Oracle® Agile Product Lifecycle Management for Process

Getting Started Guide

Release 6.2.4.x

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Oracle Agile Product Lifecycle Management for Process Getting Started Guide, Release 6.2.4.x

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Contents

4 Defining Your Profile and Preferences

5 Working with Extended Data

6 Working with Supporting Documents

Preface

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

- Audience
- Variability of Installations
- Documentation Accessibility
- Software Availability
- Related Documents
- Conventions

Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Variability of Installations

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

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

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 that have purchased support 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 Administrator User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process Extensibility Overview Guide*
- *Agile Product Lifecycle Management for Process Quality Notifications 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:

  https://www.oracle.com/technical-resources/documentation/agile.html#plmprocess

Conventions

The following text conventions are used in this document:

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

1

Introducing Agile Product Lifecycle Management for Process

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

- Solution Overview
- Solution Matrix
- Agile Product Lifecycle Management for Process Applications

Solution Overview

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

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

1. Agile Product Data Management for Process
2. Agile Formulation and Compliance for Process
3. Agile Product Supplier Collaboration for Process
4. Agile Product Quality Management for Process
5. Agile New Product Development and Introduction for Process
6. Oracle Product Lifecycle Analytics

Solution Matrix

Table 1–1 below shows contents for each Agile PLM for Process solution area, as well as licensing prerequisites.

Table 1–1 Solution Matrix

Licensed Program	Product/Component Included with License and Shipped with Order	Products to be Licensed Separately (Prerequisites)
Agile Product Data Management for Process	? Global Specification Management (excluding Design Workbench Extensions) ? Supply Chain Relationship Management ? Reporting ? Content Synchronization and Syndication ? Document Reference Library	
Agile Formulation and Compliance for Process	? Design Workbench Extensions: – Label Claims Determination – Regulatory Filings – Listed Ingredient Order (LIO) tool – Formula Optimization tool – Design Snapshots – FlexSync Formulation ? Computer-Aided Compliance Screening ? Nutrition Surveillance Management ? Product Quality Scorecard	? Agile Product Data Management for Process
Agile Product Supplier Collaboration for Process	? Electronic Questionnaire ? Supplier Portal	? Agile Product Data Management for Process
Agile Product Quality Management for Process	? Product Quality Management	? Agile Product Data Management for Process
Agile New Product Development and Introduction for Process	? New Product Development	
Oracle Product Lifecycle Analytics	? Oracle Product Lifecycle Analytics	? Agile Product Data Management for Process ? Agile New Product Development and Introduction for Process

Agile Product Lifecycle Management for Process Applications

The Agile PLM for Process solution offers a number of applications, which each customer can enable or disable. The set of applications licensed and installed in your environment is unique to the needs of your organization and may not utilize all of the applications listed below. As of this release, the Agile PLM for Process solution consists of the following applications, shown in Table 1–2.

Table 1–2 Agile Product Lifecycle Management for Process applications

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

Table 1–2 Agile Product Lifecycle Management for Process applications

Application	Description
FlexSync Formulation	Provides the ability to experiment with formulation Bill of Material (BOM) quantity and percent values to gauge the impact on various key attribute values, such as specific nutrients, extended attributes, moisture, and cost. BOM quantities can then be imported into the formulation specification.
Product Supplier Collaboration Applications	
Electronic Questionnaire (eQ)	Provides users with a tool to obtain specification data from suppliers and manage their disposition in GSM.
Supplier Portal (SP)	Enables suppliers to participate in the process of managing product and vendor data.
Product Quality Management Applications	
Product Quality Management (PQM)	Enables customers to manage customer complaints, corrective actions, and audits.
New Product Introduction and Development Applications	
New Product Development (NPD)	Enables cross-functional, cross-location management of new product and packaging development projects from ideation to post-launch.
Oracle Product Lifecycle Analytics	
Oracle Product Lifecycle Analytics (OPLA)	Provides standard dashboards and analytics allowing customers to monitor and mine information related to New Product Development & Introduction and Product Data Management. In addition customers are able to create their own dashboards and analytics using the provided data model. The data model allows a person to create analytics by simply dragging and dropping data into a given analytic.

A Note about Product Support

Please note that product support for data that has been imported via a custom application or approach only extends to data that can be entered manually via the application user interface.

2

Understanding the User Interface

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

- Resizing the Screen
- Navigating the Page
- Accessing an Application
- Using Action Items and Action Dashboard
- Working with a Page
- Using the Most Recently Used Menu
- Grids
- Fields
- Working with Modal Windows
- Keystroke Shortcuts

The following browser actions are unsupported:

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

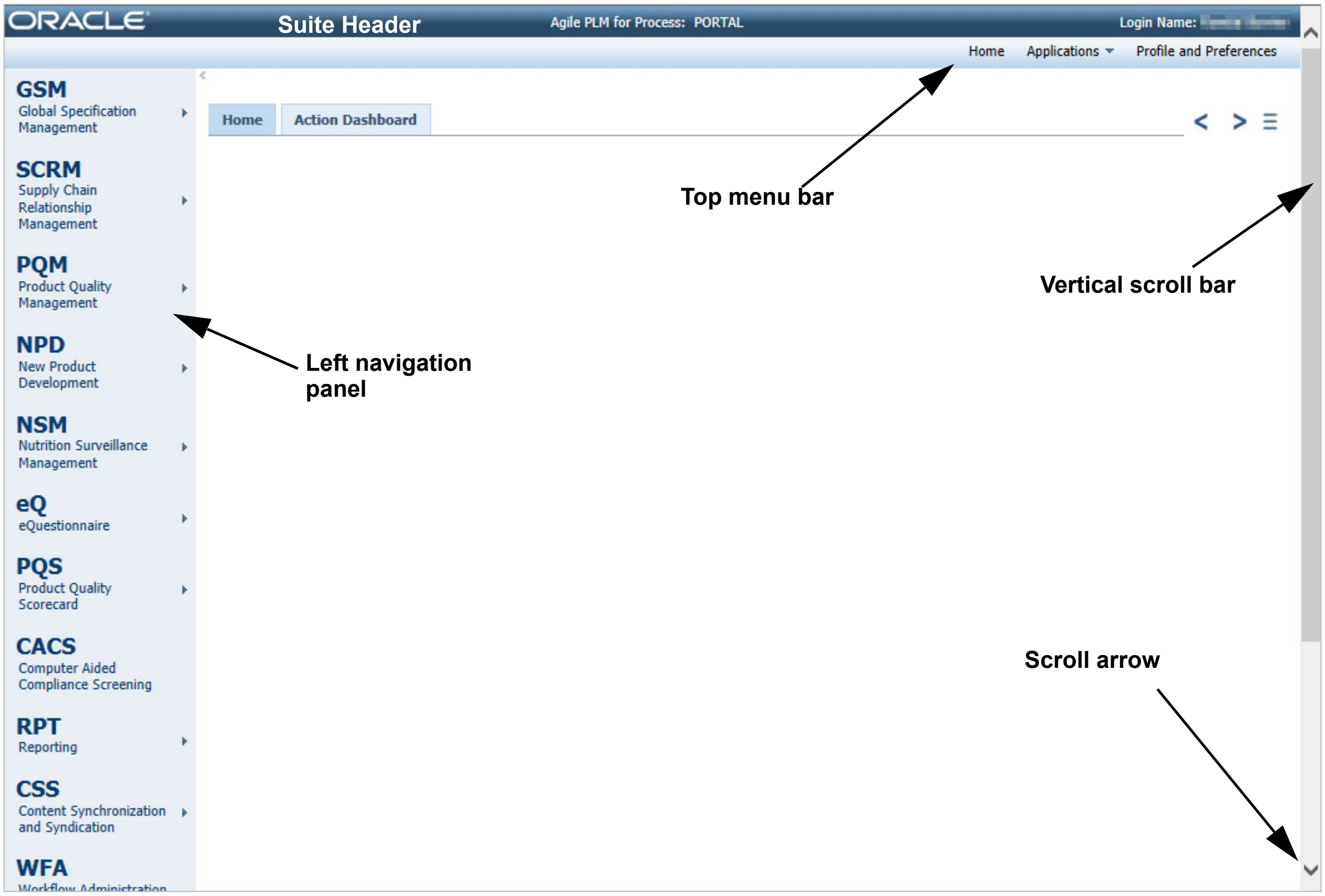
Resizing the Screen

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

Navigating the Page

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

Figure 2–1 Home page



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

Suite Header

Figure 2–2 shows the application suite header. The dark blue title bar contains:

- Brand name
- Active object name (in this example, spice oil specification) preceded by the most recently used menu, which is described in more detail in "Using the Most Recently Used Menu" on page 2-17
- Login name

The action bar (in lighter blue) contains:

- Action menu, described in more detail in "Using the Action Menu" on page 2-5
- Action icons, described in more detail in "Action Icons, Tabs, and Sections" on page 2-14
- Home menu
- Applications menu, as shown in Figure 2–5
- Profile and Preferences menu, described in more detail in Chapter 4, "Defining Your Profile and Preferences"

Figure 2–2 Application suite header

Header within an Object

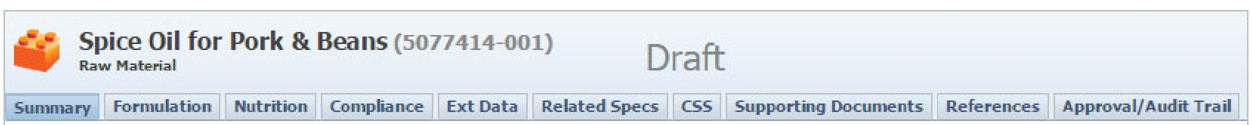
Within an application, when you are working with a business object, such as a specification or company, the object header contains the following, as shown in Figure 2–3:

- Icon representing the object, if applicable
- Object name and number (if applicable). Depending on your configuration, GSM, SCRM, and PQM display the object's cross reference equivalent.

> **Note:** The header displays the cross reference that is found using the user's preferred cross reference system. On a SCRM specification-related sourcing approval, the related specification's cross reference equivalent is displayed.

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

Figure 2–3 Object header



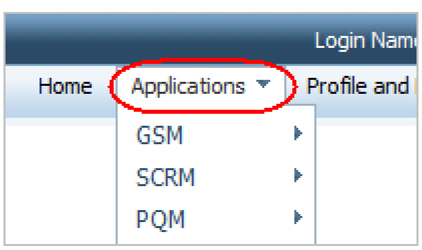
Accessing an Application

From the portal Home page, you can access an application and its features using the left navigation panel or the Applications choice on the top menu bar. The left navigation panel, shown in Figure 2–4, is only available from the main portal page.

Figure 2–4 Main portal page, left navigation panel, GSM application, submenu options

Figure 2–5 shows the Applications menu.

Figure 2–5 Top menu bar, Applications menu



Hiding Portal Navigation

From the portal Home page, you can hide the left navigation panel by clicking the hide navigation panel icon, shown in Figure 2–6. Click it again to show the navigation panel.

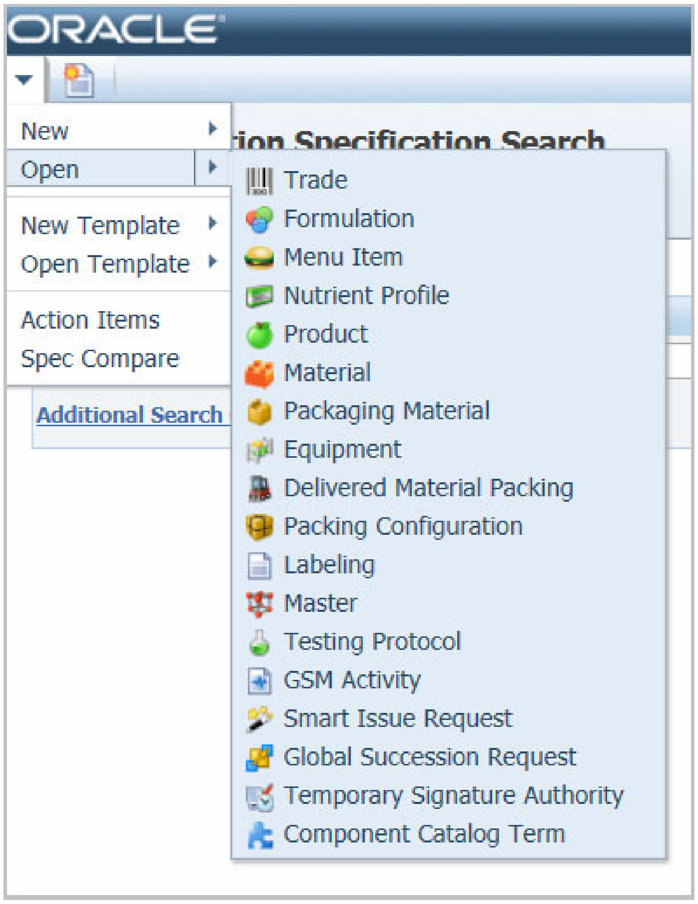
Figure 2–6 Hide navigation panel icon

Using the Action Menu

The action menu is found within each application. To access the menu, click on the action menu arrow shown in Figure 2–7. This icon is located below the suite header. A menu appears with all of the action and navigation options for that application. Some options contain submenus, represented by the expand icon. Figure 2–8 shows an example of a submenu in GSM.

Figure 2–7 Action menu, GSM

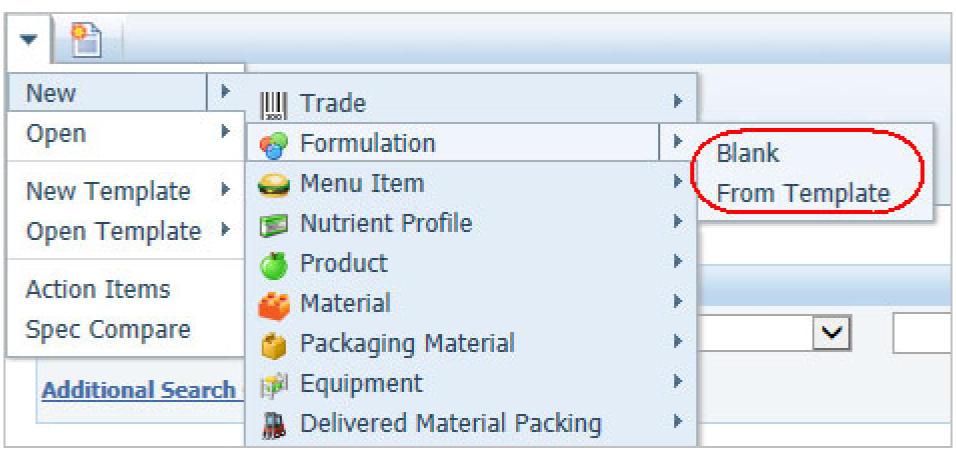
Figure 2–8 GSM submenu



Common Actions

New—Creates a new specification or object. In GSM, SCRM, and PQM, you can create a new object from **blank** or **from template**, as Figure 2–9 shows.

Figure 2–9 GSM New submenu, formulation specification, Blank and From Template options



Open—Opens a specification or object.

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

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

Edit—Opens the specification or object for edit.

Save—Saves a specification or object.

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

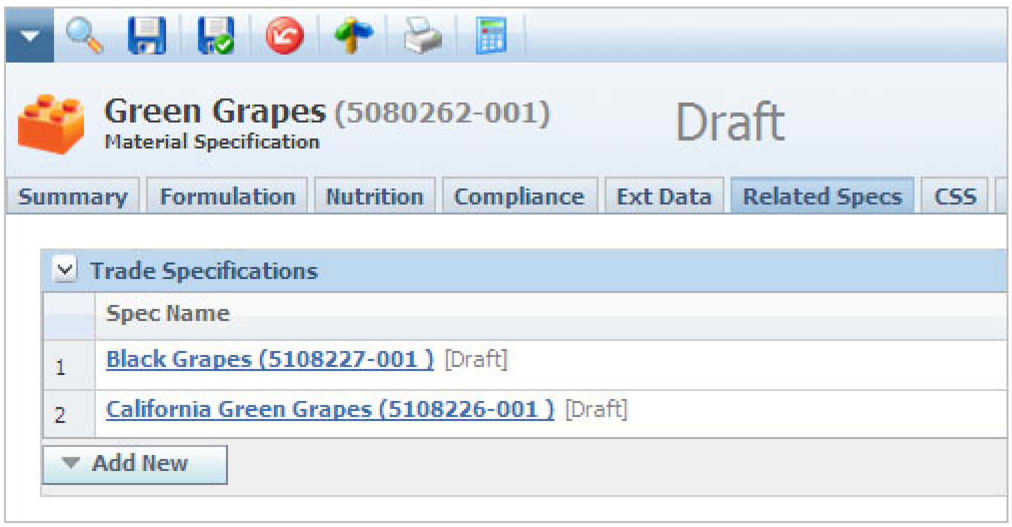
Cancel—Cancels changes to the specification or object made since the last save.

Action Items—Displays action items for the application.

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

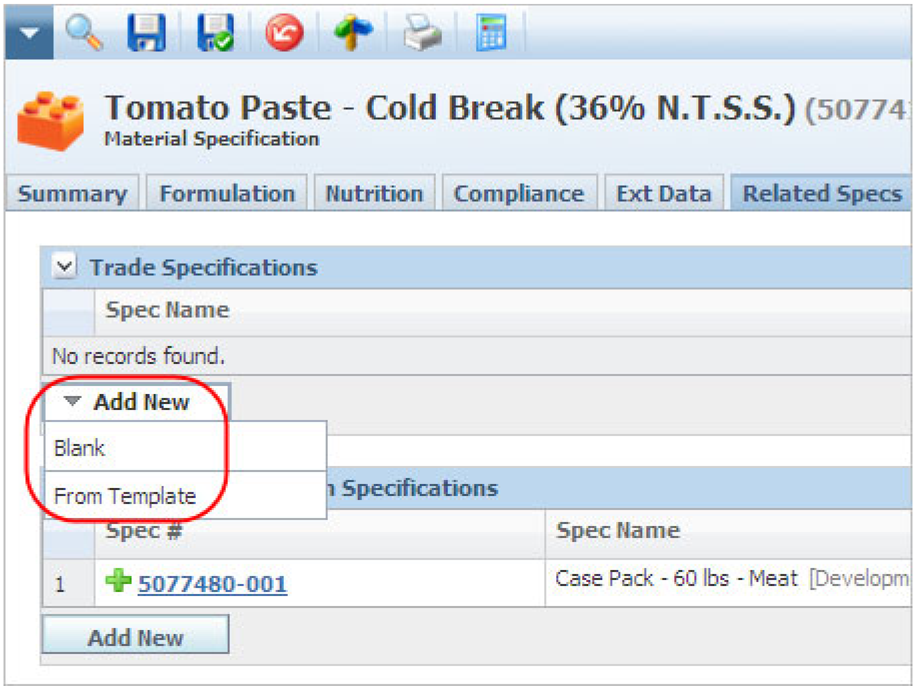
Figure 2–10 shows the Related Specs tab of a material specification in edit mode. Note that the **Edit** action icon has been replaced by the **Save** and **Save & Close** action icons. Within the page, the **Add New** button displays below tables, indicating that you can add information. For more information on modifying data in a table, see "Tables" on page 2-21.

Figure 2–10 Page in edit mode



Some buttons within a page display submenus, as Figure 2–11 shows. Those buttons contain an arrow to the left of the button name. When you click on this button, a panel appears. You can then select an action.

Figure 2–11 Submenu on button



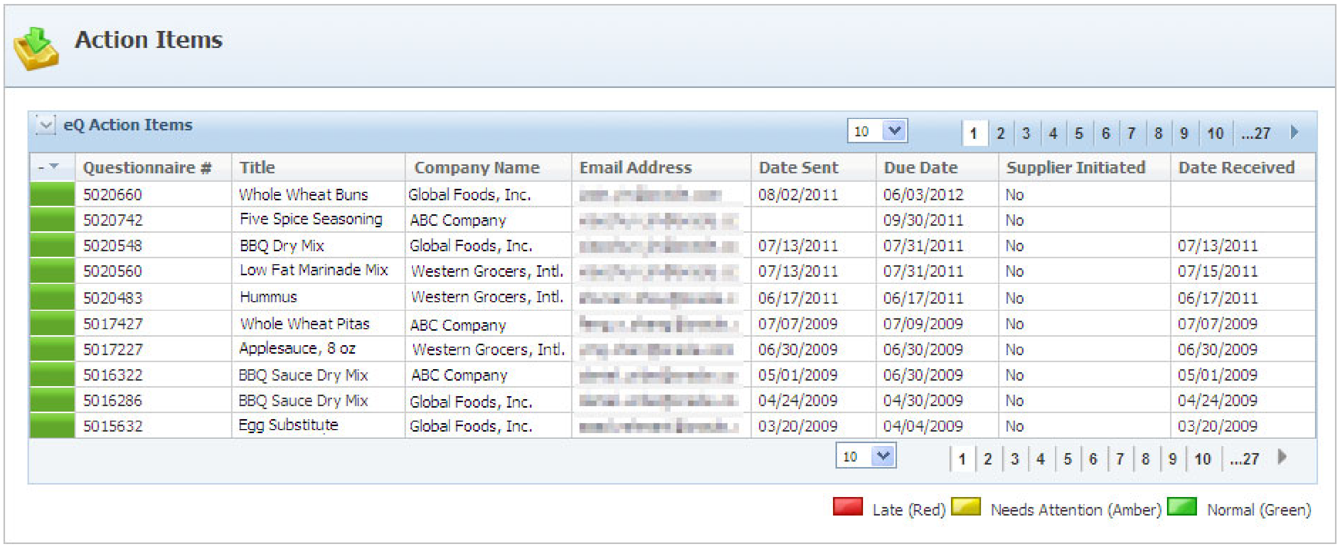
Using Action Items and Action Dashboard

Action items represent actions that you need to take on business objects, such as specifications and projects. Several applications include Action Items: GSM, SCRM, eQ, NPD, and PQM. Action items can be viewed in multiple locations. Each individual application has it's own action items listing. You can also view all of your action items across all applications using the Action Dashboard.

Action Items

To access the action items listings for individual applications, select **Action Items** from the top menu bar or left navigation panel, the application displays the Action Items page. This page contains a list of business objects (such as specifications or questionnaires) that identify you as the primary owner and require your action— think of this page as your "to do" list.

Figure 2–12 eQ Action Items page



-	Questionnaire #	Title	Company Name	Email Address	Date Sent	Due Date	Supplier Initiated	Date Received
	5020660	Whole Wheat Buns	Global Foods, Inc.	[illegible]	08/02/2011	06/03/2012	No	
	5020742	Five Spice Seasoning	ABC Company	[illegible]		09/30/2011	No	
	5020548	BBQ Dry Mix	Global Foods, Inc.	[illegible]	07/13/2011	07/31/2011	No	07/13/2011
	5020560	Low Fat Marinade Mix	Western Grocers, Intl.	[illegible]	07/13/2011	07/31/2011	No	07/15/2011
	5020483	Hummus	Western Grocers, Intl.	[illegible]	06/17/2011	06/17/2011	No	06/17/2011
	5017427	Whole Wheat Pitas	ABC Company	[illegible]	07/07/2009	07/09/2009	No	07/07/2009
	5017227	Applesauce, 8 oz	Western Grocers, Intl.	[illegible]	06/30/2009	06/30/2009	No	06/30/2009
	5016322	BBQ Sauce Dry Mix	ABC Company	[illegible]	05/01/2009	06/30/2009	No	05/01/2009
	5016286	BBQ Sauce Dry Mix	Global Foods, Inc.	[illegible]	04/24/2009	04/30/2009	No	04/24/2009
	5015632	Egg Substitute	Global Foods, Inc.	[illegible]	03/20/2009	04/04/2009	No	03/20/2009

Action Items Table

To sort rows by column, click any column head.

The Status column displays a green on schedule ( ), amber warning ( ) or red late ( ) symbol based on the dates that you specified in the Due Date and Amber Date fields when creating the business object. The value of the Amber Date field is a number of days.

For example, if the value of the Amber Date field is 3 and the value of Due Date is August 18, then the following will be true:

On August 14 or before, the symbol will be:

On August 15, 16, and 17, the symbol will be:

On August 18 or later, the symbol will be:

Each row in the Action Items table gives more information about the business object, and can vary by application. Some common fields are defined below:

- **Status** (not labeled)—This field displays a red, amber, or green status bar symbol indicating whether the due date was met. It is based on the current date, Due Date, and Amber Date:
  - **Red**—The Due Date has passed (Current Date has passed the Due Date).
  - **Amber**—The Due Date is approaching (Current Date plus the Amber Date is greater than or equal to the Due Date).
  - **Green**—Displays when the business object was returned in the allotted time (Due Date met) or if the Due Date is still some days away (the current date plus the Amber Date is less than the Due Date).
- **Business Object #**—The number assigned to the business object by the system. You can click the field link to view the object.
- **Title**—The title of the business object.
- **Date Sent**—The date the business object was sent.
- **Due Date**—The date on which the business object must be returned.
- **Date Received**—The date that the business object was received.

For more information about Actions Items, refer to the user guide for the GSM, SCRM, eQ, NPD, and PQM applications.

Action Dashboard

The Action Dashboard provides a central location to visually display all of your GSM, SCRM, NPD, PQM, and eQ action items and their status.

The Action Dashboard is deployed to the Portal application accessible through a tab on the Home page. You can also access the Action Dashboard from the following URL:

http://<PLM4P_home>/portal/default.aspx?InitialLoad=ActionDashboard

Multiple views of data are presented to quickly show relevant data:

- The Red, Amber, Green view allows you to know which items are late based on the due date (Red), which items need attention (Amber), and all other items you currently own (Green). Figure 2–13 below shows this view.
- The Recent, New, Due views allow you to see the action items you recently viewed (Recent), which items have been newly assigned to you (New), and which items are about to be Due or past due (Due). Figure 2–14 below shows this view.

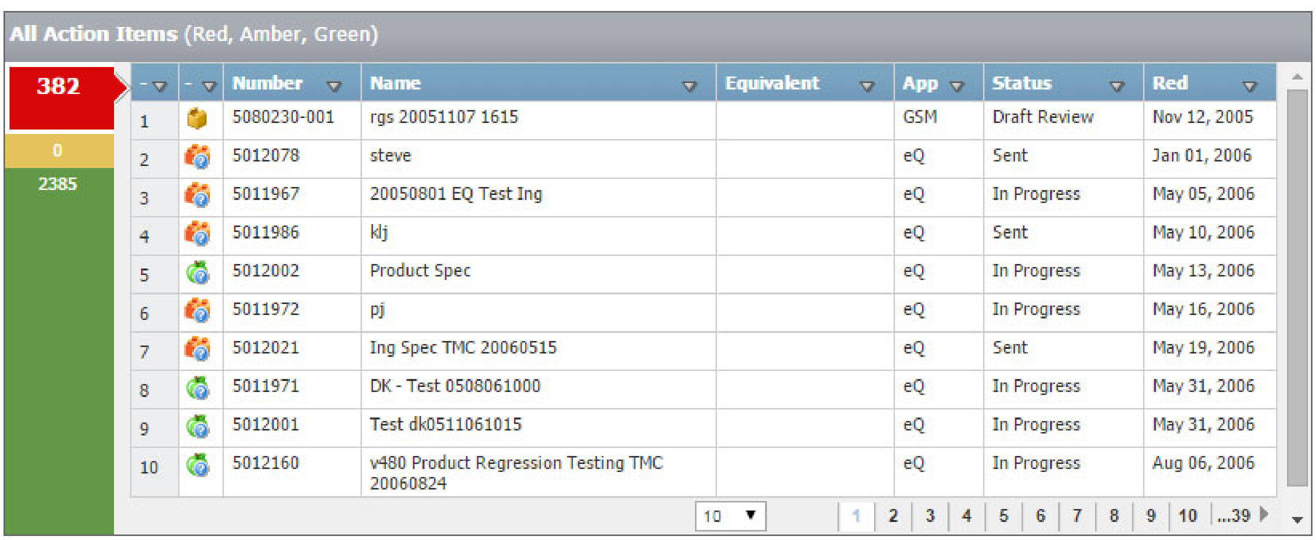
Red, Amber, Green View

Action items in this view are organized by status. Red items are past due, amber items are running behind schedule and about to turn red and green items are current.

The left bar represents a stacked bar chart. It displays the total count of red, amber, and green items.

You can quickly see how many items are past due or about to be due. Click the sections of the chart to display a list of the action items in that selected status.

Figure 2–13 Red, Amber and Green view



All Action Items (Red, Amber, Green)

382
0
2385

-	-	Number	Name	Equivalent	App	Status	Red
1		5080230-001	rgs 20051107 1615		GSM	Draft Review	Nov 12, 2005
2		5012078	steve		eQ	Sent	Jan 01, 2006
3		5011967	20050801 EQ Test Ing		eQ	In Progress	May 05, 2006
4		5011986	klj		eQ	Sent	May 10, 2006
5		5012002	Product Spec		eQ	In Progress	May 13, 2006
6		5011972	pj		eQ	In Progress	May 16, 2006
7		5012021	Ing Spec TMC 20060515		eQ	Sent	May 19, 2006
8		5011971	DK - Test 0508061000		eQ	In Progress	May 31, 2006
9		5012001	Test dk0511061015		eQ	In Progress	May 31, 2006
10		5012160	v480 Product Regression Testing TMC 20060824		eQ	In Progress	Aug 06, 2006

10 | 1 2 3 4 5 6 7 8 9 10 ...39

The attributes found in this view are defined below:

Sort order—Click the first column to return to the original sort order.

