Add New Row](#) [Add New Column](#) [Reorder Rows](#) [Reorder Columns](#)

☐ New ☐ Default ☐ Active ☐ Inactive and Archived ☐ Include In De-normalization ☐ Is De-normalized

[Validate](#) [Preview](#) ☒ Include all "New" items

## Summary Section

The Summary section contains the following fields.

**Section Number**—A unique identifier. This field is defined by the system.

**Section Name**—The name of the custom section. This field is required. This value is a multi-lingual value. Use the set alternate language text icon () to edit or add additional language values. This icon will not be visible until the attribute is saved.

**ID** — A user-defined unique identifier. This field is required. This field is populated by the system but can be changed. This ID can be used during integration and reporting.

**Hide Header** —Indicates whether the header is displayed with the table. This option allows you to group two or more sections underneath one header. Use the order feature to set positions as described in "[Custom Section Order](#)" on page 5-46.

**Security Classification**—This field is only available if Object Level Security is enabled. A classification can be used to limit access to the custom section in Agile PLM for Process applications. For more information on Object Level Security, refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

**Status**—Click the drop-down list to assign a status to the custom section with one of the following:

- **New** — The custom section is not yet ready to become available to Agile PLM for Process applications. When an custom section has a status of "New", its values remains editable.
- **Active** — The custom section is ready to become available for use in Agile PLM for Process applications.
- **Inactive** — The custom section should no longer be used. Inactive custom sections are no longer available for assignment, however, they are not removed from existing objects that reference them. Inactive custom sections are still available for searching.
- **Archived** — The custom section is not available for searching or assignment. Archived custom sections are not removed from existing objects that reference them.

**Available In** — Click the link to display a selection dialog box containing a list of areas where you can make the custom section available. This field is required.

---

---

**Note:** eQuestionnaire extended attribute availability is based on the related GSM specification type. For example, when creating a material questionnaire you will only be allowed to add custom sections that are available in material specifications.

---

---

**Tags** — Tags allow you to apply special behaviors to your custom section. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:

- **Do Not Publish to Supplier** — Custom section will not be published to Supplier Portal and will be unavailable in eQuestionnaire.
- **Insert Page Break - Above** — Adds a page break above the custom section when printing.
- **Insert Page Break - Below** — Adds a page break below the custom section when printing.
- **Landscape Printing** — Sets the custom section to print in landscape mode. This tag is recommended when the custom section table is wider than portrait printing will allow.
- **Suppress Printing** — The custom section will not be printable.

### De-normalization Process Section

Customers wishing to use custom section data for reporting purposes can use the Custom Section Denormalization process to simplify report writing and improve SQL query performance. The Custom Section Denormalization (CS Denorm) feature provides the ability to convert the complex internal data storage of custom sections and extended attributes into simplified data structures that can be defined in the user interface.

In the Custom Section Admin user interface, users select which custom sections, rows, and columns to denormalize and indicate how the target database table(s) should be set up. The CS Denorm process then reads this information, pulls the relevant custom section data from specifications (or other business objects), and populates that data into a simplified database table(s) created solely for that custom section.


CS Denorm uses database scripts to generate the new denormalized database tables for each custom section. Therefore, it requires some database administrator assistance. The denormalization scripts are available in the Extensibility Pack release, along with detailed documentation.

The De-normalization Process section allow users to specify if the custom section should be denormalized, how it should be denormalized, and the name(s) of the table(s) that will be created. A custom section can be denormalized into multiple tables. This allows for splitting up the denormalization of very large custom sections into multiple target tables, and for better handling of mixed data types within columns and/or rows.

**Figure 5–42 De-normalization Process section**

The section contains the following fields:

**Denorm Model** — A Denorm Model represent how the custom section should be denormalized. Multiple denorm models can be defined, with each model resulting in a different database table, with different columns and rows selected for denormalization. The drop-down field allows you to switch between the defined denorm models, if any. Denorm Models are named by the Section Alias field below. Once a valid denorm model has been created and validated, additional denorm models can be created by clicking the Add New button.

**Section Alias** — This field determines the table name that will be used for the denormalized custom section table. The value must be unique across all custom sections, and must be no longer than a configurable number of characters (default is 30). Click the calculate icon (  ) to pull the section name into the field replacing spaces with underscores. See the *Agile Product Lifecycle Management for Process Custom Section Denormalization Guide* in the Extensibility Pack for important details about field sizes.

**Include in De-normalization** — Check to include the custom section the in de-normalization process once the custom section becomes "Active."

---

**Warning:** If a custom section has already been de-normalized, and then this checkbox is unchecked, then the generated de-normalized custom section table will no longer be included in the data de-normalization process. Additionally, the next time the table creation process is performed this denormalized custom section table will be deleted from the database.

---

**De-normalization Type** — Determines how the custom section should be denormalized, for example, should the columns in the user interface directly map to

columns in the new database table, or should the rows in the user interface be pivoted to columns (and columns to rows) in the new database table. Select one of the following:

- **Direct Map**—The custom section is created as a table structure that mimics the view of a custom section in the UI of the application, where columns in the UI are mapped as columns in the database table. Using this approach requires that the base extended attribute data types must match for all rows (marked for denorm) in a column (marked for denorm). For examples, you cannot have a numeric extended attribute in column 1, row 1, and a date extended attribute in column 1, row 2. In this scenario, the Pivot de-normalization type may be used.
- **Pivot**—This approach "pivots" a given custom section into a table structure where each row turns into a column and each column is represented by a row. Repeatable rows cannot be de-normalized using the pivot approach. Using this approach requires that the base extended attribute data types must match for all columns (marked for denorm) in a row (marked for denorm).

---



**Note:** When direct map or pivot is selected, it is required that you select at least one column and one row to include in de-normalization before you can save your custom section. This is in place to guarantee that proper data setup rules are being followed.

---

- **None**—Prevents this section from ever being denormalized. Once a section has been marked with a de-normalization approach of "None," it cannot be changed. Note that this option is turned off by default, but can be enabled for all users or restricted to users in certain groups, by modifying configuration settings. This option would be used if you never want to run reports off of this custom section data.

To see the base data types of the custom section cells, click the **Show/Hide Data Types** link. This will change the custom section grid to display a color-coded base data type for each cell, to help plan the denormalization approach. Clicking the link again will restore the original view.

**Figure 5–43** *Show/Hide Data Types selected*

Custom Section						
	+ Test Type	+ Temperature	+ Target	+ Minimum	+ Maximum	+ Comments
	Solid Fat Content	[Numeric]	[Numeric]	[Numeric]	[Numeric]	[Text]
	Solid Fat Index	[Numeric]	[Numeric]	[Numeric]	[Numeric]	[Text]

**De-normalization Status** — Depending on the status of the custom section and whether the Include in De-normalization box is checked, choices are -1, 0, 1, and 2, as described below:

Include in De-normalization checked?	Custom Section Status	De-Normalization Status	Notes
No	any	-1: Not for de-normalization	The custom section will not be de-normalized
Yes	New	0: Not ready for de-normalization	De-normalization meta data (alias, etc.) is stored, but the custom section is ignored by the de-normalization scripts.  Once the custom section is made Active, this status is promoted to a 1.
Yes	Active, Archived, Inactive	1: Ready for table generation	A de-normalized table can now be created for the custom section.  Once the table generation scripts are executed, the status is moved to 2: Ready for de-normalization.
Yes	Active, Archived, Inactive	2: Ready for de-normalization	Custom sections in this status will now be picked up in the data de-normalization process.

For more information on the de-normalization process, see the *Agile Product Lifecycle Management for Process Custom Section Denormalization Guide*.

## Creating a Custom Section

To create a custom section:

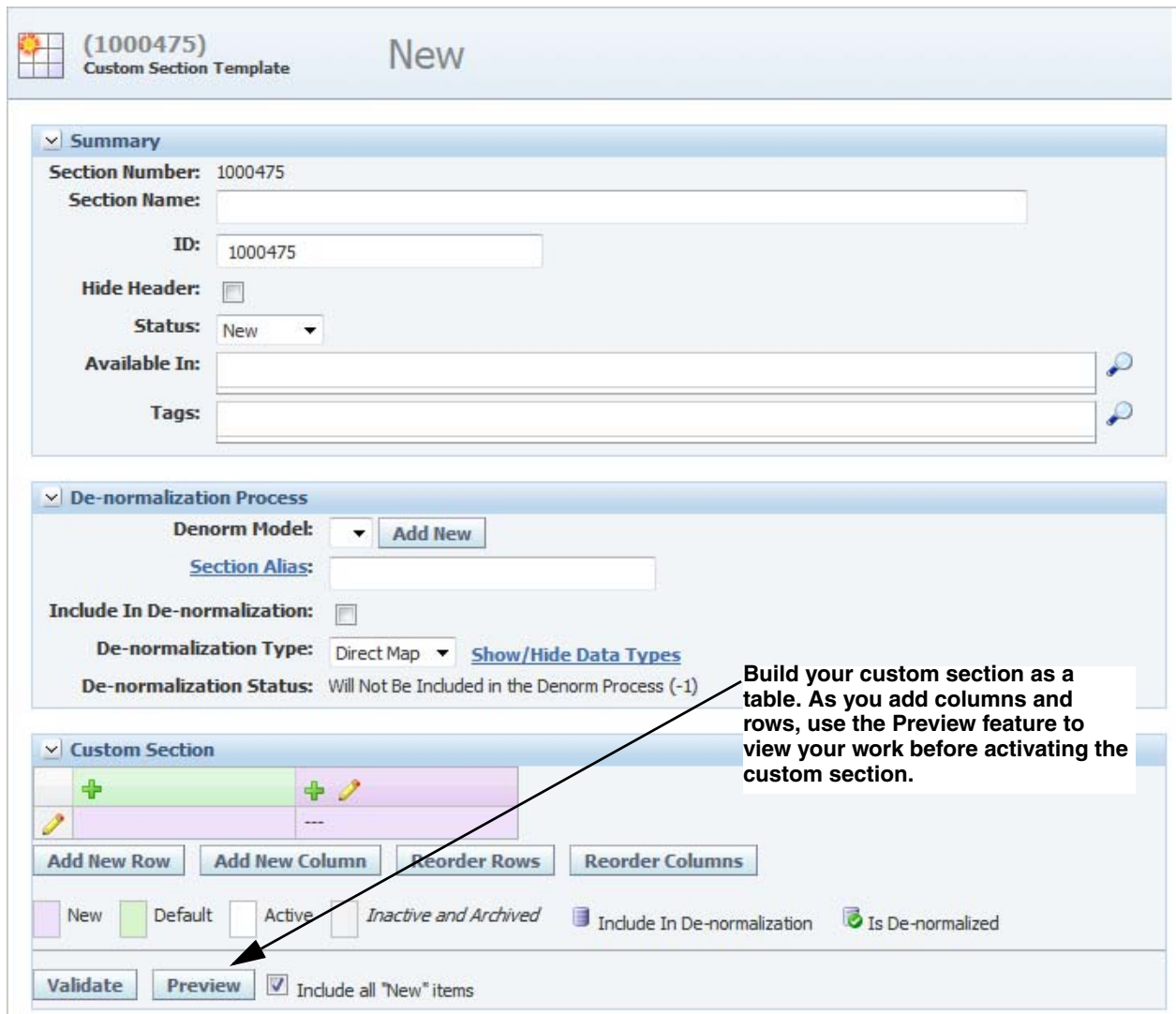
1. On the left navigation panel click **New > Custom Sections**. ADMN displays the Custom Section Template page, shown in [Figure 5-44](#).

---

**Note:** You can preview custom sections as you are building them by using the Preview feature. See "[Previewing a Custom Section](#)" on page 5-42 for instructions.

---

Figure 5-44 New custom section



**(1000475)**  
Custom Section Template

## New

**Summary**

Section Number: 1000475

Section Name:

ID: 1000475

Hide Header: ☐

Status: New

Available In:

Tags:

**De-normalization Process**

Denorm Model:  Add New

Section Alias:

Include In De-normalization: ☐

De-normalization Type: Direct Map [Show/Hide Data Types](#)

De-normalization Status: Will Not Be Included in the Denorm Process (-1)

**Custom Section**

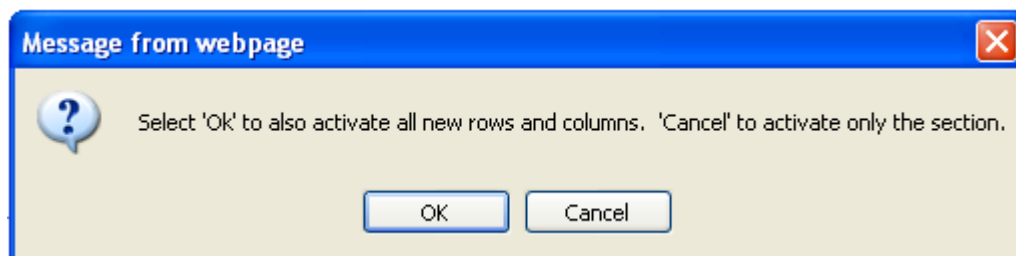

Add New Row Add New Column Reorder Rows Reorder Columns

New Default Active Inactive and Archived Include In De-normalization Is De-normalized

Validate Preview ☒ Include all "New" items

Build your custom section as a table. As you add columns and rows, use the Preview feature to view your work before activating the custom section.

2. Define the **Section Name**, **ID**, **Security Classification**, **Available In**, and **Tags** fields in the Summary Section, as described beginning on page 5-27.
3. Define whether the custom section is included in the de-normalization process, as described beginning on page 5-28.
4. Create the custom section table as described beginning in "Creating a Table" on page 5-33. Keep all table items (rows and columns) in the status of "New" while creating your table. All items can be activated at once when you activate the entire custom section.
5. Preview your table to make sure it is built correctly as described in "Previewing a Custom Section" on page 5-42.
6. In the Summary area, select "Active" in the **Status** field drop-down list. ADMN displays the following dialog box asking if you want to activate all items (rows and columns.)

**Figure 5–45 Activate all new rows and columns dialog box**

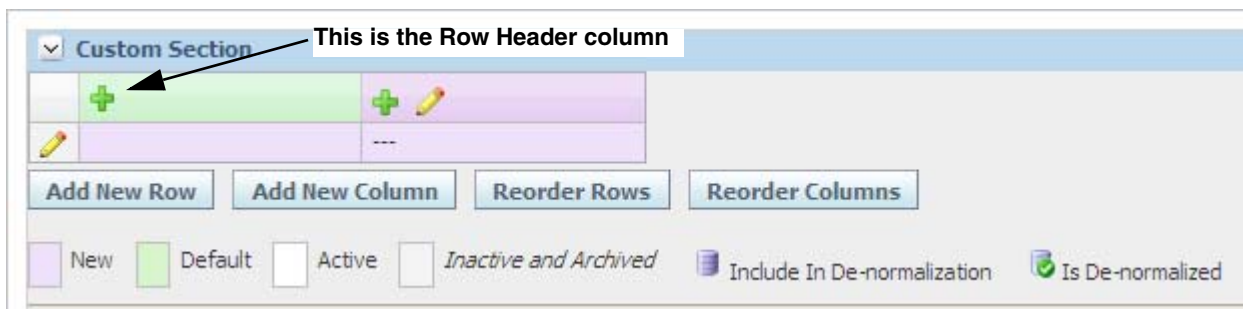
7. Click **OK**.
8. Click **Save & Close**.
9. Flush the extended attributes/custom sections cache, as described in ["Using the Cache Application"](#) on page 10-3.

## Creating a Table

As you create a table for your custom section, be sure to keep items in "New" status until you are ready to activate the entire section. Use the Preview feature as described on page 5-42 to check that all headings, columns, and rows are arranged as you would like. Activate the section only when the table is ready for use in Agile PLM for Process applications.

To create a table:

1. Define the column row header and add additional columns as described in ["Creating Columns"](#) on page 5-33.

**Figure 5–46 Custom section table**

2. Add additional rows as needed as described in ["Creating Rows"](#) on page 5-37.
3. Click **Save**.

## Creating Columns

You can add as many columns as you need in a custom section table by clicking **Add New Column** and defining the column values. Two columns are provided by default. The first (left-most) column is the Row Header column, as shown in [Figure 5–46](#) above.



## Defining the Row Header Column

To define the first (left most) row header column:

1. Click the lifetimes add data icon (+), shown in Figure 5-47, to display a Column Header Information dialog box, shown in Figure 5-48.

**Figure 5-47** Row header



**Figure 5-48** Column Header Information dialog box

2. Enter the **Name** of the column. The first column in a custom section can remain un-named.
3. Enter the unique **ID** of the column.
4. Enter the display width of the column in the **UI Width** field. This is the width of the column in the user interface.

---

**Note:** Certain UI elements require a minimum space to display properly. If you are referencing a single or multi-select style extended attribute, the UI width must be as wide as your longest selectable item.

---

5. Enter the print width of the column in the **Print Width** field. This is the width of the column when the custom section is printed. If a print width is not provided, the printed custom section will be unreadable.
6. Click the search icon (🔍) at the end of the **Tags** field to select the tags (if any) to assign to this column. Tags allow you to apply special behaviors to your column.



Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:

- **Do Not Publish to Supplier** — This column will not be published to Supplier Portal and will be unavailable in eQuestionnaire.
- **Suppress Printing** — This column will not be included when printing the custom section.
- **Supplier eQ - Create** — Allows the supplier to add or remove these columns in a questionnaire.

7. Click **Done** to confirm your choices.

## Defining Additional Columns

To define additional columns:

1. Click **Add New Column** to add an additional column to the table. The Column Header Information dialog box is displayed, as [Figure 5–49](#) shows. If you are defining a column that already exists, click the add data icon (+) to display the Column Header Information dialog box.

**Figure 5–49** Column Header Information dialog box

**Column Header Information** [Done] [Cancel]

**Summary**

Name:

ID:

Status:  [Delete](#)

UI Width:  px

Print Width:  cm  
(in x 2.54 = cm)

Tags:

☐ Add this item when section is created

**De-normalization Process**

Selected Denorm Model:

Include In De-normalization: ☐

De-normalization Alias:



2. Enter the **Name** of the column.
3. Enter the unique **ID** of the column. This field is automatically numbered by the system but can be modified. This field has to be unique within the custom section set of columns. This ID can be used when using cell location awareness in calculated extended attributes.

4. Set the column **Status** by selecting a status from the drop-down list. Keep the status of the column set to "New" until your entire section and/or column is ready to be activated.
5. Enter the display width of the column in the **UI Width** field. This is the width of the column in the user interface.

---

**Note:** Certain UI elements require a minimum space to display properly. If you are referencing a single or multi-select style extended attribute, the UI width must be as wide as the longest selectable item.

---

6. Enter the print width of the column in the **Print Width** field. This is the width of the column when the custom section is printed. If a print width is not provided, the printed custom section will be unreadable.
7. Click the search icon (  ) at the end of the **Tags** field to select the tags (if any) to assign to this column. Tags allow you to apply special behaviors to your column. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:
  - **Do Not Publish to Supplier** — This column will not be published to Supplier Portal and will be unavailable in eQuestionnaire.
  - **Supplier eQ - Create** — Allows the supplier to add or remove these columns in a questionnaire.
  - **Suppress Printing** — This column will not be included when printing the custom section.
8. Check the **Add this item when section is created** box to automatically add this column to the table when the section is created by the user.
9. To include the column in the de-normalization process for the given denorm model, select the **Include in De-normalization** checkbox.
10. Enter a unique name in the **De-normalization Alias** field, or click the calculate action icon (  ) to auto-generate one.

---

**Note:** When columns are in a "New" status they can be deleted. To delete a column, select the red **Delete** link.

---

11. Click **Done** to confirm your choices. [Figure 5-51](#) shows the defined columns.

Figure 5–50 Defined columns

**Custom Section**

	+ Amount	+ Soy Hydration Factor
	---	---
	---	---

☐ New
 ☐ Default
 ☐ Active
 ☐ Inactive and Archived
 ☐ Include In De-normalization
 ☒ Is De-normalized

### Creating Rows

You can add as many rows as you need in a custom section table.

### Defining Additional Rows

To add a new row:

1. Click **Add New Row** to add an additional row to the table. The Row Header Information dialog box is displayed, as Figure 5–51 shows. If you are defining a row that already exists, click the edit icon (✎) to make the row editable. Click the add data icon (+) to display the Row Header Information dialog box.

Figure 5–51 Adding a new row

**Row Header Information**

**Summary**

**Name:**

**ID:**

**Status:**  [Delete](#)

**Tags:**

☐ Add this item when section is created  
☐ Create copies of this row



**De-normalization Process**

**Selected Denorm Model:**




**Include In De-normalization:** ☐

**De-normalization Alias:**

2. Enter a name for the row in the **Name** field.

3. Enter a unique identifier in the **ID** field. This field is automatically numbered by the system but can be modified. This field has to be unique within the custom section set of rows. This ID can be used when using cell location awareness in calculated extended attributes.
4. Set the row **Status** by selecting a status from the drop-down list. Keep the status of the row set to "New" until your entire section and/or row is ready to be activated.
5. Click the search icon (  ) at the end of the **Tags** field to select the tags (if any) to assign to this row. Tags allow you to apply special behaviors to your row. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:
  - **Do Not Publish to Supplier** — This row will not be published to Supplier Portal and will be unavailable in eQuestionnaire.
  - **Hide Header** — The header for this row will not be displayed in consumption or printing. When all visible rows in a custom section include the hide header tag, the entire header column will not appear. This tag is beneficial when using repeatable rows.
  - **Repeatable** — This row template can be re-used during consumption. This tag should only be used when the use case is absolutely necessary. It is recommended to use distinct rows containing distinct attributes.
  - **Supplier eQ - Create** — Allows the supplier to add or remove these rows in a questionnaire.
  - **Suppress Printing** — This row will not be included when printing the custom section.
6. Check the **Add this item when section is created** box to automatically add this row to the table when the section is created by the user.
7. Check the **Create copies of this row** box to add one or more copies of this row to the table; enter the number of rows to create in the # of Copies text field. This feature is better used when all cells have already been defined. Refer to "[Copying Rows](#)" on page 5-40.
8. To include the column in the de-normalization process for the given denorm model, select the **Include in De-normalization** checkbox.
9. Enter a unique name in the **De-normalization Alias** field, or click the calculate action icon (  ) to auto-generate one.
10. Click **Done** to confirm your choices. [Figure 5-52](#) shows the newly created row in edit mode. You can now define the cells.



**Figure 5-52 Added row**

+	+ Amount 	+ Soy Hydration Factor 
 Min Soy Protein Isolate	---	---
Add New Row	Add New Column	Reorder Rows
Reorder Columns		


## Defining Cells

Custom section cells contain extended attributes.


To define a cell in a table:

1. Click the edit icon (  ) to make the row or column editable.
2. In the cell that you are adding an attribute to, click the add data icon (  ) to display the Extended Attribute dialog box. This list contains extended attributes that have been marked with a class of "Custom Sections" and have an "Active" status.
3. Select an extended attribute from the list. For more information on creating extended attributes, refer to ["Creating an Extended Attribute"](#) on page 5-22.

---

**Note:** When you add an extended attribute to the cell, a clear field icon (  ) is displayed to the right of the selection. You can click this icon to delete the extended attribute from the table, as long as the statuses of the associated row/column are "New."

---














4. Click **Done** to confirm your choice.
5. Continue this process until all cells in the row contain an extended attribute.
6. Click the apply changes icon (  ) to apply your changes.

---

**Warning:** Cells cannot be edited once the row or column has been activated.

---

**Figure 5–53** Defined cells

Custom Section			
		 Amount 	 Soy Hydration Factor 
	Min Soy Protein Isolate	Numeric - Percent UOM	Numeric - No UOM
	Min Soy Protein Concentrate	Numeric - Percent UOM	Numeric - No UOM
<div> Add New Row Add New Column Reorder Rows Reorder Columns </div>			
 New	 Default	 Active	 Inactive and Archived  Include In De-normalization  Is De-normalized

---



**Note:** The extended attribute's Attribute ID value will be displayed in brackets after the extended attribute name.

Clicking a cell with an extended attribute launches a read-only popup displaying the extended attribute information.

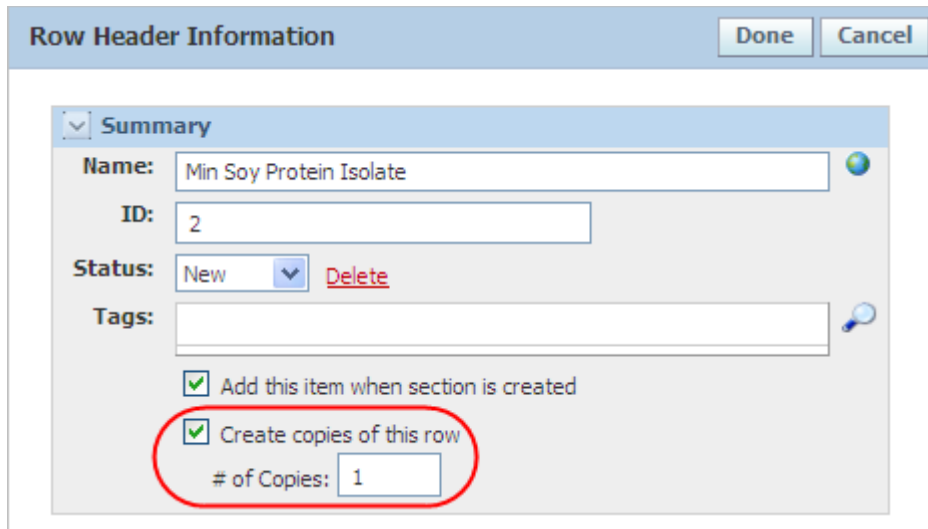
---

## Copying Rows

To copy an existing row:

1. Click the edit icon (  ) of the row you would like to copy. This makes the row editable.
2. In the Row Header column, click the add data icon (  ) to display the Row Header Information dialog box.
3. Check the **Create copies of this row** box to add one or more copies of this row to the table. The # of Copies field appears.
4. Enter the number of rows to create in the # of Copies field. [Figure 5–54](#) shows these entries.

**Figure 5–54 Copying row fields**



**Row Header Information** [Done] [Cancel]

**Summary**

Name: Min Soy Protein Isolate

ID: 2

Status: New [v] [Delete](#)

Tags: [Search Icon]

☒ Add this item when section is created

☒ Create copies of this row

# of Copies: 1

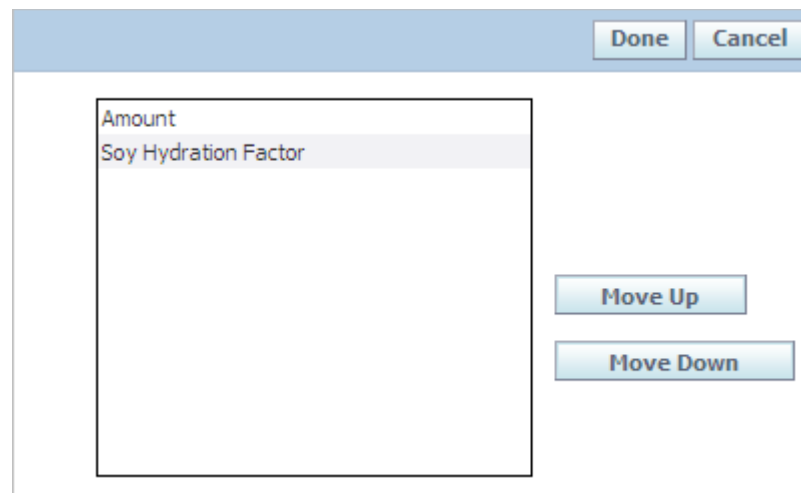
5. Click **Done**. The table displays the copied rows. A dialog box displays asking if you want to proceed with the copy.
6. Click **OK**. The new row(s) display under the copied row.
7. Define each row following the procedure above.

## Reordering Columns

The order the columns appear in during consumption is set through the custom section template.

To reorder the columns in your table:

1. With the page in edit mode, click **Reorder Columns**. A dialog box is displayed, as [Figure 5–55](#) shows.

**Figure 5–55 Reorder columns dialog box**

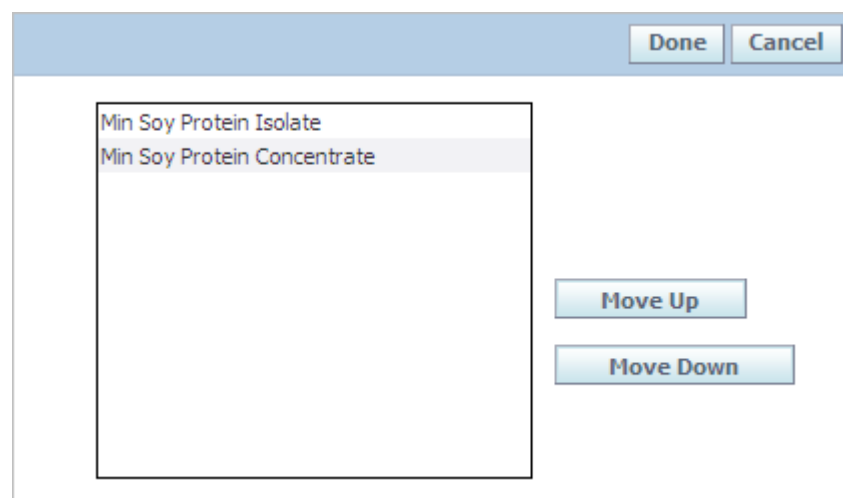
2. Click a column value in the list, and then click **Move Up** or **Move Down** to set the desired position.
3. Repeat step 2 as needed to move other columns to the desired position.
4. Click **Done**.

### Reordering Rows

The order the rows appear in during consumption is set through the custom section template.