Type—The object icon associated with each item type. Hovering over each icon displays the type description.

Number—The number associated with each item. Note: Not all items have a number in the system. For those items, a number will not be displayed.

Name—The name of the item.

Equivalent—The preferred Cross Reference for the user. For specification-related sourcing approvals (SAC), the assigned reference that is selected on the SAC displays. If this field is blank, the preferred Cross Reference for the user displays.

App—The application associated with the item.

Status—The current workflow status of the item.

Red—The date the item will be entering the red state.

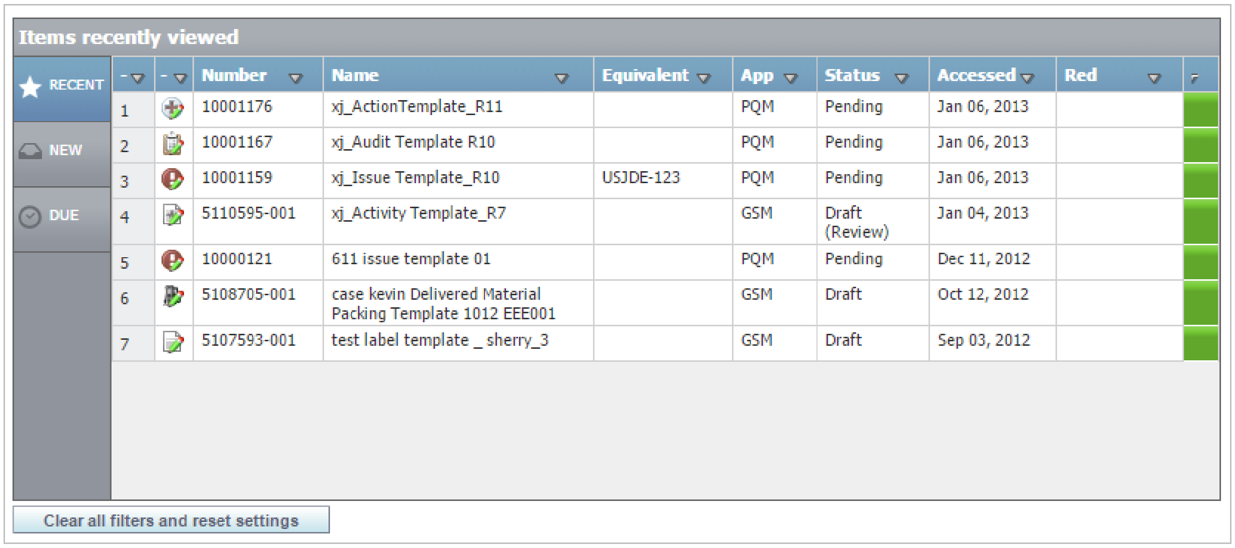
Click anywhere in the row to open the item.

Recent, New, and Due Views

The following list gives different views of the action items listing. Click the Recent, New, or Due button to display the corresponding view.

- **Recent**—These are items you own and have recently accessed. This view allows you to quickly access items you are actively working on.
- **New**—You should think of this list as your inbox. These are items that have been recently assigned to you through a workflow. By default, this includes items that have been assigned to you in the last 7 days, but an input field allows that to be modified (type the new number and press **Enter**).
  - eQ—New eQ items include all eQs in Submitted status that have not been imported into GSM. The assigned date field displays the date the supplier returned the item.
  - NPD—If the Current Stage's Start Gate Date is set, the Current Stage's Start Date is used as the project assigned date.
- **Due**—This list helps you to understand what is coming due in the next specified amount of days. This list allows you to plan ahead based on their respective due dates. By default, this includes items that will turn Red in the next 7 days and past due items. An input field allows the number of days to be modified (type the new number and press Enter). This listing also includes items that are already past due (in a Red status); un-check the Include Past Due Items checkbox to only show items that will be due between today and the number of days specified.
  - eQ—Due eQ items include all eQs in Sent or In Progress status. The assigned date field is blank.
  - NPD—The assigned date is the Last Workflow Action Date.

Figure 2–14 Items Due view



Items recently viewed

RECENT / NEW / DUE

-	-	Number	Name	Equivalent	App	Status	Accessed	Red
1		10001176	xj_ActionTemplate_R11		PQM	Pending	Jan 06, 2013	
2		10001167	xj_Audit Template R10		PQM	Pending	Jan 06, 2013	
3		10001159	xj_Issue Template_R10	USJDE-123	PQM	Pending	Jan 06, 2013	
4		5110595-001	xj_Activity Template_R7		GSM	Draft (Review)	Jan 04, 2013	
5		10000121	611 issue template 01		PQM	Pending	Dec 11, 2012	
6		5108705-001	case kevin Delivered Material Packing Template 1012 EEE001		GSM	Draft	Oct 12, 2012	
7		5107593-001	test label template _ sherry_3		GSM	Draft	Sep 03, 2012	

Clear all filters and reset settings

Sorting Views To sort by a specific attribute, click the table column header to display the Sort panel, shown below. Click the sort order. All columns can be sorted in ascending or descending alphanumeric order.

Figure 2–15 Sort panel

A down arrow in the column heading indicates descending order, and an up arrow indicates ascending order. The selected sort order is preserved within the session. The default sort view for all items in the RAG grid is in ascending order by red date so the oldest items are displayed first.

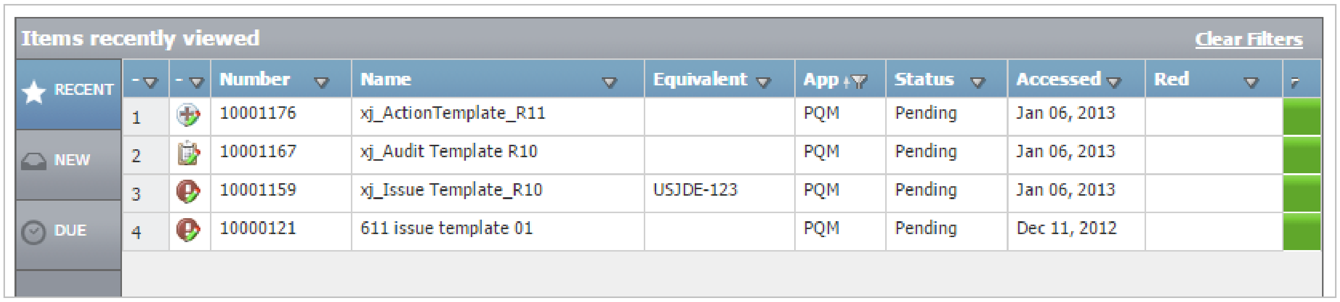
Filtering Views You can filter the Type, App, and Status columns to display only those items that meet the criteria you specify and hide the items you do not want displayed. You can also filter by more than one column. Each additional filter is based on the current filter, so the number of items displayed is further reduced.

To filter the items in a column:

1. Click the table column header to display the Sort and Filter panel.
2. Select or clear one or more filter values. If the list is large, clear **Select All**, then select the specific values to filter.
3. Click **OK** to display the filtered items.

When a column is filtered, the filter icon displays in the column header. See the App column in Figure 2–16 as an example.

Figure 2–16 App column with filter



When there are one or more filters selected on the grid, the Clear Filters link appears. Click **Clear Filters** to remove all filters from that grid.

All filtering and sorting settings are saved. This allows you to keep your view even if you log out of the system. You can reset the dashboard back to the default settings by clicking the **Clear all filters and reset settings** link at the bottom of the page.

Cached Data

The action item data retrieved is cached for performance purposes. If you act on an action item, then return to the Action Dashboard and do not see your change reflected, you can click the **Refresh** link to update the table contents. By default, data is cached for five minutes, but this can be overridden by updating the configuration value as indicated in the installation instructions.

Working with a Page

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

Once you have selected an item to work with, such as a trade specification in the Global Specification Management (GSM) application, the page consists of several elements that are common across all applications, as Figure 2–17 shows.

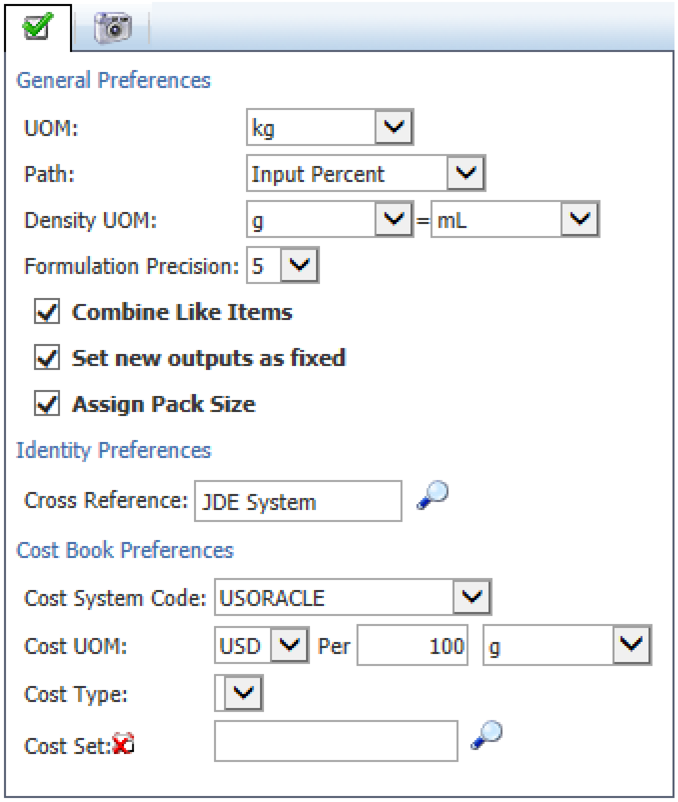
Figure 2–17 Page functions

Action Icons, Tabs, and Sections

- **Action Icons**—Use the icons to the right of the action menu to take quick actions that affect the entire page, such as save, edit, and create new. The icons that are displayed vary based on such things as your assigned role and permissions and the current state of the item. Each action represented by an icon is also listed as a choice in the action menu. These icons can be customized. See the *Agile Product Lifecycle Management for Process Navigation Configuration Guide* for more information.

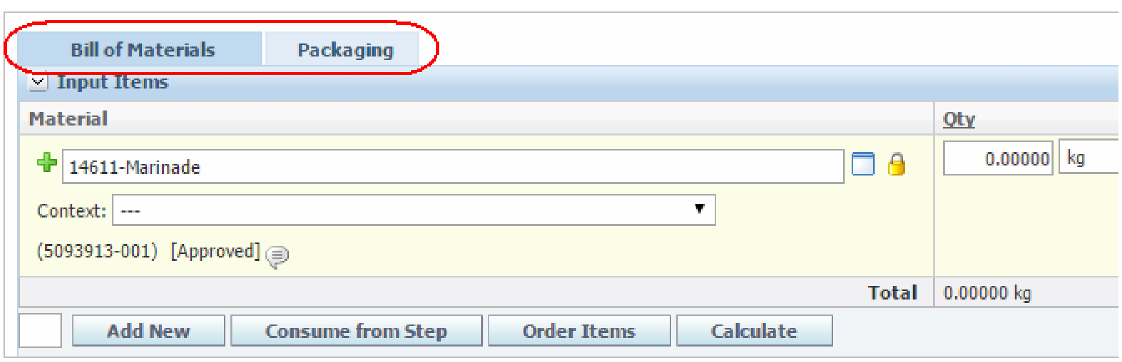
  Some action icons display panels. When you click on this button, a panel appears, as Figure 2–18 shows.

Figure 2–18 Formulation Settings action button



- **Tabs**—The tabs represent logical groupings of data for the item you are working with. Click a tab to work with data on that page. The tabs that are displayed vary based on such things as your company's installed applications and the current state of the item that you are working with. Inline tabs have been introduced with formulation specifications.
- **Subtabs**—Some GSM specifications contain tabs within a page. These tabs divide the page content into more usable sections, as Figure 2–19 shows.

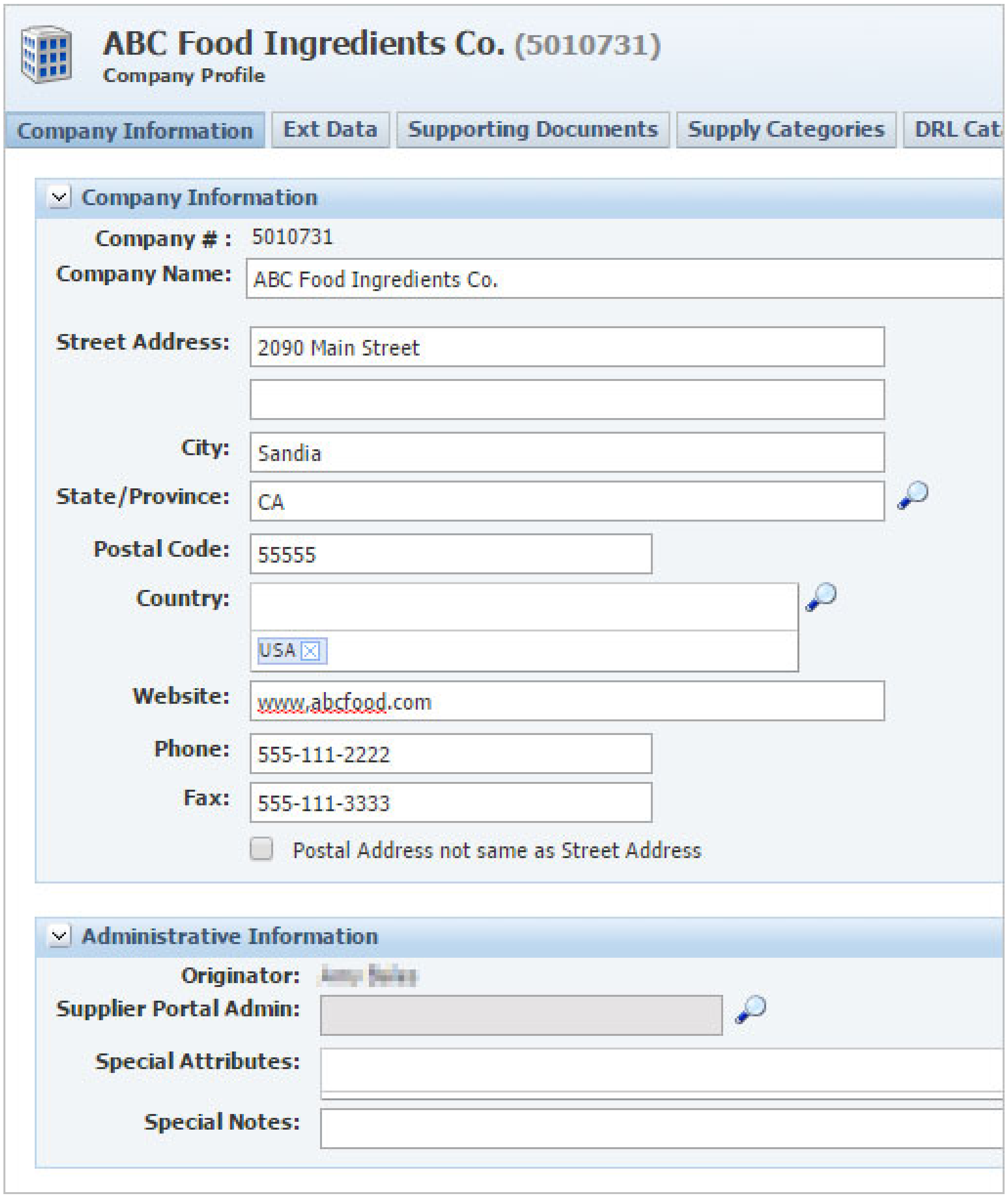
Figure 2–19 Formulation specification, subtabs



- **Sections**—Each page consists of sections, which group related information. Figure 2–20 shows two sections on a page. To collapse a section, click the icon or anywhere else in the section header. Click it again to display the section. When you collapse a section, it's state is remembered even when you log out and log back into the system. Some sections are not collapsible; when they are not collapsible, you see a disabled expanded section icon.

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

Figure 2–20 Example of sections within a page: Company Information and Administrative Information



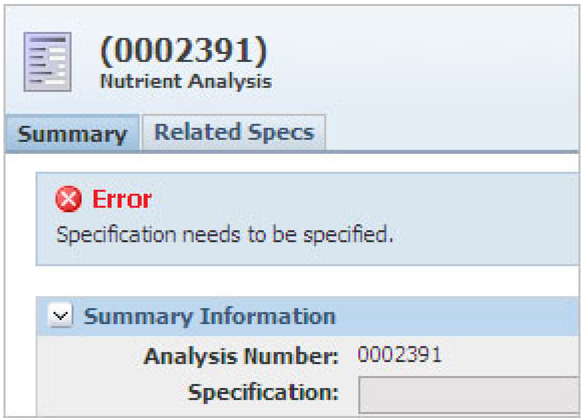
System-Generated Messages

System generated messages appear either at the top of the page, as Figure 2–21 shows, or at the top of a section. Messages are defined as follows:

- **Errors**—Corrections must be made before the user can save the data entered.

- **Warnings, Informations, and Notifications**—Messages that may be important to the user.

Figure 2–21 System-generated messages



Using the Most Recently Used Menu

The system keeps track of which items you have recently viewed or associated to other objects. You can access your most recently used (MRU) items in multiple places.

Most Recently Used Navigation Menu

Use the top Most Recently Used Navigation menu for navigation purposes so you can quickly access items you are actively working on. For example, if you are working on Specification A, B and C and you log out, when you return to PLM for Process you can quickly get back to those specifications by using the Most Recently Used Navigation menu.

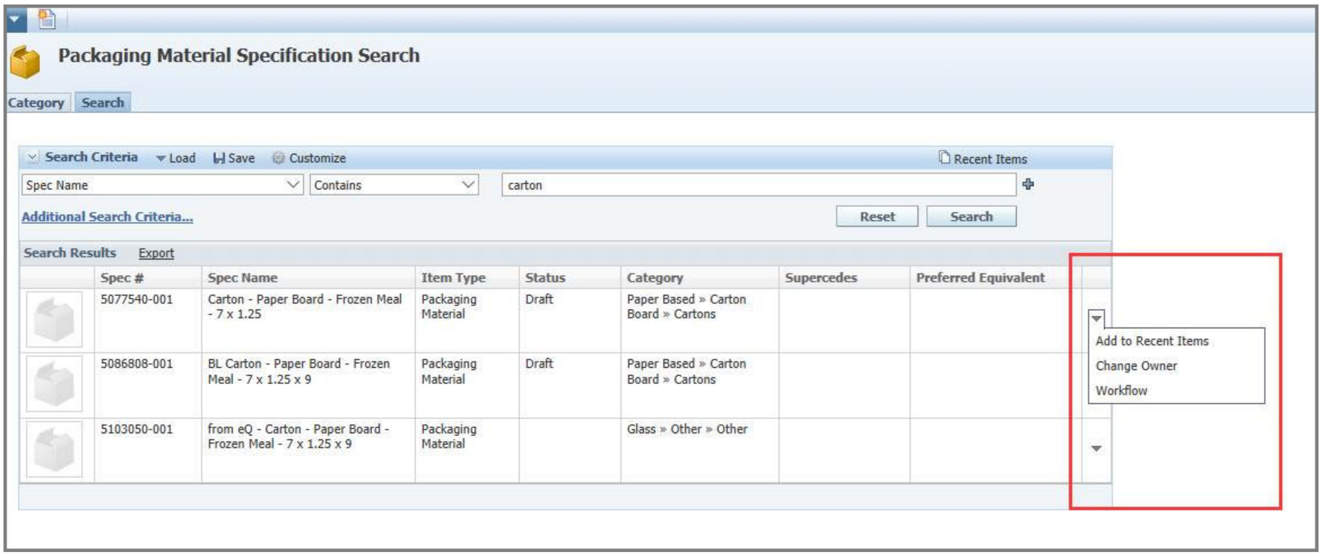
Figure 2–22 Most recently used menu, GSM

Most Recently Used Search Results You can also access your most recently used items from search screens. You can select **Recent Items** in the top right corner to display the top 50 of your most recently used items. This amount is configurable. These items are sorted based on how many times an item was used. For example, if you used the specification "Water" five times and the specification "Salt" three times then Water appears first. You can also search within your recently used items by using the "Recent Items" search criteria.

The recent items option is also available in search dialog windows when you are associating objects. This makes it extremely easy to quickly find a specification you have just created that needs to be added to a BOM or a team member that you regularly associate to a project.

You can manage your recently used items by using the inline search row navigation panel, shown in Figure 2–23. You can add items to your list or remove them.

Figure 2–23 Search results navigation column

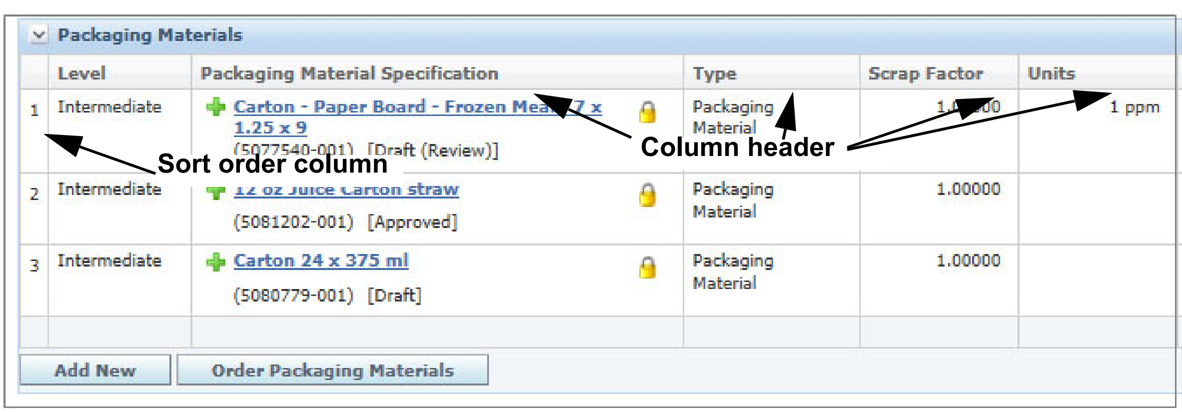


You can use this column to add or remove recently used items, to change the owner for the items, or to workflow items. You can also add links to this panel, as described in the *Agile Product Lifecycle Management for Process Extensibility Overview Guide*.

Grids

Many sections in GSM and SCRM contain grids, as Figure 2–24 shows. These grids include rows which allow for enhanced grouping of data. You can add and delete rows as you work with the data, and edit the content of rows by clicking in cells.

Figure 2–24 Grid, trade specification



Adding and Deleting Rows

As Figure 2–24 shows, when a grid is in edit mode, you can add rows by clicking **Add New**. To delete a row, click the delete icon. Agile PLM for Process displays a confirmation message. Click **OK** to confirm the deletion, or click **Cancel** to cancel the deletion.

Using the Sort Order Column

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

Resizing Columns

You can resize most columns except the sort order column and icon columns. To resize a column, hover near the right border of a header, as Figure 2–25 shows. The cursor changes to a drag cursor. Click and drag to resize the column. See Figure 2–26 for an example. Content in the column wraps when possible.

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

Figure 2–25 Grid, default width

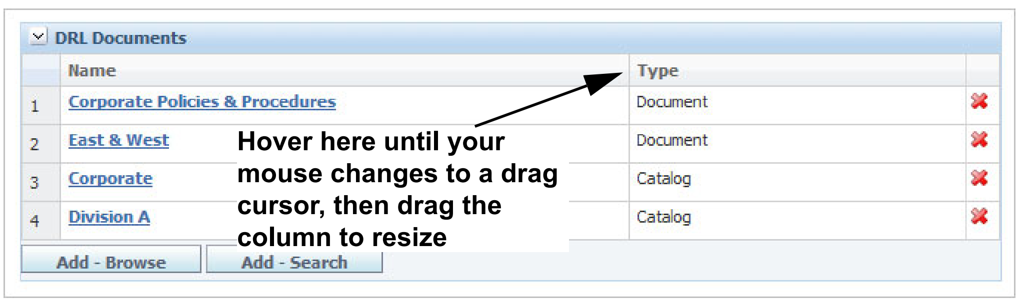
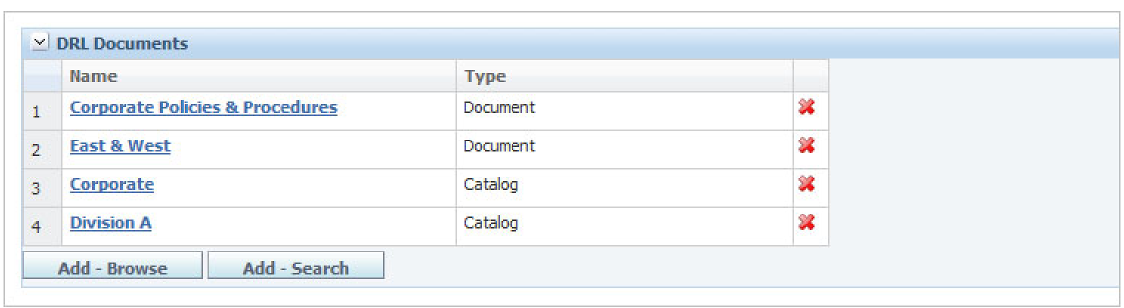


Figure 2–26 Grid, resized column



Sorting Columns

Most columns in grids are sortable. To sort, click on the header. The header changes colors indicating the grid is sorted by that column. An arrow icon appears in the right side of the header, as Figure 2–27 shows. It displays a down arrow indicating descending order, and an up arrow indicating ascending order. The sort order remains on every like grid within the application until you log out.

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

Figure 2–27 Column, sorted in ascending order

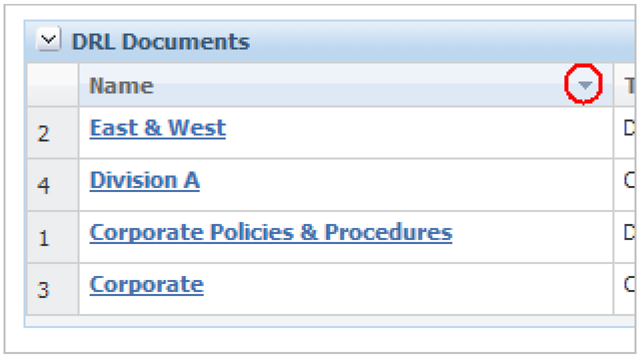
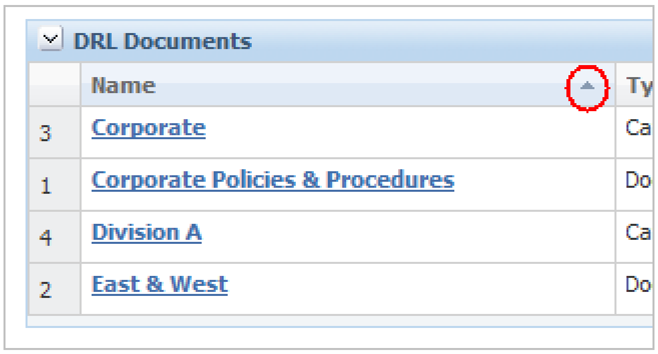


Figure 2–28 Column, sorted in descending order



The print function does not respect column sorting.

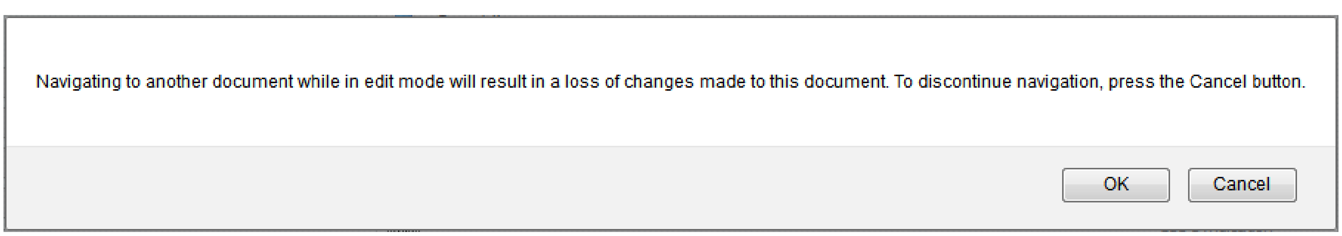
Editing Cells

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

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

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

Figure 2–29 Navigation message



Linking to Other Objects

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

Tables

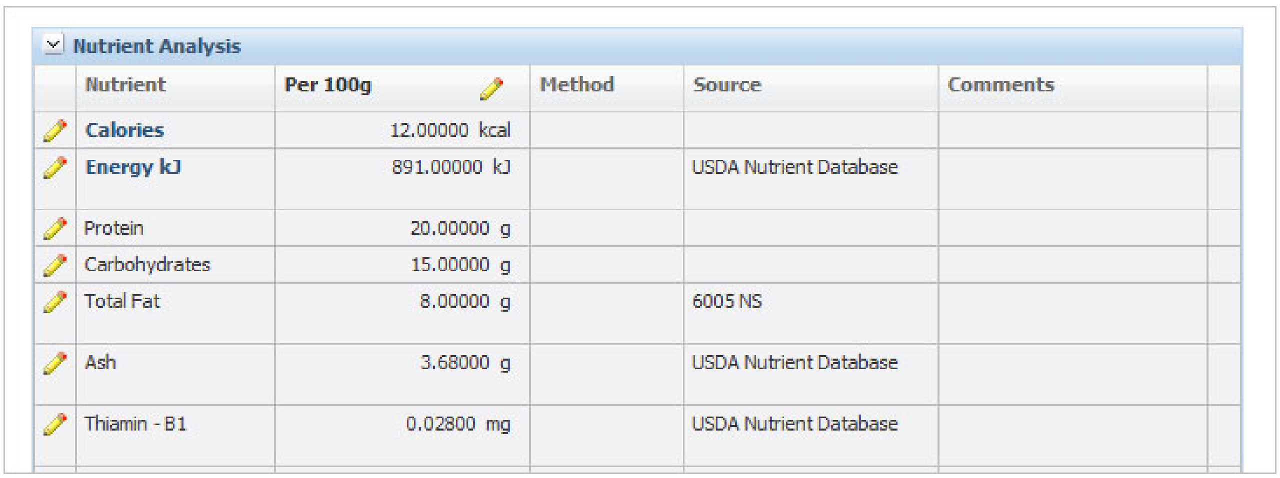
Tables group related data and are used on some pages in the Agile PLM for Process suite. You can modify the tables by editing existing rows or adding new rows.

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

To edit a table row:

1. Click **Edit**. The page redisplays in edit mode.

Figure 2–30 Nutrient analysis in NSM, Summary tab in edit mode



2. Click the edit icon in the row that you want to modify. Additional icons indicate that the row is in edit mode, as Figure 2–31 shows.

Figure 2–31 NSM nutrient analysis, Summary tab in edit mode; row in edit mode

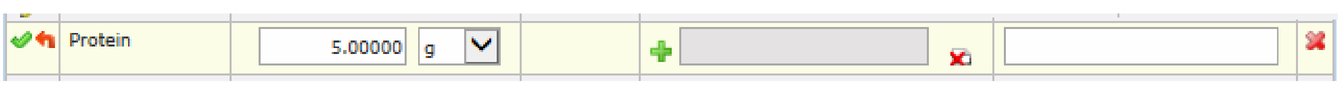


Table 2–1 defines icons that are commonly used in tables:

Table 2–1 Common icons

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

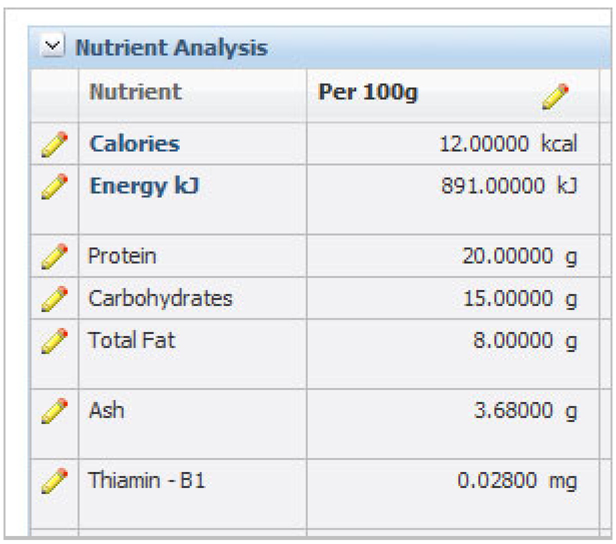
3. Enter data in the appropriate fields and click the apply changes icon to save changes, or use the other icons listed above to make modifications.
4. Click **Save**.

To add a table row:

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

On some tables, you can also edit columns by clicking the edit icon displayed in the column heading, as Figure 2–32 shows. Agile PLM for Process displays each field in the column in editable mode.

Figure 2–32 Edit icon in column heading and at table level



Nutrient Analysis

Nutrient	Per 100g
Calories	12.00000 kcal
Energy kJ	891.00000 kJ
Protein	20.00000 g
Carbohydrates	15.00000 g
Total Fat	8.00000 g
Ash	3.68000 g
Thiamin - B1	0.02800 mg

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

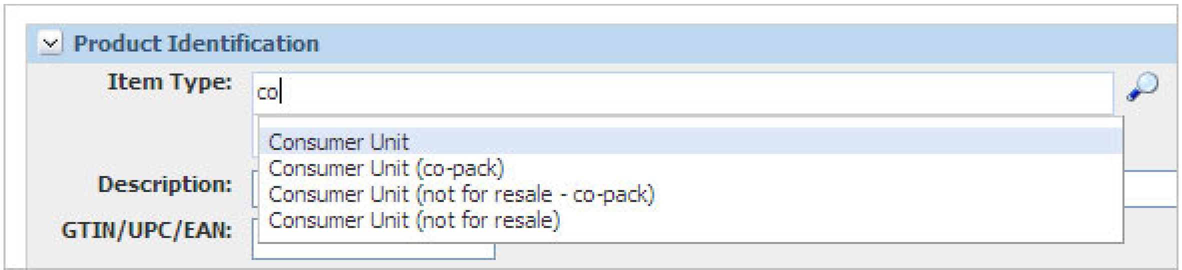
Fields

There are several types of editable fields throughout the application suite. These are described in detail below.

Simple List Control

Single Select You can type a value directly into single select fields, which are fields where one selection is allowed. As you type, the field finds the closest match and displays a selection list below, as Figure 2–33 shows. Click the desired value to populate the field. Alternatively, you can click the search icon to display the dialog box used to make a selection.

Figure 2–33 Single select field

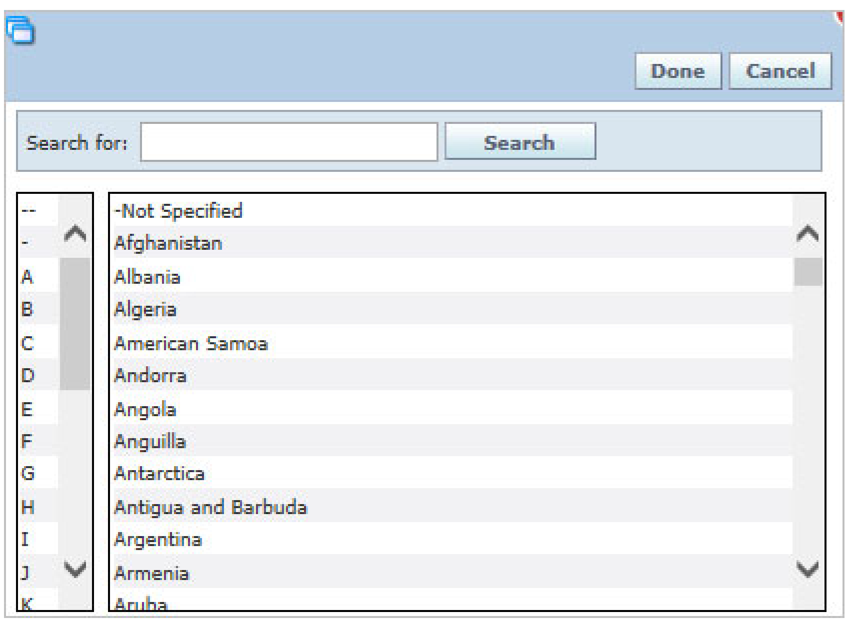


As shown in Figure 2–34, the item selected displays below the field. You can delete the item by clicking the delete icon next to the item, by highlighting the item and pressing **Delete**, or by using the search icon to display the dialog box and delete the selection.

Figure 2–34 Selected item

When using the search icon, a dialog box displays available items. To navigate to selections alphabetically, click on the corresponding letter in the left most column.

Figure 2–35 Single select dialog box



Be sure to use the action buttons, such as **Done** or **Cancel**, when you have completed your actions in a dialog box. If you click the System Window Close icon instead of the action buttons within the dialog box, unexpected results may occur. See the "Action Icons, Tabs, and Sections" on page 2-14 for more information on action buttons.

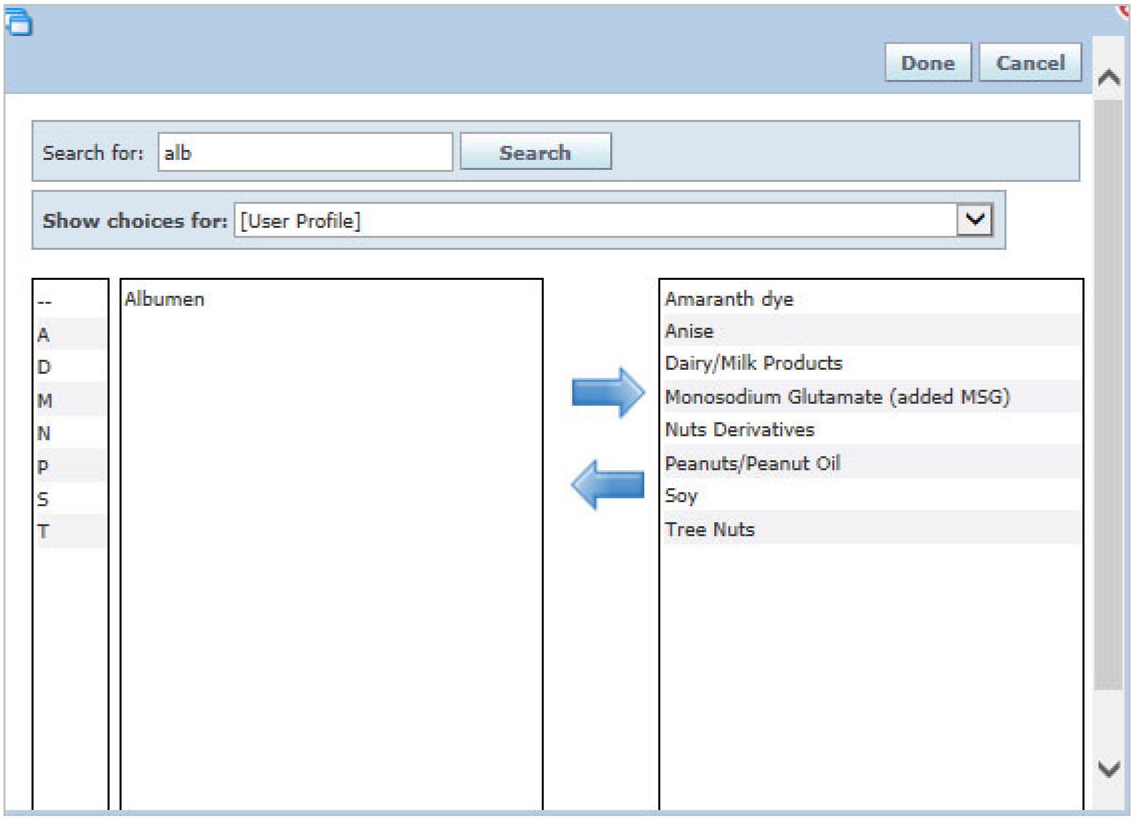
Type Ahead Some single select fields allow users to type in their choices using the Type Ahead feature. As you type in selections in the Search for field, you are presented with matching options.

Browse

Two features that enable browsing in list controls are described below:

- **Searching**—To quickly search for items in a simple list, type a phrase in the Search for field and click Search. Matching results are displayed in the selection list, as shown below.

Figure 2–36 Using the Search feature



- **Data Group Filter**—Data groups are used to organize and filter select lists in consumption. The Data Group list in ADMN maintains the data, as described in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Multi-Select Multi-select fields function the same way as single-select fields, except you can selected multiple items. Figure 2–37 shows a multi-select field. When deleting multiple items, you can click the delete icon, or use the search icon to display the dialog box and delete the selections. When using your keyboard, you can highlight multiple items using the **Ctrl** key and clicking each item, then press the **Delete** key.

Figure 2–37 Multi-select field, items selected using Shift key

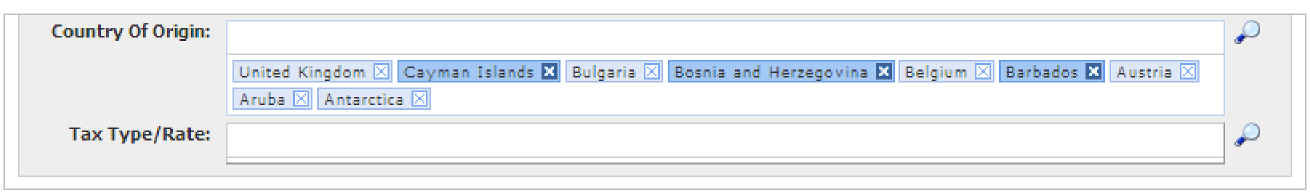
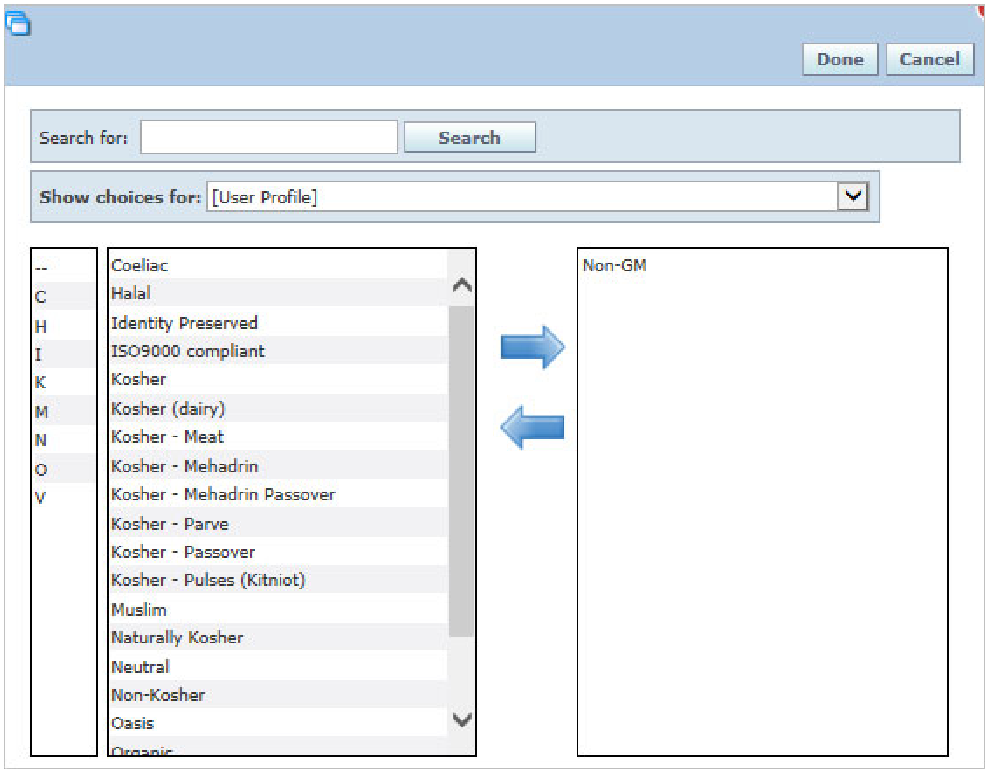


Figure 2–36 shows a multi-select dialog box. To make a selection, click a row in the left column, then click the add selected data icon to move your selection to the right column. You can make multiple selections from the left column by holding the **Ctrl** key as you select rows.

Figure 2–38 Multi-select dialog box



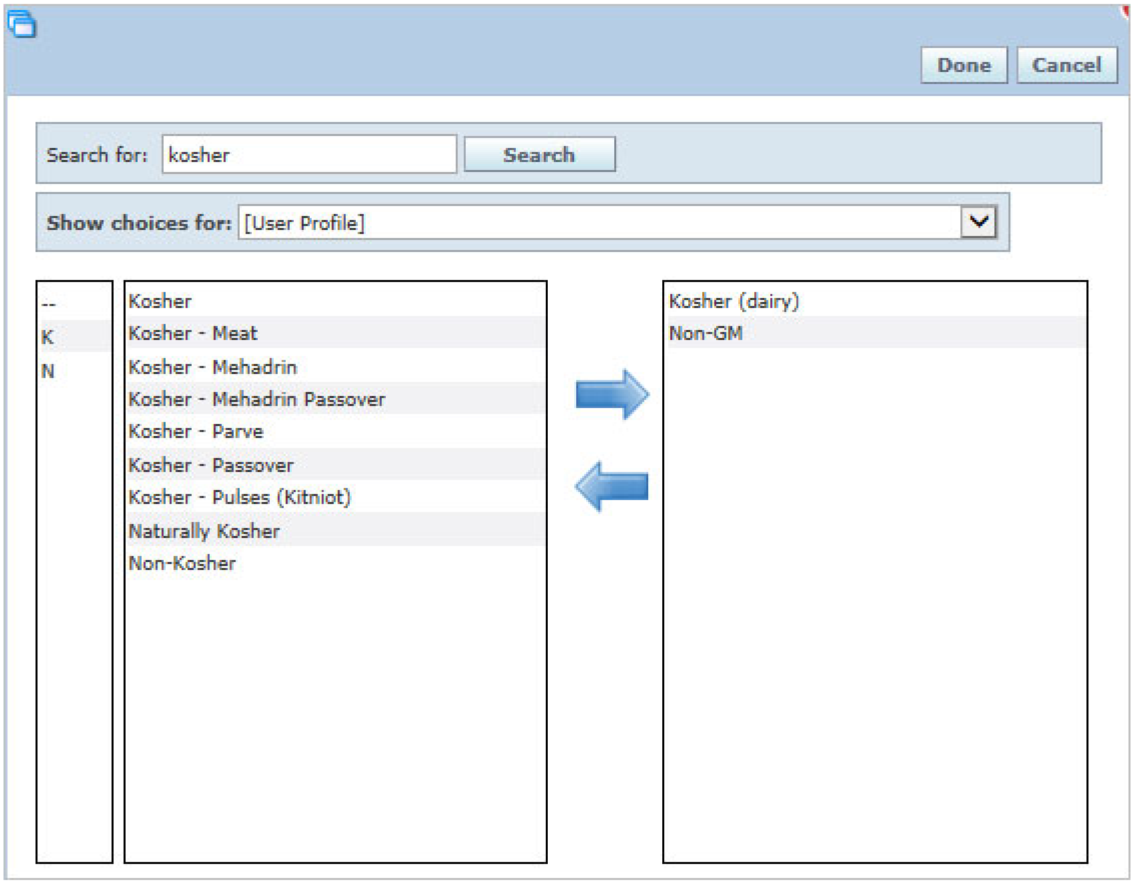
Depending on the list, some dialog boxes contain a Show choices for drop down list, enabling you to further narrow displayed data. See Figure 2–38 above for an example.

Type Ahead Multi-select fields allow users to type in their choices using the Type Ahead feature. As you type in selections in the Search for field, you are presented with matching options.

Browse Two features that enable browsing in list controls are described below:

- **Searching**—To quickly search for items in a simple list, type a phrase in the Search for field and click Search. Matching results are displayed in the selection list, as shows below.

Figure 2–39 Using the search feature



- **Data Group Filter**—Data groups are used to organize and filter select lists. The Data Group list in ADMN maintains the data, as described in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

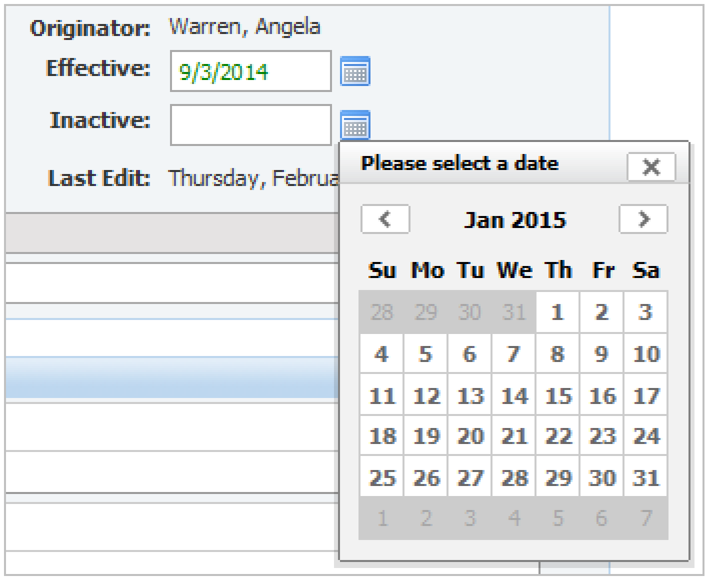
Taxonomy List Controls

Taxonomy list controls are described below.

Date Controls

For date fields you can type in a date value using the format MM/DD/YYYY. Alternatively, you can enter a date by clicking the calendar icon, as shown in Figure 2–40.

Figure 2–40 Date popup window



In read mode, it displays in the universal date format September 3, 2014. Dates entered incorrectly or in an invalid format display in red.

Free Text

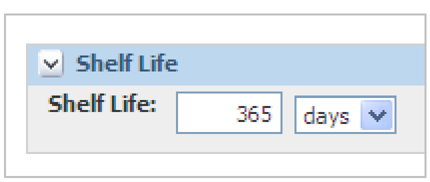
The user can enter any free text value into this field. Some free text fields are translatable, shown by the set alternate language text icon shown to the right of the field. If the field is translatable, the values entered into this field by the user are stored in the user's language. Additional values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

Figure 2–41 Translatable free text field

Numeric

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

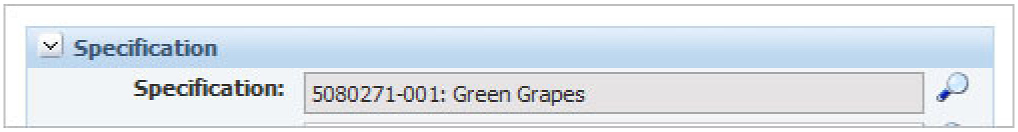
Figure 2–42 Numeric field, Shelf Life field, trade specification



Search Fields (multi and single select)

These fields are populated by the user using a specification or object search tool. The user can not directly type into this field.

Figure 2–43 Search field, Specification field on a sourcing approval in SCRM



Hierarchy Fields (multi and single select)

These fields are populated by the user using the hierarchy selection tool. The user can not directly type into this field.

Figure 2–44 Single select hierarchy field, trade specification, Category field

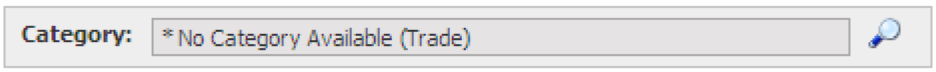


Figure 2–45 Category dialog box

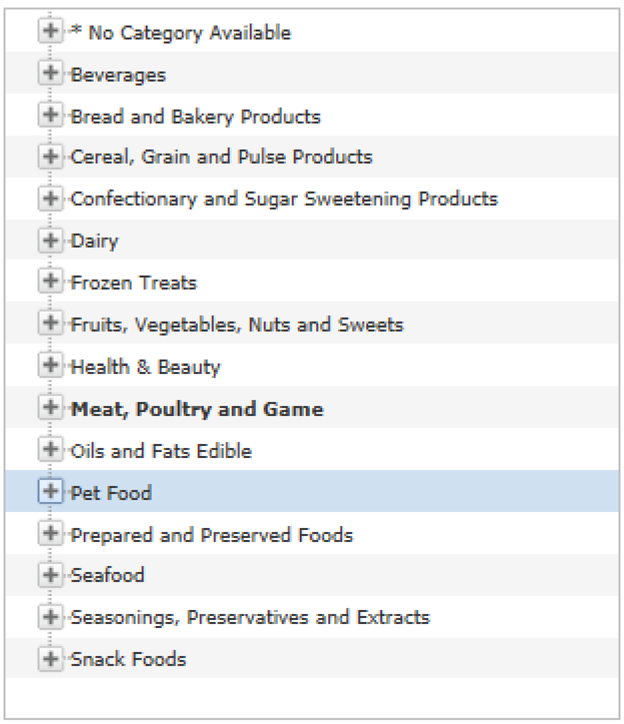


Figure 2–46 Multi-select hierarchy field, trade specification, Catalog field

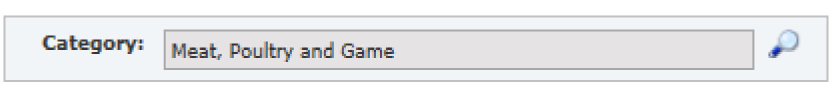
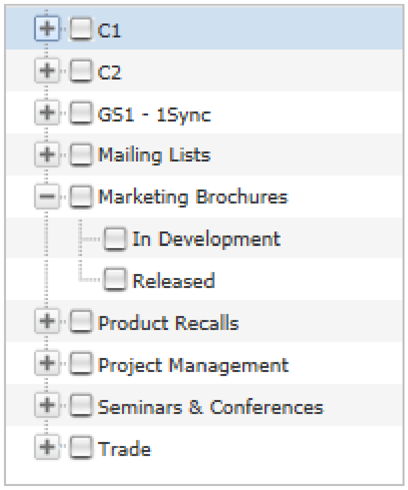


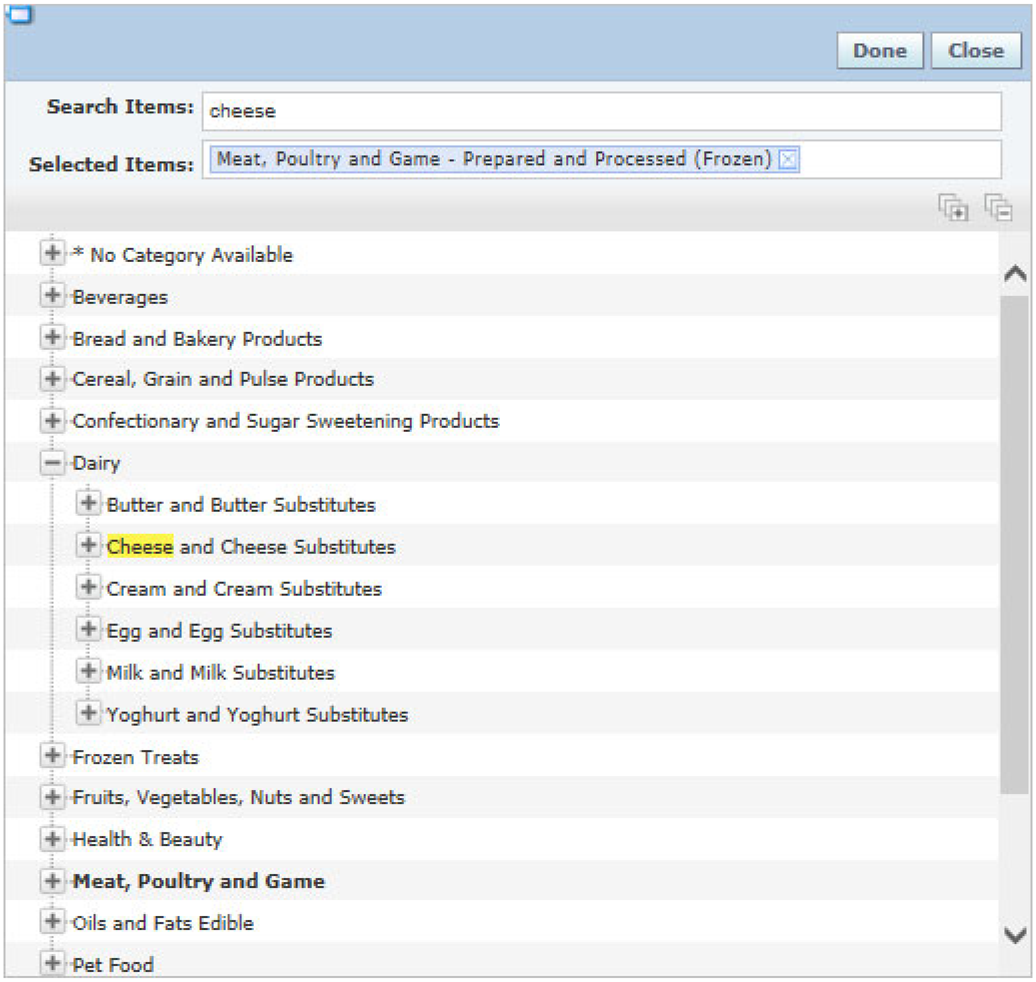
Figure 2–47 Catalog multi-select dialog box



You can use the hierarchy selection tool to search for and select items. After clicking the search icon, use the following fields in the dialog to make a selection.

- **Search Items**—Enter the item you wish to search for in the hierarchy using this field. It works similar to the type ahead feature. In the example shown in Figure 2–48 below, if you entered “cheese”, matching results are highlighted in the hierarchy below. You can then select an item and it is included in the Selected Item list.
- **Selected Items**—This field contains items you select from the hierarchy.