To reorder the rows in your table:

1. With the page in edit mode, click **Reorder Rows**. A dialog box is displayed, as [Figure 5–56](#) shows.

**Figure 5–56 Reorder rows dialog box**

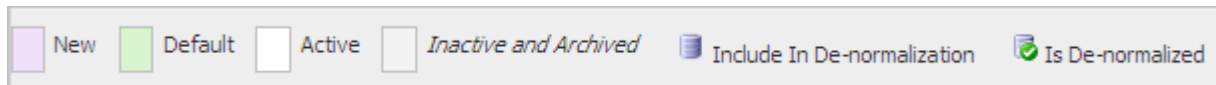
2. Click a row value in the list, and then click **Move Up** or **Move Down** to set the desired position.
3. Repeat step 2 as needed to move other rows to the desired position.

#### 4. Click **Done**.


#### Legend


Rows and columns are colored to represent status and whether an item is default. The following legend is provided.

**Figure 5–57 Custom Section statuses**



See "Status" on page 5-28 for more information on statuses. De-normalization icons are defined below:

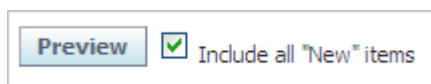
 — The Include in De-normalization icon is displayed if both the column and row for that cell are marked as Include In De-normalization, but their statuses are not Ready For Denormalization (meaning those columns and rows have not been created in the new de-normalization table.)

 — The De-normalized icon displays when both the column and row have been created in the denormalized table.

## Previewing a Custom Section

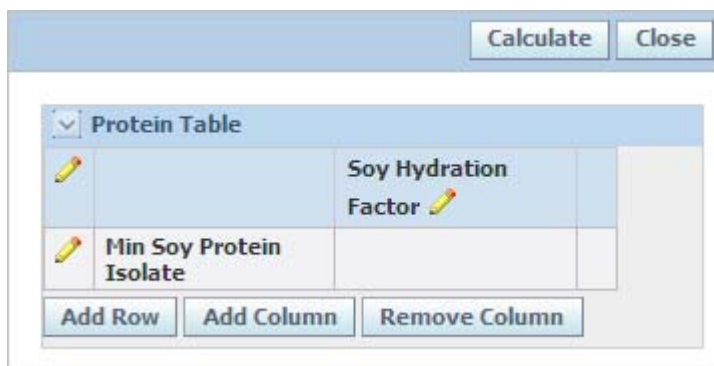
Preview custom sections by clicking **Preview** at the bottom of the page. You can use this feature to view the section as the user would see it. The preview will include all items in the status of "Active" and "New." If you don't wish to include "New" items, uncheck the Include all "New" items box. Preview mode allows you to mimic the user's experience. Preview also allows you to see UI column widths.

**Figure 5–58 Custom Section page, Preview button**



When you click Preview, the current custom section, including default values, is displayed in a dialog box, as [Figure 5–59](#) shows.

**Figure 5–59 Custom Section in preview mode**



To make further changes to the custom section, click **Close**. Agile PLM for Process closes the preview dialog box and returns to the Custom Section page.



## Calculating Extended Attributes

While in preview mode, you can click the **Calculate** button to calculate extended attribute values. This button works only with calculate attributes that are referencing attributes present in the previewed section. Depending on your calculated extended attributes, the system may pull in the mock values for items referenced by ID. Refer to the "Calculated Attributes" section of the *Agile Product Lifecycle Management for Process Extensibility Guide* for more information.

## Editing Custom Sections

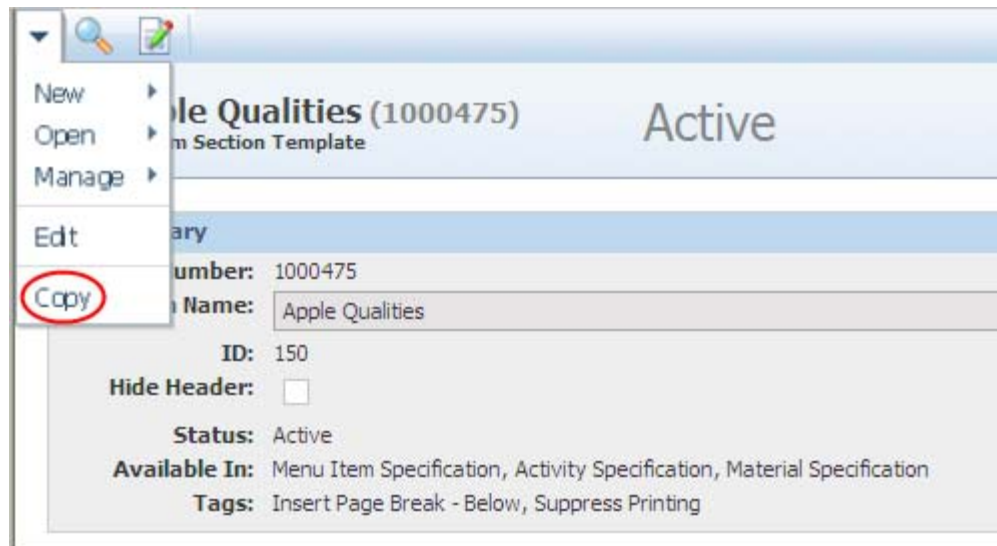
To edit a custom section:

1. Click **ADMN > Custom Data > Custom Sections**.
2. Using the search feature, search for the custom section to edit. (For instructions on the search feature, see ["Searching for Custom Sections"](#) on page 5-45.)
3. Click **Edit**.
4. Edit custom section summary information, as described in ["Summary Section"](#) on page 5-27.
5. To edit the table, complete the procedures referenced below:
  - ["Creating Columns"](#) on page 5-33
  - ["Defining the Row Header Column"](#) on page 5-34
  - ["Defining Additional Columns"](#) on page 5-35
  - ["Creating Rows"](#) on page 5-37
  - ["Defining Additional Rows"](#) on page 5-37
  - ["Defining Cells"](#) on page 5-39
  - ["Copying Rows"](#) on page 5-40
  - ["Reordering Columns"](#) on page 5-40
  - ["Reordering Rows"](#) on page 5-41
6. Activate all new rows and/or columns.
7. Click **Save & Close**.
8. Flush the extended attributes / custom sections cache, as described in ["Using the Cache Application"](#) on page 10-3.

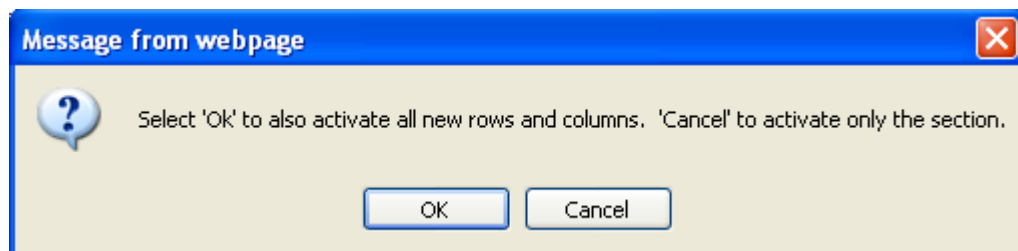
## Copying a Custom Section

To copy a custom section:

1. Click **ADMN > Custom Data > Manage Custom Sections**.
2. Use the search feature to select the custom section to copy. [Figure 5-60](#) shows an existing custom section.

**Figure 5–60 Custom section with Copy button**

3. Click **Copy**. (This button does not appear if the page is in edit mode.) All items for the custom section are copied over to a new page, including rows, column, and cells.
4. Define the **Section Name**, **ID**, **Hide Header**, **Security Classification**, **Available In**, and **Tags** fields in the Summary Section, as described beginning on page 5-27.
5. Define the fields in the De-normalization Process section, as described beginning on page 5-28.
6. Edit the custom section table as described in ["Editing Custom Sections"](#) on page 5-43.
7. Preview your table to make sure it is built correctly as described in ["Previewing a Custom Section"](#) on page 5-42.
8. In the Summary area, select "Active" in the Status drop-down list. ADMN displays the following dialog box asking if you want to activate all items (rows and columns.)

**Figure 5–61 Activate all new rows and columns dialog box**

9. Click **OK**.
10. Click **Save & Close**.
11. Flush the extended attributes / custom sections cache, as described in See ["Using the Cache Application"](#) on page 10-3.

## Searching for Custom Sections

To search for custom sections:

1. Click **ADMN > Custom Data > Custom Sections**. The Custom Sections search page displays.
2. Enter search criteria for custom sections using a combination of three search fields:
  - a. In the key field drop-down list, select your search criteria as follows:
    - -- — Searches for all custom sections
    - **Column Name** — Searches by column name
    - **Created** — Searches by creation date
    - **Last Edit** — Searches by last edit date
    - **Most Recently Used** — Searches for custom sections most recently used
    - **Row Name** — Searches by row name
    - **Section ID** — Searches by section identifier
    - **Section Name** — Searches by section name
    - **Security Classification** — Searches by security classification
    - **Status** — Searches by status
  - b. In the operator drop-down list, your options will be determined by the choice you made in the key field drop-down list. Choices may include:
    - **Contains** — Used for character searches, alphabetical, or numerical (for example, "Column Name Contains Admin" will produce only custom sections containing a column name of "Admin").
    - **Equals** — Used to quantify search criteria entered in the field to the right (for example, "Section ID Equals 123456" will produce only the custom section with the section ID of "123456").
    - **Greater Than** — Searches for custom sections with a value greater than a value you specify (for example "Last Edit Greater Than 8/1/09" will produce only custom sections edited after "8/1/09").
    - **Is True** — Used only with the Most Recently Used criterion and allows you to find your most recently viewed custom sections.
    - **Less Than** — Searches for custom sections with a value less than a value you specify (for example "Created Less Than 1/1/09" will produce only custom sections created before "1/1/09").
    - **Starts With** — Searches for custom sections that start with the character(s) you specify
  - c. Use the empty search criteria field to the right of the operator drop-down list to qualify the selections you made above. You can also enter the percent (%) sign to perform a wildcard search matching any one character.
3. Click **Search**. The Search Results table displays custom sections matching the search criteria.
4. For guidance on saving and loading searches, see ["Saving and Loading Searches"](#) on page 2-4 and ["More Search Options"](#) on page 2-4. For guidance on exporting search results, see ["Exporting Search Results"](#) on page 2-4.

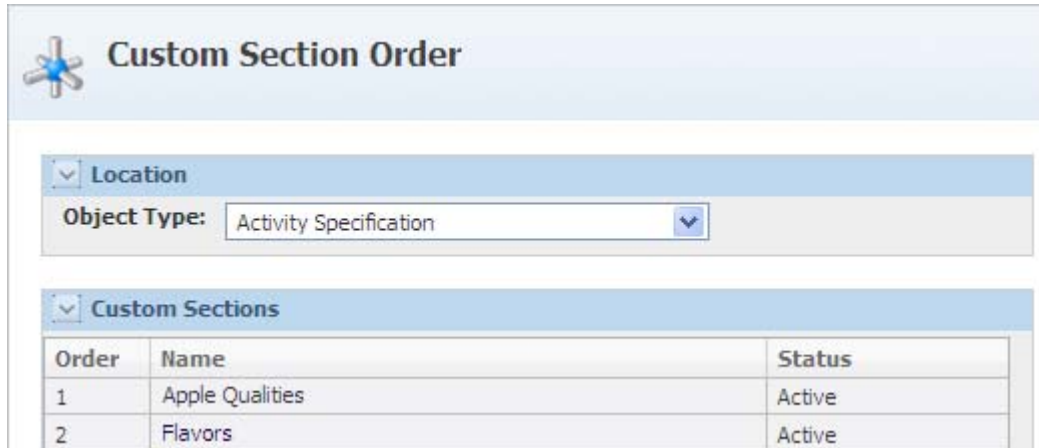
## Custom Section Order

The display order of custom sections is defined using ADMN. You can set the display order of custom sections by object type. The order you set will also determine the print order of custom sections.

To change the order of custom sections:

1. Click **ADMN > Custom Data > Custom Section Order**. The Custom Section Order page is displayed, as [Figure 5–62](#) shows.

**Figure 5–62** Custom Section Order page



Order	Name	Status
1	Apple Qualities	Active
2	Flavors	Active

2. Select an object type from the **Object Type** drop-down list. All custom sections available in that object type are displayed in the **Name** column. The **Status** column displays the current status.
3. If needed, click the **Hide/Show Inactive & Archived Statuses** link to view only the new and active custom sections. You can change the sort order by clicking the linked column names.
4. Click **Edit**.
5. In the **Order** column, set the order of display by assigning a number to each custom section, as [Figure 5–63](#) shows.

**Figure 5–63** Order column in edit mode


**Custom Section Order**

Location

Object Type: Activity Specification

Custom Sections

Update

Order	Name	Status
1	Apple Qualities	Active
2	Flavors	Active

6. Click **Update**.
7. Click **Save**.
8. To set the custom section order for another object type, repeat step 2 through step 7.

---

**Note:** When new custom sections are added, they are displayed at the bottom of this list.

---



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## Using WFA to Manage GSM Workflows

This chapter contains instructions for using the Workflow Administration (WFA) application to manage workflows in Global Specification Management (GSM). Topics in this chapter include:

- [Introducing Workflows](#)
- [Searching for Workflows](#)
- [Creating New GSM Workflow Templates](#)
- [Editing GSM Workflow Process Templates](#)
- [Copying GSM Workflow Process Templates](#)
- [Exporting and Importing Workflows](#)

### Introducing Workflows

A workflow is the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules. In Agile PLM for Process, workflows are managed using the WFA (Workflow Administration) application.

This chapter contains instructions for workflow management in GSM (Global Specification Management) only. For instructions on workflow management in SCRM (Supply Chain Relationship Management), which are slightly different from the GSM instructions, see [Chapter 7, "Using WFA to Manage SCRM Workflows"](#). For instructions on workflow management in PQM (Product Quality Management), see [Chapter 8, "Using WFA to Manage PQM Workflows"](#). For instructions on workflow management in CSS (Content Synchronization and Syndication), see [Chapter 9, "Using WFA to Manage CSS Workflows"](#).

### Associated Roles

The following user roles are associated with workflows:

[WFA\_ADMIN]—Can create, edit, import, and export workflows.

[WFA\_USER]—Can access the WFA (Workflow Administration) application and view all workflows.

[WFA\_GLOBAL\_ADMIN]—Can create and edit workflows.

## Workflow Terms and Definitions

The following are important workflow terms and definitions that you must understand in order to perform workflow administration tasks:

**Owner** — The person(s) responsible for managing the specification in a particular status. As owner of the workflow, you:

- Receive items in your Action Items list. You are responsible for assuring that the assigned parties perform all necessary actions or reviews.
- Can advance the specification in the workflow process by clicking **Workflow** in the upper right corner of the specification page.

**Author** — The person who originally created the specification.

**Signature Reviewer** — Represents a functional area, group, or individual who is responsible for reviewing information contained within a specification. The signature reviewers approve or disapprove the specification through the use of signature documents. This review enables the specification to move forward in the workflow process.

**Additional Notification** — Represents a functional area, group, or individual who receives an email notification that a specification has been moved in the workflow process to a particular status. This role is considered informational only, and additional notification recipients are not responsible for providing any formal response or input into the specification.

**Reader** — A group or individual who can open a specification and read the contents. You can assign read permissions to groups, individuals, or exclusively the specification author, owner, and/or signature requestee.

**Editor** — A group or individual who can open and edit a specification. You can assign editor permissions to groups, individuals, or exclusively to the specification author, owner, and/or signature requestee.

**Workflower** — A group or individual who can move a specification from one workflow step to another. You can assign workflow permissions to groups, individuals, or exclusively to the specification author or signature requestee.

**Service Level Agreement (SLA)** — The number of days that a document will remain in a particular status before a reminder indicator changes. The system issues an amber reminder that a deadline is approaching and a red reminder that the deadline has passed.

**Transitions** — The statuses that a particular step can be transitioned to. Moving a workflow between statuses can mean moving the workflow backward to a previous step or forward to the next step. Transitions can be serial (one back and one forward) or can allow for expedition (from any status to any other status).

**Condition** — A rule that has to be met before a particular action is applied. Conditions can be assigned to transitions, owners, signature requests, notifications, and the workflower permission tables.

**Guard Conditions** — An extensibility point that helps determine if a workflow transition can occur.

**Workflow Action** — An extensibility point that triggers the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically.



## Recommendations for Creating Workflows

The following are recommendations for creating workflows using the WFA (Workflow Administration) application in Agile PLM for Process.

- A workflow should contain a relatively small number of created statuses. These statuses should be common and applicable across all workflows. For example, consider using a workflow that progresses through the following intuitive statuses: Draft > Working > Approved > Inactive > Retired.
- When creating workflows in the WFA application, always check the **Terminate Workflow at This Step** check box to indicate the last step in the workflow.
- Deprecate workflow steps by clicking **Make Inactive**. Changing a step to inactive status assures that existing specifications already in that step can continue in the workflow but that no new specifications can enter that step.
- If a step has owners, signature documents, and/or notifications, be sure to provide functional areas for each.
- Principals are required for each permission rule.
- When setting up conditions containing multiple rows, be aware that conditions inside the same row indicate "Or" values and that conditions in different rows represent "And" values.

## Searching for Workflows

As an administrator, you often search for workflow process templates. When you first access the WFA application, you see the GSM Workflow Template Search page, shown in [Figure 6–1](#).

**Figure 6–1** GSM Workflow Template Search page

To search for GSM workflows:

1. In the key field drop-down list, select your search criteria as follows:
  - **All (--)** — Searches for all workflows
  - **Description** — Searches for workflows by description
  - **Name** — Searches for workflows by name
  - **Most Recently Used** — Searches for the most recently used workflows

2. In the operator drop-down list, your options will be determined by the choice that you made in the first drop-down list. Selections may include:
  - **Null {empty field}** — Searches for all workflows
  - **Contains** — Used for character searches, alphabetical or numerical (for example, "Name Contains Ingredient" will result in only workflow templates with names containing the word "Ingredient")
  - **Equals** — Used to evaluate search criteria entered in the field to the right (for example, "Name Equals Dairy Ingredient" will result in only workflow templates with this exact name)
  - **Starts With** — Used for character searches, alphabetical or numerical (for example, "Description Name Starts With K" will result in only workflow templates with descriptions that start with the letter "K")
  - **Is True** — Searches for workflows matching your selection. Used with Most Recently Used criterion
3. Use the third search criteria field to qualify the selections you made in the first two drop-down lists. You can also enter the percent (%) sign to perform a wildcard search matching any one character.
4. Click **Search** to display GSM workflow templates matching the search criteria.

For guidance on saving and loading searches, see ["Saving and Loading Searches"](#) on page 2-4 and ["More Search Options"](#) on page 2-4.

## Creating New GSM Workflow Templates

To create a new GSM workflow template:

1. Click **WFA** on the left navigation panel.
2. Click **New > GSM Workflow Template** in the action menu. Agile PLM for Process displays a new workflow template page, as shown in [Figure 6-2](#).

**Figure 6-2** GSM Workflow Template page

**Summary Information**

Name:

Description:

Template Type: GSM

Active:

**Resolution Criteria**

Workflow Object Type:

Attribute	Value	Match
<input type="button" value="Add New"/>		

**Step 1**

Status:

Instructions:

Amber In:

Red In:

Tags:

Type	Tags
<input type="button" value="Manage Tags"/>	

3. Enter information described in:
  - ["Summary Information Section"](#) on page 6-6
  - ["Resolution Criteria Section"](#) on page 6-6
  - ["Step Sections"](#) on page 6-8
  - ["Permissions Section"](#) on page 6-24
  - ["Workflow Permissions Section"](#) on page 6-26
4. Click **Save & Close**.
5. Flush the Workflow Cache Group, as described in ["Using the Cache Application"](#) on page 10-3.

## Summary Information Section

Enter the following workflow information in the Summary Information section:

**Name** Enter a unique name for the workflow. This name will appear to the GSM user when resolving a specification to a workflow. It is also shown on a specification as the Current Workflow value on the Approval/Audit Trail tab. This is a required field.

**Description** Enter a description for the workflow. This description will appear to the GSM user when resolving a specification to a workflow. This is a required field.

**Template Type** This field represents the type of workflow template. There are four types of workflows: GSM, SCRM, PQM and CSS.

**Active** Select **Yes** to make the template active when the workflow template is ready to become available for use in Agile PLM for Process. Otherwise, the template will remain inactive and not available for general use.

## Resolution Criteria Section

Resolution criteria are the rules that determine what workflow template the GSM specification will resolve to. For example, all material specifications with the business unit of North America and the specification category of Dairy > Milk > Powders should resolve to this workflow template.

Figure 6–3 Resolution Criteria section

Resolution Criteria

Workflow Object Type: Trade Specifications

	Attribute	Value	Match	
	Business Unit	CPI Sweden Retail CPI South Africa Retail CPI Asia CPI North America » Canada » Retail CPI Latin America CPI USA	Hierarchy	

Add New

**Note:** Once a specification has resolved to a workflow, users with the role of [CAN\_RERESOLVE\_WORKFLOWS] can re-resolve the specification to a different workflow in GSM.



Enter the following workflow information in the Resolution Criteria section:

**Workflow Object Type** To assign a **Workflow Object Type**, click the search icon ( ) to display a dialog box of workflow object types. Select the workflow object type (Material Specification, Trade Specification, and so on) that will consume this workflow process template. This is a one-to-one relationship between the template and object type; only one selection is allowed. This is a required field.

**Attribute** You can also add resolution criteria attributes, by clicking **Add New** and selecting the attribute from the dialog box. Resolution criteria attributes available will depend on the workflow object selected.

The following attributes are available:

- **Business Unit** — Select this attribute to evaluate the business unit on the specification during resolution.
- **Category** — Select this attribute to evaluate the specification category on the specification during resolution.
- **Classification** — Select this attribute to evaluate the classification on the specification during resolution. If enabled, this attribute is only available for the material specification object type. When this is configured on, the classification field on the material specification will be required.
- **Is Template** — Select this attribute to evaluate whether the specification is a template during resolution.

**Value** Click the edit icon (  ) to place the row in edit mode. Click the add data icon (  ) to display a selection list of the attribute added. Select the value to evaluate, then click **Done**.

**Match** Make a selection as follows:

- **Exact Match** — The values must match exactly
- **Hierarchy** — The values must be related hierarchically (the match moves up and down the hierarchy)
- **+ Children** — The values must be related hierarchically (the match moves down the hierarchy only)
- **Resolution Affinity** — The workflow with the closest affinity will be selected. If multiple matches are found the user will be presented with a selection option.

---

**Note:** Attribute values in the same row will represent an OR statement. For example, if the specification business unit equals "USA" or "Canada" it will resolve to this template.

Attribute values in different rows represent an AND statement. For example, the specification must have a business unit of "USA" and a specification category value of "Dairy > Milk > Powders."

---

## Step Sections

Each workflow template must have a minimum of two steps, as represented in the Step 1 and Step 2 sections. You can add more step sections by clicking **Add New Step**.

**Figure 6–4 Steps sections**

**Step 2**

Status: Inactive Make Inactive

Instructions: This approval checklist is inactive.

Amber In: 0

Red In: 0

Tags:

Type	Tags
Workflow Action	Is Developmental

Manage Tags

☐ Terminate workflow at this step

Owners:

Functional Area	Condition	Members	Roles	Selection Mode	Optional
<span>Add New</span>					

☒ Evaluate First ☐ Evaluate All Criteria ☐ Evaluate First (per functional area)

Signature Requests:

Functional Area	Condition	Members	Selection Mode	Amber In	Red In	Optional	eSignature
<span>Add New</span>							

☒ Evaluate First ☐ Evaluate All Criteria ☐ Evaluate First (per functional area)

Notifications:

Functional Area	Condition	Members	Selection Mode	Optional
			One Member	<input checked="" type="checkbox"/>

Add New

☒ Evaluate First ☐ Evaluate All Criteria ☐ Evaluate First (per functional area)

Transitions:

Condition	Transition	eSignature	Guard Conditions	Workflow Actions
	Draft	<input type="checkbox"/>		

Manage Transitions

**Manage Steps**

Add New Step Reorder / Remove Steps


**Permissions**

Action	Principal	Criteria
<span>Add New</span> <span>Generate</span>		

**Workflow Permissions**

Principal	Condition	Criteria
<span>Add New</span>		

To define steps:

1. Define the **Status** by click the search icon (  ). A Select Status dialog box displays. You can choose from a list of existing statuses or click **Add New** to create a new status and name it. Workflow process templates contain only a small number of statuses, since statuses, once created, are permanent.

---

**Note:** Give each status a unique status name. Status names should also be common and applicable across all workflows. Status names cannot be changed once the template is activated.

---

2. The **Instructions** field is populated with the instructions attached to the chosen status. If you create a new status, enter a new set of instructions for this field.
3. In the **Amber In** field, enter the number of days until this workflow step displays in amber, indicating that the deadline is approaching. This field displays in all steps except the terminal step.
4. In the **Red In** field, enter the number of days until this workflow step displays in red, indicating that the deadline has passed. This field displays in all steps except the terminal step.
5. Click **Manage Tags** to tie tags to this step using the tags dialog box. Tags are a list of specialized functions. Using tags, you can attach predetermined behaviors to workflow steps. Administrators create and manage system actions using the ADMN>WFA>Tags option. See "[Tags](#)" on page 4-109 for more information. Available choices are:
  - **Designable**— When a formulation specification reaches a step with this tag, design tools will appear. For more information, see the Formulation Specification chapter in the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.
  - **Hide Specs** — This action will hide the specifications tied to this step when a search is performed in GSM. This is a valuable action for specifications that are archived and should no longer be referenced. Users with the roles of [SPEC\_ADMIN] or [HIDDEN\_SPEC\_VIEWER] are able to see these hidden specs in search results.
  - **Initial Load**—This tag will be used to interact with future APIs. This tag currently does not define any system behavior.
  - **Is Approved**—This tag is used to specify that the specification is in an approved state.
  - **Is Developmental**—This tag is used to specify that the specification is a developmental state.
  - **Publish to Supplier Portal** — This action will publish the specifications tied to this step to the Supplier Portal. This is a valuable feature for publishing only approved specifications to your suppliers.
  - **Publish Template** — When a specification or object template reaches a step with this tag, the user will be able to create an instance from this template.

Visibility tags can also be added here. See "[Controlling Specification Visibility](#)" on page 6-29 for more information.

6. If needed, check **Terminate workflow at this step** box to end the workflow at this step. This setting indicates that no further steps are required.

- Click **Save**. If needed, add more steps by clicking **Add New Step** and repeating this procedure.

### Owners Table

Use the Owners table to designate the person(s) responsible for managing the specification. An owner of the workflow:

- Will receive items in their Action Items list
- Can advance the specification in the workflow process by clicking **Workflow** in the upper right corner of the specification page

Figure 6–5 shows the Owners table.

**Figure 6–5 Owners table**

Functional Area	Condition	Members	Roles	Selection Mode	Optional
Factory QA		bjacobs		One Member	<input checked="" type="checkbox"/>
(None)		<a href="#">Edit Users</a> <a href="#">Edit Groups</a>	(None) Author	One Member	<input type="checkbox"/>

**Add New**

☒ Evaluate First ☐ Evaluate All Criteria ☐ Evaluate First (per functional area)

**Note:** You cannot set owners on the first and terminal steps.

To add an owner:

- Click **Add New** to create a new owner's row.
- Define the owner by **Functional Area**, **Condition**, **Members**, **Roles**, **Selection Mode**, **Optional**, and **Evaluation Method** as described below and ending on page 6-13.
- Click the apply changes icon (✓) to apply your changes.
- Click **Save**.

**Functional Areas** Select the functional area for users or groups who will be assigned ownership. This value could be used for evaluation order, as described in ["Evaluation Methods"](#) on page 6-13. This value will also be used to organize groups of owners available for a user's selection during the workflow transition. Administrators create and manage functional areas using the ADMN>WFA>Functional Area (WFA) option. See ["Functional Area - \(WFA\)"](#) on page 4-108 for more information.

**Conditions** There may be times when "who owns what" will differ based on specific specification attributes.

Conditions added to an owner row must be met in order for that group or individual to be the owner or available for user selection. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

- Additives** — The additive values on the specification.
- Allergens** — The allergen values on the specification.



- **Business Unit** — The business unit value on the specification.
- **Classification** — The classification value on the specification. (This only applies to material specification workflow objects)
- **Complies With** — The Complies With value on the specification.
- **Country** — The country value on the specification.
- **Menu Item Class** — Evaluates the menu item class value on the specification. (This only applies to menu item specifications)
- **Standard** — Evaluates the standard value on the specification. (This only applies to menu item specifications and product specifications)
- **Category** — The specification category on the specification.

Multiple conditions can be used to model more complex ownership requirements. For example, if the specification has the allergen of gluten and has the business unit of North America, then the specification is owned by these members.

To add conditions:

1. With the row in edit mode, click the add data icon (+) in the Condition column. The conditions dialog box is displayed, as shown in [Figure 6–6](#).

**Figure 6–6 Conditions dialog box**

Attribute	Value	Match
<div>Add New</div>		

2. Click **Add New**. A dialog box displays available attributes.
3. Select an attribute, then click **Done**. The selected attribute is appended as a new row in the conditions dialog box.
4. Click the edit icon (✎) to place the row in edit mode.
5. Click the add data icon (+) to define the Value column.
6. Select an option from the **Match** drop-down list.
7. Click the apply changes icon (✓) to apply your changes.
8. Click **Save**.

**Members** Select the users or groups who will be assigned ownership. Click **Edit Users** to locate individual users, and click **Edit Groups** to locate groups that will be used when assigning ownership.

To add users as members:

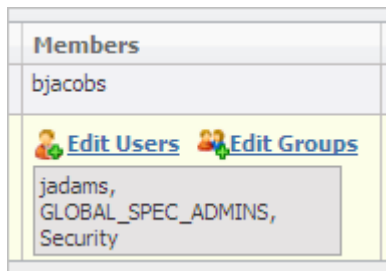
1. With the row in edit mode, click **Edit Users**. The user search page is displayed with "Last Name" and "Starts With" default search criteria.
2. Enter the user's last name in the third search criteria field.
3. Click **Search**. User names matching the information you provided are listed in the Search Results section.