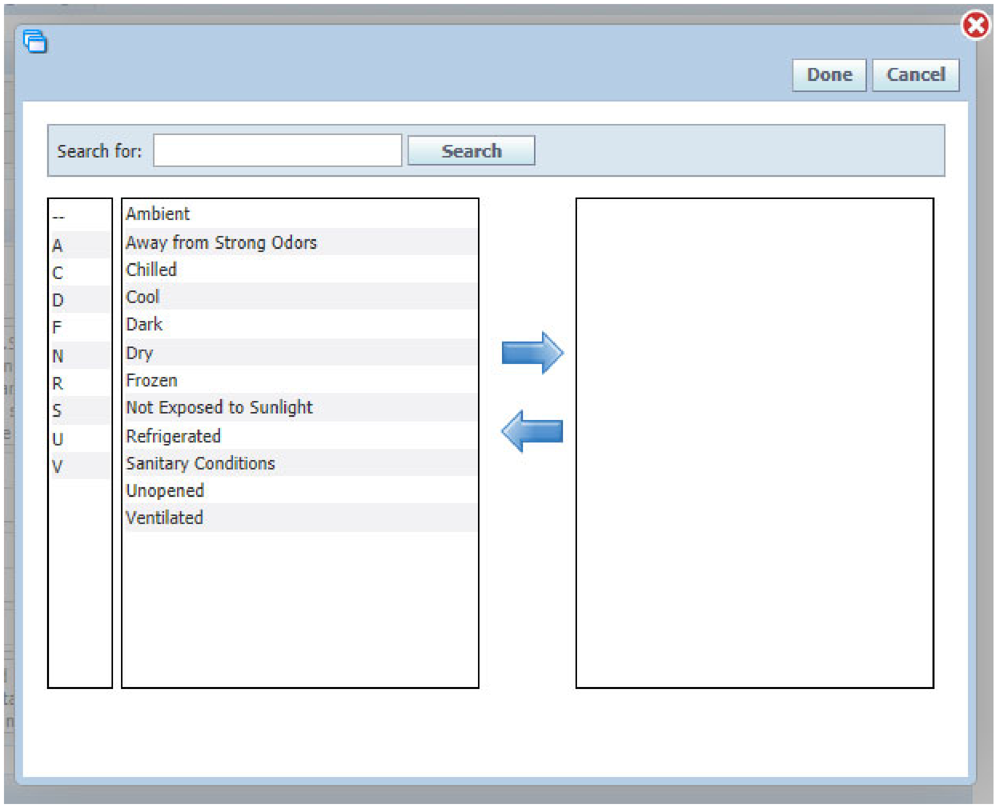
Figure 2–48 Hierarchy search feature



Working with Modal Windows

Modal Windows, as shown in Figure 2–49, are commonly used throughout Agile PLM for Process applications. Modal windows appear when the user takes action, such as selecting a link, clicking a button, or clicking an icon from a main page. Modal windows contain action buttons and other options through which users can carry out a particular command or task.

Figure 2–49 Modal window



The following actions are used with modal windows:

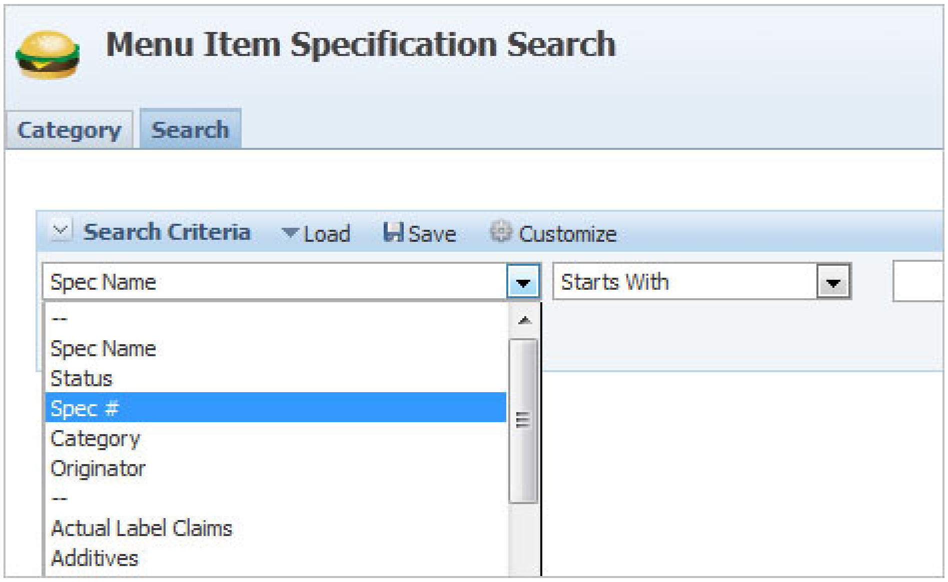
- **Dragging the Window** ( )—Modal windows can be dragged to different locations within the same browser window by hovering over the top portion of the window. The cursor changes to a "Move" cursor and then you can drag the window.
- **Resizing the Window** ( )—You can resize modal windows by hovering over the right or bottom border. The cursor changes to a "Resize" cursor and then you can drag the window to make it larger or smaller.
- **Popup the Window** ( )—Select the popup icon to convert the modal window to a standard popup window. Use caution when doing this because you can easily lose track of the popup window which can cause system errors.
- **Closing the Window** ( )—You can close a modal window by selecting the close icon. This action closes the modal window and without submitting your changes.
- **Done** (Done)—You can submit your changes by selecting the **Done** button.
- **Cancel** (Cancel)—Some modal windows have a **Cancel** button. This button clears all of your changes and closes the window.

Keystroke Shortcuts

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

For example, the menu item specification search page shows "Spec Name" as the default search criteria in the key field. If you would like to search by "Spec #", click the field, then press the S key two times to get to that option, as Figure 2–50 shows. You can then press the **Tab** key to move to the next field. You can also use the arrow keys to scroll through options in drop-down lists.

Figure 2–50 Spec # selected using keystroke shortcut



3

Finding Data

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

- Understanding the Search Page
- Searching Custom Data
- Searching Breakdown Items
- Searching Formulation Items
- Dialog Box Searches
- Viewing Search Results
- Saving Search Criteria
- Exporting Search Results
- Running the Previous Search from the Search Page
- Running the Previous Search from a Data Object
- Customizing Searches
- Understanding the Category Tab
- Using the Quick Search Feature

Understanding the Search Page

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

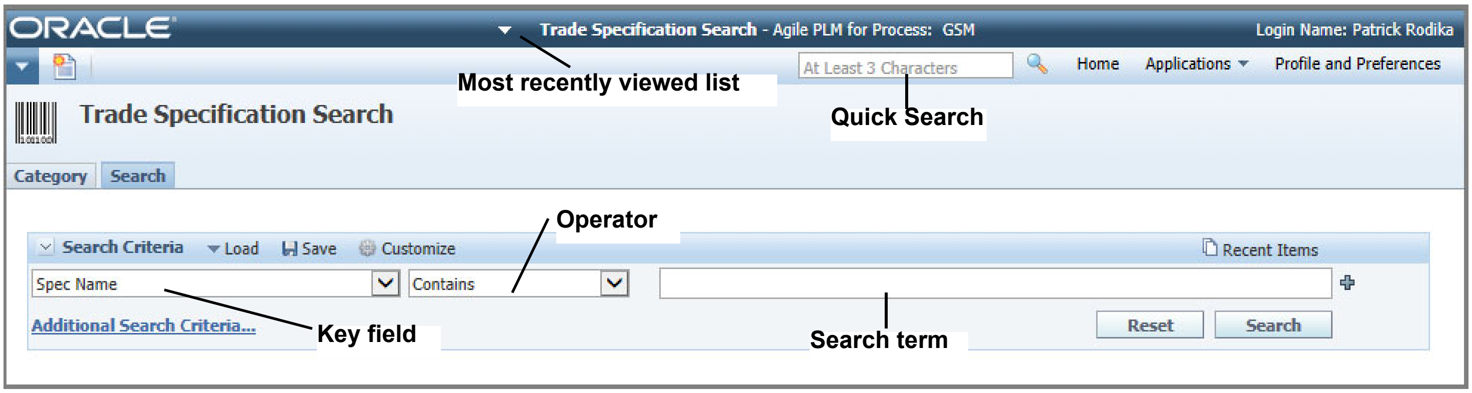
- **Searching**
- **Browsing by category**
- **Quick Search (available for the GSM application)**

This section explores the first method. For guidance on using the browsing method, see "Understanding the Category Tab" on page 3-21.

The initial screen in most applications of Agile PLM for Process consists of a search page. The search page, featuring the Entity Query Tool (EQT), has a basic structure but can vary greatly based on application or other factors. See Figure 3–1 for an illustration of the basic search page.

Note: Search results depend on visibility and security settings. For more information on visibility, refer to the, "Using WFA to Manage GSM Workflows" chapter of the *Agile Product Lifecycle Management for Process Workflow Administration User Guide*. For information on security settings, refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

Figure 3–1 The basic GSM search page



The search page resides on the Search tab, one of two tabs on most initial screens, the other being Category (see "Understanding the Category Tab" on page 3-21). To find a specification using the search page, set search criteria using a combination of three basic fields in the Search Criteria section. As shown in Figure 3–1 and defined below, these fields are:

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

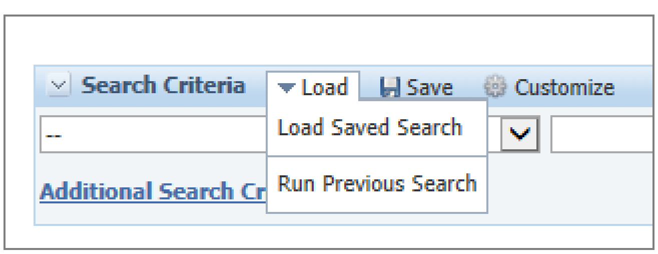
The main search page includes the following buttons, as shown in Figure 3–1 above:

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

Additional options on the search page are defined below:

- **Load**—Loads a saved search or allows you to run your last search. Figure 3–2 shows these options. For more information on running a saved search, see "To retrieve a saved search:" on page 3-12.

Figure 3–2 Load menu



- **Save**—Saves search criteria in a reusable library. Use this option if you use certain search criteria often (see "Saving Search Criteria" on page 3-12).

- **Customize**—Launches a user-defined dialog which you can use to customize search result columns and preset default search criteria. For more information see "Customizing Searches" on page 3-16.
- **Recent Items**—Displays a listing of recent search results in the Search Results section. See "Using the Most Recently Used Menu" on page 2-17 for more details.

Search Field Definitions

Below find descriptions of search fields that appear on the main search page. In most search pages, the first two search criteria fields contain a default value. In the case of a trade specification, "Spec Name" (as shown in Figure 3–1) is the default value. Fields on the main search page are defined below:

Key field list—Select from a list of fields to search in. This list varies based on the application menu search option that you chose.

Operator—Select from a list of operators based on the criteria that you chose in the key field list. A few examples include Equals, Not Equals, Contains, and Starts With.

Search term—The actual word or words that you are looking for. If this field is preceded by an add data icon, click it to view a dialog box with available choices. You can also enter a percent sign (%) to perform a wildcard search on a single character.

Results per page—Sets the number of search results to display at one time. This value can be adjusted using Profile and Preferences, as explained in "Results Per Page Section" on page 4-4.

More Criteria and Less Criteria

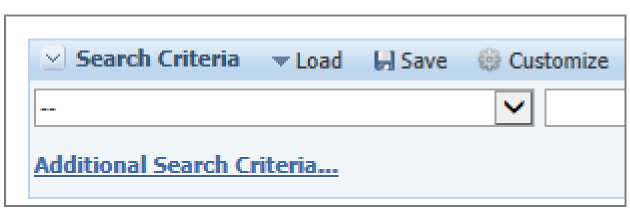
The more criteria icon displays to the right of the search term field. When clicked, more criteria creates another row of the main three search fields. You can use additional rows to enter additional search parameters. For example, you can search for all specification names that contain "Milk" that are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

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

Additional Search Criteria Link

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

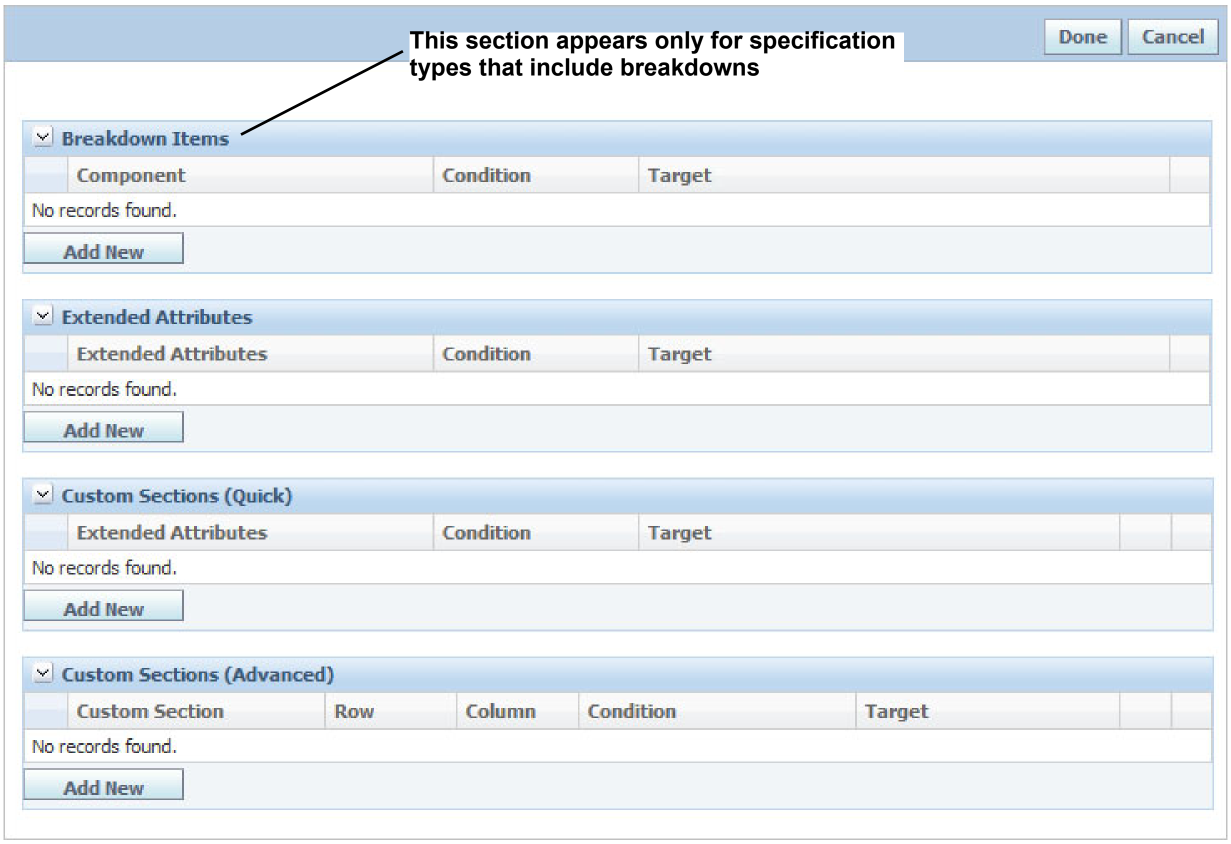
Figure 3–3 Additional Search Criteria link on the main search page



The Additional Search Criteria link opens the additional attributes dialog box, allowing you to search for three types of additional data:

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

Figure 3–4 The additional attributes dialog box



Searching Custom Data

Extended Attributes

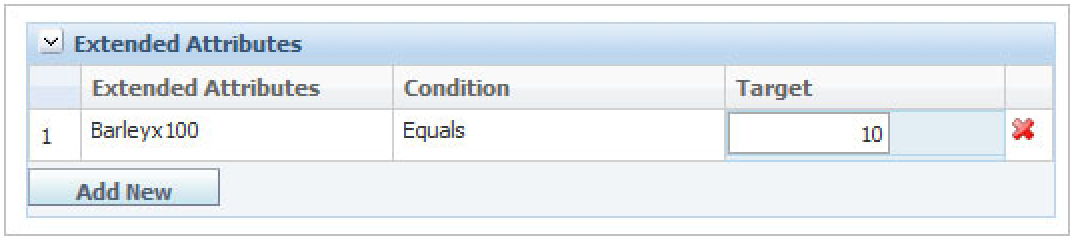
Extended attributes are data attributes that your organization has defined. They are one method of extending the functionality of the application. You can build these attributes to meet specific needs.

To search for extended attribute values:

1. In the Extended Attributes section, click **Add New**. A multiple-select popup window appears.
2. Select the extended attribute you want to search for, then click **Done**. Your selections display in the Extended Attributes table in edit mode.

3. Further define the attribute you added. The target fields vary based on the extended attribute selected.

Figure 3–5 Defining the attribute



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

You can add multiple extended attributes as search criteria.

Custom Sections

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

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

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

1. In the Custom Section (Quick) section, click **Add New**. A multiple-select popup window appears.
2. Select extended attribute names to search for, and then click **Done**. Your selections display in the Custom Sections (Quick) table in edit mode.
3. Click the edit icon displayed to the left of the added row. The row displays in edit mode.
4. Define the extended attribute value, by specifying the **Condition** and **Target** values.
5. Click **Done**. The search criteria are added to the search page.

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

1. In the Custom Sections (Advanced) section, click **Add New**. A multiple-select popup window appears.
2. Select the custom section to search in, then click **Done**. Your selections display in the Custom Section table in edit mode, as Figure 3–6 shows.

Figure 3–6 Defining the custom section value

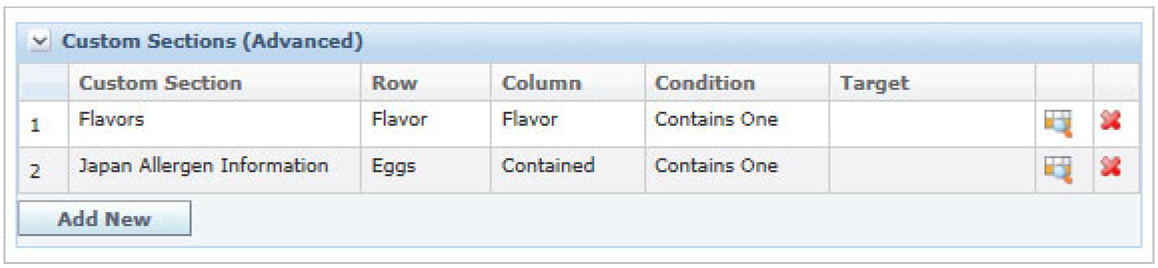
3. To further define the custom section value, you must select the **Row** and **Column** where the value may exist. Once the row and column are selected, you can define the **Condition** and **Target** values. Target fields vary based on the section + row + column combination that you have selected.

4. Click **Done**. The custom section search criteria are added to the search page.

Searching within a Row

Quick and Advanced custom section searches feature the ability to search within a row. Figure 3–7 shows a quick search using the search within row icon.

Figure 3–7 Search within a row



Custom Sections (Advanced)

	Custom Section	Row	Column	Condition	Target		
1	Flavors	Flavor	Flavor	Contains One			
2	Japan Allergen Information	Eggs	Contained	Contains One			

Add New

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

Searching for Multiple Attributes in One Custom Section Row

Clicking the search within row icon adds a new row to your grid. Each added row represents an additional attribute in the same custom section row. The row colors are alternated to help distinguish the sets, as demonstrated in Figure 3–8.

Figure 3–8 Search within a row

Custom Sections (Quick)

	Extended Attributes	Condition	Target		
1	Flavor	Contains One	*Banana*		
2	Flavor Total	Equals	**10kg**		
3	Flavor Total	Equals	**8kg**		
4	Lemon Flavor	Equals	2g		

Add New

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

Searching Breakdown Items

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

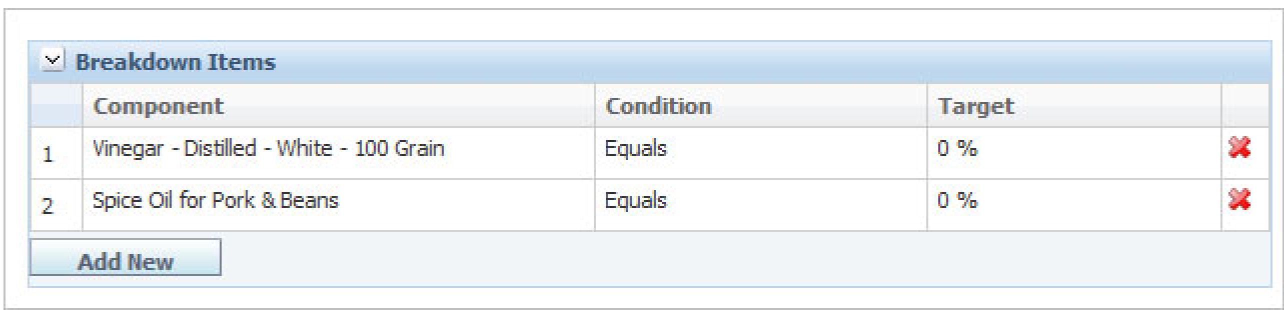
To perform a search for breakdown items:

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

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

2. Enter search criteria in the key field, operator, and search term fields.
3. Click **Search**. Components matching the search criteria display in the Search Results table, as described in "Viewing Search Results" on page 3-11.
4. Click components to add as search criteria. Your selected components display in the Selected Items section.
5. Click **Done**. The search page closes, and the selected components display in the Breakdown Items section in edit mode, as Figure 3–9 shows.

Figure 3–9 Added breakdown items

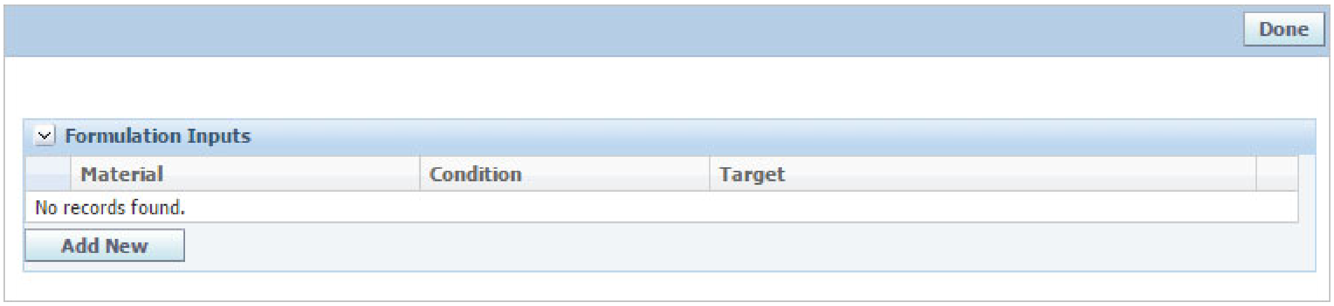


6. Define the **Condition** and **Target** values for the breakdown item.
7. Click **Done**. The breakdown items are added to the search page.

Searching Formulation Items

For formulation specifications, the Formulation Inputs section displays in the additional attributes dialog box, as Figure 3–10 shows. This section allows you to search specifications by specifying one or more material specification/value pairs used in the formulation.

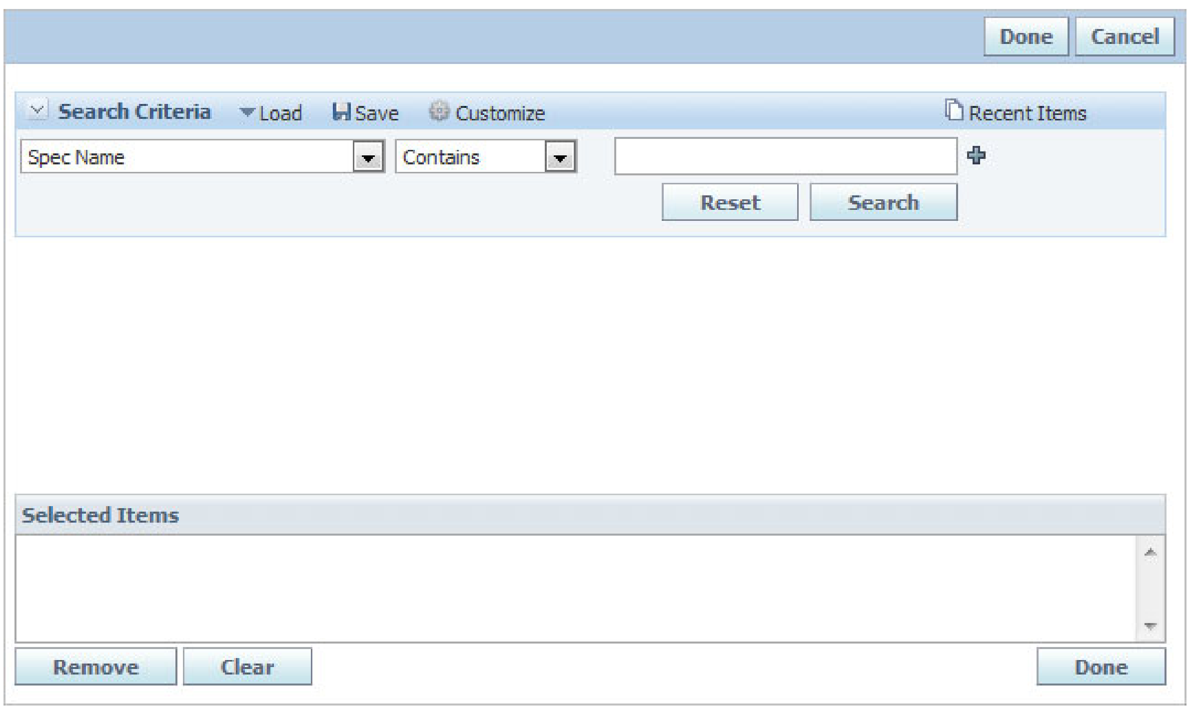
Figure 3–10 Additional attributes dialog box, Formulation Inputs section



To perform a search for formulation inputs:

1. In the Formulation Inputs section, click **Add New**. A material specification search page displays, as Figure 3–11 shows.

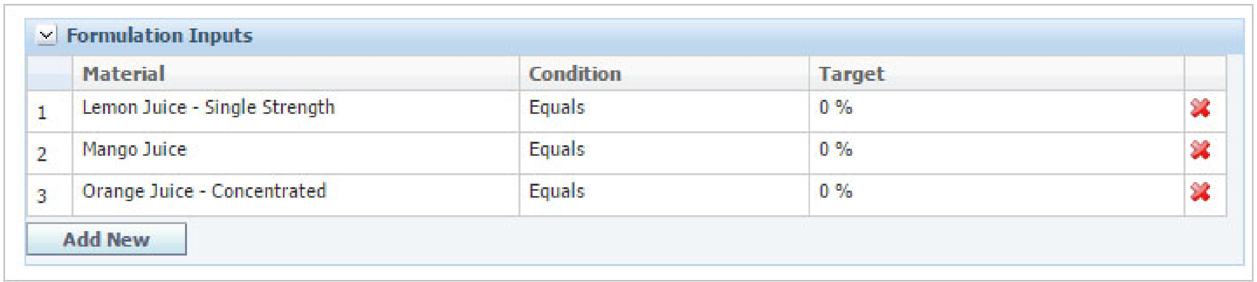
Figure 3–11 Specifications search page



2. Enter search criteria in the key field, operator, and search term fields.
3. Click **Search**. Materials matching the search criteria display in the Search Results table, as described in "Viewing Search Results" on page 3-11.
4. Click specifications to add as search criteria. Your selected specifications display in the Selected Items section.

5. Click **Done**. The search page closes, and selected specifications display in the Formulation Inputs section, as Figure 3–12 shows.

Figure 3–12 Added formulation inputs



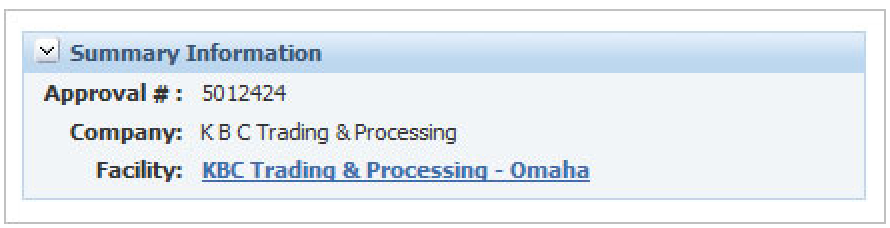
6. Click the **Condition** or **Target** field. The row displays in edit mode.
7. Enter values for the formulation input.
8. Click **Done**. The input items are added to the search page.