4. Click the user name. It displays in the Selected Items section.
5. Repeat step 2 through step 4 to select other users.
6. Click **Done**. The users are added to the Members column.
7. Click the apply changes icon (✓) to apply your changes.
8. Click **Save**.

To add user groups as members:

1. With the row in edit mode, click **Edit Groups**. The groups dialog box is displayed.
2. Check the groups to add as members.
3. Click **Done**. The groups are added to the Members column, as [Figure 6–7](#) shows.

**Figure 6–7 Selected members**



4. Click the apply changes icon (✓) to apply your changes.
5. Click **Save**.

To delete users:

1. With the row in edit mode, click **Edit Users**. The user search page displays.
2. In the Selected Items section, click the user to delete, then click **Done**. The user that you selected is removed from the Members column.
3. Repeat steps 1 and 2 to delete additional users.
4. Click **Save**.

To delete user groups:

1. With the row in edit mode, click **Edit Groups**. The group dialog box displays.
2. Uncheck the groups to delete.
3. Click **Done**. The dialog box closes. The groups that you selected are removed from the Members column.
4. Click **Save**.

**Roles** You can designate the author of the specification as the owner by selecting the value of "Author."

**Selection Modes** A user moving a specification to the next workflow step could have the opportunity to select an owner. Selections will be organized for the user by functional area. Selection Mode allows you to control this process. Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.

- **One Member** — Choose this mode to allow the workflow to select only one member.
- **Multiple Members** — Choose this mode to allow the workflow to select multiple members.

**Optional** Select this checkbox to make the workflow's selection optional.

### Evaluation Methods

**Figure 6–8 Evaluation method options**

☒ Evaluate First
 ☐ Evaluate All Criteria
 ☐ Evaluate First (per functional area)

Below the table are evaluation method options. These selections will tell WFA how to evaluate the owners table.

- **Evaluate First** — Evaluates each row in order and uses the first row where the conditions are met, ignoring all other rows
- **Evaluate All Criteria** — Evaluates all rows and executes all that apply (provide a union set)
- **Evaluate First (per functional area)** — Groups rows by functional area, evaluates rows in order, executes the first one that applies, then skips to the next functional area (ignoring any remaining rows from the original functional area)

### Signature Requests Table

Use the Signature Requests table to assign signature reviewers. Signature requestees represent a functional area, group, or individual who is responsible for reviewing information contained within a specification. The signature requestee approves or disapproves the specification through the use of signature documents. This review enables the specification to move forward in the workflow process. You can also set whether authentication is required using the eSignature checkbox.

The owner of a signature request can workflow the sourcing approval to a prior step regardless of whether all signature request have been approved or disapproved by requestees. [Figure 6–9](#) shows the Signature Requests table.

**Figure 6–9 Signature Requests table**

Signature Requests:									
	Functional Area	Condition	Members	Selection Mode	Amber In	Red In	Optional	eSignature	
	Planning		abales, UserApproval	One Member	5 Days	7 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	(None)		Edit Users            Edit Groups	One Member	5	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Add New									

**Note:** You cannot assign signature requestees on the first and terminal steps.

To add signature requestees:

1. With the page in edit mode, click **Add New** to create a new row.
2. Define the signature requestee using the **Functional Area**, **Condition**, **Members**, **Selection Mode**, **Amber In**, **Red In**, **Optional**, and **eSignature** fields as described below and ending on page 6-13.
3. Click the apply changes icon (✓) to apply your changes.
4. Click **Save**.

**Functional Areas** Use this field to select the functional area for users or groups who will receive signature requests. This value could be used for evaluation order. This value will also be used to organize the GSM user's workflow selections. See ["Evaluation Methods"](#) on page 6-13 for more information.

**Conditions** There may be times when who you require a signature document from will differ based on specific specification attributes.

Conditions added to a row must be met in order for that group or individual to be a signature requestee and/or available for user selection. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

- **Additives** — The additive values on the specification.
- **Allergens** — The allergen values on the specification.
- **Business Unit** — The business unit value on the specification.
- **Category** — The specification category on the specification.
- **Classification** — The classification value on the specification. (This only applies to material specification workflow objects)
- **Complies With** — The Complies With value on the specification.
- **Country** — The country value on the specification.
- **Menu Item Class** — Evaluates the menu item class value on the specification. (This only applies to menu item specifications)
- **Standard** — Evaluates the standard value on the specification. (This only applies to menu item specifications and product specifications)




Multiple conditions can be used to model more complex requirements. For example, if the specification has the allergen of gluten and has the business unit of "North America," then the specification needs to be reviewed by the selected members.

To add conditions:

1. With the row in edit mode, click the add data icon (+) in the Condition column. The conditions dialog box is displayed, as [Figure 6-10](#) shows.

**Figure 6-10 Conditions dialog box**

View Workflow Process Template			Close
Attribute	Value	Match	
<div>Add New</div>			

2. Click **Add New**. A dialog box displays available attributes.
3. Select an attribute, then click **Done**. The selected attribute is appended as a new row in the Conditions dialog box.
4. Click the edit icon (  ) to place the row in edit mode.
5. Click the add data icon (  ) to define the **Value** column.
6. Select an option from the **Match** drop-down list.
7. Click the apply changes icon (  ) to apply your changes.
8. Click **Save**.

**Members** Use this field to select the users or groups who will be assigned as signature requestees. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will receive signature requests.

To add users and user groups as members, refer to the procedures on ["To add users as members:"](#) on page 6-11 and ["To add user groups as members:"](#) on page 6-12.

**Selection Modes** A user who is moving a specification to the next workflow step could have the opportunity to select an owner. The Selection Mode field allows you to control this process. Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.
- **One Member** — Choose this mode to allow the workflower to only select one member.
- **Multiple Members** — Choose this mode to allow the workflower to select multiple members.

#### Amber In and Red In Options

- **Amber In** — Enter the number of days until the signature request displays in amber, indicating that the deadline is approaching.
- **Red In** — Enter the number of days until the signature request displays in red, indicating that the deadline has passed.

**Optional** Select this check box to make the workflower's selection optional.

**eSignature** Select this check box to indicate eSignature authentication is required. When this is selected, users are required to re-authenticate before being allowed to workflow signature requests to approved. Users also have to have eSignature passphrase enabled. See ["eSignature Passphrase Section"](#) on page 3-6 for more information.

Evaluation Methods

Figure 6–11 Evaluation method options

☒ Evaluate First    ☐ Evaluate All Criteria    ☐ Evaluate First (per functional area)

Below the table are evaluation method options. These selections tell WFA how to evaluate the owners table.

- **Evaluate First** — Evaluates each row in order and use the first row where the conditions are met, ignoring all other rows.
- **Evaluate All Criteria** — Evaluates all rows and executes all that apply (provide a union set).
- **Evaluate First (per functional area)** — Groups rows by functional area, evaluates rows in order, executes the first one that applies, then skips to the next functional area (ignoring any remaining rows from the original functional area).

Notifications Table

Use the Notifications table to designate who should be notified during this step. Users or groups designated will receive an email notification that the specification has been moved in the workflow process to a particular step. This role is considered informational only, and additional notification recipients are not responsible for providing any formal response or input into the specification. [Figure 6–12](#) shows the Notifications table.

Figure 6–12 Notifications table

Notifications:

	Functional Area	Condition	Members	Selection Mode	Optional		
	Field QA Managers		wdenente	One Member	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	(None)		Edit Users  Edit Groups	One Member	<input checked="" type="checkbox"/>		

Add New

**Note:** You cannot designate notifications on the first step.

To add notifications:

1. With the row in edit mode, click **Add New** to create a new row.
2. Define the signature requestee using the **Functional Area**, **Condition**, **Members**, **Selection Mode**, and **Optional** fields as described below and through on page 6-18.
3. Click the apply changes icon ( ) to apply your changes.
4. Click **Save**.

**Functional Areas** Select the functional area for users or groups who will receive notifications. This value could be used for evaluation order, as explained in ["Evaluation Methods"](#) on page 6-18. This value will also be used to organize the GSM user's workflow selections.

**Conditions** There may be times when who you want to notify will differ based on specific specification attributes.

Conditions added to a row must be met in order for that group or individual to be notified and/or available for user selection. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

- **Additives** — The additive values on the specification.
- **Allergens** — The allergen values on the specification.
- **Business Unit** — The business unit value on the specification.
- **Category** — The specification category on the specification.
- **Classification** — The classification value on the specification. (This only applies to material specification workflow objects)
- **Complies With** — The Complies With value on the specification.
- **Country** — The country value on the specification.
- **Menu Item Class** — Evaluates the menu item class value on the specification. (This only applies to menu item specifications)
- **Standard** — Evaluates the standard value on the specification. (This only applies to menu item specifications and product specifications)

Multiple conditions can be used to model more complex requirements. For example, if the specification has the allergen of gluten and has the business unit of North America, then the selected members should be notified.

To add conditions:

1. With the row in edit mode, click the add data icon (+) in the Condition column. The conditions dialog box is displayed, as [Figure 6-13](#) shows.

**Figure 6-13 Conditions dialog box**

View Workflow Process Template		
Attribute	Value	Match
<div>Add New</div>		

2. Click **Add New**. A dialog box displays available attributes.
3. Select an attribute, then click **Done**. The selected attribute is appended as a new row in the conditions dialog box.
4. Click the edit icon (✎) to place the row in edit mode.
5. Click the add data icon (+) to define the Value column.
6. Select an option from the **Match** drop-down list.
7. Click the apply changes icon (✓) to apply your changes.

## 8. Click **Save**.

**Members** Select the users or groups who will be sent notifications. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will receive notifications.

To add users and user groups as members, refer to the procedures "[To add users as members:](#)" on page 6-11 and "[To add user groups as members:](#)" on page 6-12.

## Selection Modes

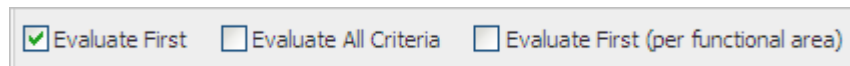
When moving a specification to the next workflow step, users could have the opportunity to select who receives notifications. Selection Mode allows you to control this process. Members displayed for selection will be organized by functional area. Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.
- **One Member** — Choose this mode to allow the workflow to only select one member.
- **Multiple Members** — Choose this mode to allow the workflow to select multiple members.

**Optional** Select this checkbox to make the workflow's selection optional.

## Evaluation Methods

**Figure 6–14** *Evaluation method options*



Below the table are evaluation method options. These selections tell WFA how to evaluate the owners table.

- **Evaluate First** — Evaluates each row in order and use the first row where the conditions are met, ignoring all other rows.
- **Evaluate All Criteria** — Evaluates all rows and execute all that apply (provide a union set).
- **Evaluate First (per functional area)** — Groups rows by functional area, evaluate rows in order, executes the first one that applies, then skip to the next functional area (ignoring any remaining rows from the original functional area).



## Transitions Table

Transitions answer the question, "Where can I go from here?" This section is used to set up which steps may be available for transition from the current step.

Predefined conditions can be placed on a particular transition to limit its availability based on specific criteria, as described in ["Conditions"](#) on page 6-19. Transitions can also be configured with a guard condition extensibility point that can programmatically determine if a workflow transition can occur, as described in ["Guard Conditions"](#) on page 6-21. Once the workflow transition does occur, workflow actions can be triggered to execute some process, as described in ["Workflow Actions"](#) on page 6-22.

**Figure 6–15 Transitions section**

Transitions:					
	Condition	Transition	eSignature	Guard Conditions	Workflow Actions
✓	+	New Step 1	<input type="checkbox"/>	+	+
		New Step 3	<input type="checkbox"/>		
Manage Transitions					

To add transitions:

1. Click **Manage Transitions**. This opens the Transitions dialog box, shown in [Figure 6–16](#). This dialog box lists all steps that exist on the workflow template.

**Figure 6–16 Transitions dialog box**

Transitions		Done	Cancel
Return To Step(s)	Submit To Step(s)		
<input checked="" type="checkbox"/> Draft	<input checked="" type="checkbox"/> Archived		

2. Select all the steps that the active step can move back to in the Return To Step(s) column.
3. Select all the steps that this step can move forward to in the Submit To Step(s) column.
4. Click **Done**.
5. Click **Save**.

**Conditions** There may be times when "Who can do what and go where" conditions should differ, based on either user-specific attributes or specification attributes.



Conditions added to a transition must be met in order for the transition to appear as an option to the user. Depending on the workflow object selected, conditions can be based on the following attributes:

- **Business Unit** — Evaluates the business unit value on the specification.
- **Complies With** — Evaluates the Complies With value on the specification.
- **Country** — Evaluates the country value on the specification.

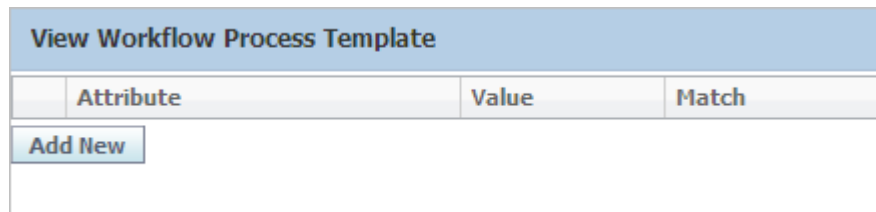
- **Classification** — Evaluates the classification value on the specification. (This only applies to material specifications)
- **Menu Item Class** — Evaluates the menu item class value on the specification. (This only applies to menu item specifications)
- **Standard** — Evaluates the standard value on the specification. (This only applies to menu item specifications and product specifications)
- **Category** — Evaluates the specification category on the specification.
- **User Groups**—Evaluates what user groups the user accessing the specification belong to.
- **User Roles** — Evaluates what user roles the user accessing the specification has.

Multiple conditions can be used to model more complex routing requirements. For example, if the user has the [SPEC\_ADMIN] role and the specification has the business unit of North America, then the specification can go to the "Approved" status.

To add conditions:

1. Click the edit icon (  ) to place the row in edit mode.
2. To add conditions, click the add data icon (  ) in the Condition column. The conditions dialog box is displayed, as [Figure 6–17](#) shows.

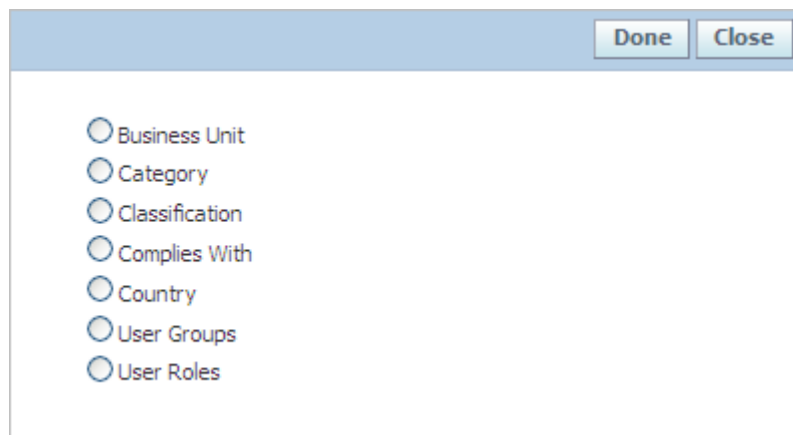
**Figure 6–17 Conditions dialog box**



Attribute	Value	Match
<div>Add New</div>		


3. Click **Add New**. A dialog box displays available attributes, as [Figure 6–18](#) shows.



**Figure 6–18 Attributes for selected condition**



Done Close

- ☐ Business Unit
- ☐ Category
- ☐ Classification
- ☐ Complies With
- ☐ Country
- ☐ User Groups
- ☐ User Roles

4. Select an attribute, then click **Done**. The selected attribute is appended as a new row in the conditions dialog box.
5. Click the edit icon (  ) to place the row in edit mode.

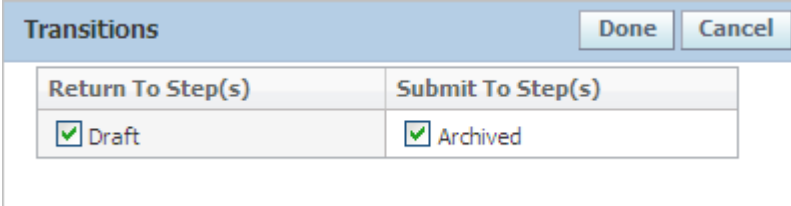
6. Click the add data icon (  ) to define the Value column.
7. Select an option from the **Match** drop-down list.
8. Click the apply changes icon (  ) to apply your changes.
9. Click **Save**.

**Transitions** Transitions answer the question, "Where can I go from here?" Transitions designate which steps are available for transition from the current step.

To add transitions:

1. Click **Manage Transitions**. This opens the Transitions dialog box, shown in [Figure 6–19](#). This dialog box lists all available active steps that exist on the workflow template for a particular step.

**Figure 6–19 Transitions dialog box**




Return To Step(s)	Submit To Step(s)
<input checked="" type="checkbox"/> Draft	<input checked="" type="checkbox"/> Archived

2. Select all the steps that the active step can move back to in the Return To Step(s) column.
3. Select all the steps that this step can move forward to in the Submit To Step(s) column.
4. Click **Done**.
5. Click **Save**.

**eSignatures** eSignatures link transitions to the authentication process. For example, when transitioning a workflow from Review to Approved, you may select this checkbox to indicate re-authentication is required. Users also have to have eSignature passphrase enabled. See "[eSignature Passphrase Section](#)" on page 3-6 for more information.


**Guard Conditions** Guard Conditions are an extensibility point that launch classes to determine if a workflow transition can occur. The classes can access the item being workflowed to execute specialized validations programmatically, and either allow the transition to occur, or prevent it and return a list of error messages. These classes are made available for selection in WFA as Guard Conditions by including them in the `config\Extensions\WFAExtensionsConfig.xml` file. Please see the *Agile Product Lifecycle Management for Process Configuration Guide* and the *Agile Product Lifecycle Management for Process Extensibility Pack* documentation for more details on WFA.

To add guard conditions:

1. Click the edit icon (  ) to place the row in edit mode, as [Figure 6–20](#) shows.



**Figure 6–20** Transitions row in edit mode

Transitions:					
	Condition	Transition	eSignature	Guard Conditions	Workflow Actions
		Admin Review	<input type="checkbox"/>		
<a href="#">Manage Transitions</a>					

2. If authentication is required on the transition, check the **eSignature** field.
3. To add guard conditions, click the add data icon (  ) in the Guard Conditions column. WFA displays a dialog box listing configured guard conditions.
4. Select guard condition(s), and then click **Done**. The selected attribute is added to the Condition column in the Transitions row.

**Workflow Actions** Workflow actions are an extensibility point that trigger the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically. These classes are made available for selection as workflow actions by including them in the `config\Extensions\WFAExtensionsConfig.xml` file.

To add workflow actions:

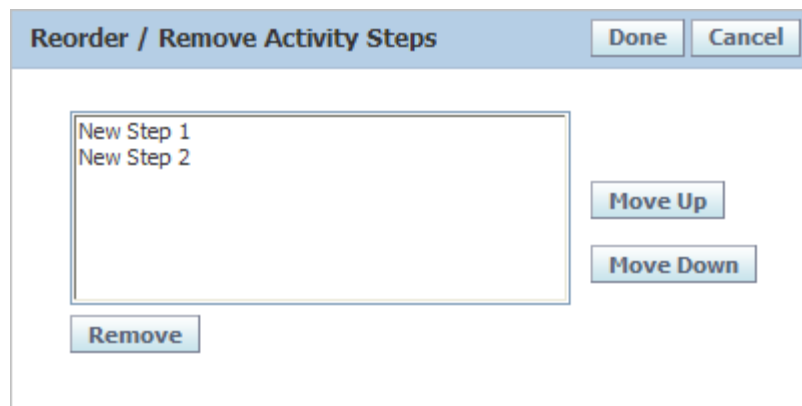
1. With the row in edit mode, click the add data icon (  ) to define the **Workflow Actions** column. The workflow actions dialog box is displayed.
2. Select workflow action(s), and then click **Done**. The selected attribute is added to the Workflow Actions column in the Transitions row.
3. Click the apply changes icon (  ) to apply your changes.
4. Click **Save**.

### Adding Steps

Click **Add New Step** to add steps to the workflow process template. You can add as many steps as needed.

### Reordering and Removing Steps

Click **Reorder / Remove Steps** to reorder or remove workflow steps. Agile PLM for Process displays the Reorder / Remove Activity Steps dialog box, as [Figure 6–21](#) shows.

**Figure 6–21 Reorder / Remove Activity Steps dialog box**

To reorder a step:

1. Click the step to move.
2. Click **Move Up** or **Move Down** to set the desired order.
3. Repeat steps 1 and 2 for other steps.
4. Click **Done**. The dialog box closes. The steps on the Create Process Template page reflect the order that you set.

To remove a step:

1. Click the step to remove.
2. Click **Remove**. The step is removed from the dialog box.
3. Click **Done**. The dialog box closes. The step that you removed no longer is included on the Create Process Template page.

Steps can only be removed if the template has never been saved. If you want to remove a step after a template has been saved, inactivate the step.

---

---

**Warning:** Reordering and inactivating steps can result in serious consequences and issues for the workflow process template.

---

---

## Permissions Section

Permissions are used to manage read and write access to the specification. Permissions reside in the Permissions table, shown in [Figure 6–22](#), and govern:

- What actions can be performed (Read or Write)
- When they can be performed (by Status/Step)
- By whom they can be performed (Users or Groups)

---

**Note:** The section level editing feature once denoted by the Type column is being deprecated in a future release. This feature is now configurable, and by default is configured off.

---

**Figure 6–22 Permissions table**

	Action	Principal	Criteria
	Read	Global	Status =
	Write	Author	Status = Draft
	Write	QA - All Specs	Status = Lab Analysis
	Write	Author	Status = Review
	Write	QA - All Specs	Status = Lab Analysis
	Write	Edit Users            Edit Groups	Status  = <input type="text"/>

Owner

To add a permission:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon ( ).
3. Define the permission using the **Action**, **Principal**, and **Criteria** fields as described below and ending on on page 6-26.
4. Click the apply changes icon ( ) to apply your changes.
5. Click **Save**.

**Actions** From the drop-down list, select what permission you are granting. Choices are "Read" or "Write."

**Principals** Select the users or groups who will be assigned permissions. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups.


To add users or user groups as members, follow the procedures "[To add users as members:](#)" on page 6-11 and "[To add user groups as members:](#)" on page 6-12.

## Tokens

You can add the token of "Author," "Owner," or "Signature Requestee" as a principal. The following token choices are available:

- **Author** — The originator of the specification
- **Owner** — A workflow participant assigned as an owner
- **Signature Requestee** — A workflow participant assigned as a signature requestee for the specification

To add tokens to the Permissions table:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon (  ) to the left of the new role.
3. Click **Edit Users**. The user search page displays.
4. Search for and select users as described on page 6-12.
5. Click **Done**. The token dialog box displays, as [Figure 6-23](#) shows:


**Figure 6-23 Tokens dialog box, Permissions**



6. Assign a token by clicking the **Author**, **Owner**, or **Signature Requestee** checkbox. You can make multiple selections.
7. Click **Done**. The users and assigned tokens are added to the Principal field, as [Figure 6-24](#) shows.

**Figure 6-24 Added tokens**



8. Click the apply changes icon (  ) to apply your changes.
9. Click **Save**.

Criteria

Designate which step(s) the principal has the selected permission for. For example, the owner only has edit rights to the specification when its in the Review step.










To quickly create permissions click **Generate**. This action will create default permissions. The Generate option overwrites any manual permission entries.

**Note:** Section level editing can be configured on or off. Refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for more information on this extensibility point.



Workflow Permissions Section

In addition to read and write permissions above, you can also set who has workflow permissions. Workflow permissions are used to manage workflow rights, meaning which users can transition a workflow on a GSM specification.

Figure 6–25 Workflow Permissions table

Workflow Permissions			
Principal	Condition	Criteria	
 Author		Status = Draft	
 QA - All Specs		Status = Lab Analysis	
 Author		Status = Review	
 <a href="#">Edit Users</a>  <a href="#">Edit Groups</a>		Status  =  <input type="text"/>	
<div>Add New</div>			

To add a workflow permission:

- 1. With the page in edit mode, click **Add New** in the Workflow Permissions section.
- 2. Click the edit icon (  ).
- 3. Define the permission using the **Principal**, **Condition**, and **Criteria** fields as described below and through page 6-31.
- 4. Click the apply changes icon (  ) to apply your changes.
- 5. Click **Save**.

**Principal** Select the users or groups who will be assigned workflow permissions. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups. The token of "Author" and "Signature Requestee" can also be added as a principal. These tokens represent the specification’s author and signature requestee(s).

To add users or user groups as members, follow the procedures "[To add users as members:](#)" on page 6-11 and "[To add user groups as members:](#)" on page 6-12.




## Tokens

The token of "Author" or "Signature Requestee" can also be added as a principal. Users but not user groups can be assigned. The following token choices are available for workflow permissions:


- **Author** — The originator of the specification
- **Signature Requestee** — A workflow participant assigned as a signature requestee for the specification

To add tokens to the Workflow Permissions table:

1. With the page in edit mode, click **Add New** in the Workflow Permissions section.
2. Click the edit icon (  ) to the left of the new role.
3. Click **Edit Users**. The user search page displays.
4. Search for and select users as described on page 6-13.
5. Click **Done**. The token dialog box displays, as [Figure 6-26](#) shows:

**Figure 6-26** Token dialog box, Workflow Permissions



6. Assign a token by selecting **Author**, **Signature Requestee**, or both.
7. Click **Done**. The users and assigned tokens are added to the **Principal** field.
8. Click the apply changes icon (  ) to apply your changes.
9. Click **Save**.

---

**Note:** You can also add tokens to existing users.

---

**Conditions** There may be times when "Who can workflow and when" conditions should differ, based on either user-specific attributes or specification attributes.



Conditions added to the Workflow Permissions table must be met in order for the Workflow button to appear as an option to the user. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

- **Additives** —The additive values on the specification.
- **Allergens** — The allergen values on the specification.
- **Business Unit** — The business unit value on the specification.
- **Catalog** — The specification category on the specification.
- **Classification** — The classification value on the specification. (This only applies to material specification workflow objects)
- **Complies With** — The Complies With value on the specification.
- **Country** — The country value on the specification.

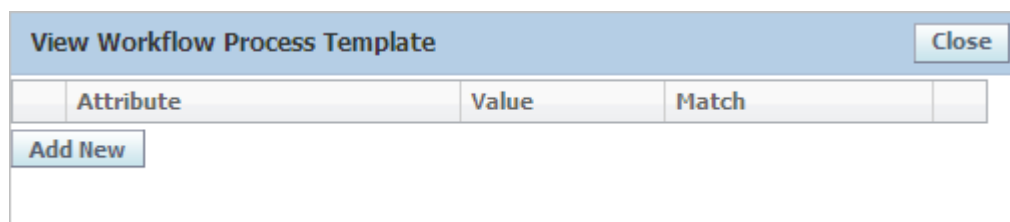
- **Menu Item Class** — The menu item class value on the specification. (This only applies to menu item specifications)
- **Standard** — The standard value on the specification. (This only applies to menu item specifications and product specifications)

Multiple conditions can be used to model more complex workflow permission requirements. For example, if the specification is "Organic," then the following users have workflow rights.

To add conditions:

1. Click the edit icon (  ) to place the row in edit mode.
2. To add conditions, click the add data icon (  ) in the Condition column. The conditions dialog box is displayed, as [Figure 6–27](#) shows.

**Figure 6–27 Conditions dialog box**



Attribute	Value	Match
<div>Add New</div>		




3. Click **Add New**. A dialog box displays available attributes, shown in [Figure 6–28](#).

**Figure 6–28 Attributes for selected condition**



Done Close

- ☐ Additives
- ☐ Allergens
- ☐ Business Unit
- ☐ Category
- ☐ Classification
- ☐ Complies With
- ☐ Country

4. Select an attribute, and then click **Done**. The selected attribute is appended as a new row in the Conditions dialog box.
5. Click the edit icon (  ) to place the row in edit mode.
6. Click the add data icon (  ) to define the **Value** column.
7. Select an option from the **Match** drop-down list.
8. Click the apply changes icon (  ) to apply your changes.
9. Click **Save**.

**Criteria** Designate which step(s) are impacted by the selected permission. For example, the author only has workflow rights to the specification when it is in the "Draft" and "Review" step.

## Controlling Specification Visibility

GSM Specifications can be filtered out of GSM search results by adding visibility tags to workflow steps. This functionality is beneficial when you want to limit search results for certain UGM user groups. For example, users in the "Marketing" group are only interested in trade specifications when they are in an Approved state, while the "R&D" group are interested in trade specifications in all statuses. To accomplish this behavior, two visibility tags need to be created -- R&D and Marketing. These tags would be created in ADMN, as described in ["Tags"](#) on page 4-109. "R&D" would be a tag applied to all steps in the workflow, while the "Marketing" tag would only be applied to the "Approved" step. In UGM, you would associate the "R&D" tag to the R&D user groups and the "Marketing" tag to the Marketing user groups. See ["Workflow Visibility Tags Section"](#) on page 2-9 for more information.

---

**Warning:** These tags only control EQT search result filtering. They do not control read or edit permissions to the specification. WFA permissions and/or BU security should be used to control permissions.

---

## Editing GSM Workflow Process Templates

To edit a GSM workflow process template:

1. Use the search tool to locate the existing workflow process template to edit. See ["Searching for Workflows"](#) on page 6-3.
2. Click **Edit** in the action menu. The workflow process template displays with editable fields.
3. Make edits to the workflow process template as described earlier in this chapter.
4. Click **Save & Close**.
5. Flush the workflow cache group, as described in [Using the Cache Application](#) on page 9-3.

## Using the Make Inactive Option

You can make certain steps of the workflow process template inactive by clicking **Make Inactive**, located to the right of applicable sections.