Dialog Box Searches

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

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

Figure 3–13 Single select search, sourcing approval, Facility field



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

Figure 3–14 Multi select search, trade specification, Related Specs tab, Next Lower Level Items section

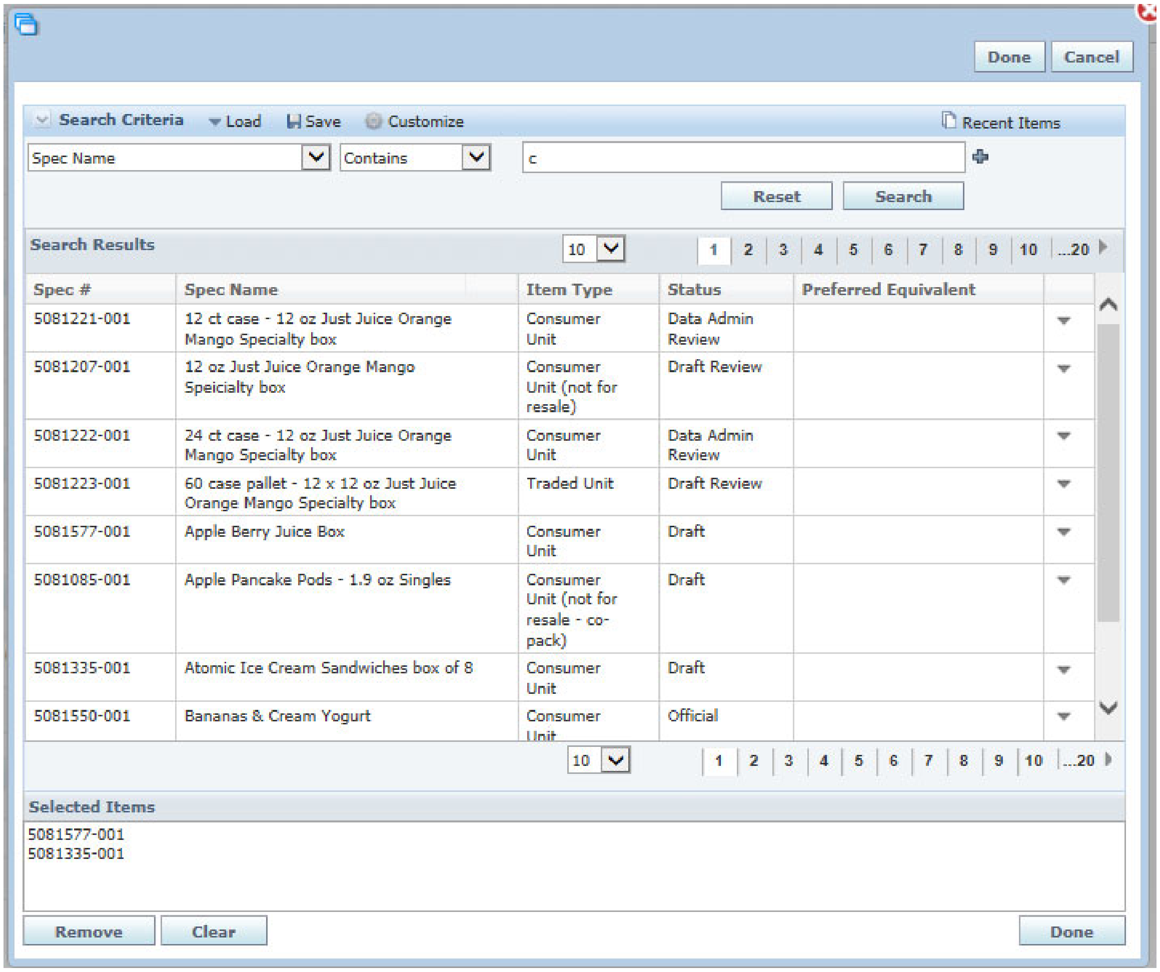
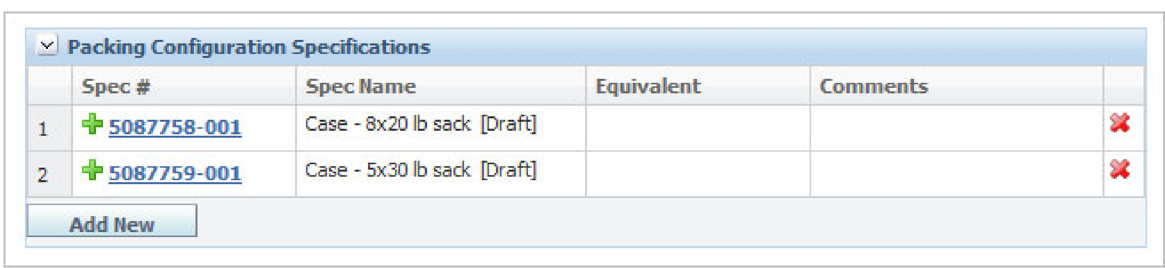
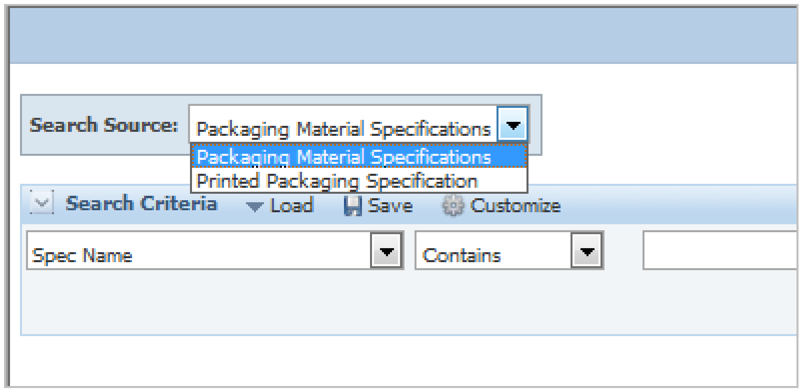


Figure 3–15 Selections made



Multi-Model Search—Some searches allow you to search multiple object types. You select the type of object you would like to search for using the Search Source drop-down above the search control, as shown in Figure 3–16.

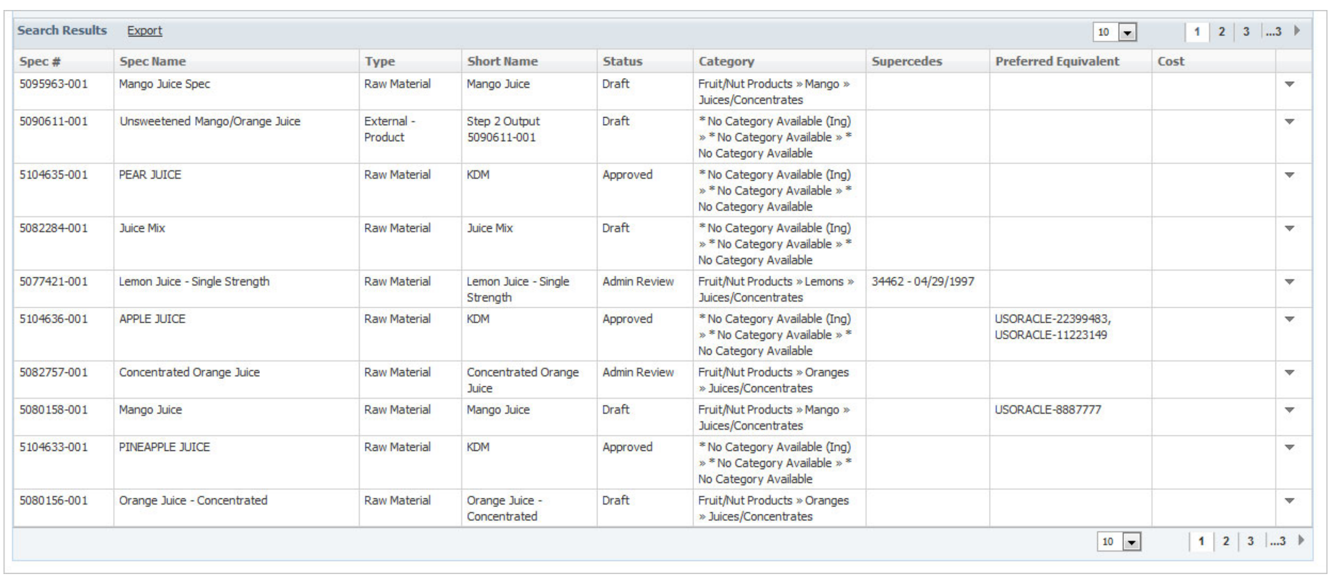
Figure 3–16 Multi-model search, selecting packaging material specification to add for a trade specification



Viewing Search Results

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

Figure 3–17 Search results



Search Results Export

Spec #	Spec Name	Type	Short Name	Status	Category	Supercedes	Preferred Equivalent	Cost
5095963-001	Mango Juice Spec	Raw Material	Mango Juice	Draft	Fruit/Nut Products » Mango » Juices/Concentrates			
5090611-001	Unsweetened Mango/Orange Juice	External - Product	Step 2 Output 5090611-001	Draft	* No Category Available (Ing) » * No Category Available » * No Category Available			
5104635-001	PEAR JUICE	Raw Material	KDM	Approved	* No Category Available (Ing) » * No Category Available » * No Category Available			
5082284-001	Juice Mix	Raw Material	Juice Mix	Draft	* No Category Available (Ing) » * No Category Available » * No Category Available			
5077421-001	Lemon Juice - Single Strength	Raw Material	Lemon Juice - Single Strength	Admin Review	Fruit/Nut Products » Lemons » Juices/Concentrates	34462 - 04/29/1997		
5104636-001	APPLE JUICE	Raw Material	KDM	Approved	* No Category Available (Ing) » * No Category Available » * No Category Available		USORACLE-22399483, USORACLE-11223149	
5082757-001	Concentrated Orange Juice	Raw Material	Concentrated Orange Juice	Admin Review	Fruit/Nut Products » Oranges » Juices/Concentrates			
5080158-001	Mango Juice	Raw Material	Mango Juice	Draft	Fruit/Nut Products » Mango » Juices/Concentrates		USORACLE-8887777	
5104633-001	PINEAPPLE JUICE	Raw Material	KDM	Approved	* No Category Available (Ing) » * No Category Available » * No Category Available			
5080156-001	Orange Juice - Concentrated	Raw Material	Orange Juice - Concentrated	Draft	Fruit/Nut Products » Oranges » Juices/Concentrates			

10 1 2 3 ...3

Saving Search Criteria

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

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

To save search criteria:

1. Enter your search criteria as described in "Understanding the Search Page" on page 3-1.
2. Click **Save**, as shown in Figure 3–18. A Save Search Criteria As dialog box displays, as shown in Figure 3–19.

Figure 3–18 Search page showing Save Search button

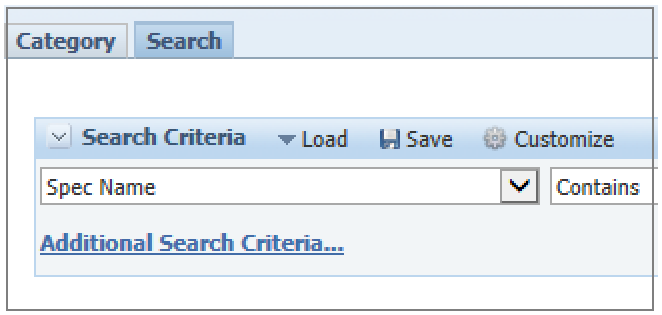
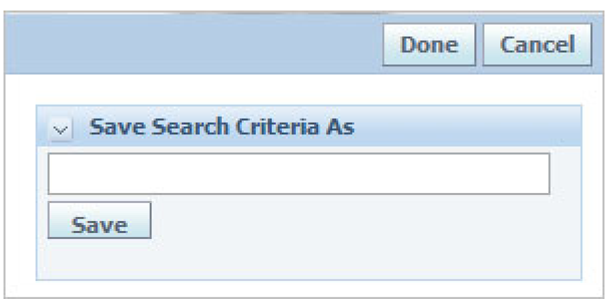


Figure 3–19 The Save Search Criteria As dialog box

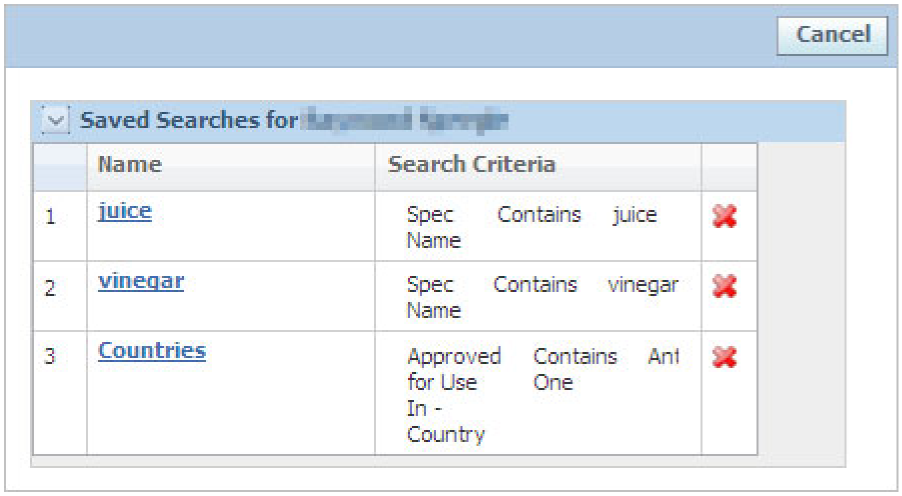


3. Type a descriptive name for the search criteria to save and click **Save**. The dialog box closes, and the search criteria are saved with the name that you provided.

To retrieve a saved search:

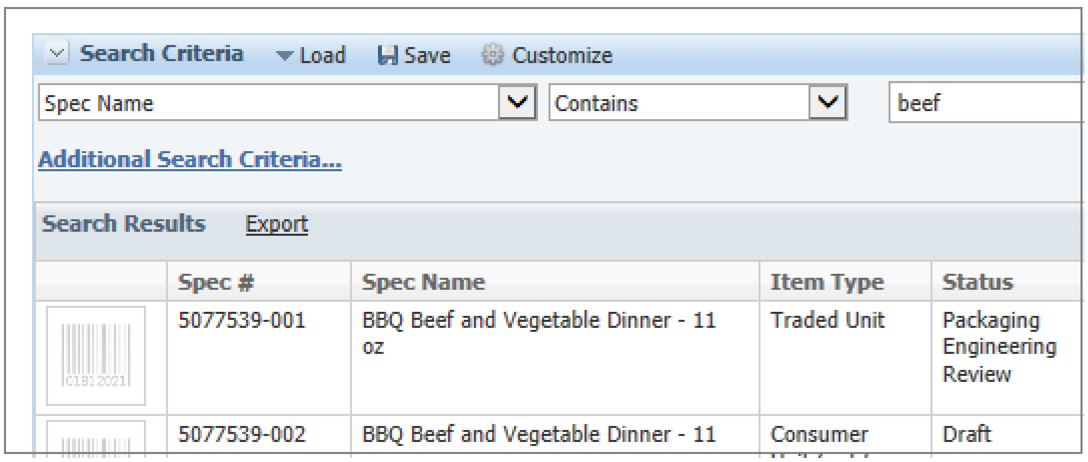
1. On any search page, click **Load**.
2. Select **Load Saved Search** from the drop-down list. A dialog box displays, showing a list of all of the searches that you have saved for a particular business object (specification, company, etc.), as shown in Figure 3–20.

Figure 3–20 Saved Searches for [Your Name] dialog box



3. Click the hyperlinked name of the saved search to load as shown in Figure 3–21.

Figure 3–21 Saved search criteria, loaded into the main search page



These saved searches can be used as default criteria. See "Customizing Searches" on page 3-16 for more information.

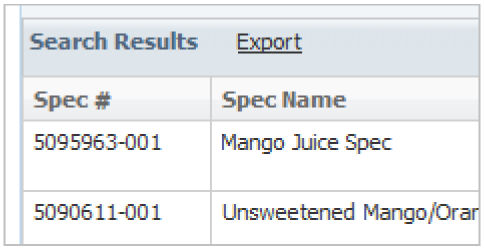
Exporting Search Results

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

To export search results to a local Excel file:

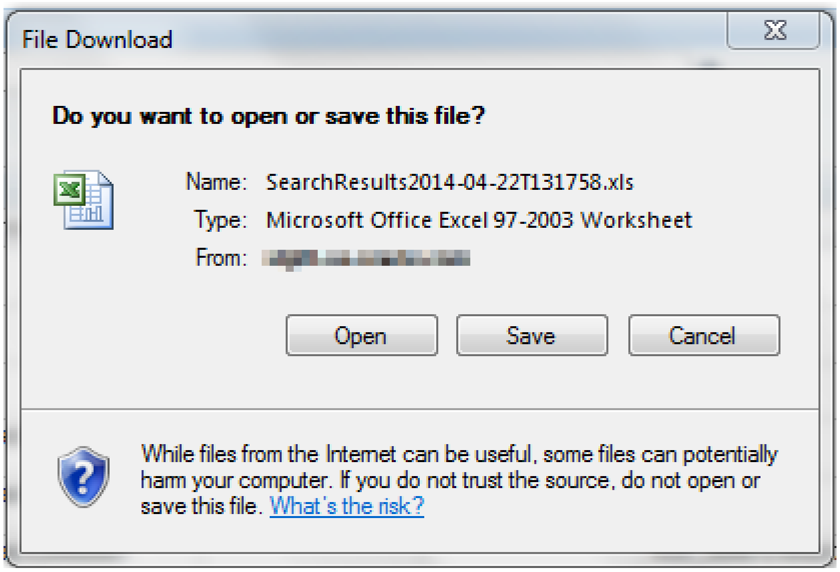
1. Perform a search. The system displays the search results, as shown in Figure 3–22.

Figure 3–22 Search results list and Export link



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

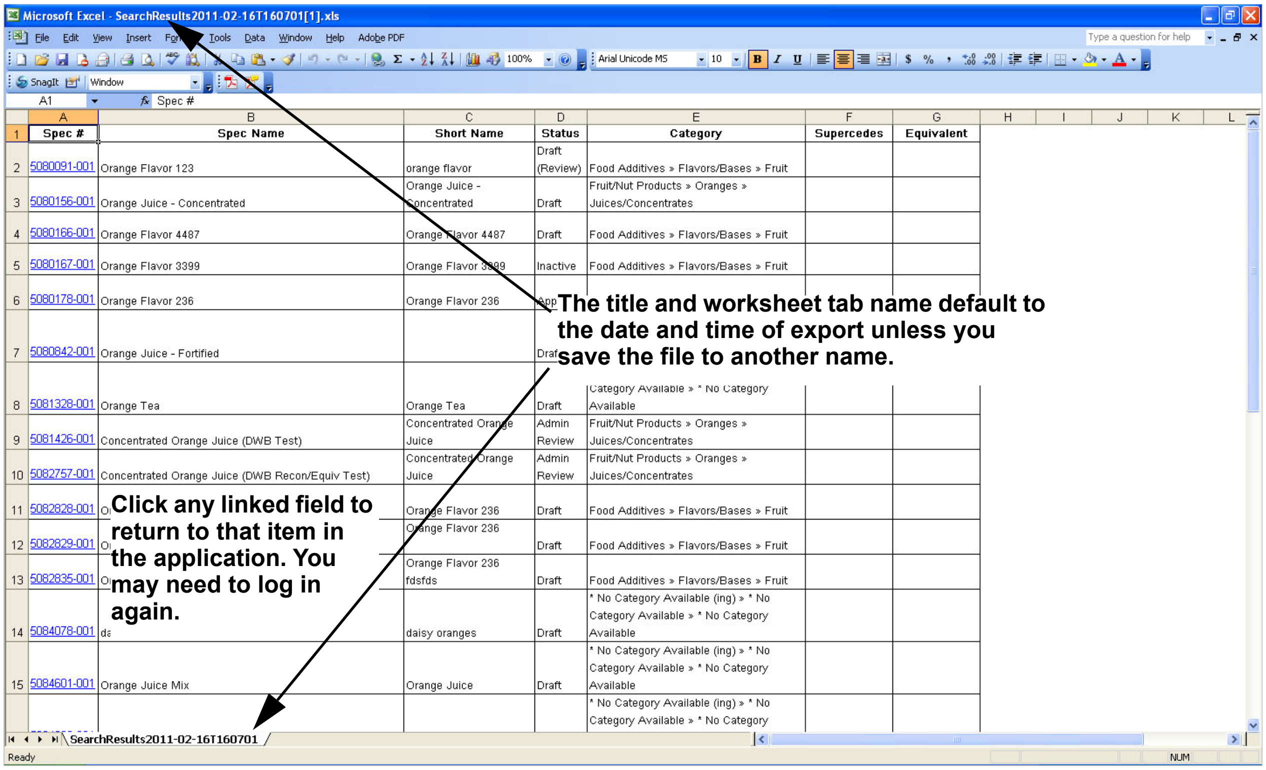
Figure 3–23 Download dialog



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

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

Figure 3–24 Exported search results in Excel

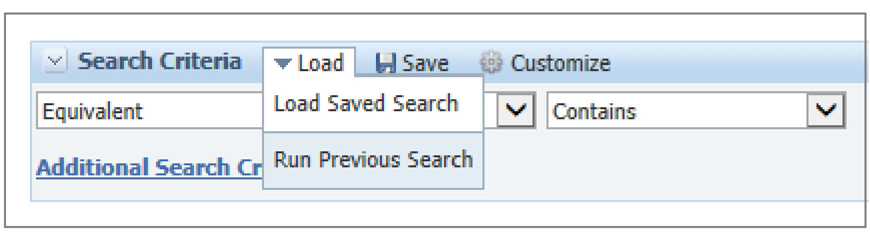


4. You can now format the data in Excel.

Running the Previous Search from the Search Page

The last run search is automatically saved for each object type (material specification, trade specification, company profile, etc.). You can return to the previous search by selecting **Run Previous Search** from the Load drop-down list, as Figure 3–25 shows. This feature is available for the current session only.

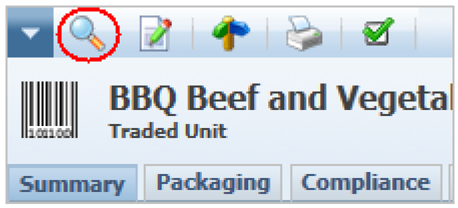
Figure 3–25 Run Previous Search option



Running the Previous Search from a Data Object

After you run a search and select an object from the Search Results list, a Run Previous Search action icon is displayed next to the action menu, as shown in Figure 3–26. Clicking **Run Previous Search** returns you to the search page of your last search and automatically re-runs it. If no previous search exists, Agile PLM for Process returns you to the search page for the object type you are on.

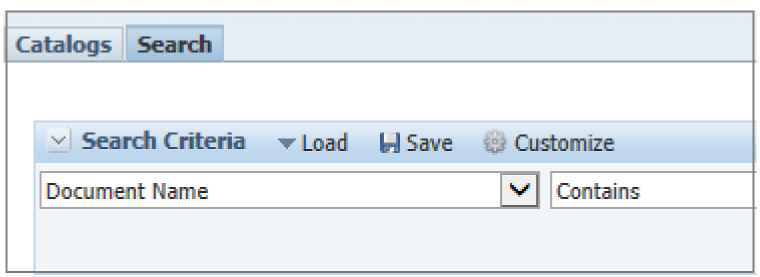
Figure 3–26 Run Previous Search link



Customizing Searches

You can customize searches using the Customize link on the search page of business objects such as specifications, facilities, and questionnaires, as shown below.

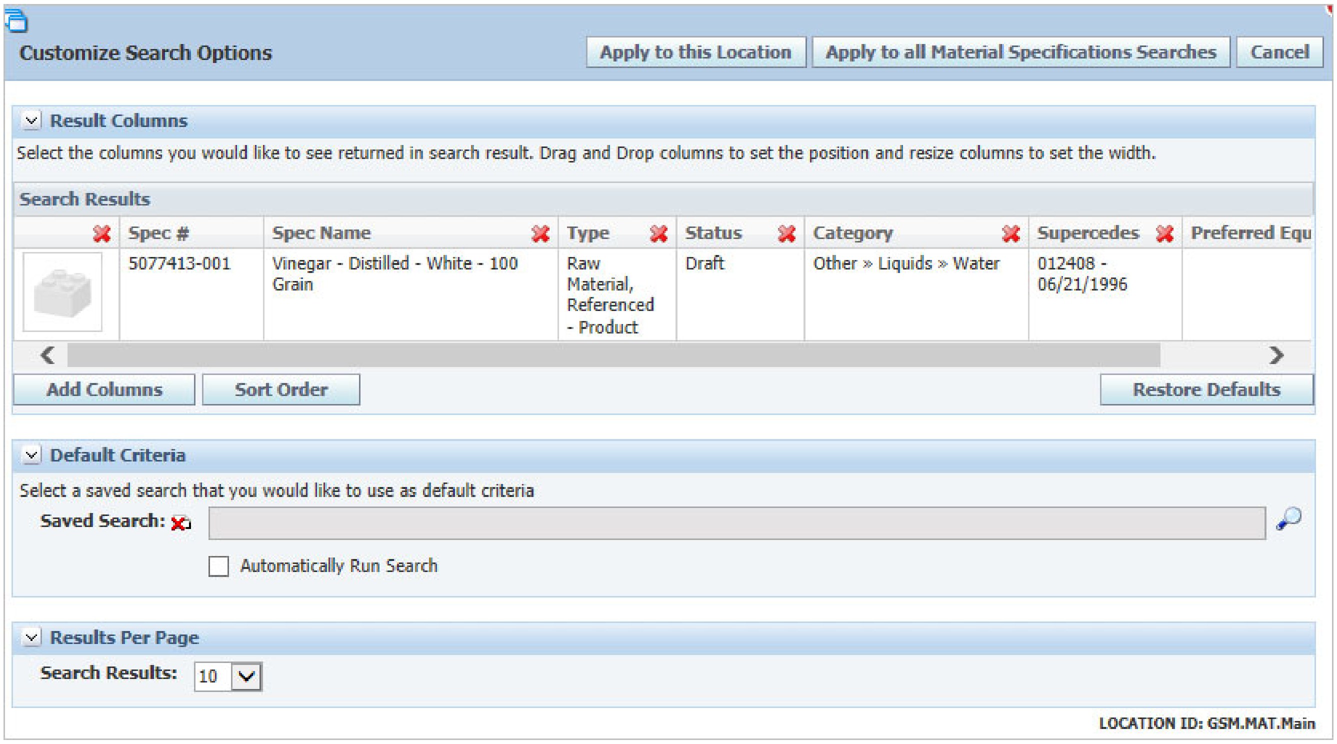
Figure 3–27 Customize link



Clicking **Customize** launches the Customize Search Options dialog box, which you can use to:

- Add and remove columns in search results
- Adjust column sort order for search results
- Define pre-populated search criteria using the default criteria
- Set the number of search results to display

Figure 3–28 Customize Search Options dialog box



You can apply customized searches for each type of object across applications by using three buttons found at the upper right of the dialog box:

Apply to this Location—The customizations are applied only to the current search. For example, only the current trade specification search will reflect the changes you saved.

Apply to all [Object Type] Searches—The customizations are applied to all object type locations. For example, all trade specification searches will reflect the changes you saved.

Restore Defaults—Deletes current customization and returns to default search settings.

This dialog box consists of three sections: Result Columns, Default Criteria, and Results per page. Their functions are described below.

- Use Results Columns to customize search results by selecting the columns to display, adding columns, removing columns, changing the sort order, and restoring defaults.
- Use Default Criteria to set default search criteria by selecting from saved searches. For information on saved searches see, "Saving Search Criteria" on page 3-12.
- Use Results Per Page to set the default number of results to display for a search.

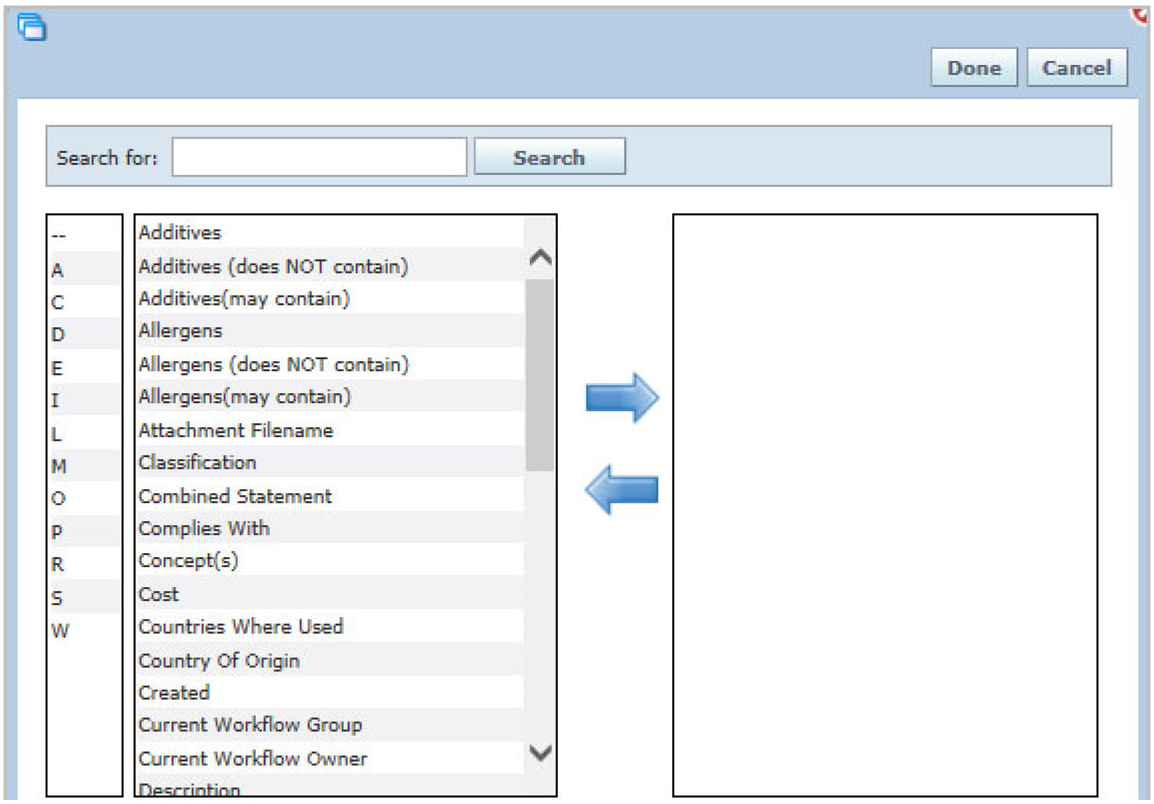
Adding Columns

The Search Results grid displays columns available for display for search results, along with sample data. Mandatory columns are displayed first and cannot be removed or re-sorted. Those that can be modified show a delete icon next to the column name.