Further, you can remove inactive sections from your view by clicking **Toggle Inactive** in the action menu. This option removes inactive sections from your view but does not remove them from the workflow process template altogether.

## Copying GSM Workflow Process Templates

If you need to create a GSM workflow process template that is very similar to an existing GSM workflow process template, you may wish to use the copy feature of the WFA application. You can copy the existing workflow, save it as a new template, and edit that template.

To copy an existing GSM workflow and use it as a basis for a new, similar workflow:

1. Use the search page to locate the existing workflow process template to copy. See ["Searching for Workflows"](#) on page 6-3.
2. Click **Copy** in the action menu. A copy of the workflow process template with editable fields is presented.
3. The words "Copy of" are added to the original workflow process template name. Change the name of the workflow process template.
4. Make additional edits to the workflow process template as needed using instructions provided in ["Creating New GSM Workflow Templates"](#) on page 6-5.
5. Click **Save & Close**.
6. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Exporting and Importing Workflows

As an administrator, you perform workflow creation and editing tasks in a staging environment. Once you have made final changes to workflows in the staging environment and they are ready to go live in the production environment, you must export them out of the staging environment and import them into the production environment.

### Exporting Workflows from Your Staging Environment

To export workflow data from your staging environment:

1. Before exporting a workflow, make sure you have flushed the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.
2. Start a new Agile PLM for Process session prior to exporting a workflow from staging to production.
3. Click **WFA** on the left navigation panel.
4. Locate the workflow process template to export.
5. Click **Export** in the action menu. A File Download dialog box displays.
6. Select the location on your hard drive to temporarily export the data.
7. Click **Save**. Agile PLM for Process encrypts the data and saves the encrypted file to your local drive.

## Importing Workflows into Your Production Environment

To import workflow data into your production environment:

1. Log in to your production environment.
2. Access **WFA**.
3. Click the **Import** in the action menu.
4. Click **Browse** to locate the encrypted file that you exported from the staging environment and select the file.
5. Click the **Import** in the action menu.
6. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.



---

## Using WFA to Manage SCRM Workflows

This chapter contains instructions for using the Workflow Administration (WFA) application to manage workflows in Supply Chain Relationship Management (SCRM). Topics in this chapter include:

- [Introducing Workflows](#)
- [Searching for Workflows](#)
- [Creating SCRM Workflow Templates](#)
- [Editing SCRM Workflow Process Templates](#)
- [Copying SCRM Workflow Process Templates](#)
- [Exporting and Importing Workflows](#)

### Introducing Workflows

In Agile PLM for Process, workflows are managed using the WFA (Workflow Administration) application. This chapter contains instructions for workflow management in SCRM (Supply Chain Relationship Management) only.

For an overview of workflows and instructions on workflow management in GSM (Global Specification Management), see [Chapter 6, "Using WFA to Manage GSM Workflows"](#). For instructions on workflow management in PQM (Product Quality Management), see [Chapter 8, "Using WFA to Manage PQM Workflows"](#). For instructions on workflow management in CSS (Content Synchronization and Syndication), see [Chapter 9, "Using WFA to Manage CSS Workflows"](#).

There are two main types of workflow templates for SCRM:

- **Specification-related sourcing approvals**—These can resolve using the receiving facility business unit, source facility business unit, specification type, and category type. Available specification types are:
  - Equipment specifications
  - Material specifications
  - Packaging material specifications
  - Printed packaging specifications
  - Product specifications
  - Trade specifications
- **Non-specification-related sourcing approvals**—These can resolve using the receiving facility business unit and source facility business unit object types.

## Associated Roles

The following user roles are associated with workflows:

[WFA\_ADMIN]—Can create, edit, import, and export workflows.

[WFA\_USER]—Can access the WFA (Workflow Administration) application and view all workflows.

[WFA\_GLOBAL\_ADMIN]—Can create and edit workflows.

## Workflow Terms and Definitions

The following are important workflow terms and definitions that you must understand in order to perform workflow administration tasks:

**Owner** — The person(s) responsible for managing the sourcing approval in a particular status. As owner of the workflow, you:

- Receive items in your Action Items list. You are responsible for assuring that the assigned parties perform all necessary actions or reviews.
- Can advance the sourcing approval in the workflow process by clicking **Workflow** in the upper right corner of the sourcing approval page.

**Author** — The person who originally created the sourcing approval.

**Signature Reviewer** — Represents a functional area, group, or individual who is responsible for reviewing information contained within a sourcing approval. The signature requestees approve or disapprove the sourcing approval through the use of signature documents. This review enables the sourcing approval to move forward in the workflow process.

**Additional Notification** — Represents a functional area, group, or individual who receives an email notification that a sourcing approval has been moved in the workflow process to a particular status. This role is considered informational only, and additional notification recipients are not responsible for providing any formal response or input into the sourcing approval.

**Reader** — A group or individual who can open a sourcing approval and read the contents. You can assign read permissions to groups, individuals, or exclusively to the sourcing approval author, owner, and/or signature requestee.

**Editor** — A group or individual who can open and edit a sourcing approval. You can assign editor permissions to groups, individuals, or exclusively to the sourcing approval author, owner, and/or signature requestee.

**Workflower** — A group or individual who can move the sourcing approval from one workflow step to another. You can assign workflow permissions to groups, individuals, or exclusively to the sourcing approval author or signature requestee.

**Service Level Agreement (SLA)** — The number of days that a document will remain in a particular status before a reminder indicator changes. The system issues an amber reminder that a deadline is approaching and a red reminder that the deadline has passed.

**Transitions** — The statuses that a particular step can be transitioned to. Moving a workflow between statuses can mean moving the workflow backward to a previous step or forward to the next step. Transitions can be serial (one back and one forward) or can allow for expedition (from any status to any other status).

**Guard Conditions** — An extensibility point that helps determine if a workflow transition can occur.



**Workflow Actions** — An extensibility point that triggers the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically.

## Recommendations for Creating Workflows

The following are recommendations for creating workflows using the WFA (Workflow Administration) application in Agile PLM for Process.

- A workflow should contain a relatively small number of created statuses. These statuses should be common and applicable across all workflows. For example, consider using a workflow that progresses through the following intuitive statuses: Draft > Working > Approved > Inactive > Retired.
- When creating workflows in the WFA application, always check the **Terminate Workflow at This Step** check box to indicate the last step in the workflow.
- Deprecate workflow steps by clicking **Make Inactive**. Changing a step to inactive status assures that existing sourcing approvals already in that step can continue in the workflow but that no new sourcing approvals can enter that step.
- If a step has signature documents and/or notifications, be sure to provide functional areas for each.
- Principals are required for each permission rule.

## Searching for Workflows

As an administrator, you often search for workflow process templates. When you first access the WFA (Workflow Administration) application, you see the GSM Workflow Templates search page. To use the SCRM template search page, select **Open > SCRM Workflow Template** from the action menu.

**Figure 7–1** SCRM Workflow Template Search page

To search for SCRM workflows, use a combination of search criteria:

1. In the key field drop-down list, select your search criteria as follows:
  - **All (--)** — Searches for all workflows.
  - **Description** — Searches for workflows by description.
  - **Name** — Searches for workflows by name.
  - **Most Recently Used** — Searches for the most recently used workflows.

2. In the operator drop-down list, your options will be determined by the choice that you made in the first drop-down list. Selections may include:
  - **Null {empty field}** — Searches for all workflows.
  - **Contains** — Used for character searches, alphabetical or numerical (for example, "Name Contains Facility" will result in only workflow templates with names containing the word "Facility").
  - **Equals** — Used to quantify search criteria entered in the field to the right (for example, "Name Equals Sourcing Facility San Antonio" will result in only workflow templates with this exact name.)
  - **Starts With** — Used for character searches, alphabetical or numerical (for example, "Description Name Starts With K" will result in only workflow templates with descriptions that start with the letter "K").
  - **Is True** — Searches for workflows matching your selection. Used with Most Recently Used criterion
3. Use the third search criteria field to qualify the selections you made in the first two drop-down lists. You can also enter the percent (%) sign to perform a wildcard search matching any one character.
4. Click **Search** to display SCRM workflow templates matching the search criteria.

---

**Note:** Click any column head to sort rows alphabetically by that column head. Click again to reverse the order of the sort.

---

For guidance on saving and loading searches, see ["Saving and Loading Searches"](#) on page 2-4 and ["More Search Options"](#) on page 2-4.

## Creating SCRM Workflow Templates

To create a new SCRM workflow template:

1. Click **WFA** on the left navigation panel.
2. Click **New > SCRM Workflow Template** in the action menu. A new workflow template page is displayed, as shown in [Figure 7-2](#).

**Figure 7-2** SCRM Workflow Template page

**Summary Information**

Name:

Description:

Template Type: SCRM

Active:

**Resolution Criteria**

Workflow Object Type:

Attribute	Value	Match
<input type="button" value="Add New"/>		

**Step 1**

Status:

Instructions:

Amber In:

Red In:

**Tags:**

Type	Tags
<input type="button" value="Manage Tags"/>	

3. Enter information described in:
  - ["Summary Information Section"](#) on page 7-6
  - ["Resolution Criteria Section"](#) on page 7-6
  - ["Steps Section"](#) on page 7-8
  - ["Permissions Section"](#) on page 7-18
  - ["Workflow Permissions Section"](#) on page 7-20

4. Click **Save & Close**.
5. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

---

**Note:** For instructions on workflow management in GSM (Global Specification Management), which are slightly different from SCRM instructions, see [Chapter 6, "Using WFA to Manage GSM Workflows"](#). See [Chapter 9, "Using WFA to Manage CSS Workflows"](#) for instructions on CSS workflows.

---

## Summary Information Section

Enter the following workflow information in the Summary Information section:

**Name** Enter a unique name for the workflow. This name will appear to the SCRM user when resolving a sourcing approval to a workflow. It is also shown on a sourcing approval as the Current Workflow value on the approval/audit trail tab. This is a required field.

**Description** Enter a description for the workflow. This will appear to the SCRM user when resolving a sourcing approval to a workflow. This is a required field.

**Template Type** This field represents the type of workflow template. There are four types of workflows: GSM, SCRM, PQM and CSS.

**Active** Select **Yes** to make the template active when the workflow template is ready to become available for use in Agile PLM for Process. Otherwise, the template will remain inactive and unavailable for general use.

## Resolution Criteria Section

Sourcing approval workflows can resolve using receiving facility business unit, source facility business unit, specification type, and category.

**Figure 7–3 Resolution Criteria Section**


Resolution Criteria		
Workflow Object Type: Specification-related Sourcing Approvals		
Attribute	Value	Match
Sourcing Facility BU	SCRM-BU	Exact Match
Add New		

---

**Note:** Once a sourcing approval has resolved to a workflow, users with the role of [CAN\_RERESOLVE\_WORKFLOWS\_SCRM] can re-resolve the sourcing approval to a different workflow in SCRM.

---

Enter the following workflow information in the Resolution Criteria section:



**Workflow Object Type** To assign a **Workflow Object Type**, click the search icon (  ) to display a dialog box of workflow object types. There are two main types of workflow templates for SCRM:

- Specification-related sourcing approvals
- Non-specification related sourcing approvals

Select the type of sourcing approval that will consume this workflow process template. There is a one-to-one relationship between the template and object type; only one selection is allowed.

**Attributes** You can also add resolution criteria attributes, by clicking **Add New** and selecting the attribute from the dialog box. For specification-based sourcing approvals, workflows can resolve using the receiving facility business unit, source facility business unit, specification type, template, and category.

For non-specification sourcing approvals, workflows can resolve using the receiving facility business unit, source facility business unit, and template.

**Value** Click the edit icon (  ) to place the row in edit mode. Click the add data icon (  ) to display a selection list of the attribute added. Select the value to evaluate, and then click **Done**.

**Match** Make a selection as follows:

- **Exact Match** — The values must match exactly
- **+ Children** — The values must be related hierarchically (the match moves down the hierarchy only)

---

**Note:** Attribute values in the same row will represent an OR statement. For example, if the specification business unit equals "USA" or "Canada" it will resolve to this template.

Attribute values in different rows represent an AND statement. For example, the specification must have a business unit of "USA" and a specification category value of "Dairy > Milk > Powder."

---

## Steps Section

Each workflow template must have a minimum of two steps, as represented in the Step 1 and Step 2 sections. You can add more step sections by clicking **Add New Step**.

**Figure 7-4 Steps sections**

**Step 1**

Status:

Instructions:

Amber In:

Red In:

Tags:

Type	Tags
<a href="#">Manage Tags</a>	

Transitions:

Transition	eSignature	Guard Conditions	Workflow Actions
<a href="#">Manage Transitions</a>			

**Step 2**

Status:

Instructions:

Tags:

Type	Tags
<a href="#">Manage Tags</a>	

☒ Terminate workflow at this step

Notifications:

Functional Area	Members	Selection Mode	Optional
<a href="#">Add New</a>			


Transitions:

Transition	eSignature	Guard Conditions	Workflow Actions
<a href="#">Manage Transitions</a>			

**Manage Steps**

[Add New Step](#) [Reorder / Remove Steps](#)

To define steps:

1. Define the **Status** by clicking the search icon (  ). A Select Status dialog box displays. You can choose from a list of existing statuses or click **Add New** to create a new status and name it. Workflow process templates contain only a small

number of statuses, since statuses, once created, are permanent. Statuses should also be common and applicable across all workflows.

---

**Note:** Give each status a unique status name. Status names cannot be changed once the template is activated.

---

2. The **Instructions** field is populated with the instructions attached to the chosen status. If you create a new status, enter a new set of instructions for this field.
3. In the **Amber In** field, enter the number of days until this workflow step displays in amber, indicating that the deadline is approaching. This field displays in all steps except the terminal step.
4. In the **Red In** field, enter the number of days until this workflow step displays in red, indicating that the deadline has passed. This field displays in all steps except the terminal step.
5. Click **Manage Tags** to tie workflow actions or visibilities to this step. Tags are a list of specialized functions. This field is available for specification-related sourcing approvals only. Using tags, you can attach predetermined behaviors to workflow steps. Administrators create and manage tags using the ADMN>WFA>Tags option. See "[Tags](#)" on page 4-109 for more information. Available choices are:
  - **Initial Load**—This tag will be used to interact with future APIs. This tag currently does not define any system behavior.
  - **Publish to Supplier Portal** — This action will publish the sourcing approvals tied to this step to the Supplier Portal. This is a valuable feature for publishing only approved sourcing approvals to your suppliers.
  - **Send Notification to Sourcing Supplier** — This action notifies the sourcing facility when a sourcing approval is published to the Supplier Portal.
  - **Supplier Approved**—This tag is used to specify which status represents supplier approval. All statuses tagged with this will appear in the supplier electronic review transition drop-down. See the *Agile Product Lifecycle Management for Process Supplier Portal User Guide* more information on electronic review of specifications.
  - **Supplier Rejected**—This tag is used to specify which status represents supplier rejection. All statuses tagged with this will appear in the supplier electronic review transition drop-down. See the *Agile Product Lifecycle Management for Process Supplier Portal User Guide* more information on electronic review of specifications.
  - **Supplier Review** — This tag is used to specify when the specification is ready for supplier review. When this tag is included and the specification is published to Supplier Portal, the supplier will be allowed to submit an electronic signature. See the *Agile Product Lifecycle Management for Process Supplier Portal User Guide* more information on electronic review of specifications.
  - **Publish Template** — When a specification or object template reaches a step with this tag, the user will be able to create an instance from this template.
6. If needed, check the **Terminate workflow at this step** box to end the workflow at this step. This setting indicates that no further steps are required.
7. Click **Save**. If needed, add more steps by clicking **Add New Step** and repeating this procedure.

## Owners Table

Use the Owners table to designate the person(s) responsible for managing the sourcing approval, as [Figure 7-5](#) shows. An owner of the workflow:

- Will receive items in their Action Items list
- Can advance the sourcing approval in the workflow process by clicking **Workflow** in the upper right corner of the sourcing approval page.

**Figure 7-5** Owners table

Owners:					
	Functional Area	Members	Roles	Selection Mode	Optional
	Procurement	R&D User Group, jessie, Strategic Sourcing, UserApproval		One Member	<input type="checkbox"/>
	(None)	Edit Users            Edit Groups	(None) Author	One Member	<input type="checkbox"/>

**Note:** You cannot set owners on the first and terminal steps.

To add an owner:

1. Click **Add New** to create a new owner's row.
2. Define the owner by **Functional Area**, **Members**, **Roles**, **Selection Mode**, and **Optional**, as described below and ending on page 7-12.
3. Click the apply changes icon ( ) to apply your changes.
4. Click **Save**.


**Functional Areas** Select the functional area for users or groups who will be assigned ownership. This value will also be used to organize groups of owners available for a user's selection during the workflow transition. Administrators create and manage functional areas using the Manage >WFA >Functional Area (WFA) option. See ["Functional Area - \(WFA\)"](#) on page 4-108 for more information.

**Members** Select the users or groups who will be assigned ownership. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will be used when assigning ownership.

To add users as members:

1. With the row in edit mode, click **Edit Users**. The user search page is displayed with "Last Name" and "Starts With" default search criteria.
2. Enter the user's last name in the third search criteria field.
3. Click **Search**. User names matching the information you provided are listed in the Search Results section.
4. Click the user name. It displays in the Selected Items section.
5. Repeat step 2 through step 4 to select other users.
6. Click **Done**. The users are added to the Members column.

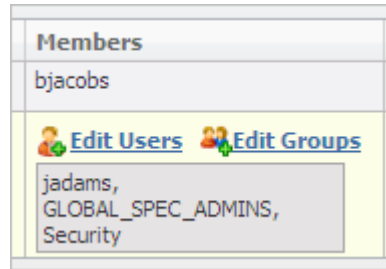



7. Click the apply changes icon (  ) to apply your changes.
8. Click **Save**.

To add user groups as members:

1. With the row in edit mode, click **Edit Groups**. The groups dialog box is displayed.
2. Check the groups to add as members.
3. Click **Done**. The groups are added to the Members column, shown in [Figure 7–6](#).

**Figure 7–6 Selected members**



4. Click the apply changes icon (  ) to apply your changes.
5. Click **Save**.

To delete users:

1. With the row in edit mode, click **Edit Users**. The user search page displays.
2. In the Selected Items section, click the user to delete, then click **Done**. The user that you selected is removed from the Members column.
3. Repeat steps 1 and 2 to delete additional users.
4. Click **Save**.

To delete user groups:

1. With the row in edit mode, click **Edit Groups**. The group dialog box displays.
2. Uncheck the groups to delete.
3. Click **Done**. The dialog box closes. The groups that you selected are removed from the Members column.
4. Click **Save**.

**Roles** You can designate the author of the sourcing approval as the owner by selecting the value of "Author."

**Selection Modes** A user moving a sourcing approval to the next workflow step could have the opportunity to select an owner. Selections will be organized for the user by functional area. Selection Mode allows you to control this process.

Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.
- **One Member** — Choose this mode to allow the workflow to select only one member.

- **Multiple Members** — Choose this mode to allow the workflower to select multiple members.

**Optional** Select this checkbox to make the workflower's selection optional.

### Signature Requests Table

Use the Signature Requests table to assign signature reviewers. Signature requestees represent a functional area, group, or individual who is responsible for reviewing information contained within a sourcing approval. The signature requestee approves or disapproves the sourcing approval through the use of signature documents. This review enables the sourcing approval to move forward in the workflow process.

The owner of a signature request can now workflow the sourcing approval to a prior step regardless of whether all signature request have been approved or disapproved by requestees. You can also set whether authentication is required using the eSignature checkbox. [Figure 7-7](#) shows the Signature Requests table.

**Figure 7-7** Signature Requests table


Signature Requests:								
	Functional Area	Members	Selection Mode	Amber In	Red In	Optional	eSignature	
	Division Product Leads	abarlon, abales, abennett	One Member	5 Days	7 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	(None)	Edit Users            Edit Groups	One Member	5 Days	7 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Add New"/>								

---

**Note:** You cannot assign signature requestees on the first and terminal steps.

---

To add signature requestees:

1. With the page in edit mode, click **Add New** to create a new row.
2. Define the signature requestee using the **Functional Area**, **Conditions**, **Members**, **Selection Mode**, **Amber In**, **Red In**, **Optional**, and **eSignature** fields as described below and ending on page 7-15.
3. Click the apply changes icon (  ) to apply your changes.
4. Click **Save**.

**Functional Areas** Use this field to select the functional area for users or groups who will receive signature requests. This value will be used to organize the SCRM user's workflow selections.

**Members** Use this field to select the users or groups who will be assigned as signature requestees. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will receive signature requests.

To add users as members, refer to the procedure "[To add users as members:](#)" on page 7-10. To add user groups as members, refer to the procedure "[To add user groups as members:](#)" on page 7-11.

**Selection Modes** A user who is moving a sourcing approval to the next workflow step could have the opportunity to select an owner. Selection Mode allows you to control this process. Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.
- **One Member** — Choose this mode to allow the workflow to only select one member.
- **Multiple Members** — Choose this mode to allow the workflow to select multiple members.

#### Amber In and Red In Options

- **Amber In** — Enter the number of days until the signature request displays in amber, indicating that the deadline is approaching.
- **Red In** — Enter the number of days until the signature request displays in red, indicating that the deadline has passed.

**Optional** Select this checkbox to make the workflow's selection optional.

**eSignature** Select this check box to indicate eSignature re-authentication is required. When this is selected users will be required to re-authenticate before being allowed to workflow signature requests to approved. Users also have to have eSignature passphrase enabled. See "[eSignature Passphrase Section](#)" on page 3-6 for more information.

## Notifications Table

Use the Notifications table to designate who should be notified during this step. Users or groups designated will receive an email notification that the sourcing approval has been moved in the workflow process to a particular step. This role is considered informational only, and additional notification recipients are not responsible for providing any formal response or input into the sourcing approval. [Figure 7–8](#) shows the Notifications table.

**Figure 7–8** Notifications table

Notifications:				
	Functional Area	Members	Selection Mode	Optional
	Director	apeterso	One Member	<input checked="" type="checkbox"/>
	(None)	Edit Users            Edit Groups	One Member	<input checked="" type="checkbox"/>

[Add New](#)

---

**Note:** You cannot designate notifications on the first step.

---

To add notifications:

1. With the row in edit mode, click **Add New** to create a new row.
2. Define the signature requestee using the **Functional Area**, **Members**, **Selection Mode**, and **Selection Optional** fields as described below.
3. Click the apply changes icon ( ) to apply your changes.
4. Click **Save**.

**Functional Areas** Select the functional area for users or groups who will receive notifications. This value will be used to organize the SCRM user's workflow selections.

**Members** Select the users or groups who will be sent notifications. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will receive notifications.

To add users as members, refer to the procedure "[To add users as members:](#)" on page 7-10. To add user groups as members, refer to the procedure "[To add user groups as members:](#)" on page 7-11.

**Selection Modes** When a user is workflowing a sourcing approval they could have the opportunity to select who receives notifications. Selection Mode allows you to control this process. Members displayed for selection will be organized by functional area. Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.
- **One Member** — Choose this mode to allow the workflower to only select one member.
- **Multiple Members** — Choose this mode to allow the workflower to select multiple members.

**Optional** Select this checkbox to make the workflow's selection optional.

### Transitions Table

Transitions answer the question, "Where can I go from here?" This section is used to set up which steps may be available for transition from the current step.

Transitions can be configured with a guard condition extensibility point that can programmatically determine if a workflow transition can occur, as described in "[Guard Conditions](#)" on page 7-16. Once the workflow transition does occur, workflow actions can be triggered to execute some process, as described in "[Workflow Actions](#)" on page 7-16.

**Figure 7-9** Transitions section

Transitions:				
	Transition	eSignature	Guard Conditions	Workflow Actions
✓	Approved	<input type="checkbox"/>	+	+
Manage Transitions				

To add transitions:

1. Click **Manage Transitions**. This opens the Transitions dialog box, shown in [Figure 7-10](#). This dialog box lists all steps that exist on the workflow template.

**Figure 7-10** Transitions dialog box

Transitions		Done	Cancel
Return To Step(s)	Submit To Step(s)		
<input checked="" type="checkbox"/> Draft	<input checked="" type="checkbox"/> Approved		
<input type="checkbox"/> Review			

2. Select all the steps that the active step can move back to in the Return To Step(s) column.
3. Select all the steps that this step can move forward to in the Submit To Step(s) column.
4. Click **Done**.
5. Click **Save**.

**eSignatures** eSignatures link transitions to the authentication process. For example, when transitioning a workflow from Review to Approved, you may select this checkbox to indicate authentication is required. Users also have to have eSignature passphrase enabled. See "[eSignature Passphrase Section](#)" on page 3-6 for more information.

**Guard Conditions** Guard Conditions are an extensibility point that launch classes to determine if a workflow transition can occur. The classes can access the item being workflowed to execute specialized validations programmatically, and either allow the transition to occur, or prevent it and return a list of error messages. These classes are made available for selection in WFA as Guard Conditions by including them in the `config\Extensions\WFAExtensionsConfig.xml` file. Please see the *Agile Product Lifecycle Management for Process Configuration Guide* and the Agile Product Lifecycle Management for Process Extensibility Pack documentation for more details on WFA.

To add guard conditions:

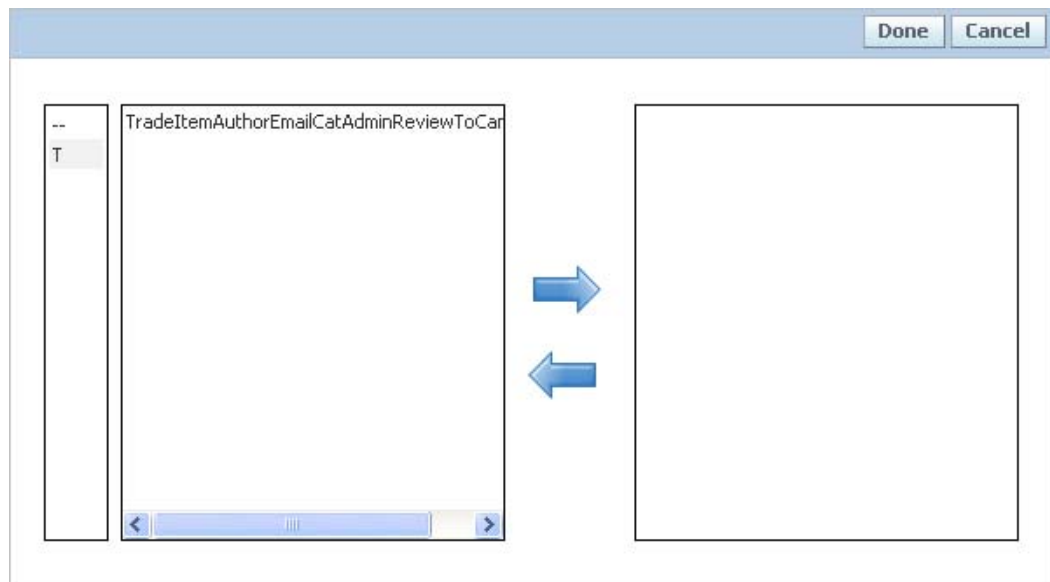
1. Click the edit icon (✎) to place the row in edit mode.
2. To add conditions, click the add data icon (+) in the Guard Conditions column. WFA displays a dialog box listing configured guard conditions.
3. Select guard condition(s), and then click **Done**. The selected attribute is added to the Guard Conditions column in the Transitions row.

**Workflow Actions** Workflow actions are an extensibility point that trigger the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically. These classes are made available for selection as workflow actions by including them in the `config\Extensions\WFAExtensionsConfig.xml` file.

To add workflow actions:

1. With the row in edit mode, click the add data icon (+) to define the Workflow Actions column. The workflow actions dialog box is displayed, as [Figure 7-11](#) shows.

**Figure 7-11 Workflow Actions dialog box**



2. Select workflow action(s), and then click **Done**. The selected attribute is added to the Workflow Actions column in the Transitions row.
3. Click the apply changes icon (✓) to apply your changes.
4. Click **Save**.

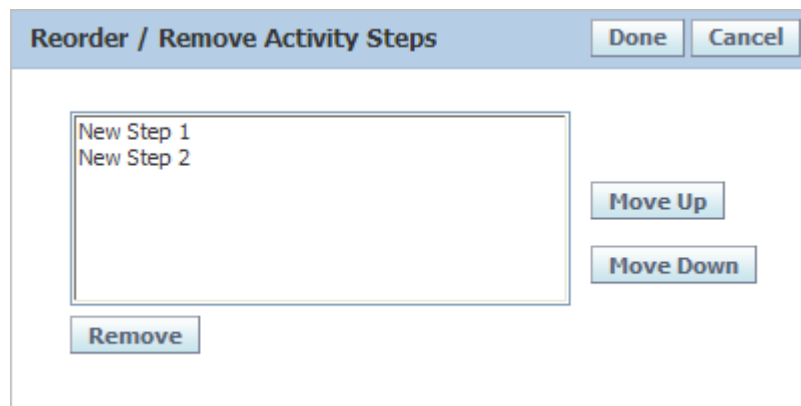
## Adding Steps

Click **Add New Step** to add steps to the workflow process template. You can add as many steps as needed.

## Reordering and Removing Steps

Click **Reorder / Remove Steps** to reorder or remove workflow steps. Agile PLM for Process displays the Reorder / Remove Activity Steps dialog box, as [Figure 7–12](#) shows.

**Figure 7–12** *Reorder / Remove Activity Steps dialog box*



To reorder a step:

1. Click the step to move.
2. Click **Move Up** or **Move Down** to set the desired order.
3. Repeat steps 1 and 2 for other steps.
4. Click **Done**. The dialog box closes. The steps on the Workflow Template page reflect the order that you set.

To remove a step:

1. Click the step to remove.
2. Click **Remove**. The step is removed from the dialog box.
3. Click **Done**. The dialog box closes. The step that you removed no longer is included on the Workflow Template page.

Steps can only be removed if the template has never been saved. If you want to remove a step after a template has been saved, inactivate the step.

---

**Warning:** Reordering and inactivating steps can result in serious consequences and issues for the workflow process template.

---

## Permissions Section

Permissions are used to manage read and write access to the sourcing approval. Permissions, shown in [Figure 7-13](#), govern:

- What actions can be performed (Read/Write)
- When they can be performed (by Status/Step)
- By whom they can be performed (Users or Groups)

**Figure 7-13** *Permissions table*

Action	Principal	Criteria
Read	Global	Status = Approved
Write	Edit Users, Edit Groups	Status = +

Add New Generate

To add a permission:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon ( ).
3. Define the permission using the **Action**, **Principal**, and **Criteria** fields as described below and ending on page 7-19.
4. Click the apply changes icon ( ) to apply your changes.
5. Click **Save**.

**Actions** From the drop-down list, select what permission you are granting. Choices are Read or Write.

**Principals** Select the users or groups who will be assigned permissions. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups.

To add users or user groups as members, follow the procedures on page 7-10 and on page 7-11.

**Tokens** The token of "Author," "Owner," or "Signature Requestee" can also be added as a principal. The following token choices are available:

- **Author** — The originator of the sourcing approval
- **Owner** — A workflow participant assigned as an owner
- **Signature Requestee** — A workflow participant assigned as a signature requestee for the sourcing approval

To add tokens to the Permissions table:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon ( ) to the left of the new role.
3. Click **Edit Users**. The user search page displays.
4. Search for and select users as described on page 7-10.



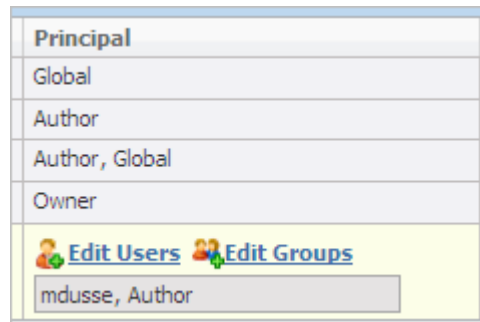
5. Click **Done**. The token dialog box displays, as [Figure 7-14](#) shows:

**Figure 7-14 Tokens dialog box, Permissions**



6. Assign a token by checking the **Author**, **Owner**, or **Signature Requestee** box. You can make multiple selections.
7. Click **Done**. The users and assigned tokens are added to the Principal field, as [Figure 7-15](#) shows.

**Figure 7-15 Added tokens**



8. Click the apply changes icon (✓) to apply your changes.
9. Click **Save**.







**Criteria** Designate which steps are impacted by the selected permission. For example, the owner only has edit rights to the sourcing approval when its in the Review step.

To quickly create permissions click **Generate**. This action will create default permissions. The Generate option overwrites any manual permission entries.

## Workflow Permissions Section



In addition to read and write permissions above, you can also set who has workflow permissions, as [Figure 7–16](#) shows. Workflow permissions are used to manage workflow rights, meaning which users can transition a workflow on an SCRM sourcing approval.

**Figure 7–16** Workflow Permissions table

Principal	Criteria
	
 <a href="#">Edit Users</a>  <a href="#">Edit Groups</a>	Status  =  
Author, aaynes, NPD	

[Add New](#)

To add a workflow permission:

1. With the page in edit mode, click **Add New** in the Workflow Permissions section.
2. Click the edit icon (  ).
3. Define the permission using the **Principal** and **Criteria** fields, as described below and ending on page 7-21.
4. Click the apply changes icon (  ) to apply your changes.
5. Click **Save**.

**Principals** Select the users or groups who will be assigned workflow permissions. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups. The token of "Author" and "Signature Requestee" can also be added as a principal. These tokens represent the sourcing approval's author and signature requestee(s).


To add users or user groups as members, follow the procedures found on page 7-10.

### Tokens


You can add the token of "Author" or "Signature Requestee" as a principal. You can assign users but not user groups. The following token choices are available for workflow permissions:

- **Author** — The originator of the sourcing approval
- **Signature Requestee** — A workflow participant assigned as a signature requestee for the sourcing approval

To add tokens to the Workflow Permissions table:

1. With the page in edit mode, click **Add New** in the Workflow Permissions section.
2. Click the edit icon (  ) to the left of the new role.
3. Click **Edit Users**. The user search page displays.
4. Search for and select users as described on page 7-10.
5. Click **Done**. The token dialog box displays, as [Figure 7–17](#) shows:

**Figure 7-17** Token dialog box, Workflow Permissions

6. Assign a token to the user(s) by selecting **Author**, **Signature Requestee**, or both.
7. Click **Done**. The users and assigned tokens are added to the **Principal** field.
8. Click the apply changes icon (  ) to apply your changes.
9. Click **Save**.

---

**Note:** You can also add tokens to existing users.

---

**Criteria** Designate which step(s) are impacted by the selected permission. For example, the author only has workflow rights to the sourcing approval when its in the "Draft" and "Review" steps.

## Editing SCRM Workflow Process Templates

To edit an SCRM workflow process template:

1. Use the search tool to locate the existing workflow process template to edit. See ["Searching for Workflows"](#) on page 6-3.
2. Click **Edit** in the action menu. The workflow process template displays with editable fields.
3. Make edits to the workflow process template as described earlier in this chapter.
4. Click **Save & Close**.
5. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Using the Make Inactive Option

You can make certain steps of the workflow process template inactive by clicking **Make Inactive**, located to the right of applicable sections.

Further, you can remove inactive sections from your view by clicking **Toggle Inactive** in the action menu. This option removes inactive sections from your view but does not remove them from the workflow process template altogether.

## Copying SCRM Workflow Process Templates

If you need to create an SCRM workflow process template that is very similar to an existing SCRM workflow process template, you can use the copy feature of the WFA application. You can copy the existing workflow, save it as a new template, and edit that template.

To copy an exiting SCRM workflow and use it as a basis for a new, similar workflow:

1. Use the search page to locate the existing workflow process template to copy. See ["Searching for Workflows"](#) on page 7-3.
2. Click **Copy** in the action menu. A copy of the workflow process template with editable fields is presented.
3. The words "Copy of" are added to the original workflow process template name. Change the name of the workflow process template.
4. Make additional edits to the workflow process template as needed using instructions provided in ["Creating SCRM Workflow Templates"](#) on page 7-5.
5. Click **Save & Close**.
6. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Exporting and Importing Workflows

As an administrator, you perform workflow creation and editing tasks in a staging environment. Once you have made final changes to workflows in the staging environment and they are ready to go live in the production environment, you must export them out of the staging environment and import them into the production environment.

### Exporting Workflows from Your Staging Environment

To export workflow data from your staging environment:

1. Before exporting a workflow, make sure you have flushed the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.
2. Start a new Agile PLM for Process session prior to exporting a workflow from staging to production.
3. Click **WFA** on the left navigation panel.
4. Locate the workflow process template to export.
5. Click **Export** in action menu. A File Download dialog box displays.
6. Select the location on your hard drive to temporarily export the data.
7. Click **Save**. Agile PLM for Process encrypts the data and saves the encrypted file to your local drive.

## Importing Workflows into Your Production Environment

To import workflow data into your production environment:

1. Log in to your production environment.
2. Access **WFA** on the left navigation panel.
3. Click **Import** in the action menu.
4. Click **Browse** to locate the encrypted file that you exported from the staging environment and select the file.
5. Click **Import** in the action menu.
6. Flush the workflow cache group, as described in "[Using the Cache Application](#)" on page 10-3.



---

## Using WFA to Manage PQM Workflows

This chapter contains instructions for using the Workflow Administration (WFA) application to manage workflows in Product Quality Management (PQM). Topics in this chapter include:

- [Introducing Workflows](#)
- [Searching for Workflows](#)
- [Creating New PQM Workflow Templates](#)
- [Editing PQM Workflow Process Templates](#)
- [Copying PQM Workflow Process Templates](#)
- [Exporting and Importing Workflows](#)

### Introducing Workflows

A workflow is the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules. In Agile PLM for Process, workflows are managed using the WFA (Workflow Administration) application.

This chapter contains instructions for workflow management in PQM (Product Quality Management) only. For instructions on workflow management in GSM (Global Specification Management), see [Chapter 6, "Using WFA to Manage GSM Workflows"](#). For instructions on workflow management in SCRM (Supply Chain Relationship Management), see [Chapter 7, "Using WFA to Manage SCRM Workflows"](#). For instructions on workflow management in CSS (Content Synchronization and Syndication), see [Chapter 9, "Using WFA to Manage CSS Workflows"](#).

### Associated Roles

The following user roles are associated with workflows:

[WFA\_ADMIN]—Can create, edit, import, and export workflows.

[WFA\_USER]—Can access the WFA (Workflow Administration) application and view all workflows.

[WFA\_GLOBAL\_ADMIN]—Can create and edit workflows.

## Workflow Terms and Definitions

The following are important workflow terms and definitions that you must understand in order to perform workflow administration tasks:

**Owner** — The person(s) responsible for managing the issue, action or audit in a particular status. As owner of the workflow, you:

- Receive items in your Action Items list. You are responsible for assuring that the assigned parties perform all necessary actions or reviews.
- Can advance the issue, action, or audit in the workflow process by clicking **Workflow** in the upper right corner of the object's page.

**Author** — The person who originally created the issue, action or audit.

**Signature Reviewer** — Represents a functional area, group, or individual who is responsible for reviewing information contained within an issue, action, or audit. The signature reviewers approve or disapprove the object through the use of signature documents. This review enables the object to move forward in the workflow process.

**Additional Notification** — Represents a functional area, group, or individual who receives an email notification that an issue, action, or audit has been moved in the workflow process to a particular status. This role is considered informational only, and additional notification recipients are not responsible for providing any formal response or input into the object.

**Reader** — A group or individual who can open an issue, action, or audit and read the contents. You can assign read permissions to groups, individuals, or exclusively the author, owner, and/or signature requestee.

**Editor** — A group or individual who can open and edit an issue, action, or audit. You can assign editor permissions to groups, individuals, or exclusively to the object author, owner, and/or signature requestee.

**Workflower** — A group or individual who can move an issue, action, or audit from one workflow step to another. You can assign workflow permissions to groups, individuals, or exclusively to the object author or signature requestee.

**Service Level Agreement (SLA)** — The number of days that a document will remain in a particular status before a reminder indicator changes. The system issues an amber reminder that a deadline is approaching and a red reminder that the deadline has passed.

**Transitions** — The statuses that a particular step can be transitioned to. Moving a workflow between statuses can mean moving the workflow backward to a previous step or forward to the next step. Transitions can be serial (one back and one forward) or can allow for expedition (from any status to any other status).

**Condition** — A rule that has to be met before a particular action is applied. Conditions can be assigned to transitions, owners, signature requests, notifications, and the workflower permission tables.

**Guard Conditions** — An extensibility point that helps determine if a workflow transition can occur.

**Workflow Action** — An extensibility point that triggers the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically.



## Recommendations for Creating Workflows

The following are recommendations for creating workflows using the WFA (Workflow Administration) application in Agile PLM for Process.

- A workflow should contain a relatively small number of created statuses. These statuses should be common and applicable across all workflows. For example, consider using a workflow that progresses through the following intuitive statuses: Draft > Working > Approved > Inactive > Retired.
- When creating workflows in the WFA application, always check the **Terminate Workflow at This Step** check box to indicate the last step in the workflow.
- Deprecate workflow steps by clicking **Make Inactive**. Changing a step to inactive status assures that existing specifications already in that step can continue in the workflow but that no new specifications can enter that step.
- If a step has owners, signature documents, and/or notifications, be sure to provide functional areas for each.
- Principals are required for each permission rule.
- When setting up conditions containing multiple rows, be aware that conditions inside the same row indicate "Or" values and that conditions in different rows represent "And" values.

## Searching for Workflows

As an administrator, you often search for workflow process templates. When you first access the WFA application, you see the PQM Workflow Template Search page, shown in [Figure 8–1](#).

**Figure 8–1** PQM Workflow Template Search page

The screenshot shows the 'PQM Workflow Template Search' page. At the top, there is a header bar with a purple arrow icon on the left and the title 'PQM Workflow Template Search' in the center. Below the header, there is a search interface. It includes a 'Search Criteria' dropdown menu with a downward arrow, a 'Load' button, a 'Save' button, and a 'Recent Items' link with a document icon. The 'Search Criteria' dropdown is currently set to 'Name'. To the right of the dropdown is a 'Contains' dropdown menu, also with a downward arrow. To the right of the 'Contains' dropdown is a text input field for the search term. Below the input field are two buttons: 'Reset' and 'Search'.

To search for PQM workflows:

1. In the key field drop-down list, select your search criteria as follows:
  - **All (--)** — Searches for all workflows
  - **Description** — Searches for workflows by description
  - **Name** — Searches for workflows by name
  - **Most Recently Used** — Searches for the most recently used workflows

2. In the operator drop-down list, your options will be determined by the choice that you made in the first drop-down list. Selections may include:
  - **Null {empty field}** — Searches for all workflows
  - **Contains** — Used for character searches, alphabetical or numerical (for example, "Name Contains Quality" will result in only workflow templates with names containing the word "Quality")
  - **Equals** — Used to evaluate search criteria entered in the field to the right (for example, "Name Equals Quality" will result in only workflow templates with this exact name)
  - **Starts With** — Used for character searches, alphabetical or numerical (for example, "Description Name Starts With K" will result in only workflow templates with descriptions that start with the letter "K")
  - **Is True** — Searches for workflows matching your selection. Used with Most Recently Used criterion
3. Use the third search criteria field to qualify the selections you made in the first two drop-down lists. You can also enter the percent (%) sign to perform a wildcard search matching any one character.
4. Click **Search** to display PQM workflow templates matching the search criteria.


For guidance on saving and loading searches, see ["Saving and Loading Searches"](#) on page 2-4 and ["More Search Options"](#) on page 2-4.

## Creating New PQM Workflow Templates

To create a new PQM workflow template:

1. Click **WFA** on the left navigation panel.
2. Click **New > PQM Workflow Template** in the action menu. Agile PLM for Process displays a new workflow template page, as shown in [Figure 8-2](#).

Figure 8–2 PQM Workflow Template page

 PQM Workflow Template Inactive

---

**Summary Information**

Name:

Description:

Template Type: PQM

Active: ☐ No ☐

---

**Resolution Criteria**

Workflow Object Type:

Attribute	Value	Match
<a href="#">Add New</a>		

---

**Step 1**

Status:

Instructions:

Amber In:

Red In:

Tags:

Type	Tags
<a href="#">Manage Tags</a>	

Transitions:

Condition	Transition	eSignature	Guard Conditions	Workflow Actions
<a href="#">Manage Transitions</a>				

---

**Step 2**

Status:

Instructions:

Tags:

Type	Tags
<a href="#">Manage Tags</a>	

☒ Terminate workflow at this step

Notifications:

Functional Area	Condition	Members	Selection Mode	Optional
<a href="#">Add New</a>				

☒ Evaluate First ☐ Evaluate All Criteria ☐ Evaluate First (per functional area)

Transitions:

Condition	Transition	eSignature	Guard Conditions	Workflow Actions
<a href="#">Manage Transitions</a>				

---

**Manage Steps**

[Add New Step](#) [Reorder / Remove Steps](#)

---

**Permissions**

Action	Principal	Criteria
<a href="#">Add New</a> <a href="#">Generate</a>		

---

**Workflow Permissions**

Principal	Condition	Criteria
<a href="#">Add New</a>		

3. Enter information described in:
  - ["Summary Information Section"](#) on page 8-6
  - ["Resolution Criteria Section"](#) on page 8-6
  - ["Step Sections"](#) on page 8-8
  - ["Permissions Section"](#) on page 8-24
  - ["Workflow Permissions Section"](#) on page 8-26
4. Click **Save & Close**.
5. Flush the Workflow Cache Group, as described in ["Using the Cache Application"](#) on page 10-3.

## Summary Information Section

Enter the following workflow information in the Summary Information section:

**Name** Enter a unique name for the workflow. This name will appear to the PQM user when resolving an issue, action, or audit to a workflow. It is also shown on a issue, action, or audit as the Current Workflow value on the Approval/Audit Trail tab. This is a required field.

**Description** Enter a description for the workflow. This description will appear to the PQM user when resolving an issue, action, or audit to a workflow. This is a required field.

**Template Type** This field cannot be edited. This field represents the type of workflow template. There are four types of workflows: GSM, SCRM, PQM and CSS.

**Active** Select **Yes** to make the template active when the workflow template is ready to become available for use in Agile PLM for Process. Otherwise, the template will remain inactive and not available for general use.


## Resolution Criteria Section

PQM objects do not auto resolve, the workflow is selected on the PQM template or by the user at the time of creation. Resolution Criteria is only used to filter workflow field selection options. For example, when creating a PQM audit template only WFA templates with the resolution criteria of Audit > Is Template will be shown to the user when selecting a workflow. When creating a PQM action, only WFA templates with the workflow object type of Action will appear for selection.

**Figure 8–3 Resolution Criteria section**

Resolution Criteria		
Workflow Object Type: <input type="text" value="Audit"/>		
Attribute	Value	Match
Is Template	True	Exact Match
<input type="button" value="Add New"/>		

Enter the following workflow information in the Resolution Criteria section:

**Workflow Object Type** To assign a **Workflow Object Type**, click the search icon (  ) to display a dialog box of workflow object types. Select the workflow object type (Issue, Action, and Audit) that will consume this workflow process template. This is a one-to-one relationship between the template and object type; only one selection is allowed. This is a required field.

**Attribute** You can also add resolution criteria attributes, by clicking **Add New** and selecting the attribute from the dialog box. Resolution criteria attributes available will depend on the workflow object selected.

The following attributes are available:

- **Is Template** — Select this attribute to evaluate whether the issue, action, or audit is a template during selection.

**Value** Value will be automatically selected when IsTemplate is selected. No further action is required.

**Match** Match will be automatically selected when IsTemplate is selected. No further action is required.:

## Step Sections

Each workflow template must have a minimum of two steps, as represented in the Step 1 and Step 2 sections. You can add more step sections by clicking **Add New Step**.

**Figure 8–4 Steps sections**

The screenshot displays the configuration interface for a workflow template, showing two step sections: Step 1 and Step 2.

**Step 1 Configuration:**

- Status: Draft
- Instructions: Draft
- Amber In: 0
- Red In: 0
- Tags:
 

Type	Tags
Workflow Action	Is Approved
- Transitions:
 

Condition	Transition	eSignature	Guard Conditions	Workflow Actions

**Step 2 Configuration:**

- Status:
- Instructions:
- Tags:
 

Type	Tags
- Transitions:
 

Condition	Transition	eSignature	Guard Conditions	Workflow Actions
- Notifications:
 

Functional Area	Condition	Members	Selection Mode	Optional
- Termination: ☒ Terminate workflow at this step
- Notifications:
 

Functional Area	Condition	Members	Selection Mode	Optional
- Transitions:
 

Condition	Transition	eSignature	Guard Conditions	Workflow Actions

**Manage Steps Section:**

- Buttons: Add New Step, Reorder / Remove Steps

**Permissions Section:**

- Table:
 

Action	Principal	Criteria
- Buttons: Add New, Generate

**Workflow Permissions Section:**


- Table:
 

Principal	Condition	Criteria
- Buttons: Add New

**Callout Box:**

By default, Step 2 is set as the last step in the workflow. Uncheck the "Terminate workflow at this step" box as needed.

To define steps:

1. Define the **Status** by click the search icon (  ). A Select Status dialog box displays. You can choose from a list of existing statuses or click **Add New** to create a new status and name it. Workflow process templates contain only a small number of statuses, since statuses, once created, are permanent.

---

**Note:** Give each status a unique status name. Status names should also be common and applicable across all workflows. Status names cannot be changed once the template is activated.

---

2. The **Instructions** field is populated with the instructions attached to the chosen status. If you create a new status, enter a new set of instructions for this field.
3. In the **Amber In** field, enter the number of days until this workflow step displays in amber, indicating that the deadline is approaching. This field displays in all steps except the terminal step.
4. In the **Red In** field, enter the number of days until this workflow step displays in red, indicating that the deadline has passed. This field displays in all steps except the terminal step.
5. Click **Manage Tags** to tie tags to this step using the tags dialog box. Tags are a list of specialized functions. Using tags, you can attach predetermined behaviors to workflow steps. Administrators create and manage system actions using the ADMN>WFA>Tags option. See "[Tags](#)" on page 4-109 for more information. Available choices are:
  - **Pending**— The PQM issue, action or audit is pending. For example, the PQM Issue is not a valid problem yet, it was just identified. For example, this could have originated from an automated system.
  - **Submitted** — The issue, action or audit has been acknowledged and deemed valid.
  - **Review**—The issue, action or audit is being reviewed.
  - **Released**—The issue, action or audit has been released and is being acted against. For example, the PQM issue has been associated to a corrective action and is being addressed.
  - **Complete**—The issue, action or audit has been completed/corrected.
  - **Cancelled**—The issue, action or audit has been deemed invalid and is cancelled.
  - **Publish to Supplier Portal**—This action will publish the PQM object tied to this step to Supplier PQM. This is a valuable feature for publishing only PQM objects that are ready for supplier review.
  - **Publish Template**—When a specification or object template reaches a step with this tag, the user will be able to create an instance from this template.
  - **Initial Load**—This tag will be used to interact with future APIs. This tag currently does not define any system behavior.
  - **Is Approved**—When a specification or template reaches a step with this tag, Get Latest Revision capability in GSM will work.

Visibility tags can also be added here. See "[Controlling Visibility](#)" on page 8-29 for more information.

6. If needed, check **Terminate workflow at this step** box to end the workflow at this step. This setting indicates that no further steps are required.
7. Click **Save**. If needed, add more steps by clicking **Add New Step** and repeating this procedure.

### Owners Table

Use the Owners table to designate the person(s) responsible for managing the issue, action, or audit. An owner of the workflow:

- Will receive items in their Action Items list
- Can advance the object in the workflow process by clicking **Workflow** in the upper right corner of the object page

Figure 8–5 shows the Owners table.

**Figure 8–5 Owners table**

Owners:							
	Functional Area	Condition	Members	Roles	Selection Mode	Optional	
	Field QA Managers		PQM - Issue, twannett		One Member	<input type="checkbox"/>	
	(None)		Edit Users  Edit Groups	(None) Author Supplier	One Member	<input type="checkbox"/>	

---

**Note:** You cannot set owners on the first and terminal steps.

---

To add an owner:

1. Click **Add New** to create a new owner's row.
2. Define the owner by Functional Area, Condition, Members, Roles, Selection Mode, Optional, and Evaluation Method as described below and ending on page 8-18.
3. Click the apply changes icon () to apply your changes.
4. Click **Save**.

**Functional Areas** Select the functional area for users or groups who will be assigned ownership. This value could be used for evaluation order, as described in "Evaluation Methods" on page 8-13. This value will also be used to organize groups of owners available for a user's selection during the workflow transition. Administrators create and manage functional areas using the ADMN>WFA>Functional Area (WFA) option.

See "[Functional Area - \(WFA\)](#)" on page 4-108 for more information. There may be times when "who owns what" will differ based on specific specification attributes.

Conditions added to an owner row must be met in order for that group or individual to be the owner or available for user selection. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

- **Action Type** — The type of action.
- **Audit Result** — The result of the audit.
- **Audit Type** — The type of audit.
- **Issue Type** — The type of issue.



- **Product Lines** — The product line affected by the action, audit, or issue.
- **Resolution**— The resolution of the issue.
- **Severity** — The severity of the issue.
- **User Groups** — The user group associated with the action, audit, or issue.
- **User Roles** — The user roles assigned to a user who will be notified of the action, audit, or issue.

Multiple conditions can be used to model more complex owner assignments. For example, if the PQM issue product line is "snacks and crackers" and the issue has a severity of S1, then Quality Manager A is the owner.

To add conditions:

1. With the row in edit mode, click the add data icon (+) in the Condition column. The conditions dialog box is displayed, as [Figure 8-13](#) shows.

**Figure 8-6 Conditions dialog box**

View Workflow Process Template			Close
Attribute	Value	Match	
<div>Add New</div>			

2. Click **Add New**. A dialog box displays available attributes.
3. Select an attribute, then click **Done**. The selected attribute is appended as a new row in the conditions dialog box.
4. Click the edit icon (✎) to place the row in edit mode.
5. Click the add data icon (+) to define the Value column.
6. Select an option from the **Match** drop-down list.
7. Click the apply changes icon (✓) to apply your changes.
8. Click **Save**.

**Members** Select the users or groups who will be assigned ownership. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will be used when assigning ownership.

To add users as members:

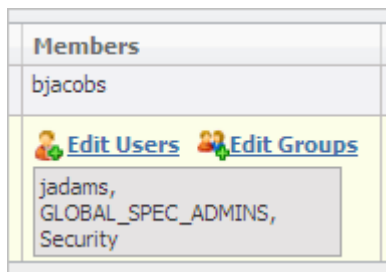
1. With the row in edit mode, click **Edit Users**. The user search page is displayed with "Last Name" and "Starts With" default search criteria.
2. Enter the user's last name in the third search criteria field.
3. Click **Search**. User names matching the information you provided are listed in the Search Results section.
4. Click the user name. It displays in the Selected Items section.
5. Repeat step 2 through step 4 to select other users.
6. Click **Done**. The users are added to the Members column.
7. Click the apply changes icon (✓) to apply your changes.

8. Click **Save**.

To add user groups as members:

1. With the row in edit mode, click **Edit Groups**. The groups dialog box is displayed.
2. Check the groups to add as members.
3. Click **Done**. The groups are added to the Members column, as Figure 8–7 shows.

**Figure 8–7 Selected members**



4. Click the apply changes icon (✓) to apply your changes.
5. Click **Save**.

To delete users:

1. With the row in edit mode, click **Edit Users**. The user search page displays.
2. In the Selected Items section, click the user to delete, then click **Done**. The user that you selected is removed from the Members column.
3. Repeat steps 1 and 2 to delete additional users.
4. Click **Save**.

To delete user groups:

1. With the row in edit mode, click **Edit Groups**. The group dialog box displays.
2. Uncheck the groups to delete.
3. Click **Done**. The dialog box closes. The groups that you selected are removed from the Members column.
4. Click **Save**.

**Roles** Roles represent a specific user that is designated by the instance data on the PQM object. There are two roles available:

- **Author**—The originator of the issue, action or audit will be designated as the owner.
- **Supplier**—The supplier users associated to the companies and/or facilities associated to the issue, action or audit will be designated as the owner.

**Selection Modes** A user moving an issue, action, or audit to the next workflow step could have the opportunity to select an owner. Selections will be organized for the user by functional area. Selection Mode allows you to control this process. Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.

- **One Member** — Choose this mode to allow the workflow to select only one member.
- **Multiple Members** — Choose this mode to allow the workflow to select multiple members.

**Optional** Select this checkbox to make the workflow's selection optional.

### Evaluation Methods

**Figure 8–8 Evaluation method options**

☒ Evaluate First
 ☐ Evaluate All Criteria
 ☐ Evaluate First (per functional area)

Below the table are evaluation method options. These selections will tell WFA how to evaluate the owners table.

- **Evaluate First**—Evaluates each row in order and uses the first row where the conditions are met, ignoring all other rows
- **Evaluate All Criteria**—Evaluates all rows and executes all that apply (provide a union set)
- **Evaluate First (per functional area)**—Groups rows by functional area, evaluates rows in order, executes the first one that applies, then skips to the next functional area (ignoring any remaining rows from the original functional area)

### Signature Requests Table

Use the Signature Requests table to assign signature reviewers. Signature requestees represent a functional area, group, or individual who is responsible for reviewing information contained within an issue, action, or audit. The signature requestee approves or disapproves the issue, action, or audit through the use of signature documents. This review enables the object to move forward in the workflow process. You can also set whether authentication is required using the eSignature checkbox.

The owner of a signature request can workflow the issue, action, or audit to a prior step regardless of whether all signature request have been approved or disapproved by requestees. [Figure 8–9](#) shows the Signature Requests table.

**Figure 8–9 Signature Requests table**

Signature Requests:										
	Functional Area	Condition	Members	Roles	Selection Mode	Amber In	Red In	Optional	eSignature	
	Planning		abales		One Member	5 Days	7 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
✓	(None) ▼	+	<a href="#">Edit Users</a> <a href="#">Edit Groups</a>	(None) Supplier	One Member ▼	5 Days	7 Days	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗ ↑
Add New										

**Note:** You cannot set owners on the first and terminal steps.

To add signature requestees:

1. With the page in edit mode, click **Add New** to create a new row.
2. Define the signature requestee using the Functional Area, Condition, Members, Selection Mode, Amber In, Red In, Optional, and eSignature fields as described below and ending on page 8-13.
3. Click the apply changes icon (✓) to apply your changes.
4. Click **Save**.

**Functional Areas** Use this field to select the functional area for users or groups who will receive signature requests. This value could be used for evaluation order. This value will also be used to organize the PQM user's workflow selections. See "[Evaluation Methods](#)" on page 8-13 for more information.

**Conditions** There may be times when who you require a signature document from will differ based on specific issue, action, or audit attributes.

Conditions added to a row must be met in order for that group or individual to be a signature requestee and/or available for user selection. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

- **Action Type** — The type of action.
- **Audit Result** — The result of the audit.
- **Audit Type** — The type of audit.
- **Issue Type** — The type of issue.
- **Product Lines** — The product line affected by the action, audit, or issue.
- **Resolution** — The resolution of the issue.
- **Severity** — The severity of the issue.
- **User Groups** — The user group associated with the action, audit, or issue.
- **User Roles** — The user roles assigned to a user who will be notified of the action, audit, or issue.

Multiple conditions can be used to model more complex Signature Request assignments. For example, if the PQM Issue Type is of "Customer Injury" and the severity is S1, then the issue must be signed off on by users in the group "Legal".




To add conditions:

1. With the row in edit mode, click the add data icon (+) in the Condition column. The conditions dialog box is displayed, as [Figure 8-10](#) shows.