To add columns:

1. Click **Add Columns**. A dialog box lists available columns, as Figure 3–29 shows below. Mandatory columns are not included since they cannot be altered.

Figure 3–29 Columns dialog box



2. Use the left and right arrow keys to set which columns you want added to search results, and then click **Done**. The dialog box closes and the new columns appear in the Result Columns grid.

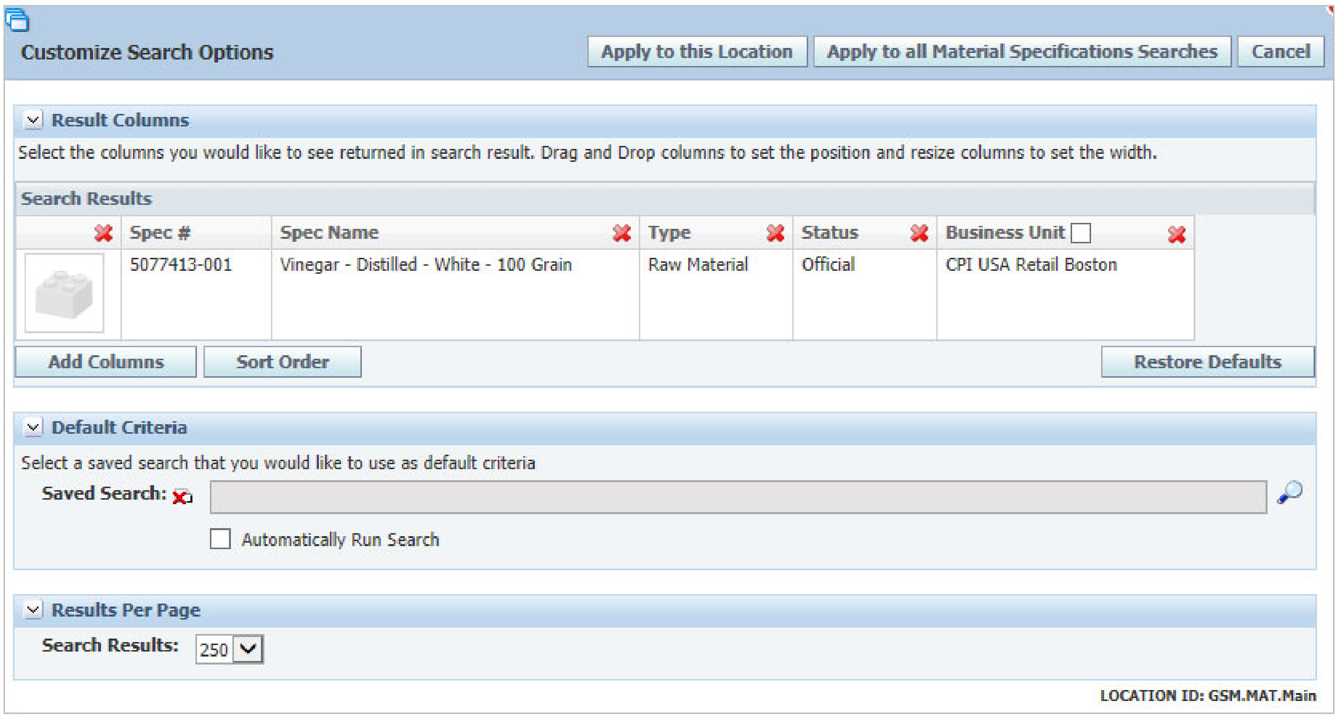
   Note that a maximum of 20 columns can be added

3. Click **Apply to this Location** to save only for this search, or click **Apply to all <name of object> Searches** to apply changes to all searches of the current business object.

Aggregating Result Columns

Some columns can be aggregated. If a column can be aggregated you will see a checkbox to the right of the header label. See the Business Unit column in Figure 3–30. When this checkbox is selected the data returned will be aggregated. For example, let's say a specification has 8 business units associated to it. If the Business Units column is not aggregated then the specification will appear 8 times in your results. If it is aggregated then the specification will return as a single row with all business units listed comma separated. An important thing to note is the aggregated single row will count as 8 results because there are 8 unique business units associated to the specification. Aggregation is merely displaying the results in a more consumable manner.

Figure 3–30 Aggregated column



Removing Columns

For columns listed in the Result Columns grid, you can remove any indicated with the delete icon. Those not marked with the delete icon are mandatory and cannot be removed. These will always appear in Search Results, followed by columns that you customized.

To remove a column, click the delete icon to the right of the column name. Click **Apply to this Location** to save only for this search, or click **Apply to all <name of object> Searches** to apply changes to all searches of the current business object.

Reordering Columns

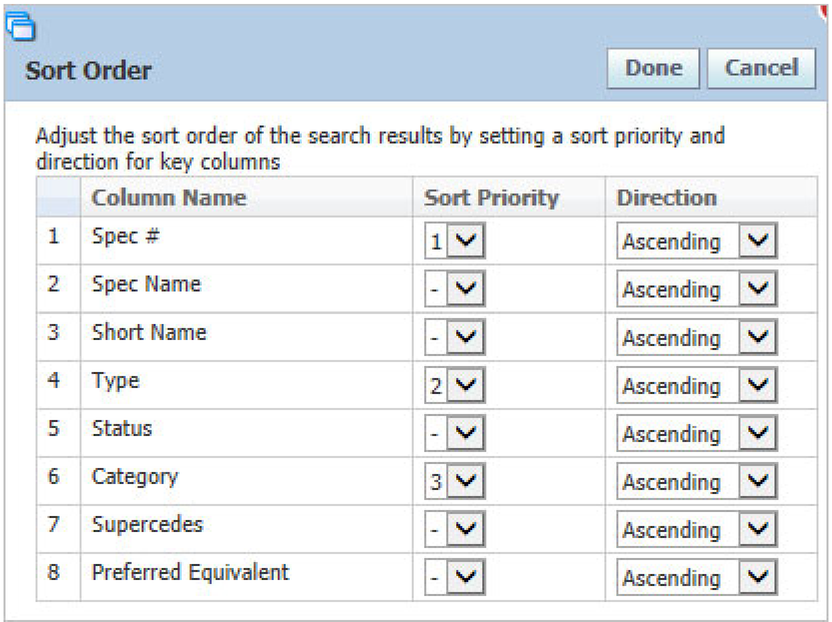
Columns can be re ordered by dragging and dropping columns in the position you prefer.

Sorting Search Results

In typical Agile PLM for Process search pages, search results display in ascending order by default. To re-sort results, you clicked any column head and the data re-displays sorted on that column. Clicking any column head a second time reversed the sort order.

Now you can also save a customized sort order. In the Customize Search Options dialog box, click **Sort Order**. Agile PLM for Process displays the Sort Order dialog box, shown below. Use this dialog to set your preferred sort order.

Figure 3–31 Sort Order dialog box



All sortable columns are listed. To adjust the sort order:

1. For the column you want to sort, set the sort priority by selecting a number from the Sort Priority drop-down list.
2. Select **Ascending** or **Descending** from the Direction drop-down list.
3. Repeat the above steps for other columns.
4. Click **Done**. Your changes are reflected in the he Customize Search Options dialog box.
5. Click **Apply to this Location** to save only for this search, or click **Apply to all <name of object> Searches** to apply changes to all searches of the current business object.

Restoring Defaults

You can restore the changes you made to columns in the Result Columns grid by clicking the **Restore Defaults** button. A dialog box displays two choices:

Restore this Location Only—The default settings are applied only to the current search. For example, only the current trade specification search will be returned to default settings.

Apply to all [Object Type] Searches—The default settings are applied to all object type locations. For example, all trade specification searches will be returned to default settings.

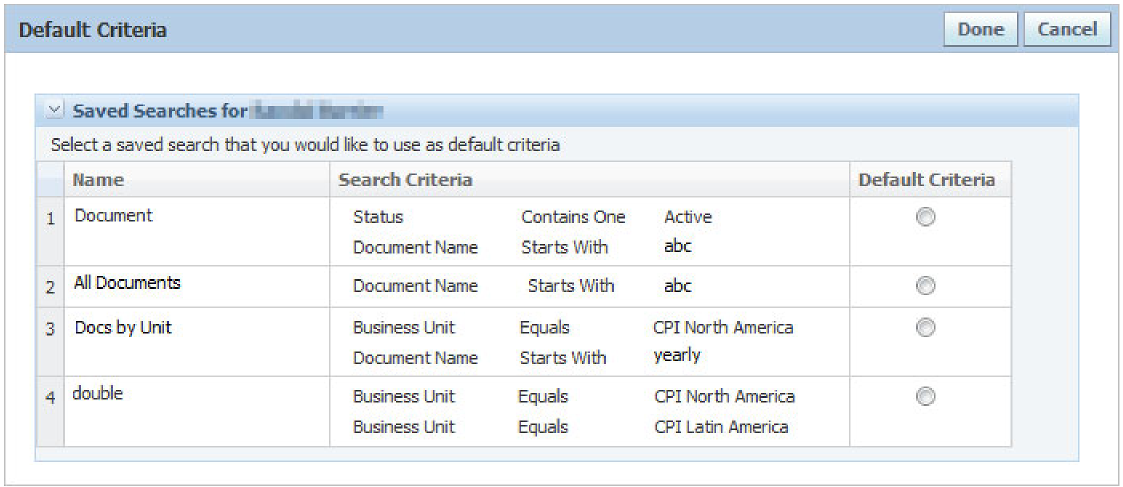
Setting Default Search Criteria

Use the Default Criteria section of the Customize Search Options dialog box to choose a saved search to use as default search criteria.

To set default search criteria:

1. Click the search icon at the end of the Saved Search field. A dialog box displays searches that you have saved.

Figure 3–32 Default Criteria dialog box



2. Select a saved search by clicking its radio button in the Default Criteria column.
3. Click **Done**. The dialog box closes and your selection populates the Saved Search field.
4. If you want to automatically run the search selected, check the **Automatically Run Search** box.
5. Click **Apply to this Location** to save only for this search, or click **Apply to all <name of object> Searches** to apply changes to all searches of the current business object.

Setting Results per Page

In the Results Per Page section of the Customize Search Options dialog box, you can set the number of results per page. By default, Agile PLM for Process loads the Search Result per page number as set in the Profile and Preferences as described in "Results Per Page Section" on page 4-4.

After changing the results per page number, click **Apply to this Location** to save only for this search, or click **Apply to all <name of object> Searches** to apply changes to all searches of the current business object.

The system only returns a maximum of 500 search results. When a search result column is aggregated you may see less than 500 rows because they results are being grouped together in single rows. See "Aggregating Result Columns" on page 3-18 for more information.

Understanding the Category Tab

The second method of finding data within Agile PLM for Process uses the Category tab, which resides on the same screen as the main search page for certain applications (see Figure 3–33). The Category tab allows you to navigate through a set of business objects based on their categorization. Visibility of items in the category search may be limited based on user privileges.

Figure 3–33 Category tab, as seen from the main search page tab

Using the Quick Search Feature

The Quick Search feature is available in the GSM application. For more information, see the "Using Global Specification Search to Find Specifications" section in Chapter 2 of the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

4

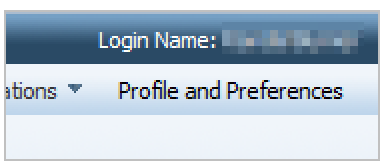
Defining Your Profile and Preferences

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

- Preferences Tab
- Basic Information Tab
- Access Information Tab
- Filters Tab

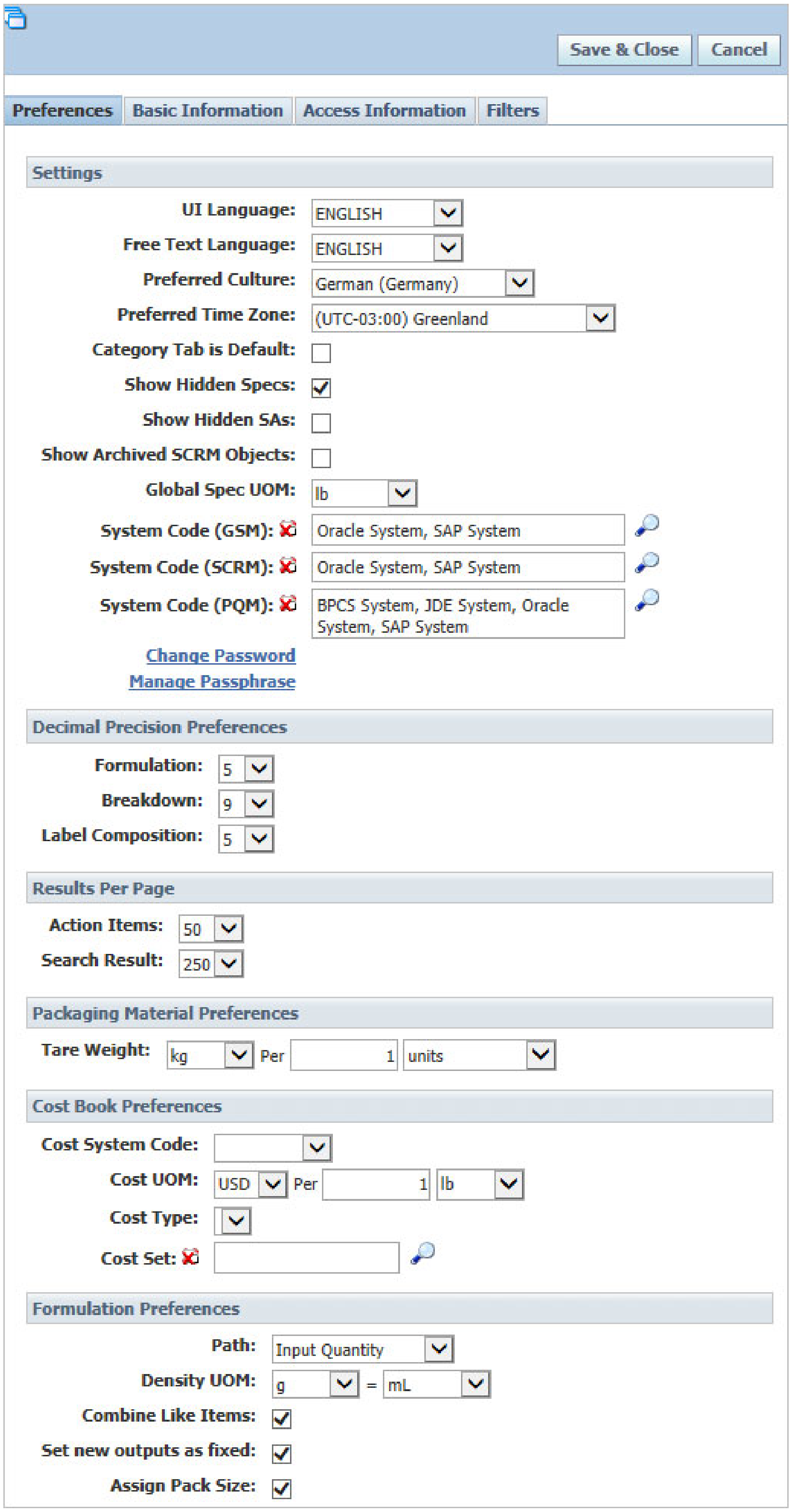
Use Profile and Preferences to edit and view your settings that span select applications. In the user preferences dialog box, you update your basic information, set your application preferences, view your access information, and modify your usability filters. To access this dialog box, click **Profile and Preferences** on the top menu, as shown in Figure 4–1.

Figure 4–1 Profile and Preferences menu



The user preferences dialog box displays, as shown in Figure 4–2.

Figure 4–2 User Preferences dialog box, Preferences tab



Legend: UI—User interface; UOM—Unit of measure

Preferences Tab

The Preferences tab consists of the following sections: Settings, Decimal Precision Preferences, Results Per Page, Packaging Material Preferences, Cost Book Preferences, and Formulation Preferences.

Settings Section

The Settings section contains language settings and key default values.

- **UI Language**—Denotes your preferred user interface language and culture. This field includes a variety of items, such as navigation controls, tab labels, month names, and attribute labels.
- **Free Text Language**—Denotes your preferred language for data you enter into the system. 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.
- **Preferred Culture**—Denotes your preferred culture. Selections here are based on your chosen free text language.
- **Preferred Time Zone**—Select your preferred time zone. This is reflected in date and times throughout the system. Choices are:
  - Auto Detect on First Login—The system automatically detects the user's time zone and transmits it to the server upon login.
  - Server Time Zone—The user's time zone is evaluated each time an application is started.
  - List of internationally recognized time zones, such as UTC-06:00 Central America.
- **Category Tab Is Default**—Sets the Category tab as the default tab that displays when you go to a search page.
- **Show Hidden Specs**—Show GSM specifications tagged as **"**hidden.**"** You must have the [HIDDEN_SPEC_VIEWER] role to view this field. By default, this is selected.
- **Show Hidden SAs**—Show SCRM sourcing approvals tagged as **"**hidden.**"** You must have the [HIDDEN_SA_VIEWER] role to view this field.
- **Show Archived SCRM Objects**—Show archived SCRM objects. You must have the [ARCHIVED_SCRM_VIEWER] role to view this field. Learn more about archived SCRM objects in the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*.
- **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.
- **System Code (APP)**—Selections made in the System Code fields designate which cross reference systems are used as the preferred system for identity information displayed in areas like search results and object headers. Preferred Cross References are supported in GSM, SCRM and PQM. This is a multi selection field.
- **Change Password**—Changes password if password management is enabled by the administrator.

  To change your password:

  1. Click **Change Password**. A Change User Password dialog box opens.

2. Type your **Old Password** and type your new password in the **New Password** and **Confirm Password** fields.
3. Click **Submit**. The new password takes effect after you have saved the revised user profile.

- **Manage Passphrase**—Displayed when the logged in user has been set up to have eSignature enabled in UGM. When a user needs to establish a new passphrase or manage an existing passphrase upon logging in to Profile and Preferences, one of the following messages displays:

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

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

  To manage your passphrase:

  1. Click **Manage Passphrase**. A Manage Password dialog box opens.
  2. Type your **Old Passphrase** and type your new passphrase in the **New Passphrase** and **Confirm Passphrase** fields.
  3. Click **Submit**. The new passphrase takes effect after you have saved the revised user profile.

Decimal Precision Preferences

The Decimal Precision Preferences section contains settings for the default decimal precision shown in certain areas of GSM.

- **Formulation**—Defines the default decimal precision for formulation specification.
- **Breakdown**—Defines the default decimal precision for the composition %s inside breakdowns on GSM specifications.
- **Label Compositions**—Defines the number of decimal places you would like to view for label compositions.

Results Per Page Section

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

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

Packaging Material Preferences Section

The Packaging Material Preferences section defines tare weights for packaging materials.

Tare Weight—Sets the default tare weight for packaging material specifications.

Cost Book Preferences Section

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

- **Cost System Code**—Sets the default cross reference system to use when pulling cost values.

- **Cost UOM**—Sets the default currency and per UOM for cost displayed. By default, cost is displayed in USD per 100 kg. With this preference you can adjust how cost is displayed, for example: USD per 100 lbs. or EUR per 1000 kg.
- **Cost Type**—The type associated with the cost set.
- **Cost Set**—The actual set of costs that are used for the bill of material (BOM) items added to the formulation specification.

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

Formulation Preferences Section

The Formulation Preferences section defines your default preferences for formulations.

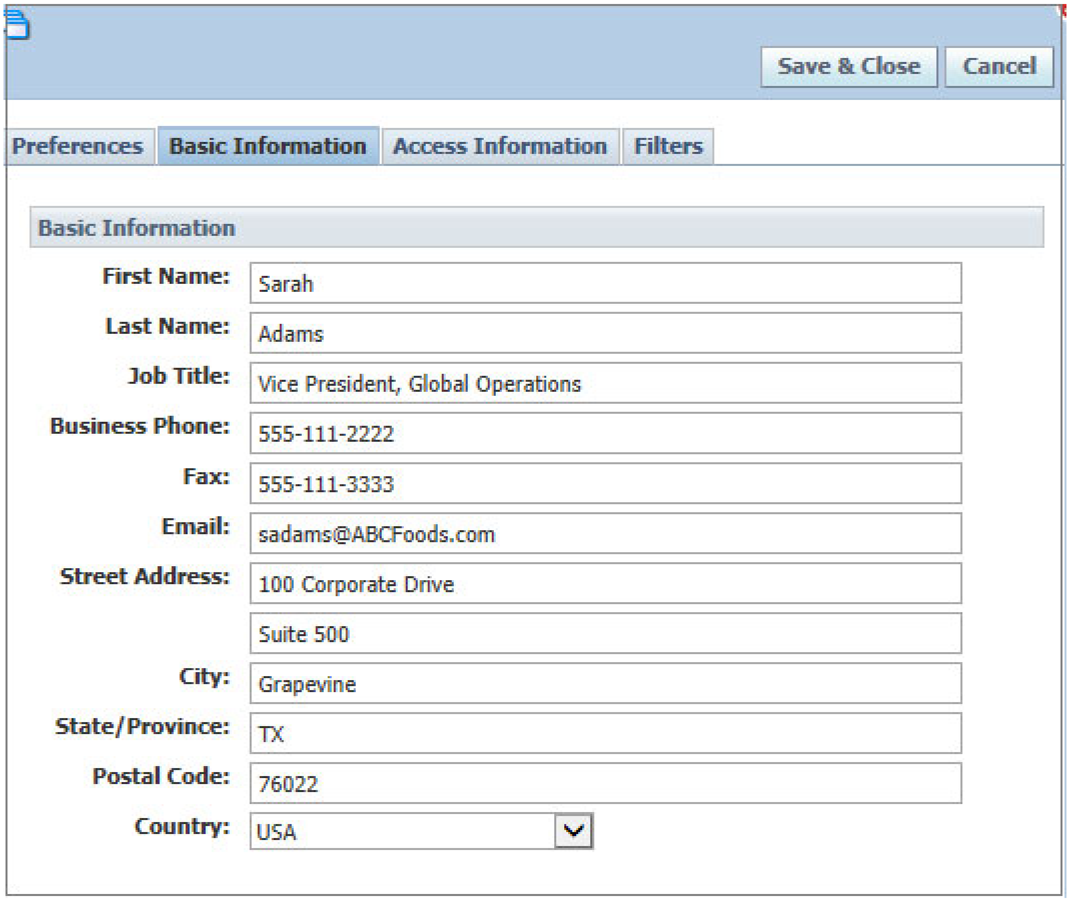
- **Path**—Sets the default calculation path to use when creating formulation specifications.
- **Density UOM**—Sets the UOM that is used for density during formulation theoretical calculations. By default this is set to g = ml.
- **Combine Like Items**—Combines like input items when viewing the formulation specification in read mode. By default, this is selected.
- **Set new outputs as fixed**—When multiple outputs are created on a formulation step they are automatically set to “fixed” by default. When unselected, all outputs created are no longer automatically set to fixed.
- **Assign Pack Size**—When selected, the system displays the pack size attribute in the formulation bill of materials.

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

Basic Information Tab

The Basic Information tab contains contact information, as shown in Figure 4–3.

Figure 4–3 Basic Information tab



Basic Information

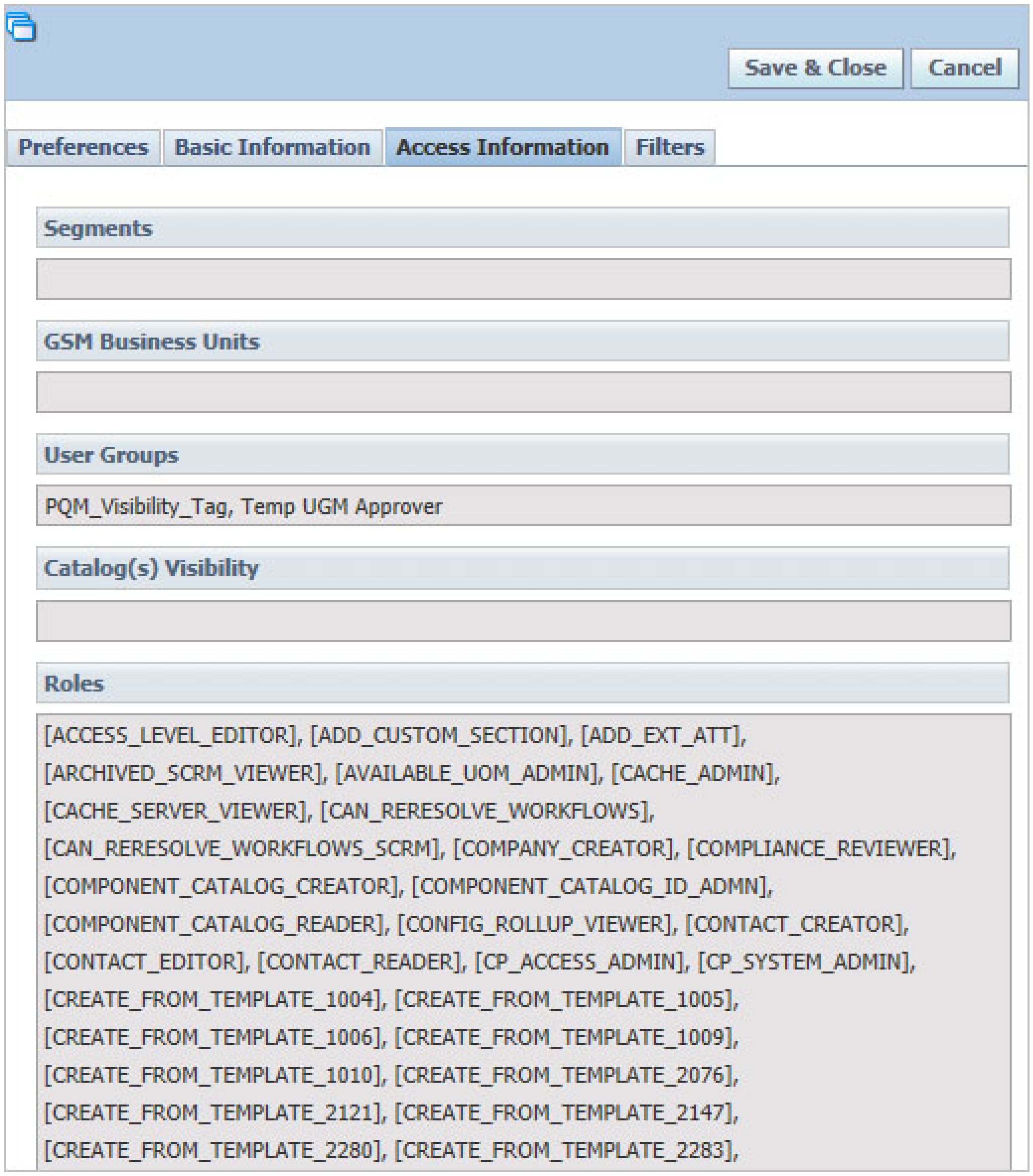
You can update your contact information using the fields below:

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

Access Information Tab

The Access Information tab, shown in Figure 4–4, contains a read only view of the access you have throughout the application suite.

Figure 4–4 Access Information tab



Segments

This is a read only view of the business segments you have access to. Your system administrator assigns business segments.

GSM Business Units

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

SCRM Business Units

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

User Groups

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

Catalog(s) Visibility

A read-only field that displays which DRL catalogs you have access to. Your system administrator assigns DRL catalogs.