**Figure 8-10 Conditions dialog box**

View Workflow Process Template			Close
Attribute	Value	Match	
<div>Add New</div>			

2. Click **Add New**. A dialog box displays available attributes.

3. Select an attribute, then click **Done**. The selected attribute is appended as a new row in the Conditions dialog box.
4. Click the edit icon (  ) to place the row in edit mode.
5. Click the add data icon (  ) to define the Value column.
6. Select an option from the Match drop-down list.
7. Click the apply changes icon (  ) to apply your changes.
8. Click **Save**.

**Members** Use this field to select the users or groups who will be assigned as signature requestees. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will receive signature requests.

To add users and user groups as members, refer to the procedures on ["To add users as members:"](#) on page 8-11 and ["To add user groups as members:"](#) on page 8-12.

**Selection Modes** A user who is moving an issue, action, or audit to the next workflow step could have the opportunity to select an owner. The Selection Mode field allows you to control this process. Choose a selection mode as follows:

- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.
- **One Member** — Choose this mode to allow the workflow to only select one member.
- **Multiple Members** — Choose this mode to allow the workflow to select multiple members.

#### Amber In and Red In Options

- **Amber In** — Enter the number of days until the signature request displays in amber, indicating that the deadline is approaching.
- **Red In** — Enter the number of days until the signature request displays in red, indicating that the deadline has passed.

**Optional** Select this check box to make the workflow's selection optional.

**eSignature** Select this check box to indicate eSignature authentication is required. When this is selected, users are required to re-authenticate before being allowed to workflow signature requests to approved. Users also have to have eSignature passphrase enabled. See ["eSignature Passphrase Section"](#) on page 3-6 for more information.

#### Evaluation Methods

**Figure 8-11 Evaluation method options**



Below the table are evaluation method options. These selections will tell WFA how to evaluate the owners table.










- **Evaluate First**—Evaluates each row in order and uses the first row where the conditions are met, ignoring all other rows

- **Evaluate All Criteria**—Evaluates all rows and executes all that apply (provide a union set)
- **Evaluate First** (per functional area)—Groups rows by functional area, evaluates rows in order, executes the first one that applies, then skips to the next functional area (ignoring any remaining rows from the original functional area)

### Notifications Table

Use the Notifications table to designate who should be notified during this step. Users or groups designated will receive an email notification that the issue, action, or audit has been moved in the workflow process to a particular step. This role is considered informational only, and additional notification recipients are not responsible for providing any formal response or input into the specification. [Figure 8-12](#) shows the Notifications table.

**Figure 8-12** Notifications table


Notifications:						
	Functional Area	Condition	Members	Selection Mode	Optional	
	Field QA Managers		wdenente	One Member	<input checked="" type="checkbox"/>	
	(None) 		 Edit Users  Edit Groups	One Member 	<input checked="" type="checkbox"/>	 
Add New						

---

**Note:** You cannot designate notifications on the first step.

---

To add notifications:

1. With the row in edit mode, click **Add New** to create a new row.
2. Define the signature requestee using the **Functional Area**, **Condition**, **Members**, **Selection Mode**, and **Optional** fields as described below and through on page 8-18.
3. Click the apply changes icon (  ) to apply your changes.
4. Click **Save**.

**Functional Areas** Select the functional area for users or groups who will receive notifications. This value could be used for evaluation order, as explained in "[Evaluation Methods](#)" on page 8-18. This value will also be used to organize the PQM user's workflow selections.

**Conditions** There may be times when who you want to notify will differ based on specific specification attributes.

Conditions added to a row must be met in order for that group or individual to be notified and/or available for user selection. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

- **Action Type** — The type of action.
- **Audit Result** — The result of the audit.
- **Audit Type** — The type of audit.

- **Issue Type** — The type of issue.
- **Product Lines** — The product line affected by the action, audit, or issue.
- **Resolution** — The resolution of the issue.
- **Severity** — The severity of the issue.
- **User Groups** — The user group associated with the action, audit, or issue.
- **User Roles** — The user roles assigned to a user who will be notified of the action, audit, or issue.

Multiple conditions can be used to model more complex notification disbursement. For example, if the PQM Issue Resolution was a "Label Change" and the severity is S1, then users in the "Compliance and Regulatory" group should be notified.

To add conditions:

1. With the row in edit mode, click the add data icon (+) in the Condition column. The conditions dialog box is displayed, as [Figure 8-13](#) shows.

**Figure 8-13** Conditions dialog box

Attribute	Value	Match
<div>Add New</div>		

2. Click **Add New**. A dialog box displays available attributes.
3. Select an attribute, then click **Done**. The selected attribute is appended as a new row in the conditions dialog box.
4. Click the edit icon (✎) to place the row in edit mode.
5. Click the add data icon (+) to define the Value column.
6. Select an option from the **Match** drop-down list.
7. Click the apply changes icon (✓) to apply your changes.
8. Click **Save**.

**Members** Select the users or groups who will be sent notifications. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups that will receive notifications.

To add users and user groups as members, refer to the procedures "[To add users as members:](#)" on page 8-11 and "[To add user groups as members:](#)" on page 8-12.

## Selection Modes

When moving an issue, action, or audit to the next workflow step, users could have the opportunity to select who receives notifications. Selection Mode allows you to control this process. Members displayed for selection will be organized by functional area. Choose a selection mode as follows:

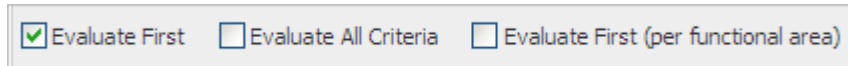
- **All Members** — Choose this mode when you want all members to be automatically selected for the workflow.

- **One Member** — Choose this mode to allow the workflower to only select one member.
- **Multiple Members** — Choose this mode to allow the workflower to select multiple members.

**Optional** Select this checkbox to make the workflower's selection optional.

### Evaluation Methods

**Figure 8–14 Evaluation method options**



☒ Evaluate First    ☐ Evaluate All Criteria    ☐ Evaluate First (per functional area)

Below the table are evaluation method options. These selections tell WFA how to evaluate the owners table.

- **Evaluate First** — Evaluates each row in order and use the first row where the conditions are met, ignoring all other rows.
- **Evaluate All Criteria** — Evaluates all rows and execute all that apply (provide a union set).
- **Evaluate First (per functional area)** — Groups rows by functional area, evaluate rows in order, executes the first one that applies, then skip to the next functional area (ignoring any remaining rows from the original functional area).

### Transitions Table

Transitions answer the question, "Where can I go from here?" This section is used to set up which steps may be available for transition from the current step.

Predefined conditions can be placed on a particular transition to limit its availability based on specific criteria, as described in "[Conditions](#)" on page 8-19. Transitions can also be configured with a guard condition extensibility point that can programmatically determine if a workflow transition can occur, as described in "[Guard Conditions](#)" on page 8-21. Once the workflow transition does occur, workflow actions can be triggered to execute some process, as described in "[Workflow Actions](#)" on page 8-22.

**Figure 8–15 Transitions section**



Transitions:					
	Condition	Transition	eSignature	Guard Conditions	Workflow Actions
✓	+	New Step 1	<input type="checkbox"/>	+	+
✎		New Step 3	<input type="checkbox"/>		

Manage Transitions

To add transitions:

1. Click **Manage Transitions**. This opens the Transitions dialog box, shown in [Figure 8–16](#). This dialog box lists all steps that exist on the workflow template.



**Figure 8–16** *Transitions dialog box*

Transitions		Done	Cancel
Return To Step(s)	Submit To Step(s)		
<input checked="" type="checkbox"/> Draft	<input checked="" type="checkbox"/> Archived		

2. Select all the steps that the active step can move back to in the Return To Step(s) column.
3. Select all the steps that this step can move forward to in the Submit To Step(s) column.
4. Click **Done**.
5. Click **Save**.



**Conditions** There may be times when "Who can do what and go where" conditions should differ, based on either user-specific attributes or issue, action, or audit attributes.

Conditions added to a transition must be met in order for the transition to appear as an option to the user. Depending on the workflow object selected, conditions can be based on the following attributes:

- **Action Type** — The type of action.
- **Audit Result** — The result of the audit.
- **Audit Type** — The type of audit.
- **Issue Type** — The type of issue.
- **Product Lines** — The product line affected by the action, audit, or issue.
- **Resolution** — The resolution of the issue.
- **Severity** — The severity of the issue.
- **User Groups** — The user group associated with the action, audit, or issue.
- **User Roles** — The user roles assigned to a user who will be notified of the action, audit, or issue.

Multiple conditions can be used to model more complex routing requirements. For example, if the user is in the group "Quality Managers" and the severity is S3, then the issue can be moved from Pending directly to Closed.

To add conditions:

1. Click the edit icon (  ) to place the row in edit mode.
2. To add conditions, click the add data icon (  ) in the Condition column. The conditions dialog box is displayed, as [Figure 8–17](#) shows.

**Figure 8–17 Conditions dialog box**

Attribute	Value	Match
<input type="button" value="Add New"/>		

- Click **Add New**. A dialog box displays available attributes, as [Figure 8–18](#) shows.

**Figure 8–18 Attributes for selected condition for an Action**

☐ Action Type  
☐ Product Lines  
☐ User Groups  
☐ User Roles

- Select an attribute, then click **Done**. The selected attribute is appended as a new row in the conditions dialog box.
- Click the edit icon ( ) to place the row in edit mode.
- Click the add data icon ( ) to define the Value column.
- Select an option from the **Match** drop-down list.
- Click the apply changes icon ( ) to apply your changes.
- Click **Save**.

**Transitions** Transitions answer the question, "Where can I go from here?" Transitions designate which steps are available for transition from the current step.

To add transitions:

- Click **Manage Transitions**. This opens the Transitions dialog box, shown in [Figure 8–19](#). This dialog box lists all available active steps that exist on the workflow template for a particular step.

**Figure 8–19 Transitions dialog box**


Transitions		Done	Cancel
Return To Step(s)	Submit To Step(s)		
<input checked="" type="checkbox"/> Draft	<input checked="" type="checkbox"/> Archived		

2. Select all the steps that the active step can move back to in the Return To Step(s) column.
3. Select all the steps that this step can move forward to in the Submit To Step(s) column.
4. Click **Done**.
5. Click **Save**.

**eSignatures** eSignatures link transitions to the authentication process. For example, when transitioning a workflow from Review to Approved, you may select this checkbox to indicate re-authentication is required. Users also have to have eSignature passphrase enabled. See "[eSignature Passphrase Section](#)" on page 3-6 for more information.

**Guard Conditions** Guard Conditions are an extensibility point that launch classes to determine if a workflow transition can occur. The classes can access the item being workflowed to execute specialized validations programmatically, and either allow the transition to occur, or prevent it and return a list of error messages. These classes are made available for selection in WFA as Guard Conditions by including them in the `config\Extensions\WFAExtensionsConfig.xml` file. Please see the *Agile Product Lifecycle Management for Process Configuration Guide* and the *Agile Product Lifecycle Management for Process Extensibility Pack* documentation for more details on WFA.


To add guard conditions:

1. Click the edit icon (  ) to place the row in edit mode, as [Figure 8–20](#) shows.

**Figure 8–20 Transitions row in edit mode**

Transitions:				
Condition	Transition	eSignature	Guard Conditions	Workflow Actions
<input checked="" type="checkbox"/> 	Admin Review	<input type="checkbox"/>		

[Manage Transitions](#)

2. If authentication is required on the transition, check the **eSignature** field.
3. To add guard conditions, click the add data icon () in the Guard Conditions column. WFA displays a dialog box listing configured guard conditions.
4. Select guard condition(s), and then click **Done**. The selected attribute is added to the Condition column in the Transitions row.

**Workflow Actions** Workflow actions are an extensibility point that trigger the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically. These classes are made available for selection as workflow actions by including them in the config\Extensions\WFAExtensionsConfig.xml file.

An out of the box workflow action is available for PQM action workflows; "PQM Action - Complete Related Issues". When this workflow action is applied to a transition, all PQM issues directly related to the PQM action will be automatically workflowed to the status tagged with the "Complete" tag.

**Note:** Issues already in a cancelled state will not be moved to "Complete". If the issue is related to more than one action then all actions must be in a state of "Complete" before the issue will be automatically workflowed.

The example below shows a sample transitions grid for the "Quality Manager Review" status. In this example, when the PQM action moves to the "Complete" status the related PQM issues will also move to the "Complete" status.

Figure 8–21 Workflow Actions

Transitions:					
	Condition	Transition	eSignature	Guard Conditions	Workflow Actions
		Complete	<input type="checkbox"/>		PQM Action - Complete Related Issues
	User Groups=QualityManager	Cancelled	<input type="checkbox"/>		
<div>Manage Transitions</div>					

To add workflow actions:

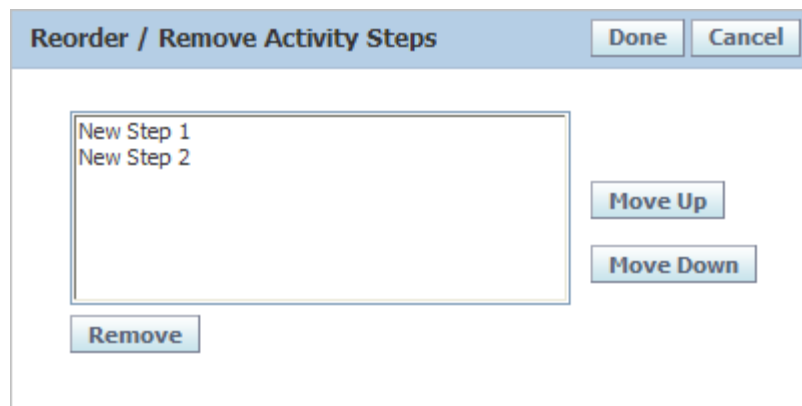
1. With the row in edit mode, click the add data icon (+) to define the **Workflow Actions** column. The workflow actions dialog box is displayed.
2. Select workflow action(s), and then click **Done**. The selected attribute is added to the Workflow Actions column in the Transitions row.
3. Click the apply changes icon (✓) to apply your changes.
4. Click **Save**.

Adding Steps

Click **Add New Step** to add steps to the workflow process template. You can add as many steps as needed.

Reordering and Removing Steps

Click **Reorder / Remove Steps** to reorder or remove workflow steps. Agile PLM for Process displays the Reorder / Remove Activity Steps dialog box, as [Figure 8–22](#) shows.

**Figure 8–22 Reorder / Remove Activity Steps dialog box**

To reorder a step:

1. Click the step to move.
2. Click **Move Up** or **Move Down** to set the desired order.
3. Repeat steps 1 and 2 for other steps.
4. Click **Done**. The dialog box closes. The steps on the Create Process Template page reflect the order that you set.

To remove a step:

1. Click the step to remove.
2. Click **Remove**. The step is removed from the dialog box.
3. Click **Done**. The dialog box closes. The step that you removed no longer is included on the Create Process Template page.

Steps can only be removed if the template has never been saved. If you want to remove a step after a template has been saved, inactivate the step.

---

---

**Warning:** Reordering and inactivating steps can result in serious consequences and issues for the workflow process template.

---

---

## Permissions Section

Permissions are used to manage read and write access to the issue, action, or audit. Permissions reside in the Permissions table, shown in [Figure 8–23](#), and govern:

- What actions can be performed (Read or Write)
- When they can be performed (by Status/Step)
- By whom they can be performed (Users or Groups)

---

**Note:** The section level editing feature once denoted by the Type column is being deprecated in a future release. This feature is now configurable, and by default is configured off.

---

**Figure 8–23** *Permissions table*

Action	Principal	Criteria
Read	Global	Status =
Write	Author	Status = Draft
Write	QA - All Specs	Status = Lab Analysis
Write	Author	Status = Review
Write	QA - All Specs	Status = Lab Analysis

Write (v) | [Edit Users](#) [Edit Groups](#) | Status (v) = +

Owner

To add a permission:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon ( ).
3. Define the permission using the **Action**, **Principal**, and **Criteria** fields as described below and ending on on page 8-26.
4. Click the apply changes icon ( ) to apply your changes.
5. Click **Save**.

**Actions** From the drop-down list, select what permission you are granting. Choices are "Read" or "Write."

**Principals** Select the users or groups who will be assigned permissions. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups.


To add users or user groups as members, follow the procedures "[To add users as members:](#)" on page 8-11 and "[To add user groups as members:](#)" on page 8-12.

## Tokens

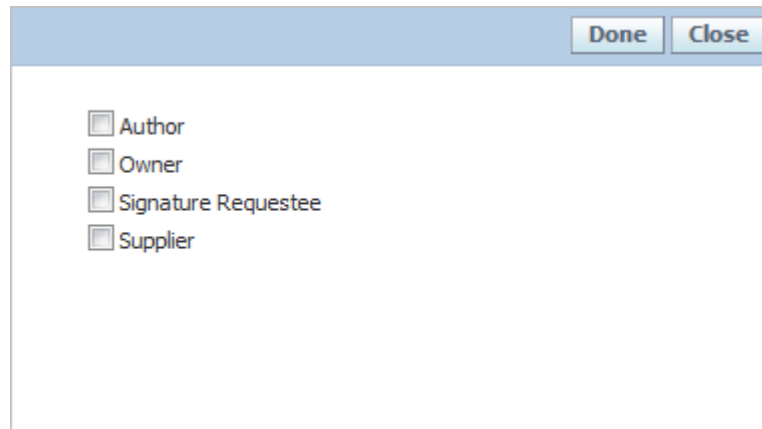
You can add one of several tokens as a principal. The following token choices are available:

- **Author** — The originator of the PQM object
- **Owner** — A workflow participant assigned as an owner
- **Signature Requestee** — A workflow participant assigned as a signature requestee for the PQM object
- **Supplier** — The supplier users associated to the companies and/or facilities associated to the issue, action or audit in the Suppliers section.

To add tokens to the Permissions table:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon (  ) to the left of the new role.
3. Click **Edit Users**. The user search page displays.
4. Search for and select users as described on page 8-11.
5. Click **Done**. The token dialog box displays, as [Figure 8-24](#) shows:

**Figure 8-24** Tokens dialog box, Permissions



6. Assign a token by clicking the **Author**, **Owner**, **Signature Requestee**, or **Supplier** checkbox. You can make multiple selections.
7. Click **Done**. The users and assigned tokens are added to the Principal field, as [Figure 8-25](#) shows.

Figure 8–25 Added tokens

<b>Principal</b>
Global
Author
Author, Global
Owner
<a href="#">Edit Users</a> <a href="#">Edit Groups</a>
<input type="text" value="mdusse, Author"/>

- 8. Click the apply changes icon ( ) to apply your changes.
- 9. Click **Save**.

**Criteria**

Designate which step(s) the principal has the selected permission for. For example, the owner only has edit rights to the issue, action, or audit when its in the Review step.

To quickly create permissions click **Generate**. This action will create default permissions. The Generate option overwrites any manual permission entries.

**Note:** Section level editing can be configured on or off. Refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for more information on this extensibility point.

**Workflow Permissions Section**

In addition to read and write permissions above, you can also set who has workflow permissions. Workflow permissions are used to manage workflow rights, meaning which users can transition a workflow on a PQM issue, action, or audit.


Figure 8–26 Workflow Permissions table

Workflow Permissions			
	Principal	Condition	Criteria
	Author		Status = Draft
	QA - All Specs		Status = Lab Analysis
	Author		Status = Review
	<a href="#">Edit Users</a> <a href="#">Edit Groups</a>		Status  = <input type="text"/>
<input type="text"/>			
<input type="button" value="Add New"/>			

To add a workflow permission:

- 1. With the page in edit mode, click **Add New** in the Workflow Permissions section.
- 2. Click the edit icon ( ).
- 3. Define the permission using the **Principal**, **Condition**, and **Criteria** fields as described below and through page 6-31.



4. Click the apply changes icon (  ) to apply your changes.
5. Click **Save**.

**Principal** Select the users or groups who will be assigned workflow permissions. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups. The token of "Author", "Signature Requestee", and "Supplier" can also be added as a principal. These tokens represent the issue, action, or audit's author, signature requestee(s) and suppliers.


To add users or user groups as members, follow the procedures ["To add users as members:"](#) on page 8-11 and ["To add user groups as members:"](#) on page 8-12.

### Tokens

The token of "Author", "Signature Requestee", and "Supplier" can also be added as a principal. Users but not user groups can be assigned. The following token choices are available for workflow permissions:


- **Author** — The originator of the issue, action, or audit
- **Signature Requestee** — A workflow participant assigned as a signature requestee for the issue, action, or audit
- **Supplier** — The supplier users associated to the companies and/or facilities associated to the issue, action or audit in the Suppliers section

To add tokens to the Workflow Permissions table:

1. With the page in edit mode, click **Add New** in the Workflow Permissions section.
2. Click the edit icon (  ) to the left of the new role.
3. Click **Edit Users**. The user search page displays.
4. Search for and select users as described on page 6-13.
5. Click **Done**. The token dialog box displays, as [Figure 8-27](#) shows:

**Figure 8-27** Token dialog box, Workflow Permissions



6. Assign a token by selecting **Author**, **Signature Requestee**, or **Supplier**. You can make multiple selections.
7. Click **Done**. The users and assigned tokens are added to the **Principal** field.
8. Click the apply changes icon (  ) to apply your changes.
9. Click **Save**.

---

**Note:** You can also add tokens to existing users.

---



**Conditions** There may be times when "Who can workflow and when" conditions should differ, based on either user-specific attributes or issue, action, or audit attributes.

Conditions added to the Workflow Permissions table must be met in order for the Workflow button to appear as an option to the user. Depending on the workflow object selected, conditions can be evaluated based on the following attributes:

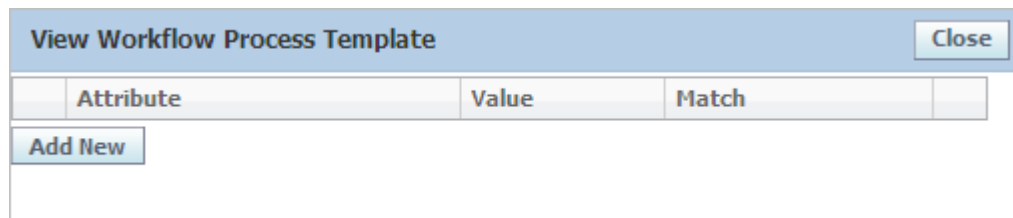
- **Action Type** — The type of action.
- **Audit Result** — The result of the audit.
- **Audit Type** — The type of audit.
- **Issue Type** — The type of issue.
- **Product Lines** — The product line affected by the action, audit, or issue.
- **Resolution** — The resolution of the issue.
- **Severity** — The severity of the issue.

Multiple conditions can be used to model more complex workflow permissions.

To add conditions:

1. Click the edit icon (  ) to place the row in edit mode.
2. To add conditions, click the add data icon (  ) in the Condition column. The conditions dialog box is displayed, as [Figure 8–28](#) shows.

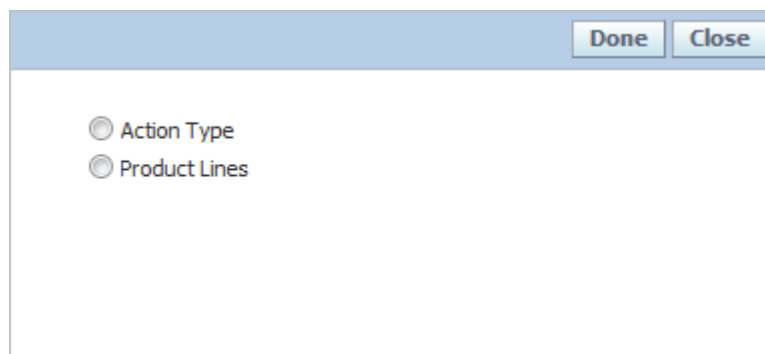
**Figure 8–28** Conditions dialog box



Attribute	Value	Match
<div> Add New </div>		




3. Click **Add New**. A dialog box displays available attributes, shown in [Figure 8–29](#).

**Figure 8–29** Attributes for selected condition, Action



Done
Close

☐ Action Type
☐ Product Lines

4. Select an attribute, and then click **Done**. The selected attribute is appended as a new row in the Conditions dialog box.
5. Click the edit icon (  ) to place the row in edit mode.
6. Click the add data icon (  ) to define the **Value** column.
7. Select an option from the **Match** drop-down list.
8. Click the apply changes icon (  ) to apply your changes.
9. Click **Save**.

**Criteria** Designate which step(s) are impacted by the selected permission. For example, the author only has workflow rights to the issue, action, or audit when it is in the "Draft" and "Review" step.

## Controlling Visibility

PQM issues, actions, or audits can be filtered out of PQM search results by adding visibility tags to workflow steps. This functionality is beneficial when you want to limit search results for certain UGM user groups. For example, users in the "Marketing" group are only interested in issues when they are in an Approved state, while the "R&D" group are interested in issues in all statuses. To accomplish this behavior, two visibility tags need to be created -- R&D and Marketing. These tags would be created in ADMN, as described in ["Tags"](#) on page 4-109. "R&D" would be a tag applied to all steps in the workflow, while the "Marketing" tag would only be applied to the "Approved" step. In UGM, you would associate the "R&D" tag to the R&D user groups and the "Marketing" tag to the Marketing user groups. See ["Workflow Visibility Tags Section"](#) on page 2-9 for more information.

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**Warning:** These tags only control EQT search result filtering. They do not control read or edit permissions to the specification. WFA permissions should be used to control permissions.

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## Editing PQM Workflow Process Templates

To edit a PQM workflow process template:

1. Use the search tool to locate the existing workflow process template to edit. See ["Searching for Workflows"](#) on page 8-3.
2. Click **Edit** in the action menu. The workflow process template displays with editable fields.
3. Make edits to the workflow process template as described earlier in this chapter.
4. Click **Save & Close**.
5. Flush the workflow cache group, as described in [Using the Cache Application](#) on page 9-3.

## Using the Make Inactive Option

You can make certain steps of the workflow process template inactive by clicking **Make Inactive**, located to the right of applicable sections.

Further, you can remove inactive sections from your view by clicking **Toggle Inactive** in the action menu. This option removes inactive sections from your view but does not remove them from the workflow process template altogether.

## Copying PQM Workflow Process Templates

If you need to create a PQM workflow process template that is very similar to an existing PQM workflow process template, you may wish to use the copy feature of the WFA application. You can copy the existing workflow, save it as a new template, and edit that template.

To copy an existing PQM workflow and use it as a basis for a new, similar workflow:

1. Use the search page to locate the existing workflow process template to copy. See ["Searching for Workflows"](#) on page 8-3.
2. Click **Copy** in the action menu. A copy of the workflow process template with editable fields is presented.
3. The words "Copy of" are added to the original workflow process template name. Change the name of the workflow process template.
4. Make additional edits to the workflow process template as needed using instructions provided in ["Creating New PQM Workflow Templates"](#) on page 8-4.
5. Click **Save & Close**.
6. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Exporting and Importing Workflows

As an administrator, you perform workflow creation and editing tasks in a staging environment. Once you have made final changes to workflows in the staging environment and they are ready to go live in the production environment, you must export them out of the staging environment and import them into the production environment.

### Exporting Workflows from Your Staging Environment

To export workflow data from your staging environment:

1. Before exporting a workflow, make sure you have flushed the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.
2. Start a new Agile PLM for Process session prior to exporting a workflow from staging to production.
3. Click **WFA** on the left navigation panel.
4. Locate the workflow process template to export.
5. Click **Export** in the action menu. A File Download dialog box displays.
6. Select the location on your hard drive to temporarily export the data.
7. Click **Save**. Agile PLM for Process encrypts the data and saves the encrypted file to your local drive.

## Importing Workflows into Your Production Environment

To import workflow data into your production environment:

1. Log in to your production environment.
2. Access **WFA**.
3. Click the **Import** in the action menu.
4. Click **Browse** to locate the encrypted file that you exported from the staging environment and select the file.
5. Click the **Import** in the action menu.
6. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.



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## Using WFA to Manage CSS Workflows

This chapter contains instructions for using the Workflow Administration (WFA) application to manage workflows in Content Synchronization and Syndication (CSS). Topics in this chapter include:

- [Introducing Workflows](#)
- [Searching for Workflows](#)
- [Creating New CSS Workflow Templates](#)
- [Editing CSS Workflow Process Templates](#)
- [Copying CSS Workflow Process Templates](#)
- [Exporting and Importing Workflows](#)

### Introducing Workflows

A workflow is the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules. In Agile Product Lifecycle Management for Process, workflows are managed using the WFA (Workflow Administration) application.

This chapter contains instructions for workflow management in CSS (Content Synchronization and Syndication) only. For instructions on workflow management in GSM (Global Specification Management) or SCRM (Supply Chain Relationship Management), which are slightly different from the CSS instructions, see [Chapter 6, "Using WFA to Manage GSM Workflows"](#), and [Chapter 7, "Using WFA to Manage SCRM Workflows"](#). For instructions on workflow management in PQM (Product Quality Management), see [Chapter 8, "Using WFA to Manage PQM Workflows"](#).

CSS workflows govern the way specification information is syndicated to other systems. When a Transactive Item Publication (TIP) is added to a specification, that TIP has its own workflow, which is configured here.

CSS workflows are partially system controlled: As a TIP is syndicated by CSS, the CSS system is controlling the workflow status of the TIP, automatically transitioning the TIP's workflow status to indicate if it has been transmitted, received, etc. Since the process of syndicating that TIP is managed by the system, several specific workflow steps are required in the workflow and should not be modified. When a TIP is transitioned into the first of these required steps, the system will manage the rest of the transitions through the required step sequences. It is strongly advised to not modify any of these required steps for a CSS workflow. The steps before or after these required steps can be added and modified as needed.

## Predefined Workflows

Two default CSS workflows are provided for use: Default GDSN CSS Workflow Template and Default Internal Syndication Workflow Template. The system process differs slightly for internal and external syndications, so some of the required steps are different.

- **Default GDSN CSS Workflow Template**—Used for external syndication to 1SYNC. Required steps are: Staged for Syndication, Syndication, Awaiting Response, Active, Active-Accepted, Active-Rejected, Failed. The transitions between these required steps should not be modified. Transitions from and to other (non-required) steps can be modified.
- **Default Internal Syndication Workflow Template**—Used for internal systems syndication. Required steps are: Staged for Syndication, Syndication, Awaiting Response, Active, Failed. The transitions between these required steps should not be modified. Transitions from and to other (non-required) steps can be modified.

When configuring a CSS workflow, it is strongly recommended to create a copy of these default templates and then modify the copy as needed.

CSS workflows are tied to publication paths using a widget included in the Data Administration Toolkit. For instructions, refer to the *Agile Product Lifecycle Management for Process Data Administration Toolkit User Guide*.

## Associated Roles

The following user roles are associated with workflows:

[WFA\_ADMIN]—Can create, edit, import, and export workflows.

[WFA\_USER]—Can access the WFA (Workflow Administration) application and view all workflows.

## Workflow Terms and Definitions

The following are important workflow terms and definitions that you must understand in order to perform workflow administration tasks:

**Owner** — The person(s) responsible for managing the Trans-active Item Publication (TIP) in a particular status. As owner of the workflow, you:

- Receive items in your Action Items list. You are responsible for assuring that the assigned parties perform all necessary actions or reviews.
- Can advance the TIP in the workflow process by clicking **Workflow** in the upper right corner of the Trade Item page.

**Author** — The person who originally created the TIP.

**Reader** — A group or individual who can open a TIP and read the contents. You can assign read permissions to groups, individuals, or exclusively the TIP author or owner.

**Editor** — A group or individual who can open and edit a TIP. You can assign editor permissions to groups, individuals, or exclusively to the TIP author or owner.

**Workflower** — A group or individual who can move a TIP from one workflow step to another. You can assign workflow permissions to groups, individuals, or exclusively to the TIP author.

**Transitions** — The statuses that a particular step can be transitioned to. Moving a workflow between statuses can mean moving the workflow backward to a previous



step or forward to the next step. Transitions can be serial (one back and one forward) or can allow for expedition (from any status to any other status).

**Guard Condition** — An extensibility point that helps determine if a workflow transition can occur.

**Workflow Action** — An extensibility point that triggers the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically.

## Recommendations for Creating Workflows

The following are recommendations for creating CSS workflows using the WFA application.

- A workflow should contain a relatively small number of created statuses. These statuses should be common and applicable across all workflows. For example, consider using a workflow that progresses through the following intuitive statuses: Draft > Working > Approved > Inactive > Retired.
- When creating workflows in the WFA application, always check the Terminate Workflow at This Step check box to indicate the last step in the workflow.
- Deprecate workflow steps by clicking **Make Inactive**. Changing a step to inactive status assures that existing specifications already in that step can continue in the workflow but that no new specifications can enter that step.
- Principals are required for each permission rule.

## Searching for Workflows

As an administrator, you often search for workflow process templates. When you first access the WFA (Workflow Administration) application, you see the GSM Workflow Templates search page. To use the CSS template search page, select **Open > CSS Workflow Template** from the action menu.

**Figure 9–1 CSS Workflow Template Search page**

To search for CSS workflows, use a combination of search criteria:

1. Select CSS from the type of workflow template drop-down list.
2. In the key field drop-down list, select your search criteria as follows:
  - **All (--)** — Searches for all workflows
  - **Description** — Searches for workflows by description

- **Name** — Searches for workflows by name
  - **Most Recently Used** — Searches for the most recently used workflows
3. In the operator drop-down list, your options will be determined by the choice that you made in the first drop-down list. Selections may include:
    - **Null {empty field}** — Searches for all workflows
    - **Contains** — Used for character searches, alphabetical or numerical (for example, "Name Contains Publication" will result in only workflow templates with names containing the word "Publication")
    - **Equals** — Used to evaluate search criteria entered in the field to the right (for example, "Name Equals Trade Item Publication" will result in only workflow templates with this exact name)
    - **Starts With** — Used for character searches, alphabetical or numerical (for example, "Description Name Starts With K" will result in only workflow templates with descriptions that start with the letter "K")
    - **Is True** — Searches for workflows matching your selection. Used with Most Recently Used criterion
  4. Use the third search criteria field to qualify the selections you made in the first two drop-down lists. You can also enter the percent (%) sign to perform a wildcard search matching any one character.
  5. Click **Search** to display CSS workflow templates matching the search criteria.

For guidance on saving and loading searches, see ["Saving and Loading Searches"](#) on page 2-4 and ["More Search Options"](#) on page 2-4.

## Creating New CSS Workflow Templates

To create a new CSS workflow template:

1. Click **WFA** on the left navigation panel.
2. Click **New > CSS Portal Workflow Template** in the action menu. Agile PLM for Process displays a new workflow template page, as shown in [Figure 9–2](#).

**Figure 9–2 CSS Workflow Template page**

The screenshot shows the 'CSS Workflow Template' page. At the top, there is a green arrow icon and the text 'CSS Workflow Template' and 'Inactive'. Below this, there are four main sections:

- Summary Information:** Contains fields for 'Name:', 'Description:', 'Template Type: CSSPORTAL', and 'Active: No' (with a dropdown arrow).
- Step 1:** Contains fields for 'Status:' and 'Instructions:'. Below these is a 'Transitions:' section with a table with columns 'Transition', 'Guard Conditions', and 'Workflow Actions'. A 'Manage Transitions' button is below the table.
- Step 2:** Contains fields for 'Status:' and 'Instructions:'. Below these is a checkbox labeled 'Terminate workflow at this ste' (note the typo in the image). Below this is another 'Transitions:' section with a table with columns 'Transition', 'Guard Conditions', and 'Workflow Actions'. A 'Manage Transitions' button is below the table.
- Manage Steps:** Contains two buttons: 'Add New Step' and 'Reorder / Remove Steps'.

3. Enter information described in:
  - ["Summary Information Section"](#) on page 9-6
  - ["Step Sections"](#) on page 9-7
  - ["Workflow Permissions Section"](#) on page 9-10

- ["Permissions Section"](#) on page 9-11
- 4. Click **Save & Close**.
- 5. Flush the Workflow Cache Group, as described in ["Using the Cache Application"](#) on page 10-3.

## Summary Information Section

Enter the following workflow information in the Summary Information section:

**Name** Enter a unique name for the workflow. This name will appear to the CSS user when resolving a TIP to a workflow. It is also shown on a specification as the Current Workflow value on the Approval/Audit Trail tab. This is a required field.

**Description** Enter a description for the workflow. This description will appear to the CSS user when resolving a TIP to a workflow. This is a required field.

**Template Type** This field represents the type of workflow template. There are four types of workflows: GSM, SCRM, PQM and CSS.

**Active** Select **Yes** to make the template active when the workflow template is ready to become available for use in Agile PLM for Process. Otherwise, the template will remain inactive and not available for general use.

## Step Sections

Each workflow template must have a minimum of two steps, as represented in the Step 1 and Step 2 sections. You can add more step sections by clicking **Add New Step**.

**Figure 9–3 Steps sections**

The screenshot displays the 'Steps sections' of a workflow template. It features two main sections, 'Step 1' and 'Step 2', each with a 'Status' dropdown menu and an 'Instructions' text area. Below these is a 'Transitions' section with columns for 'Transition', 'Guard Conditions', and 'Workflow Actions', and a 'Manage Transitions' button. At the bottom, a 'Manage Steps' section includes an 'Add New Step' button and a 'Reorder / Remove Steps' button. A callout box points to the 'Terminate workflow at this step' checkbox in the Step 2 section, stating: 'By default, Step 2 is set as the last step in the workflow. Uncheck the box as needed.'

To define steps:

1. Define the **Status** by clicking the search icon (🔍). A Select Status dialog box displays. Choose from the list of statuses. Workflow process templates contain only a small number of statuses, since statuses, once created, are permanent.

---

**Note:** Give each status a unique status name. Status names should also be common and applicable across all workflows. Status names cannot be changed once the template is activated.

---

2. The **Instructions** field is populated with the instructions attached to the chosen status. If you create a new status, enter a new set of instructions for this field.
3. If needed, check **Terminate workflow at this step** box to end the workflow at this step. This setting indicates that no further steps are required.
4. Click **Save**. If needed, add more steps by clicking **Add New Step** and repeating this procedure.

## Transitions Table

This section is used to set up which steps may be available for transition from the current step. Transitions can be configured with a guard condition extensibility point that can programmatically determine if a workflow transition can occur, as described in ["Guard Conditions"](#) on page 9-8. Once the workflow transition does occur, workflow actions can be triggered to execute some process, as described in ["Workflow Actions"](#) on page 9-9. [Figure 9-4](#) shows the Transitions table.

**Figure 9-4 Transitions section**

Transitions:		
Transition	Guard Conditions	Workflow Actions
<a href="#">Manage Transitions</a>		

**Transitions** Transitions answer the question, "Where can I go from here?" Transitions designate which steps are available for transition from the current step.

To add transitions:

1. Click **Manage Transitions**. This opens the Transitions dialog box, shown in [Figure 9-5](#). This dialog box lists all available active steps that exist on the workflow template for a particular step.


**Figure 9-5 Transitions dialog box**

Transitions		Done	Cancel
Return To Step(s)	Submit To Step(s)		
	<input checked="" type="checkbox"/> New Step 2		

2. Select all the steps that the active step can move back to in the Return To Step(s) column.
3. Select all the steps that this step can move forward to in the Submit To Step(s) column.
4. Click **Done**.
5. Click **Save**.

**Guard Conditions** Guard Conditions are an extensibility point that launch classes to determine if a workflow transition can occur. The classes can access the item being workflowed to execute specialized validations programmatically, and either allow the transition to occur, or prevent it and return a list of error messages. These classes are made available for selection in WFA as Guard Conditions by including them in the `config\Extensions\WFAExtensionsConfig.xml` file. Please see the *Agile Product Lifecycle Management for Process Configuration Guide* and the *Agile Product Lifecycle Management for Process Extensibility Pack* documentation for more details on WFA.

To add guard conditions:

1. Click the edit icon (  ) to place the row in edit mode.

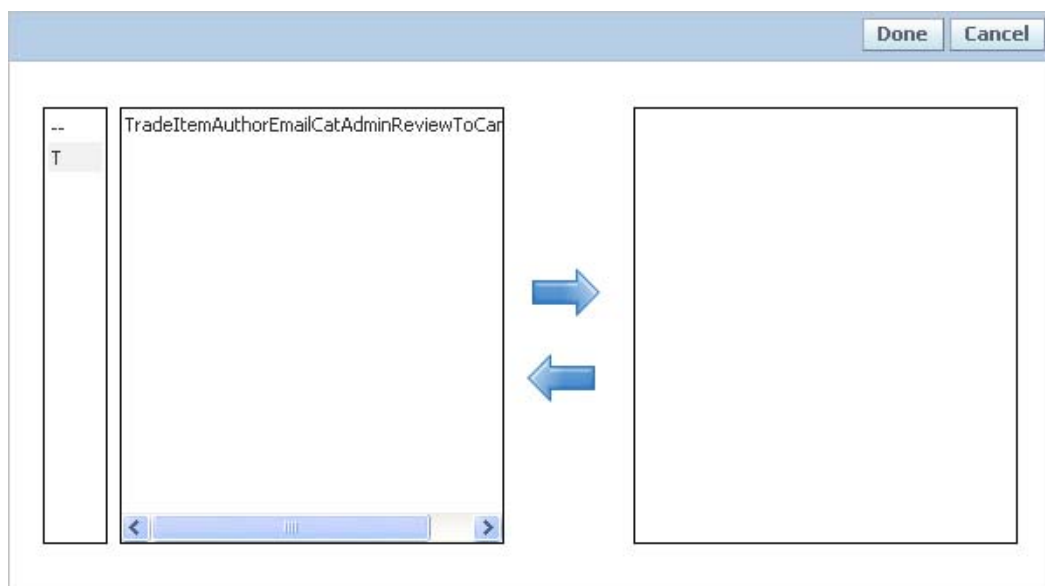
2. To add conditions, click the add data icon (+) in the Guard Conditions column. WFA displays a dialog box listing configured guard conditions.
3. Select guard condition(s), and then click **Done**. The selected attribute is added to the Guard Conditions column in the Transitions row.

**Workflow Actions** Workflow actions are an extensibility point that trigger the execution of classes when a workflow transition occurs. The classes can access the item being workflowed to execute specialized actions programmatically. These classes are made available for selection as workflow actions by including them in the `config\Extensions\WFAExtensionsConfig.xml` file.

To add workflow actions:

1. With the row in edit mode, click the add data icon (+) to define the Workflow Actions column. The workflow actions dialog box is displayed, as [Figure 9–6](#) shows.

**Figure 9–6 Workflow Actions dialog box**



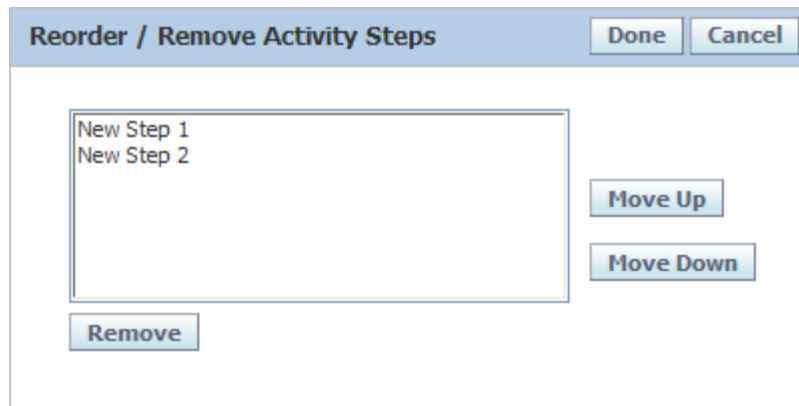
2. Select workflow action(s), and then click **Done**. The selected attribute is added to the Workflow Actions column in the Transitions row.
3. Click the apply changes icon (✓) to apply your changes.
4. Click **Save**.

### Adding Steps

Click **Add New Step** to add steps to the workflow process template. You can add as many steps as needed.

### Reordering and Removing Steps

Click **Reorder / Remove Steps** to reorder or remove workflow steps. Agile PLM for Process displays the Reorder / Remove Activity Steps dialog box, as [Figure 9–7](#) shows.

**Figure 9–7 Reorder / Remove Activity Steps dialog box**

To reorder a step:

1. Click the step to move.
2. Click **Move Up** or **Move Down** to set the desired order.
3. Repeat steps 1 and 2 for other steps.
4. Click **Done**. The dialog box closes. The steps on the Workflow Template page reflect the order that you set.

To remove a step:

1. Click the step to remove.
2. Click **Remove**. The step is removed from the dialog box.
3. Click **Done**. The dialog box closes. The step that you removed no longer is included on the Workflow Template page.

Steps can only be removed if the template has never been saved. If you want to remove a step after a template has been saved, inactivate the step.

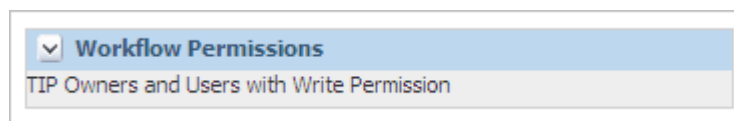
---

**Warning:** Reordering and inactivating steps can result in serious consequences and issues for the workflow process template. Do not remove steps from a CSS workflow that are required for syndication.

---

## Workflow Permissions Section

This read-only section displays CSS workflow permissions, as [Figure 9–8](#) shows.

**Figure 9–8 Workflow Permissions section**



## Permissions Section

Permissions are used to manage read and write access to the publication. Permissions reside in the Permissions table, shown in [Figure 9–9](#), and govern:

- What actions can be performed (Read or Write)
- When they can be performed (by Status/Step)
- By whom they can be performed (Users or Groups)

**Figure 9–9** *Permissions table*

Action	Principal	Criteria
Read	<a href="#">Edit Users</a> <a href="#">Edit Groups</a> aalcanta, Owner	Status = + <input type="text"/>

To add a permission:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon ( ).
3. Define the permission using the **Action**, **Principal**, and **Criteria** fields as described below.
4. Click the apply changes icon ( ) to apply your changes.
5. Click **Save**.

**Actions** From the drop-down list, select what permission you are granting. Choices are "Read" or "Write."

**Principals** Select the users or groups who will be assigned permissions. Click **Edit Users** to locate individual users and click **Edit Groups** to locate groups.

### Tokens

You can add the token of "Author," "Owner," or "Signature Requestee" as a principal. The following token choices are available:

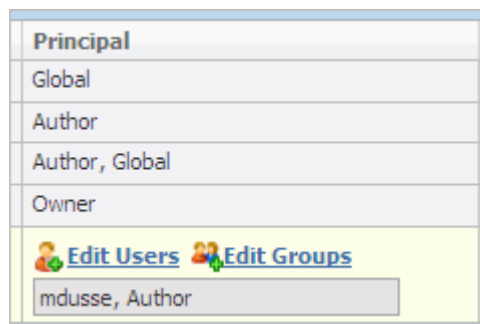
- **Author** — The originator of the TIP
- **Owner** — A workflow participant assigned as an owner
- **Signature Requestee** — A workflow participant assigned as a signature requestee for the specification

To add tokens to the Permissions table:

1. With the page in edit mode, click **Add New** in the Permissions section.
2. Click the edit icon ( ) to the left of the new role.
3. Click **Edit Users**. The user search page displays.
4. Search for and select users as described on page 9-11.
5. Click **Done**. The token dialog box displays, as [Figure 9–10](#) shows:

**Figure 9–10 Tokens dialog box, Permissions**

6. Assign a token by clicking the **Author**, **Owner**, or **Signature Requestee** checkbox. You can make multiple selections.
7. Click **Done**. The users and assigned tokens are added to the Principal field, as [Figure 9–11](#) shows.

**Figure 9–11 Added tokens**

8. Click the apply changes icon (✓) to apply your changes.
9. Click **Save**.

**Criteria** Designate which step(s) the principal has the selected permission for. For example, the owner only has edit rights to the specification when it is in the Review step.

To quickly create permissions, click **Generate**. This action will create default permissions. The Generate option overwrites any manual permission entries.

## Editing CSS Workflow Process Templates

To edit a CSS workflow process template:

1. Use the search tool to locate the existing workflow process template to edit. See ["Searching for Workflows"](#) on page 9-3.
2. Click **Edit**. The workflow process template displays with editable fields.
3. Make edits to the workflow process template as described earlier in this chapter.
4. Click **Save & Close**.
5. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Using the Make Inactive Option

You can make certain steps of the workflow process template inactive by clicking **Make Inactive**, located to the right of applicable sections.

Further, you can remove inactive sections from your view by clicking **Toggle Inactive** in the action menu. This option removes inactive sections from your view but does not remove them from the workflow process template altogether.

## Copying CSS Workflow Process Templates

If you need to create a CSS workflow template that is very similar to an existing CSS workflow template, you may wish to use the copy feature of the WFA application. You can copy the existing workflow, save it as a new template, and edit that template.

To copy an existing CSS workflow and use it as a basis for a new, similar workflow:

1. Use the search page to locate the existing workflow template to copy. See ["Searching for Workflows"](#) on page 9-3.
2. Click **Copy** in the action menu. A copy of the workflow template with editable fields is presented.
3. The words "Copy of" are added to the original workflow process template name. Change the name of the workflow process template.
4. Make additional edits to the workflow template as needed using instructions provided in ["Creating New CSS Workflow Templates"](#) on page 9-5.
5. Click **Save & Close**.
6. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

## Exporting and Importing Workflows

As an administrator, you perform workflow creation and editing tasks in a staging environment. Once you have made final changes to workflows in the staging environment and they are ready to go live in the production environment, you must export them out of the staging environment and import them into the production environment.

### Exporting Workflows from Your Staging Environment

To export workflow data from your staging environment:

1. Before exporting a workflow, make sure you have flushed the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.
2. Start a new Agile PLM for Process session prior to exporting a workflow from staging to production.
3. Click **WFA** on the left navigation panel.
4. Locate the workflow template to export.
5. Click **Export** in the action menu. A File Download dialog box displays.
6. Select the location on your hard drive to temporarily export the data.
7. Click **Save**. Agile PLM for Process encrypts the data and saves the encrypted file to your local drive.

### Importing Workflows into Your Production Environment

To import workflow data into your production environment:

1. Log in to your production environment.
2. Access **WFA** on the left navigation panel.
3. Click **Import** in the action menu.
4. Click **Browse** to locate the encrypted file that you exported from the staging environment and select the file.
5. Click **Import** in the action menu.
6. Flush the workflow cache group, as described in ["Using the Cache Application"](#) on page 10-3.

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## Using CACHE to Manage Caches

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This chapter explains the cache management feature. Topics in this chapter include:

- [Scheduling Data Cache Flushes](#)
- [Using the Cache Application](#)

### Scheduling Data Cache Flushes

Caches are temporary storage areas for frequently or recently accessed data. Caches must be routinely flushed. Modified data that belongs to one process must be written out of the cache to main memory so that the cache can be used by another process.

The CACHE (Manage Data Caches) application provides administrators with an application for managing data caches. You can access the CACHE application on the left navigation panel. For more information see "[Using the Cache Application](#)" on page 10-3.

You should flush caches after the following activities:

- After creating/editing/importing users using the UGM application
- After creating/editing/importing groups using the UGM application
- After creating/editing/importing workflows using the WFA application
- After creating/editing data using the ADMN application
- After creating/editing core data using the ADMN application

### Workflow Groups and Workflows

When creating workflow groups and workflows, flush the cache after you have completed each of the following steps:

- After creating/editing workflow groups in UGM
- When creating workflow groups in UGM, after adding or changing assigned roles to the groups

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**Warning:** When creating new workflow groups in UGM, be sure to flush the cache before adding new users to the group to avoid encountering system issues.

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- After creating workflows in WFA

- Before exporting workflows or workflow groups from the staging environment to the production environment
- After importing workflows or workflow groups into the production environment from the staging environment

### Data Administration

When working in the ADMN (Manage Core Data) application, flush the cache after you have created/edited any data using the ADMN application. You must also flush the cache from the production environment after you have exported completed data changes from a staging environment to a production environment.

For example, flush the cache as follows:

- After creating/editing extended attribute groups
- After creating/editing extended attributes
- After creating/editing sections (customer-specific data)
- After creating/editing taxonomies
- After creating/editing any core data

## Using the Cache Application

Access the CACHE application by selecting **CACHE** from the left navigation panel. By default, CACHE displays the Schedule Cache Flush page, as [Figure 10–1](#) shows.

**Figure 10–1** Schedule Cache Flush page

**Schedule Cache Flush**

Select Cache Group: Taxonomy

Select a Date and Time: August 2011

0 : 56 AM

Schedule Cache Flush

**Scheduled Cache Flush Queue** Refresh

Flush Request	Cache Group	Requested By
<a href="#">8/18/2011 10:08 AM</a>	Workflow Cache Group	Robert L. Smith
<a href="#">8/18/2011 10:05 AM</a>	Workflow Cache Group	Robert L. Smith
<a href="#">8/18/2011 10:01 AM</a>	Workflow Cache Group	Robert L. Smith
<a href="#">7/31/2011 3:28 AM</a>	Workflow Cache Group	Robert L. Smith
<a href="#">7/31/2011 3:35 AM</a>	User Cache Group	Robert L. Smith
<a href="#">7/31/2011 10:45 PM</a>	Taxonomy	Robert L. Smith
<a href="#">7/31/2011 10:45 PM</a>	Taxonomy	Robert L. Smith
<a href="#">8/16/2011 10:30 PM</a>	Admin Data Cache Group	Robert L. Smith
<a href="#">8/16/2011 10:30 PM</a>	Taxonomy	Robert L. Smith

1 2 3 4 5 Refresh

The Select Cache Group drop-down list contains several cache flush selections:

- **Taxonomy**— Select this option to flush the taxonomy cache after you have made changes to any tree lists/taxonomies using the ADMN (Manage Core Data) application.
- **Portal Application Cache Group** — Select this option to flush the data cache after you have made changes to the data within the Data Administration (ADMN) application.
- **Workflow Cache Group** — Select this option to flush the workflow cache after you have made workflow changes using the WFA (Workflow Administration) application.

- **User Cache Group** — Select this option to flush the user/group cache after you have made user/group changes using the UGM (User Group Management) application.
- **Admin Data Cache Group** — Select this option to flush the administrator data cache after you have made core data changes using the ADMN (Manage Core Data) application. This option is used for all ADMN data changes other than taxonomies, extended attributes, and custom sections. These data types have their own cache flush groups.
- **Extended Attributes / Custom Sections** — Select this option to flush the extended attributes/ sections cache after you have made extended attribute/ section changes using the ADMN (Manage Core Data) application.

After you have selected a cache group from the drop-down list, use the **Select a Date and Time** feature to schedule your cache flush.

When you have made your selection, click **Schedule Cache Flush**.

## Scheduled Cache Flush Queue

This section displays a queue showing scheduled cache flushes has been added. The queue shows which applications have been flushed, and indicates whether each execution was successful.



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## Using Performance Logging

This chapter explains the performance logging feature. Topics in this chapter include:

- [Overview](#)
- [Enabling Performance Logging](#)
- [Performance Log File](#)
- [Performance Analysis](#)

### Overview

Performance Logging is a feature that helps troubleshoot performance issues. When enabled, a .csv file will be created on the server with detailed performance information about activities performed on the system. When this feature is enabled, there is little impact to the user's experience, however, we recommend only enabling it while troubleshooting.

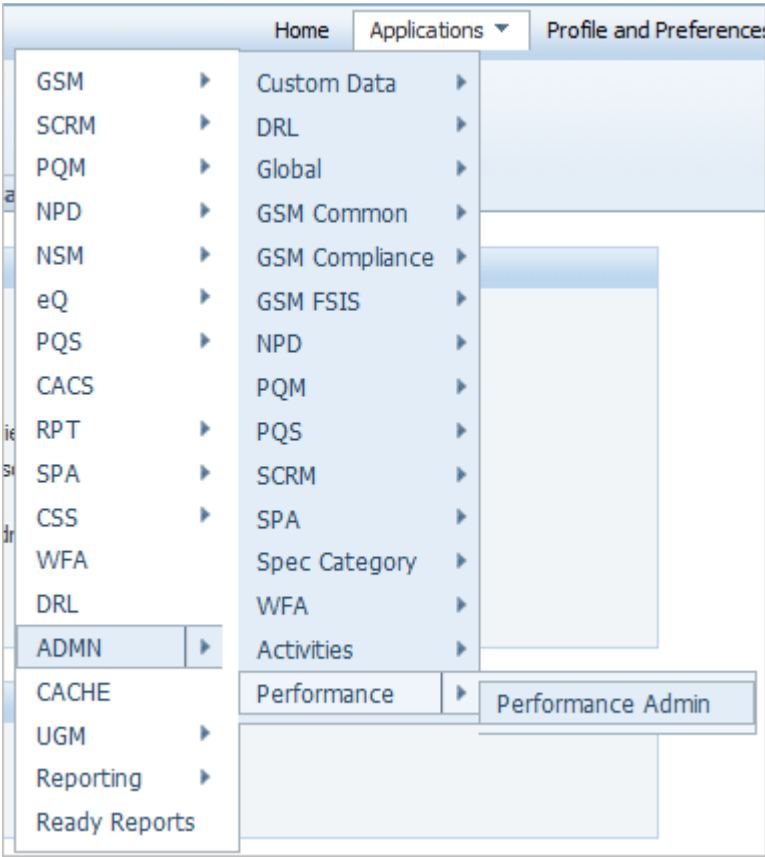
### Enabling Performance Logging

By default Performance Logging is disabled. Follow these steps to enable it.

1. Add the following line to the <FeatureConfig> section of PRODIKA\_HOME\Config\Custom\CustomerSettings.config:  

```
<add key="Portal.DataAdmin.SideNav.Performance.Enabled" value="true"
configDescription="Turn on/off to enable/disable performance instrumentation
timers management"/>
```
2. Assign the [PERFORMANCE\_ADMIN] role to a group of users designated as performance administrators.
3. Follow your normal UGM process for assigning the new role, including export and import, if necessary. Refer to [Chapter 3, "Using UGM to Manage Users"](#) for instructions.
4. With the admin user that has the above role, login to PLM for Process. If already logged in, then logout and re-login to have the new role respected. Open the Performance Admin UI by navigating to the Performance Admin menu item from the portal navigation, as [Figure 11-1](#) shows below.

Figure 11–1 Menu navigation



5. In the Performance Admin UI, set the **Enabled Flag** to "True".

Refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for more details on performance logging configurations.

## Performance Log File

The location of the performance log file can be configured on the Performance Admin UI by setting the Log File Path field. The default is "%PRODIKA\_HOME%\Logs\\".

The name of the performance log file is "PLM4P\_Performance\_Log\_0".csv. When the file reaches a certain size or if the file is locked, preventing it from being written to, another log file will be created with the "0" incremented.

## Performance Analysis

### Logging the Action

If an area of the application has been identified as poor performing, for example, slow response time, then Performance Logging should be used to capture the execution detail. If possible, isolate the use case to a single user performing a single UI action. For example, save a specification.

To log the action detail, follow these steps:

1. Make sure Performance Logging is turned on and test that the log file is being written to.
2. Have a user navigate to the location in the application just prior to the user action that will be analyzed.
3. Wait until the performance log file is updated. The frequency in which this file is updated is configured in the Admin UI with the **Log Frequency (in seconds)**: field. The default is 30 seconds.
4. Delete the performance log file.
5. Have the user perform the action.
6. Wait until the log file is updated.
7. Create a copy of the log file. Do NOT open this file directly as this will lock the file.
8. Open the copied file with an appropriate application such as Microsoft Excel.
9. Check to see if the action the user performed was captured. This can be accomplished by looking at the first column in the file called **Root Event**. If you are uncertain, then wait another 30 seconds and copy the file once again and open it.