Access Privileges

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

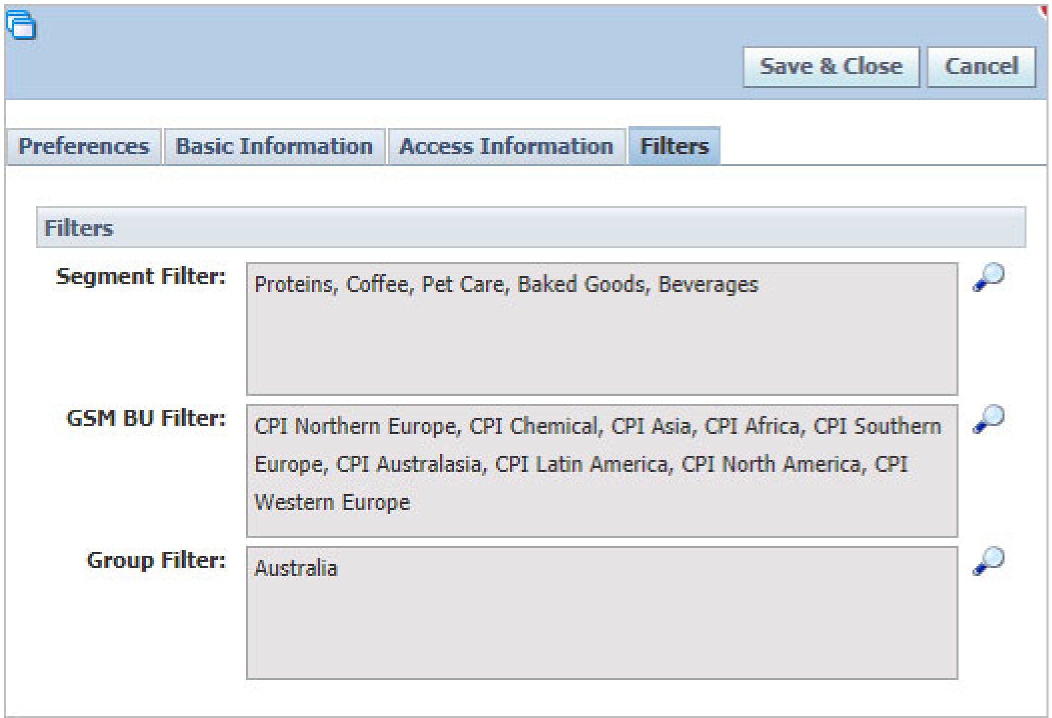
Roles

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

Filters Tab

Filters are a usability helper that reduces your GSM search results (GSM BU Filter) and your selection options (Group and Business Segment Filter). The Filters tab sets these filters, as shown in Figure 4–5.

Figure 4–5 Filters tab



- **Segment Filter**—Filters search results based on business segment and allows you to remove things from the list. For example, if you have access to Proteins and Coffee, but only want to see Protein things in your search results for the week, you would use this field to remove Coffee from your filter list.
- **GSM BU Filter**—Filters GSM search results based on business unit. For example, you may have access to Europe, North America, and South America business units. You can set your filter to contain a subset of these business units (North America) and your search results only contain items assigned to the North America BU.
- **Group Filter**—Filters group-defined attributes such as allergens, intolerances, additives, and Complies With lists.

5

Working with Extended Data

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

Overview of Extended Data

As mentioned earlier in this guide, extended attributes are data attributes that your organization has defined. They are one method of extending the functionality of the application. You can build these attributes to meet specific needs.

Custom sections are configurable sets of extended attributes.

Roles

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

Setting Up Extended Data

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

Searching for Extended Data

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

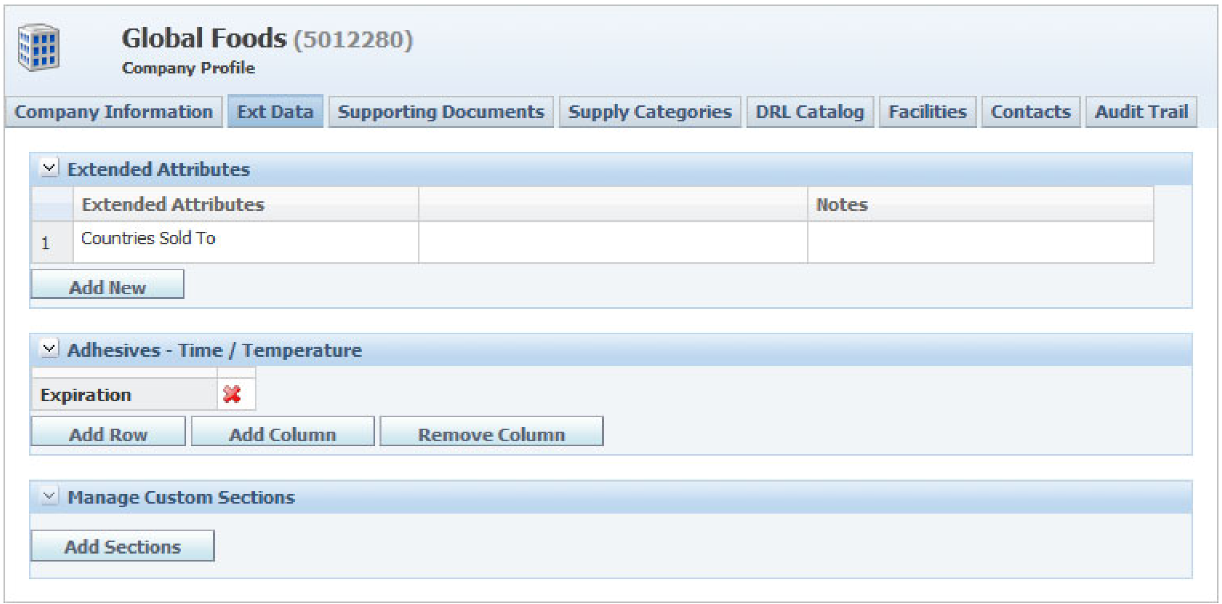
Ext Data Tab

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

- Extended Attributes
- Custom Sections

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

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



Extended Attributes Section

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

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

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

Custom Sections Section

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

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

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

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

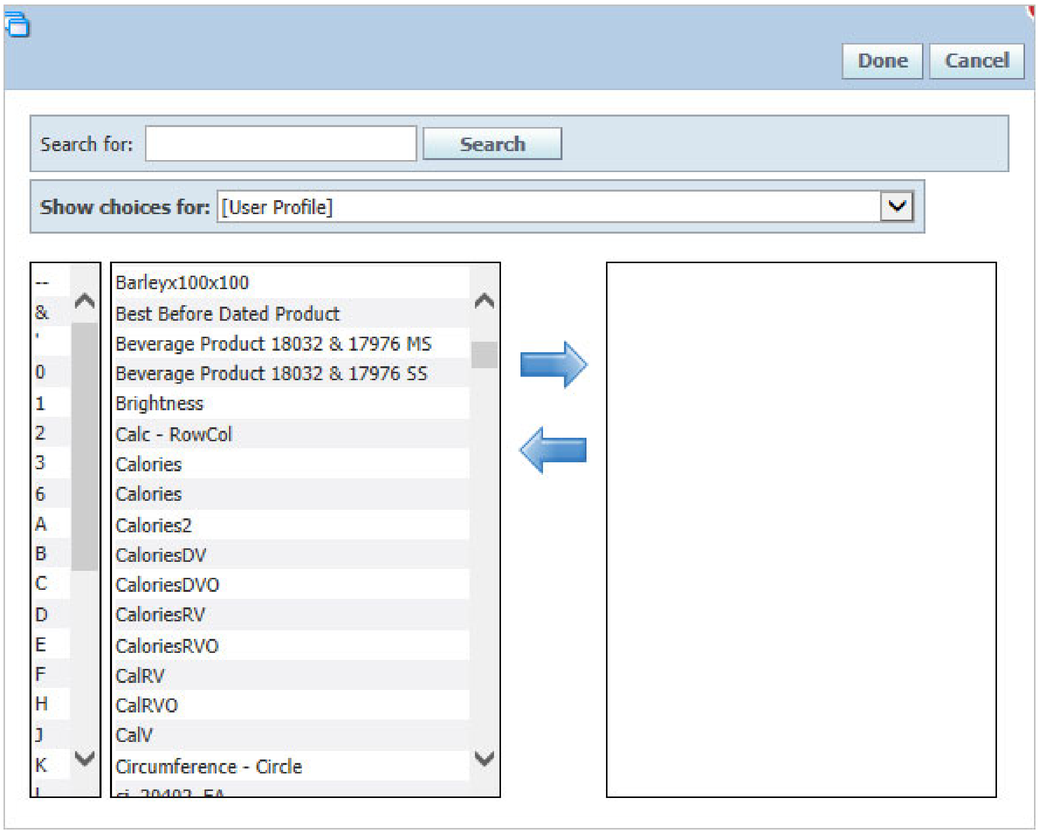
Warning: If you remove a custom section or extended attribute, the system deletes the data that you entered. Delete data with caution, because it cannot be retrieved.

Adding Extended Attributes

To add extended attributes:

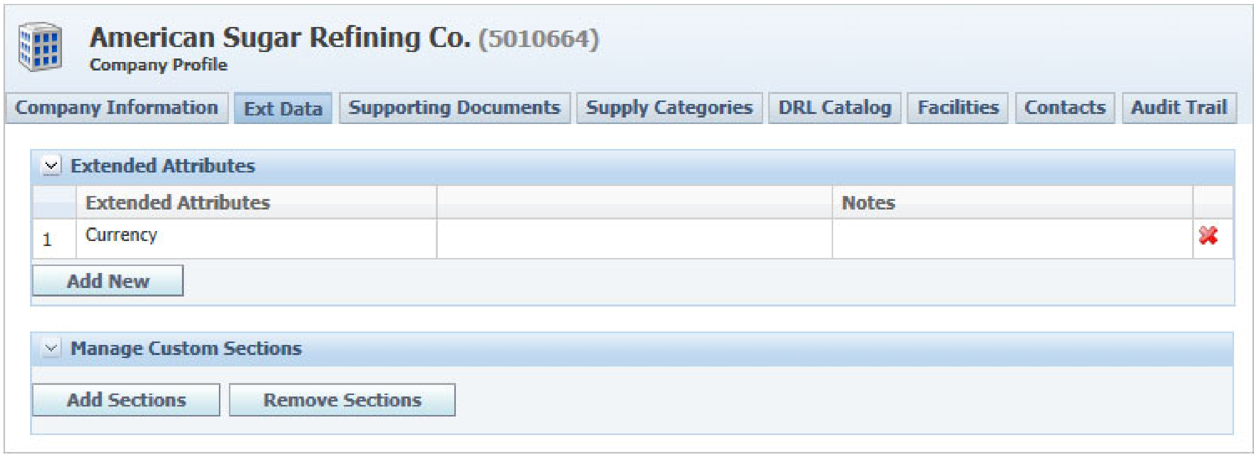
1. Click **Add New** in the Extended Attributes section. A dialog box opens, as shown in Figure 5–2.

Figure 5–2 Extended attributes dialog box



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

Figure 5–3 Added extended Attribute



Defining Values for the Extended Attributes

You can add values to the extended attributes grid using our standard inline editing procedures. Click in a cell of the row, and add the desired value or notes.

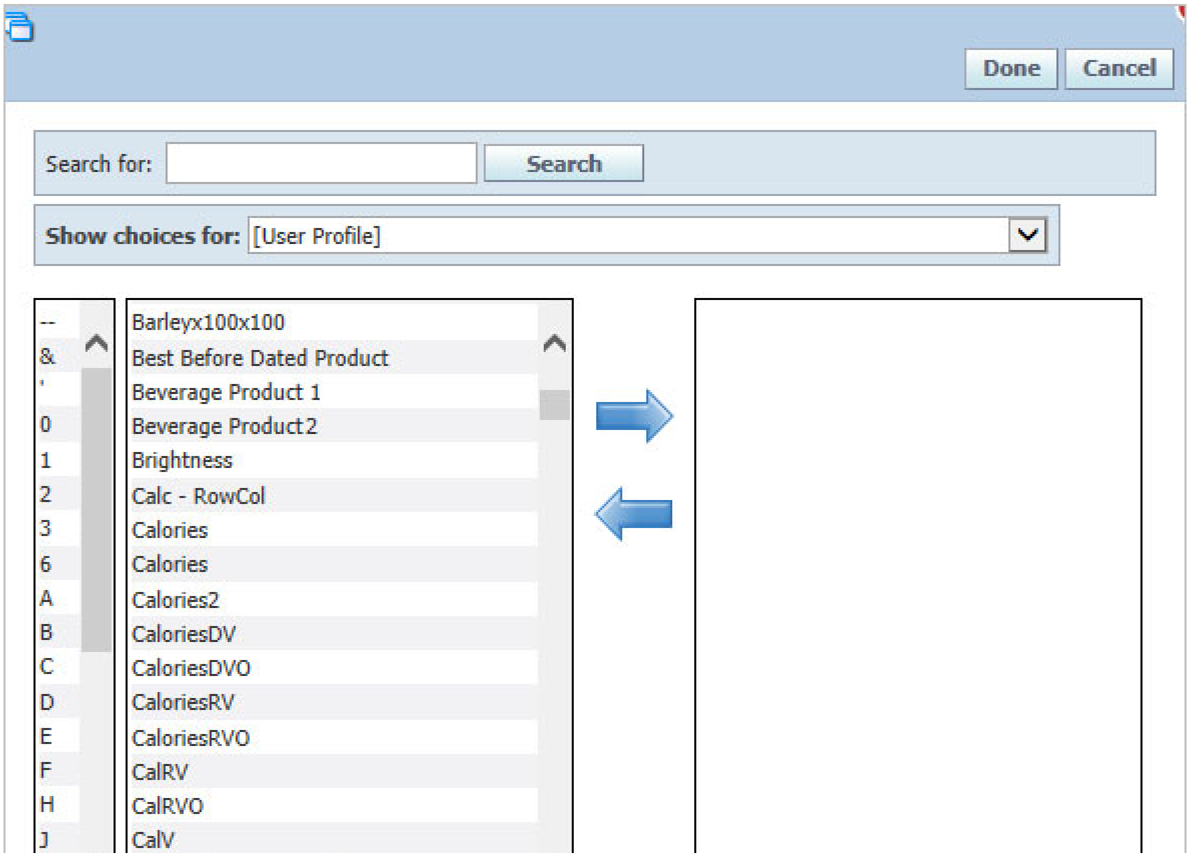
After you have entered the desired extended attribute information, click **Save** to save your data.

Adding a Custom Section

To add a custom section:

1. With the page in edit mode, click **Add Sections**. A dialog box listing available custom sections is displayed, as Figure 5–4 shows.

Figure 5–4 Custom section selection dialog box



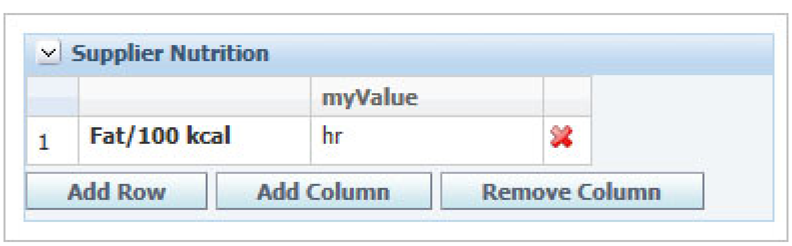
2. Search for and select a section name, and then click **Done**. The custom section is added to the business object. You can make multiple selections.

Editing a Custom Section

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

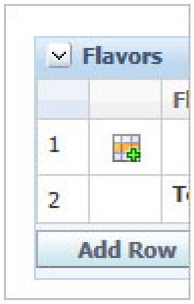
1. If the page is not already in edit mode, click **Edit**. If you just added a custom section, it displays on the Ext Data tab in edit mode.

Figure 5–5 Custom section in edit mode



2. Make appropriate changes to the table, row, or column. For rows marked with the "Repeatable" tag in ADMN, the add row icon displays to the right of the order column. Use this icon to quickly add repeatable rows to the table. You can then set the row order using the reorder row icons. For more information on the Repeatable tag, see the "Using ADMN to Manage Custom Data" chapter in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Figure 5–6 Add rows icon

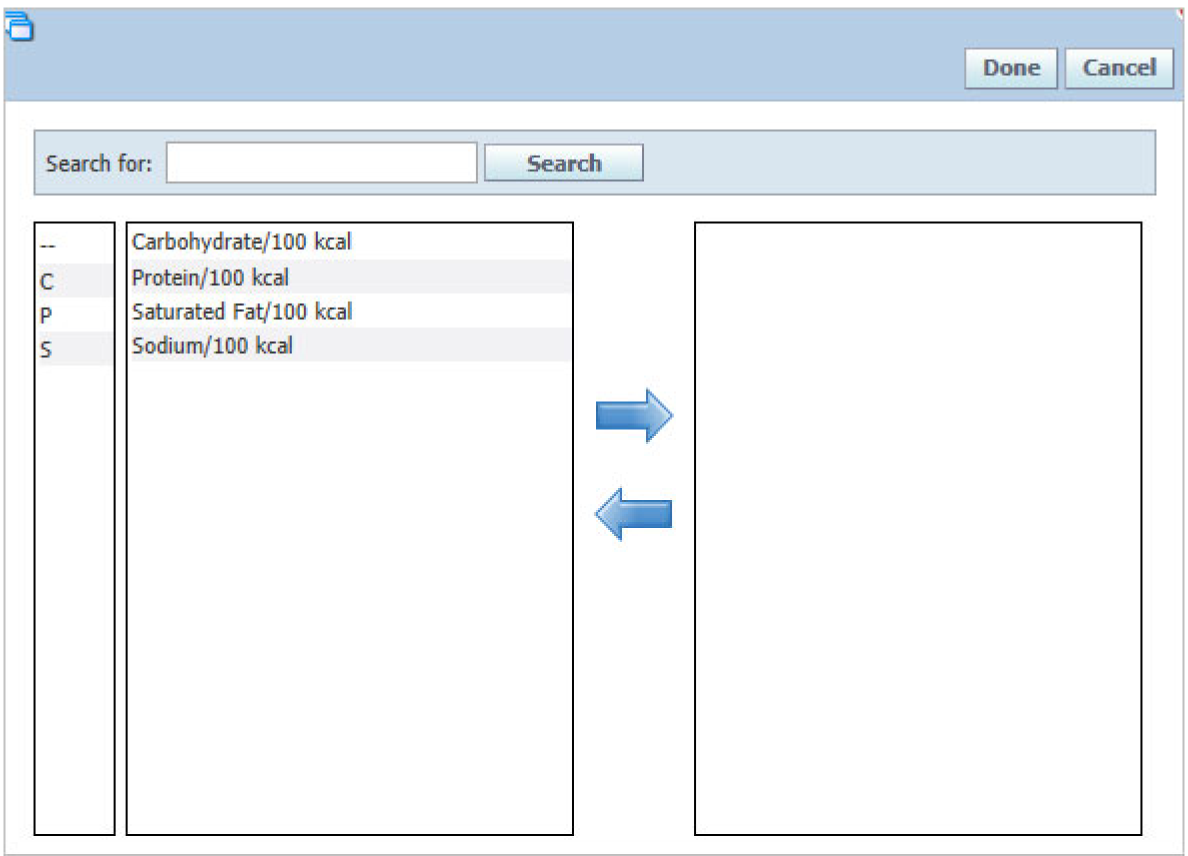


3. Click **Save**.

To add a row:

1. With the custom section in edit mode, click **Add Row**. A dialog box listing rows that can be added is displayed, as Figure 5–7 shows. To quickly find a particular row, or filter a long selection of rows, use the search field at the top of the dialog.

Figure 5–7 Available rows dialog box



2. Select a row, and then click the add selected data icon. You can make multiple selections using the **Ctrl** key.
3. Repeat step 2 to add additional rows.
4. Click **Done**. The dialog box is closed, and the added rows display in the table.
5. Click **Save**.

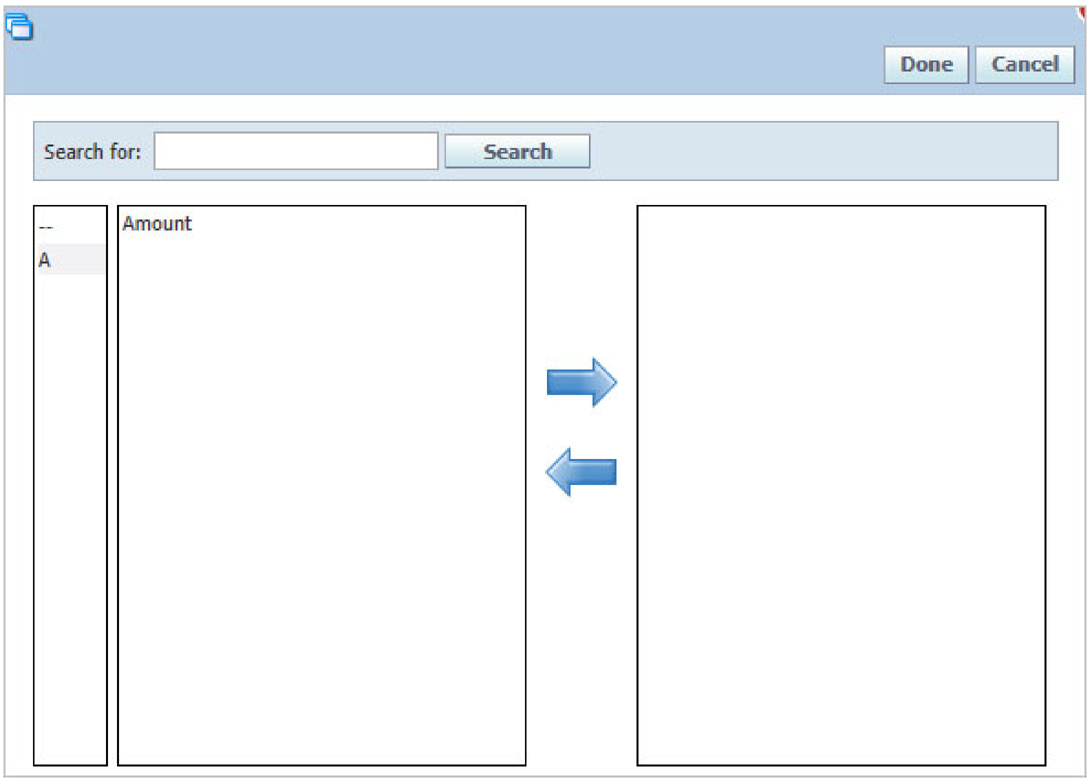
To delete a row:

1. With the custom section in edit mode, click the delete row icon. A message prompts you to confirm the deletion.
2. Click **OK**. The row is deleted from the table.
3. Click **Save**.

To add a column:

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

Figure 5–8 Available columns dialog box



2. Select a column, and then click the add selected data icon. You can make multiple selections using the **Ctrl** key.
3. Repeat step 2 to add additional columns.
4. Click **Done** to close the dialog box. The added columns display in the table.
5. Click **Save**.

To delete a column:

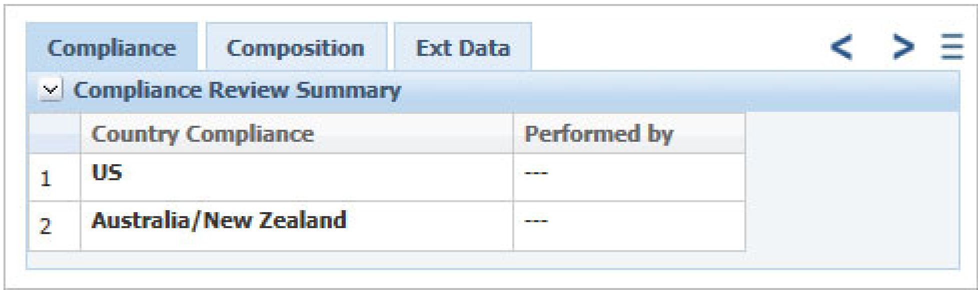
1. With the custom section in edit mode, click **Remove Column**. A dialog box listing columns that can be deleted is displayed, as Figure 5–8 shows above. To quickly find a particular column, or filter a long selection of columns, use the search field at the top of the dialog.
2. Select a column, and then click the add selected data icon.
3. Repeat step 2 to select additional columns to delete.
4. Click **Done** to close the dialog box. The selected columns no longer appear in the table.

5. Click **Save**.

Working with Custom Section Category Tabs

Configurable Category tabs allow you to group extended attributes and customer sections and thereby reduce page scroll. These tabs display inline on the Ext Data tab. As an example you may want three custom sections related to auditing (Compliance, Composition, and Ext Data) to be grouped together on the page. Use the left and right arrow icons to move through the tabs, or click directly on the tab. The list icon displays a listing of all category tabs.

Figure 5–9 Sample showing category tabs

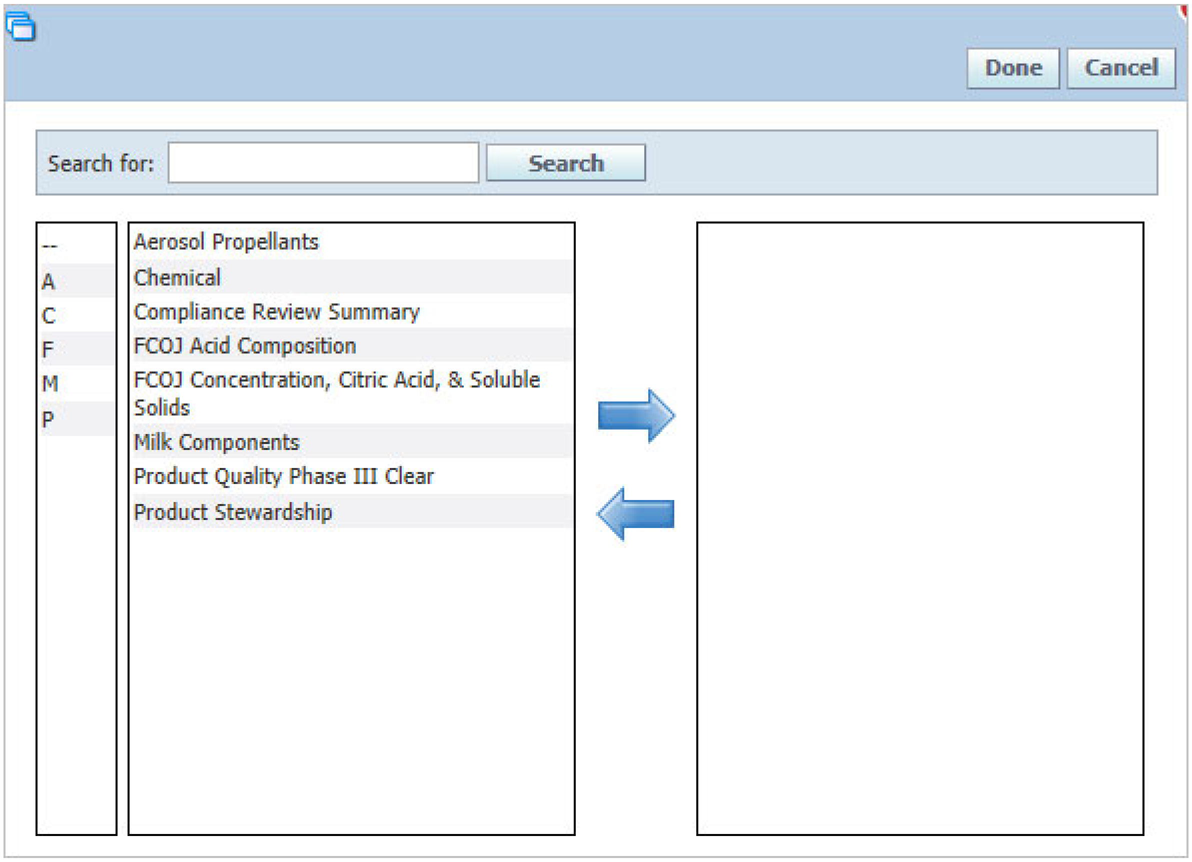


Deleting a Custom Section

To remove a custom section:

1. With the page in edit mode, click **Remove Sections**. A dialog box listing all custom sections is displayed, as Figure 5–10 shows.

Figure 5–10 Available sections dialog box



2. Select a custom section, and then click the add selected data icon. You can make multiple selections using the **Ctrl** key.
3. Click **Done**. The custom section is removed.
4. Click **Save**.

Calculated Attributes

GSM, PQM and NPD support calculated extended attributes. This means that some extended attributes in custom sections can be calculated. A calculated extended attribute is an attribute that references other attributes and performs calculations.

When you add a calculated attribute to your object, PLM for Process calculates it when you click any of the following action buttons:

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

If PLM for Process encounters an error while calculating the attribute, it displays a calculation error icon. In some cases, you can click the error icon to see error details. For more information about calculated attributes, see the *Agile Product Lifecycle Management for Process Extended Attribute Calculation Guide*.