## Interpreting the Data

Most of the data in the log file is intended to be analyzed by an Agile PLM for Process developer, though customers can use this data to determine if any SQL is executing slowly. To analyze SQL, see the ["Finding SQL Performance Issues"](#) section below.

The other area that can be used by the customer is for capturing the execution of custom code. Most extensibility points have a line in the log file that represents this custom code. There is a lot of data in the log file and the explanation is beyond the scope of this document, so to keep it simple just look at the columns titled **Event Type** and **DurationInMilliseconds**. This information tells you how long that item took, in milliseconds.

If you want Oracle to investigate the issue in more detail, please go through Oracle Support and upload the spreadsheet to a service request.

## Finding SQL Performance Issues

Poor performance can often be attributed to poor performing SQL. The execution time for SQL depends on many factors such as, network traffic and bandwidth, amount of data retrieved, amount of data in the database tables and hardware specifications. Sometimes execution time of SQL can be improved by the addition of indexes. Because the need for indexes is specific to the customers' implementation, it is their responsibility to ensure the proper indexes are present. Oracle provides some out of the box indexes that will be useful to the majority of customers but additional indexes should be created by the customer. Performance Logging is a tool that can simplify the identification of inefficient SQL.

Much of the SQL executed by the application will be captured in the log file on lines that have "SQL" in the **Event Type** column. The **DurationInMilliseconds** column will show the time in milliseconds, taken to execute the SQL. The **Details** column displays the actual SQL executed. This column should be looked at to find any potential SQL issues. This assumes the network between the PLM for Process web/application server and the database server is not an issue.

First it is easiest to find any single SQL statement that exceeds an acceptable duration threshold. This threshold will vary between implementations. A general rule of thumb would be to investigate anything over 200ms.

Next it would be useful to look at all similar SQL statements where the combined time is large.

Once all the SQL statements are identified as a potential issue, a database administrator should do further analysis to determine if the addition of indexes will help. Note that adding indexes can drastically help performance, but adding too many unnecessary ones could hurt performance. Retesting after the indexes are added should be performed to ensure the addition produces the desired improvements.

## User Interface and Field Definitions

Figure 11–2 below shows the Performance Admin user interface.

**Figure 11–2 Performance Admin page**

The Performance Admin page contains the following fields:

- **Enabled**—Indicates whether or not the performance logger is enabled. It will only log data when set to "True".
- **Log File Path**—The directory path to the location of the log file.
- **Log Frequency (in seconds)**—The frequency in which the logger will write to the log file.
- **Sample Rate**—If it is desired that user activity in general should be logged without targeting an identified area that needs improvements, it is likely that not every user action needs to be logged and instead a sampling can be logged. The Sample Rate determines at what interval to capture the user's actions. For example, when set to 0 or 1 every action will be logged. When set to 2 every 2nd action will be logged and the others will be ignored. When set to 3 every 3rd action will be logged, and so on. This allows for less of a performance impact and less data captured.

- **Default Rollup**—Rollup can be used to combine all events of the same name and parent, onto one line instead of multiple lines in the log file. The **Occurrences** column shows the number of times the event was executed. This will help reduce the size of the log file.

This value is the default value for all event types and can be configured individually for each event in the event grid.

- **Default Duration Filter (in milliseconds)**—Duration Filter can be used to filter out events (lines in the log file, not user actions) that do not take longer than a given duration threshold. For instance if you are not interested in seeing any event that takes under 50ms, then set this field to 50 and only events with a duration of greater than 50 will be shown. This will help cut down the size of the log file.

This value is the default value for all event types and can be configured individually for each event in the event grid. A value of **-1** in the Duration Filter of the individual event indicates that the default should be used.



## System-Based Roles

This appendix contains a list of system-based roles provided with Agile PLM for Process.

### Roles

The following definitions include references to Agile PLM for Process applications, group profiles, and user profiles. For more information on the applications, refer to the applicable user guide. For more information about groups, see [Chapter 2, "Using UGM to Manage Groups"](#). For more information about user profiles and site access, see [Chapter 3, "Using UGM to Manage Users"](#).

**Table A–1 System-based roles**

Role	Definition
[ACCESS_LEVEL_EDITOR]	Can edit access levels in Global Specification Management (GSM).
[ADD_CUSTOM_SECTION]	Can add custom sections.
[ADD_EXT_ATT]	Can add extended attributes.
[ARCHIVED_DWB_SPEC_CREATOR]	Obsolete. Do not use.
[ARCHIVED_DWB_TO_GSM_SPEC_EXPORTER]	Obsolete. Do not use.
[AVAILABLE_UOM_ADMIN]	Can manage units of measure (UOM) conversions in the Available UOM control as long as the specification has not been consumed on another specification.
[CACHE_ADMIN]	Has access to the CACHE application and can schedule flushes related to taxonomy, workflow, user group, administrator data, and extended attributes/ sections.
[CACHE_SERVER_VIEWER]	Can see the Server column in the cache details pop-up window.
[CAN_RERESOLVE_WORKFLOWS]	Can re-resolve workflows.
[CAN_RERESOLVE_WORKFLOWS_SCRM]	Can re-resolve workflows in Supply Chain Relationship Management (SCRM).
[COMPANY_CREATOR]	Can create company records in the SCRM (Supply Chain Relationship Management) application. Always include SCRM_COMPANY_READER in the group with this role.
[COMPLIANCE_REVIEWER]	Can review compliance of an item using existing screens (displays the CACS button on specifications that support this feature).
[COMPONENT_CATALOG_ID_ADMIN]	Allows the user to edit the ID field for a component catalog item.

**Table A–1 System-based roles**

Role	Definition
[CONFIG_ROLLUP_VIEWER]	Allows the user to view key environment information for PLM for Process.
[CP_ACCESS_ADMIN]	Allows users to manage Custom Portal profiles. See the <i>Agile Product Lifecycle Management for Process Custom Portal Implementation Guide</i> in the Extensibility Pack for more information.
[CP_SYSTEM_ADMIN]	Allows users to configure Custom Portals and Views in ADMN. See the <i>Agile Product Lifecycle Management for Process Custom Portal Implementation Guide</i> in the Extensibility Pack for more information.
[CREATE_FROM_TEMPLATE_1004]	Can create material specifications from templates.
[CREATE_FROM_TEMPLATE_1005]	Can create master specifications from templates.
[CREATE_FROM_TEMPLATE_1006]	Can create labeling specifications from templates,
[CREATE_FROM_TEMPLATE_1009]	Can create packaging material specifications from templates.
[CREATE_FROM_TEMPLATE_1010]	Can create delivered material packing specifications from templates.
[CREATE_FROM_TEMPLATE_2076]	Can create packing configuration specifications from templates.
[CREATE_FROM_TEMPLATE_2121]	Can create printed packaging specifications from templates.
[CREATE_FROM_TEMPLATE_2147]	Can create trade specifications from templates.
[CREATE_FROM_TEMPLATE_2280]	Can create equipment specifications from templates.
[CREATE_FROM_TEMPLATE_2283]	Can create activity specifications from templates.
[CREATE_FROM_TEMPLATE_5001]	Can create companies from templates.
[CREATE_FROM_TEMPLATE_5002]	Can create facilities from templates.
[CREATE_FROM_TEMPLATE_5012]	Can create specification related sourcing approvals from templates.
[CREATE_FROM_TEMPLATE_5019]	Can create non-specification related sourcing approvals from templates.
[CREATE_FROM_TEMPLATE_5750]	Can create nutrient profiles from templates.
[CREATE_FROM_TEMPLATE_5816]	Can create formulation specifications from templates.
[CREATE_FROM_TEMPLATE_6500]	Can create menu item specifications from templates.
[CREATE_FROM_TEMPLATE_6501]	Can create product specifications from templates.
[CREATE_FROM_TEMPLATE_7002]	Can create issues from templates.
[CREATE_FROM_TEMPLATE_7003]	Can create actions from templates.
[CREATE_FROM_TEMPLATE_7004]	Can create audits from templates.
[CSS_ADMIN]	Can create, read, edit, and manage Trans-active Item Publications (TIP) / Publication Path documents.
[CUSTOM_REPORTER]	Can view custom reports.
[CUSTOM_SECTION_DENORM_ENABLER]	Can edit the custom section's Include in De-normalization checkbox.
[DATA_ADMIN]	Has access to the ADMN (Manage Core Data) application.
[DENORMALIZED_SECTION_EDITOR]	Once a section has been activated (status of active, inactive, archived) and is flagged as Include in De-normalization, a user needs this role to make any edits to the custom section. Users without this role will not see the Edit action button.
[DRL_CREATOR]	Can see the Create New and Create Copy buttons in Document Reference Library (DRL). Always include DRL_VIEWER in the group with this role.



**Table A–1 System-based roles**

<b>Role</b>	<b>Definition</b>
[DRL_EDITOR]	Can see the Edit button in DRL. Always include DRL_VIEWER in the group with this role.
[DRL_VIEWER]	Can view DRL documents.
[DUTCH_TRANSLATOR]	Obsolete. Do not use.
[EA_SECTION_CREATOR]	Can see the <b>Create New</b> button on custom sections in ADMN (Data Administration) and can see the Edit button.
[ENGLISHUK_TRANSLATOR]	Obsolete. Do not use.
[EQ_ACCESS_LEVEL_EDITOR]	Can edit access levels in eQ.
[EQ_TEMPLATE_CREATOR]	Can create templates in eQ.
[EXTERNALLY_MANAGED_CROSS_REF_ADMIN]	Can edit the GSM Cross Reference data even when the column is locked in ADMN. Can set the Managed Externally flag in ADMN. This role only applies if the system is configured for externally managed cross references.
[FACILITY_CREATOR]	Can create facility records in SCRM. Always include SCRM_FACILITY_READER in the group with this role and SCRM_EDITOR.
[FIC_CREATOR]	Can add and edit Food Item Catalog (FIC) terms, alias names, disclosures, groups, and reconstitution rules. Basically, this role can edit all portions of the FIC term. Always include FIC_READER in the group with this role. You must have site access for REG.
[FIC_READER]	Can view any FIC-related information. You must have site access for REG.
[FRENCH_TRANSLATOR]	Obsolete. Do not use.
[GERMAN_TRANSLATOR]	Obsolete. Do not use.
[GLOBAL_CREATOR]	Obsolete. Do not use.
[GLOBAL_EDITOR]	Obsolete. Do not use.
[GLOBAL_PRINTER]	Obsolete. Do not use.
[GLOBAL_READER]	Obsolete. Do not use.
[GLOBAL_SA]	Obsolete. Do not use.
[GLOBAL_TIP_ADMIN]	Obsolete. Do not use.
[GSM_PRINT_ADMIN]	Can create/edit the print models for process specification worksheets.
[HIDDEN_SPEC_VIEWER]	Can search hidden specifications and can access the Hidden Specifications toggle in GSM/Profile and Preferences.
[HTML_POWERUSER]	Obsolete. Do not use.
[ITALIAN_TRANSLATOR]	Obsolete. Do not use.
[LIO_CREATOR]	Can create LIO profiles.
[LIO_READER]	Can read LIO profiles.
[LOCAL_USER]	eQuestionnaire-reserved entry. Do not use.
[NON_SPEC_SAC_CREATOR]	Can create sourcing approvals (non-specification-related only) in SCRM.

**Table A–1 System-based roles**

Role	Definition
[NPD_ADMIN]	Can access and create NPD (New Product Development) templates, including strategic brief TMFRs (Team Member Formulation Requirements) and project and activity templates. Can delete strategic brief TMFR templates. This role should be assigned to a relatively small and well-trained set of users.
[NPD_FINANCIAL]	Has access to NPD activity metrics that have been marked as containing financial information and for which the user's business unit matches the project's business unit. Access is at the activity, project, and portfolio levels. This role cannot see the financial information of projects from other business units.
[NPD_GLOBAL_DATA_MANAGER]	Can create and manage metrics that can be associated with activities/projects associated with NPD.
[NPD_GLOBAL_FINANCIAL]	Has access to NPD activity metrics that have been marked as containing financial information globally (across all business units, regardless of business unit affiliation). Access is at the activity, project, and portfolio levels. This access should be assigned only to high-level executive managers or those who require a truly global perspective.
[NPD_IDEA_DELETER]	Can see and use the <b>Admin</b> button to delete innovative sales pipelines (ISPs) that are not in an Approved stage.
[NPD_ISP_CREATOR]	Allow the user to : <ul style="list-style-type: none"> <li>■ Create ISPs</li> <li>■ Workflow ISPs where the user is designated as an owner in the workflow</li> <li>■ Edit ISPs created by the user</li> </ul>
[NPD_PACKAGE_COPY_ADMIN]	Controls whether the user has access to the Package Copy Library. Also determines contents of the left navigation panel within NPD and the applications menu from the top menu bar for NPD and the cascading menu from the top menu bar.
[NPD_PARTNER]	Assigned to a member of a partner organization granting members the ability to collaborate via NPD activities. Users associated with this role have limited access within NPD and are able to interact with NPD's action items and activities.
[NPD_PROJECT_DELETER]	Can view and use the <b>Remove Project</b> radio button within the Project Administration section on an NPD project.
[NPD_SA]	Can create, edit, and manage the workflow of projects, strategic briefs, signature documents, activities, and templates across all business units. This role should only be granted to a few users who will be responsible for troubleshooting and implementing NPD worldwide. This role bypasses all document-level and business unit-specific security.
[NPD_SA_READER]	Can view all projects within NPD, regardless of document-level and business unit-specific security.
[NUTRIENT_ANALYSIS_CREATOR]	Can create nutrient analysis documents within the NSM application. You must have site access for REG checked on the user profile in order for this role to work properly. Always include NUTRIENT_ANALYSIS_READER in the group with this role.
[NUTRIENT_ANALYSIS_READER]	Can view nutrient analyses.

Table A-1 System-based roles

Role	Definition
[NUTRIENT_COMPARER]	Can view nutrient analysis and nutrient composite documents for comparison purposes. This role can compare these documents with all available specification type nutrition information in Nutrition Surveillance Management (NSM). You must have site access for REG checked on the user profile in order for this role to work properly.
[NUTRIENT_COMPOSITE_CREATOR]	Can create nutrient composite documents within the Nutrition Surveillance Management (NSM) application. You must have site access for REG checked on the user profile in order for this role to work properly. Always include NUTRIENT_COMPOSITE_READER in the group with this role.
[NUTRIENT_COMPOSITE_READER]	Can view nutrient composites.
[OUTPUT_DELETER]	Can delete External and Referenced outputs from a formulation.
[PERFORMANCE_ADMIN]	Shows "Performance Admin" in the ADMN menu.
[PMA_GLOBAL_ADMIN]	Can see and use the <b>Create User</b> and <b>Create User Group</b> buttons in the UGM (User Group Management) application.
[PMA_GROUP_ADMIN]	Can see and use the <b>Create User Group</b> button in the UGM application.
[PMA_USER_ADMIN]	Can see and use the <b>Create User</b> button in the UGM application.
[POLISH_TRANSLATOR]	Obsolete. Do not use.
[PORTUGUESE_TRANSLATOR]	Obsolete. Do not use.
[PQM_ADMIN]	Can create, create from template, read, write, and workflow PQM objects. <i>This role overrides the WFA write permission. Use this role with caution.</i>
[PQM_COPIER]	Can create copies of the PQM objects that the user has PQM_CREATOR rights for.
[PQM_CREATOR_7002]	Can create issues in PQM.
[PQM_CREATOR_7003]	Can create actions in PQM.
[PQM_CREATOR_7004]	Can create audits in PQM.
[PQS_ADMIN]	Can create sessions, samples, and reporting items.
[PQS_FINAL_SCORER_ROLE]	Can create a final score in Product Quality Scorecard (PQS).
[PQS_GUEST]	Can see PQS sessions and samples to which this user has been assigned (for Product Quality Scorecard users).
[PQS_REPORTER]	Has basic access to action items and reports only. Does not have creation access. You must have site access for Reporting checked on the user profile in order for this role to work.
[PQS_SAMPLE_CREATOR]	Can see the <b>Create New</b> button on the sample search page and the <b>Edit</b> button on samples.
[PQS_SCORECARD_CREATOR]	Can see the <b>Create New</b> button on the scorecard search page and the <b>Edit</b> button on scorecards.
[PQS_SESSION_CREATOR]	Can see the <b>Create New</b> button on the session search page and the <b>Edit</b> button on sessions.
[PRINT_DEBUG]	Within a Print dialog box, has access to the Output Format selection of XSL-FO and XML. (Otherwise, the default is PDF.) This role should only be granted to system administrators.
[REGULATORY_FILING_CREATOR]	Has access to the <b>FSIS/Regulatory Filing</b> button within the GSM > Trade Specification > Supporting Documents tab.

**Table A-1 System-based roles**

Role	Definition
[REMOVE_CUSTOM_SECTION]	Can remove custom sections.
[REMOVE_EXT_ATT]	Can remove extended attributes.
[SAC_CREATOR]	Can create sourcing approvals (specification-related only) in SCRM. [SCRM_COMPANY_READER] and [SCRM_FACILITY_READER] is also required.
[SCREEN_CREATOR]	Has access to the <b>Add New</b> and <b>Copy</b> buttons in the CACS (Computer Aided Compliance Screening) application. This role also determines whether CACS is displayed in the left navigation panel.
[SCRM_COMPANY_EDITOR]	Can edit SCRM company records. Always include SCRM_COMPANY_READER in the group with this role.
[SCRM_COMPANY_READER]	Can read SCRM company records.
[SCRM_FACILITY_EDITOR]	Can edit SCRM facility records. Always include SCRM_FACILITY_READER in the group with this role.
[SCRM_FACILITY_READER]	Can read SCRM facility records.
[SCRM_FACILITY_RELOCATOR]	Can assign a saved facility to a different company.
[SCRM_LOGIN]	Has access to the SCRM application.
[SCRM_PRINCIPAL_EDITOR]	Can view and edit associated users in SCRM.
[SCRM_SEARCH]	Can search for SCRM objects (companies, facilities, sourcing approvals).
[SMART_ISSUE_CREATOR]	Can create smart issue requests. Always include SMART_ISSUE_EDITOR and SMART_ISSUE_READER in the group with this role.
[SMART_ISSUE_EDITOR]	Can edit smart issue requests. Always include SMART_ISSUE_READER in the group with this role.
[SMART_ISSUE_READER]	Can view smart issue requests not marked as 'Private.'
[SPANISH_TRANSLATOR]	Obsolete. Do not use.
[SPEC_ADMIN]	Can see hidden specifications and can create GSM specifications, testing protocols, and sourcing approvals. This role overrides the WFA write permission. <i>Use this role with caution.</i>
[SPEC_COPIER]	Can create copies of specifications that the user has SPEC_CREATOR rights for.
[SPEC_CREATOR]	Can create all available specification types and testing protocols.
[SPEC_CREATOR_1004]	Can create material specifications.
[SPEC_CREATOR_1005]	Can create master specifications.
[SPEC_CREATOR_1006]	Can create labeling specifications.
[SPEC_CREATOR_1009]	Can create packaging material specifications.
[SPEC_CREATOR_1010]	Can create delivered material packing specifications.
[SPEC_CREATOR_2076]	Can create packing configuration specifications.
[SPEC_CREATOR_2121]	Can create printed packaging specifications.
[SPEC_CREATOR_2147]	Can create trade specifications.

**Table A-1 System-based roles**

<b>Role</b>	<b>Definition</b>
[SPEC_CREATOR_2280]	Can create equipment specifications.
[SPEC_CREATOR_2283]	Can create activity specifications.
[SPEC_CREATOR_5750]	Can create nutrient profiles.
[SPEC_CREATOR_5816]	Can create formulation specifications. Since formulation specifications create material specifications, a formulation creator must also have the role of SPEC_CREATOR_1004.
[SPEC_CREATOR_6500]	Can create menu item specifications.
[SPEC_CREATOR_6501]	Can create product specifications.
[SPEC_EDITOR]	Obsolete. Do not use.
[SPEC_GRADUATOR]	Can change output type to Referenced.
[SPEC_ISSUER]	Can create issues of specifications that the user has SPEC_CREATOR rights for.
[SPEC_LOGIN]	Obsolete. Do not use.
[SPEC_PRINTER]	Obsolete. Do not use.
[SPEC_PRINT_CONTROLLER]	Can print controlled or third-party-controlled copies of specifications in GSM printing.
[SPEC_READER]	Obsolete. Do not use.
[SPEC_READER_1004]	Obsolete. Do not use.
[SPEC_READER_2283]	Obsolete. Do not use.
[SPEC_SEARCH]	Obsolete. Do not use.
[SPEC_TARGET_REVISIONER]	For formulation specifications, can target a specific specification/issue combination from the specifications lineage once design has completed.
[SPEC_XML_VIEWER]	Obsolete. Do not use.
[SUBSTITUTE_MATERIAL_DEFINER]	Can add new or modify existing substitute materials on raw material specifications and formulation specifications.
[SUCCESSION_REQUEST_EDITOR]	Can create and edit global succession requests. Always include SUCCESSION_REQUEST_READER in the group with this role.
[SUCCESSION_REQUEST_READER]	Can search for and view global succession requests.
[SUPER_DATA_ADMIN]	Can edit administrative data that has already been set to a status of "Active" and that is being consumed in the system.
[TEMPLATE_CREATOR]	Can create a specification or object template. Used in conjunction with object creator roles, such as SPEC_CREATOR_1004 or COMPANY_CREATOR or PQM_CREATOR_7002.
[TEMPLATE_OVERRIDE]	Can lock or unlock fields on a business object created from a template. Used in conjunction with edit roles and permissions.
[TESTING_PROTOCOL_ADMIN]	Can create a testing protocol in GSM.
[TRANSLATION_APPROVER]	Obsolete. Do not use.
[TSA_ADMIN]	Can create and modify temporary signature authority documents on behalf of others.
[UGM_GROUP_APPROVER]	Can approve UGM group change requests.
[UGM_USER_APPROVER]	Can approve UGM user change requests.

**Table A–1** *System-based roles*

Role	Definition
[UMP_ADMIN]	Obsolete. Do not use.
[WFA_ADMIN]	Can create, edit, import, and export workflows.
[WFA_GLOBAL_ADMIN]	Can create workflows and edit these workflows.
[WFA_USER]	Can access the WFA (Workflow Administration) application and view all workflows.

## InFoods IDs and ISO Codes

Topics in this appendix include:

- [InFoods IDs](#)
- [ISO Codes](#)

### InFoods IDs

The following InFoods IDs are currently available in GSM for use in calculated attributes.

**Table B-1 InFoods IDs**

Name	InFoods ID	UNID	Sequence ID
ALCOHOL	ALC	ALC	520
AOAC Fiber	FIBTG	FIBTG	60
ASH	ASH	ASH	210
CALCIUM	CA	CA	350
CALORIES	ENERC_KCAL	ENERC_KCAL	10
CARBOHYDRATES (TOTAL)	CHOCDF	CHOCDF	40
CARBOHYDRATES (AVAILABLE)	CHOAVL	CHOAVL	45
CAROTENE	CARTB	CARTB	490
CASEIN (Nx6.38)	CASN	CASN	34
CHLORIDE	CLD	CLD	354
CHOLESTEROL	CHOLE	CHOLE	190
CHOLINE	CHOLN	CHOLN	435
CHOLINE CHLORIDE	CHOLNCLD	CHOLNCLD	440
CHROMIUM	CR	CR	357
COBALAMIN-B12	VITB12	VITB12	280
COPPER	CU	CU	450
d-BIOTIN	BIOT	BIOT	430
DIETARY FIBER	FIBTS	FIBTS	50
ENERGY kj	ENERC_KJ	ENERC_KJ	20

**Table B-1 InFoods IDs**

<b>Name</b>	<b>InFoods ID</b>	<b>UNID</b>	<b>Sequence ID</b>
<b>FOLIC ACID</b>	FOL	FOL	320
<b>FRUCTOSE</b>	FRUS	FRUS	530
<b>GLUCOSE</b>	GLUS	GLUS	85
<b>IODIDE</b>	ID	ID	360
<b>IRON</b>	FE	FE	370
<b>LACTOSE</b>	LACS	LACS	97
<b>LYCOPENE</b>	LYCPN	LYCPN	540
<b>MAGNESIUM</b>	MG	MG	380
<b>MALTOSE</b>	MALS	MALS	94
<b>MANGANESE</b>	MN	MN	480
<b>MOISTURE</b>	WATER	WATER	200
<b>MOLYBDENUM</b>	MO	MO	485
<b>MONOUNSATURATED FAT</b>	FAMS	FAMS	140
<b>NIACIN-B3</b>	NIA	NIA	250
<b>NIACIN EQUIVALENTS</b>	NIAEQ	NIAEQ	260
<b>NITROGEN</b>	NAM	NAM	500
<b>OLIGOSACCHARIDES</b>	OLSAC	OLSAC	65
<b>OMEGA-3</b>	F18D3N3	F18D3NS	160
<b>OMEGA-6</b>	F18D3N6	F19D3N6	170
<b>ORGANIC ACIDS</b>	ORGACD	ORGACD	110
<b>PANTOTHENIC</b>	PANTAC	PANTAC	340
<b>PHOSPHORUS</b>	P	P	390
<b>POLYOLS</b>	POLYOLS	POLYOLS	215
<b>POLYUNSATURATED FAT</b>	FAPU	FAPU	150
<b>POTASSIUM</b>	K	K	400
<b>PROTEIN</b>	PROCNT	PROCNT	30
<b>PROTEIN (Nx6.25)</b>	PROCNT_NX625	PROCNT_NX625	32
<b>PYRIDOXINE-B6</b>	VITB6A	VITB6A	270
<b>RIBOFLAVIN-B2</b>	RIBF	RIBF	240
<b>SATURATED FAT</b>	FASAT	FASAT	130
<b>SELENIUM</b>	SE	SE	460
<b>SODIUM</b>	NA	NA	410
<b>STARCH</b>	STARCH	STARCH	510
<b>SUCROSE</b>	SUCS	SUCS	92
<b>SUGARS:DI</b>	SUGARDI	SUGARDI	90
<b>SUGARS:MONO</b>	SUGARM	SUGARM	80



**Table B-1 InFoods IDs**

<b>Name</b>	<b>InFoods ID</b>	<b>UNID</b>	<b>Sequence ID</b>
<b>SUGARS:OTHER</b>	SUGARM	SUGARM	100
<b>TAURINE</b>	TAU	TAU	470
<b>THIAMINE-B1</b>	THIA	THIA	230
<b>TOTAL FAT</b>	FAT	FAT	120
<b>TOTAL SOLIDS</b>	TTLSOLID	TTLSOLID	205
<b>TOTAL SUGAR</b>	SUGAR	SUGAR	70
<b>TRANS FATTY ACID</b>	FATRNM	FATRNM	180
<b>VITAMIN A-IU</b>	VITAA	VITAA	223
<b>VITAMIN A-TOTAL</b>	VITA	VITA	220
<b>VITAMIN C</b>	VITC	VITC	290
<b>VITAMIN D</b>	VITD	VITD	300
<b>VITAMIN E</b>	VITE	VITE	310
<b>VITAMIN K</b>	VITK	VITK	330
<b>WHEY (NX6.38)</b>	WHEY	WHEY	37
<b>ZINC</b>	ZN	ZN	420

## ISO Codes

The following ISO codes are currently available in GSM for use in calculated attributes.

**Table B–2 ISO codes for units of measure**

Name	Abbreviation	Id	ISO Code
#/SQ.FT.	#/SQ.FT	LB-SQ.FT	FP
CELSIUS	C	C	CE
CENTILITER	cL	CENT-L	C3
CENTIMETERS	cm	cm	CM
COUNT	Cnt	COUNT	1N
CUBIC CENTIMETERS	Cu.CM	CU.CM	CC
CUBIC FEET	Cu.Ft	CU.FT	CF
CUBIC INCHES	Cu.iN	CU.IN	CI
CUBIC METER	m3	CU.M	CR
DAYS	days	DAYS	DA
DECILITER	dL	DECI-L	DL
DEGREES	Degrees	DEGREES	DD
FAHRENHEIT	F	F	FA
FEET	ft	ft	FT
FLUID OUNCES (UK)	fl oz (UK)	FL-OZ-UK	FZ
FLUID OUNCES (US)	fl oz (US)	FL-OZ-US	FO
GALLONS (UK)	gal (UK)	GAL-UK	GI
GALLONS (US)	gal (US)	GAL-US	GA
GRAMS	g	G	GR
HOURS	hr	HR	HR
INCHES	in	IN	IN
INTERNATIONAL UNITS	IU	IU	F2
KILOGRAMS	kg	KILO-G	KG
KILOLITERS	kL	KILO-L	K6
KIT LEVEL	Kit Level	KITLEVEL	KT
LITERS	L	LITER	LT
METERS	m	M	MR
MICROGRAMS	ug	MICRO-G	MC
MILIGRAMS	mg	MILI-G	ME
MILLILITERS	mL	MILI-L	ML
MILLIMETERS	mm	MILI-M	MM
MINUTES	min	MIN	MJ
MONTHS	mos	MONTHS	MO

**Table B-2 ISO codes for units of measure**

<b>Name</b>	<b>Abbreviation</b>	<b>Id</b>	<b>ISO Code</b>
<b>OUNCES</b>	oz	OZ	OZ
<b>PARTS PER MILLION</b>	ppm	PPM	59
<b>PARTS PER THOUSAND</b>	per mil	PPTH	NX
<b>PERCENT</b>	%	PERCENT	P1
<b>POUNDS</b>	lb	LB	LB
<b>POUNDS PER SQUARE INCH</b>	PSI	PSI	PS
<b>SECONDS</b>	s	SEC	3
<b>SQUARE INCHES</b>	Sq.In	SQ.IN	SI
<b>UNITS</b>	units	UNITS	UN
<b>WEEKS</b>	wks	WEEKS	WK
<b>YEARS</b>	yrs	YEARS	YR