6

Working with Supporting Documents

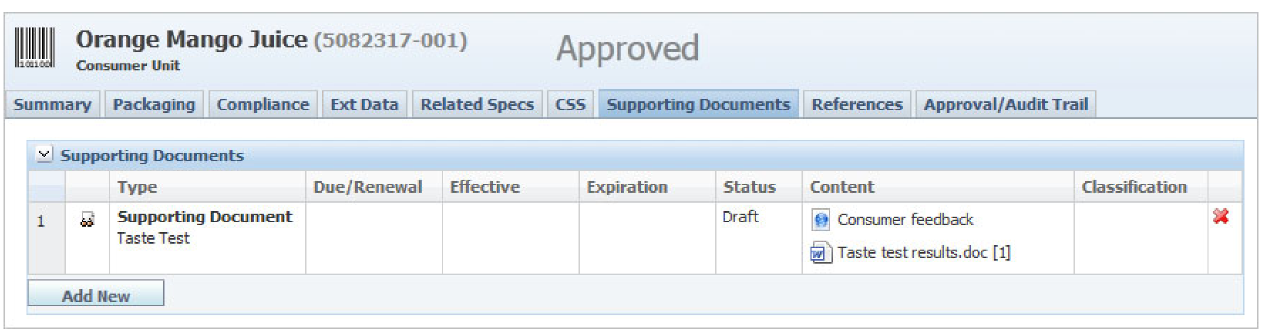
This chapter explains how to use the Supporting Documents feature to manage your supporting documents across Agile PLM for Process applications. This chapter contains the following topics:

- Overview
- Supporting Documents Page
- Publishing to Supplier Portal
- Searching for Supporting Documents
- Editing Supporting Documents
- Deleting Supporting Documents

Overview

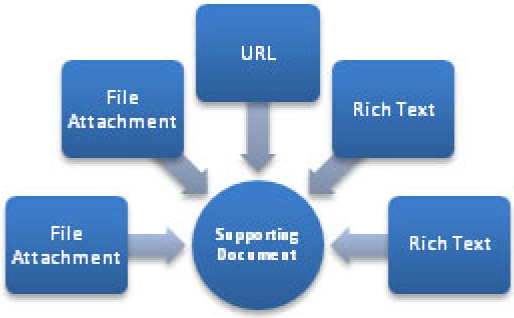
A supporting document is a collection of attachments with corresponding data that allows for easier managing, searching, and reporting against the documents. Agile PLM for Process hosts a robust place to store your documents called Supporting Documents. The Supporting Documents tab, shown in Figure 6–1 below, is found on business objects such as GSM specifications, eQ questionnaires, NPD projects, and SCRM companies and facilities.

Figure 6–1 Supporting Documents page



As the figure below shows, supporting documents include URL links, attachments, and rich text.

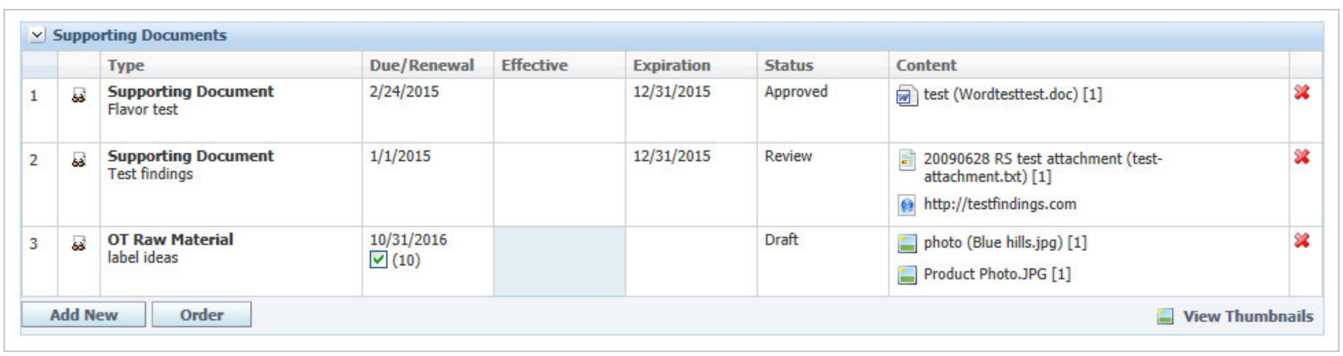
Figure 6–2 Contents of a supporting document



For each supporting document, you can have multiple attachments, and each attachment is composed of files, rich text, and URL links. For example, a trade specification might have four supporting documents:

1. Assembly instructions consisting of Word documents outlining assembly
2. Testing attributes consisting of Excel files containing storage attributes and attribute listings
3. Product photos
4. Agreements such as a PDF privacy agreement

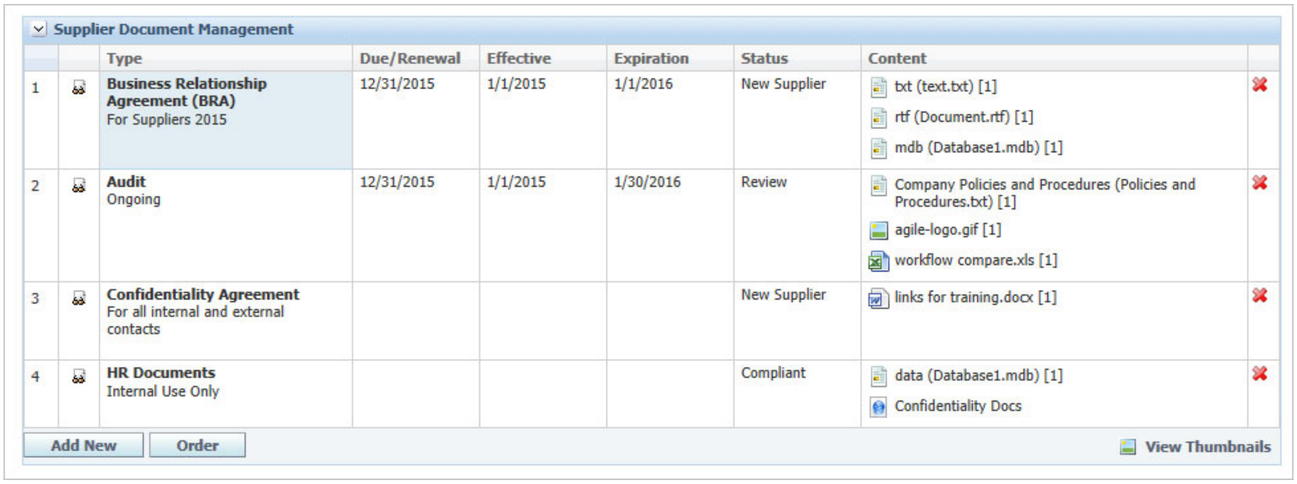
Figure 6–3 Supporting documents for a material specification



Supporting Documents Page

The Supporting Documents page contains the Supporting Documents grid, shown in Figure 6–4 below. In the SCRM application, this is called the Supplier Document Management grid. This grid houses “parent” documents, to which several attachments can be assigned. Document Type and additional data can be assigned to every supporting document.

Figure 6–4 Supporting Documents grid



The supporting documents grid contains several columns which are defined below. Your company might hide some of these columns through configurations for different object types.

Type—Type of supporting document.

Due/Renewal—Due date or renewal date.

Effective—Date the document takes effect.

Expiration—Date the document expires.

Status—Status of the document.

Content—Title of attachment, URL, or rich text. The version number is also displayed. Click the link to view details about the document in the File Attachment Detail dialog box.

Classification—The security classification assigned to the document. This field appears when object level security (OLS) is configured on. For more information on OLS, refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

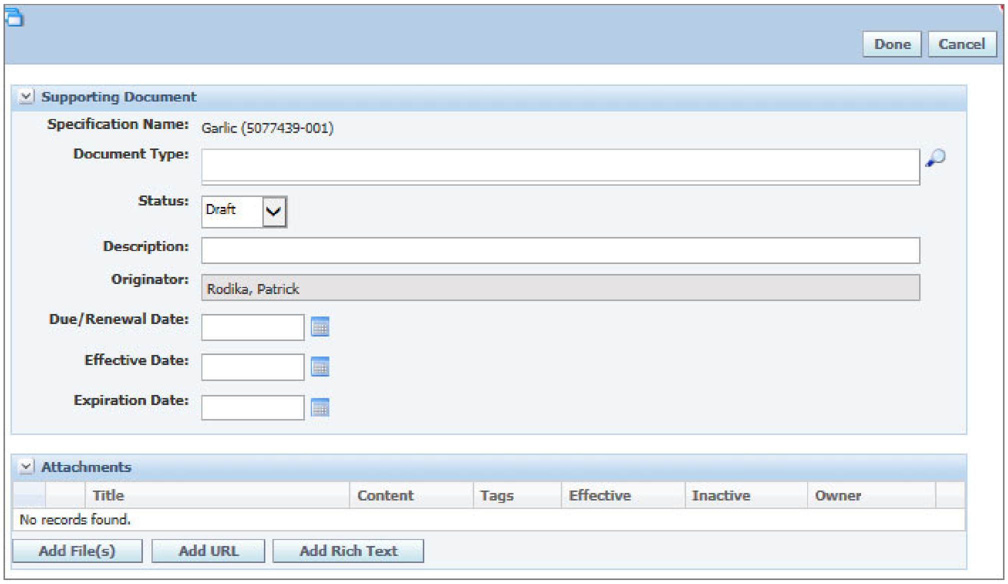
Depending on your configuration, up to five extensible columns or plugins can be added to this grid.

- Click the view details icon to open the Supporting Documents dialog box showing details of the supporting document.
- Use the delete icon to delete supporting documents.
- Click **Add New** to add a new supporting document using the Supporting Document dialog box.
- Click **Order** to change the order of supporting documents when more than one is listed in the grid.
- Click the **View Thumbnails** link to view thumbnails of graphic files added as supporting documents.

Supporting Documents Dialog Box

Use the Supporting Documents dialog box to add new and manage existing supporting documents. It contains two sections: Supporting Documents and Attachments. Some applications contain only the Attachments section.

Figure 6–5 Supporting Documents dialog box



Supporting Document Section

Use this section to define the supporting document. In SCRM, this section is called Supplier Document Management. The section includes the following fields:

Parent Name—Auto-populated based on business object. For example, in SCRM, this would be the company name, facility name, or sourcing approval name. In PQM, this would be the issue name, action name, or audit name. This field cannot be changed.

Document Type—Select the document type from the drop-down list. The list is managed in ADMN as described in "Document Types" on page 6-4.

Status—Select the document status from the drop-down list. The list is managed in ADMN as described in "Document Status Types" on page 6-4.

Description—Description of document.

Originator—Read only view of user who created the document.

Due/Renewal Date—Select a due date or renewal date

Effective Date—Select a date the document takes effect.

Expiration Date or is this called Notify Prior—Select a date the document expires.

Document Types The types of documents assigned for supporting documents is administered in core lists in ADMN for the following applications: GSM, SCRM, PQM, and NPD. So if your company uses NPD, available document types are found in **ADMN** > **NPD** > **Document Type**.

For more information see the core data chapter in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Document Status Types The status of supporting documents is administered in core lists in ADMN for the GSM, SCRM, PQM, and NPD applications. Out-of-the-box statuses are: Draft (default), Review, and Approved. For more information see the core data chapter in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Attachments Section

The attachments grid displayed on the supporting document details screen is where all attachments the supporting document owns are listed. The grid includes the following columns:

Title—Title of file, rich text, or URL. Any applicable version numbers and the date the attachment was added are also displayed.

Content—Icon representing attachment. The version number is also displayed. Click the icon to open the attachment.

Tags—Tags that apply to the attachment. These are managed by a list in ADMN for the following applications:

- SCRM
- GSM Specifications and smart issue requests
- PQM
- NPD
- PQS Samples
- DRL

Attachments marked with the “Publish to Supplier” tag are published to Supplier Portal. Attachments tagged as “Proprietary” are not included in printing.

Effective—Effective date of the attachment.

Inactive—Inactive date of the attachment.

Owner—Owner of the attachment.

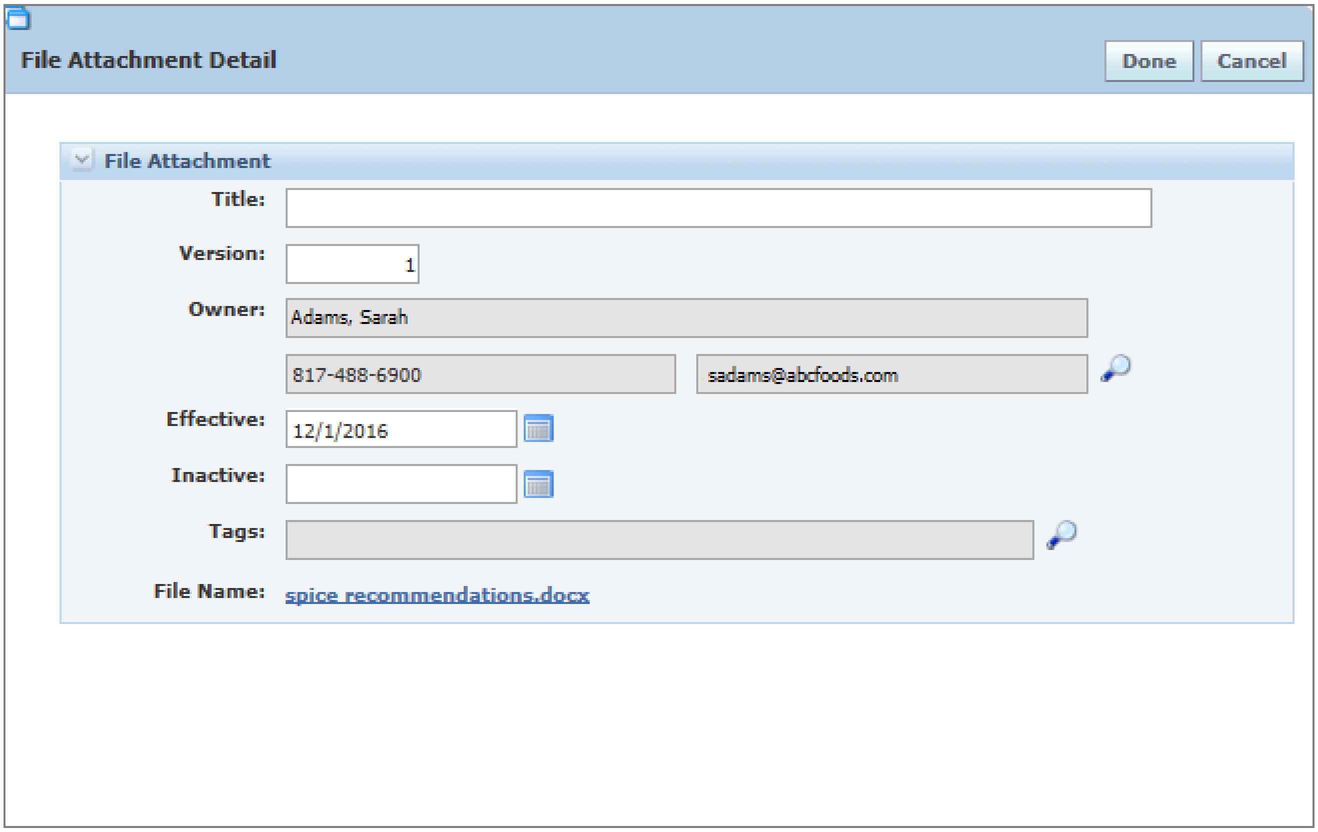
Click **Save** to save your changes.

Use the delete icon to delete an attachment.

When you click the view details icon in the Attachments grid, the File Attachment dialog box is displayed.

Note: Each added or removed attachment (including Files, URL, and Rich Text) will be saved or removed in memory as soon as the change is made. Click the Done button to save the other modifications. Click the Cancel button to remove all other modifications.

Figure 6–6 File Attachment dialog box



Using the Attachments grid, users can:

- Upload a file by clicking **Add File** or drag and drop files.
- Add a URL by clicking **URL**.
- Add Rich Text by clicking **Rich Text**.

Figure 6–7 Attachments grid

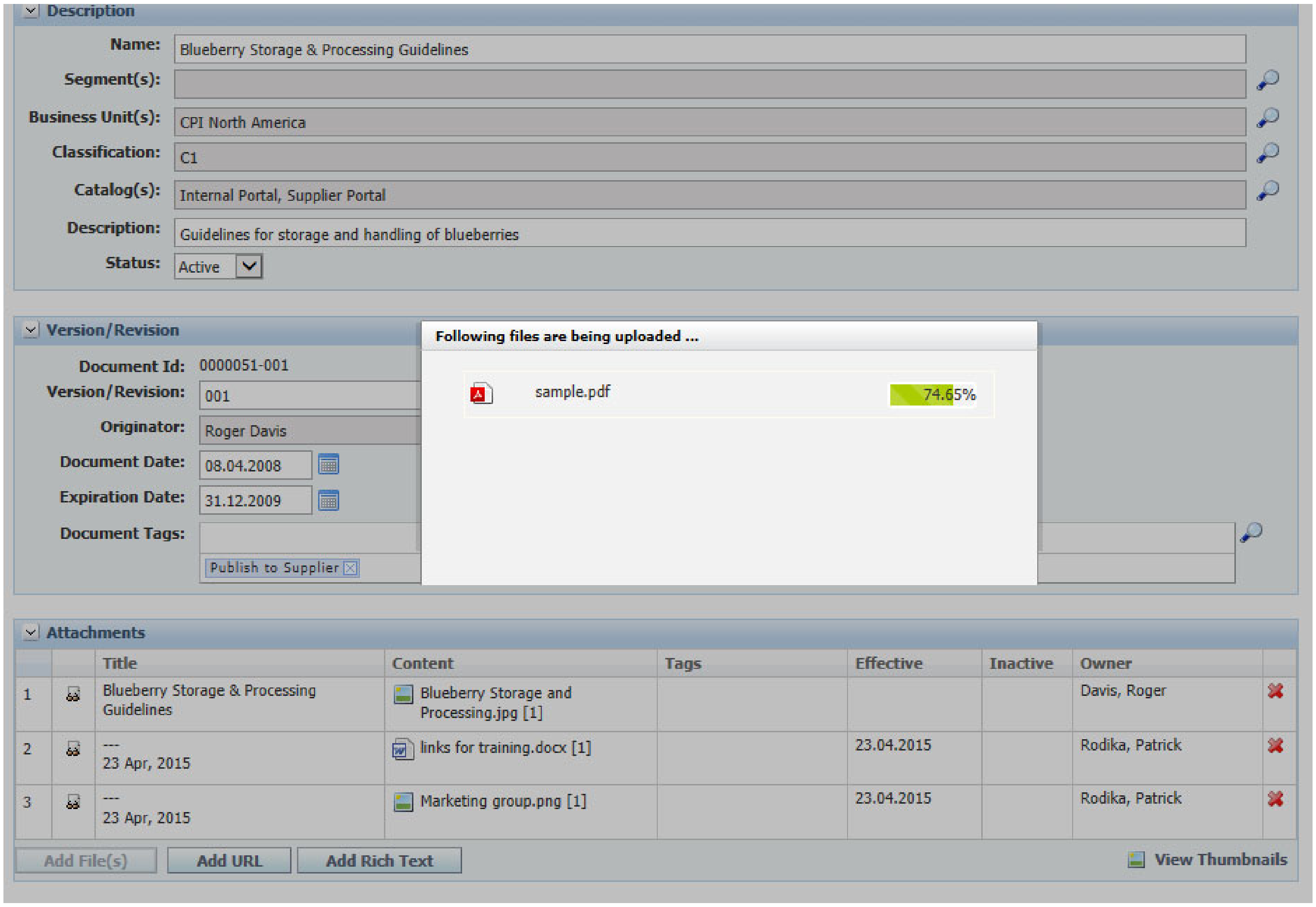
Adding Files When you click **Add File**, the standard file upload dialog box is displayed.

Select the files you want to upload. You can select multiple files at once by holding **Shift**+click or **Ctrl**+click.

You can also drag and drop files to the Attachments grid.

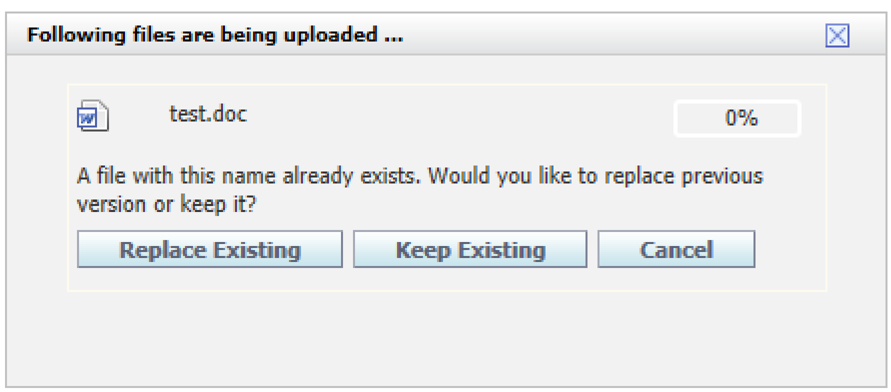
When you add a file, a floating panel shows the status of each file that is uploading. When the upload is complete, the Attachment grid refreshes to show the new files. You can then edit all attributes except for Content (filename).

Figure 6–8 Progress panel



If a file is too large the following error is returned: "`This file exceeds the maximum size allowed and cannot be uploaded.`"

Figure 6–9 Warning



Versioning During upload, if the same file name is found it is automatically versioned. You are given the choice to replace the existing file and increase the version number by one, or keep the file and add a new attachment with a new version. The version number is determined by the most recent document with the same filename and version number set. So if fileA.doc version 1 exists and you upload FileA.doc again, it would go to version 2.

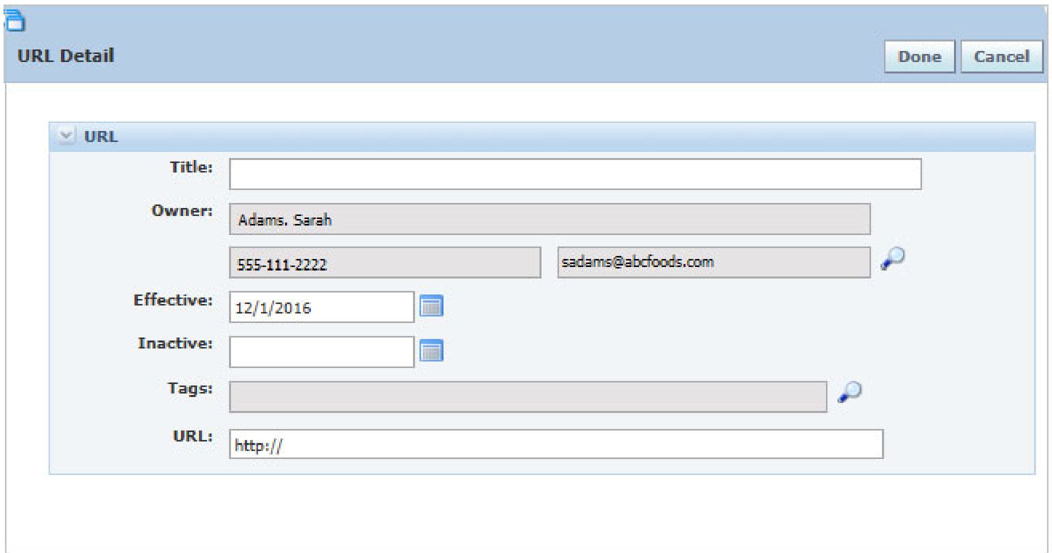
If 5 versions of FileA.doc are found, date would be the deciding factor. For example, if you upload FileA.doc -1today, and upload FileA.doc-2 tomorrow and set the version to 8, the system would use 9.

When you have finished making changes for the supporting document, click **Save**.

Adding URLs

When you click **Add URL** from the Attachments grid, the URL dialog box is displayed. It includes all fields that are available in the grid and a browse functionality.

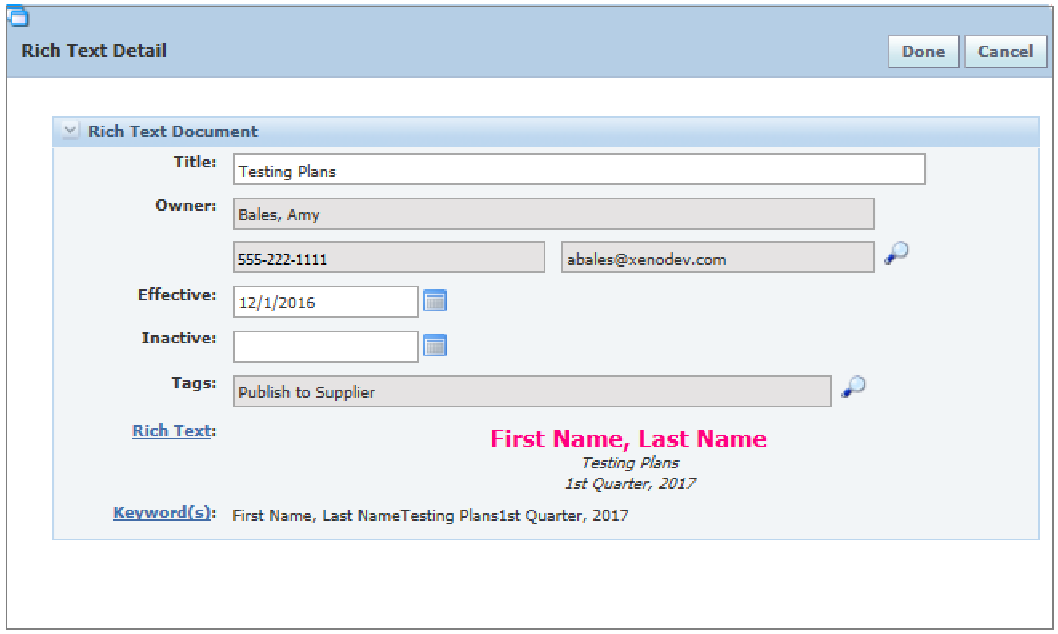
Figure 6–10 URL dialog box



Adding Rich Text

The rich text document type is a way to create a formatted attachment to the business object that can be printed in line with the printed object. You can also publish rich text documents to Supplier Portal. The rich text document includes a title and an enriched textual entry. When you click **Rich Text** from the Attachments grid, the Rich Text dialog box is displayed. It includes all fields that are available in the grid, a Rich Text control and Keywords below that.

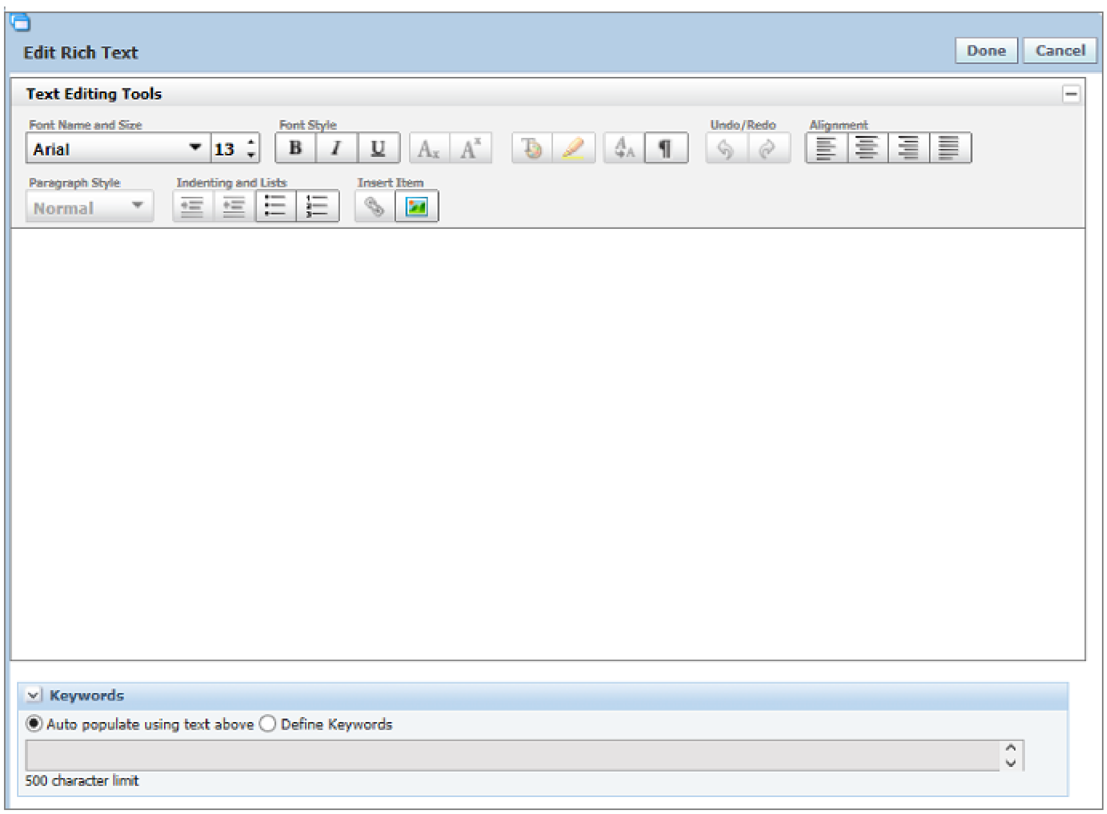
Figure 6–11 Rich Text dialog box



To add rich text:

1. Enter a **Title** (optional).
2. Click **Rich Text**. The rich text dialog box opens.

Figure 6–12 Rich text formatting dialog box

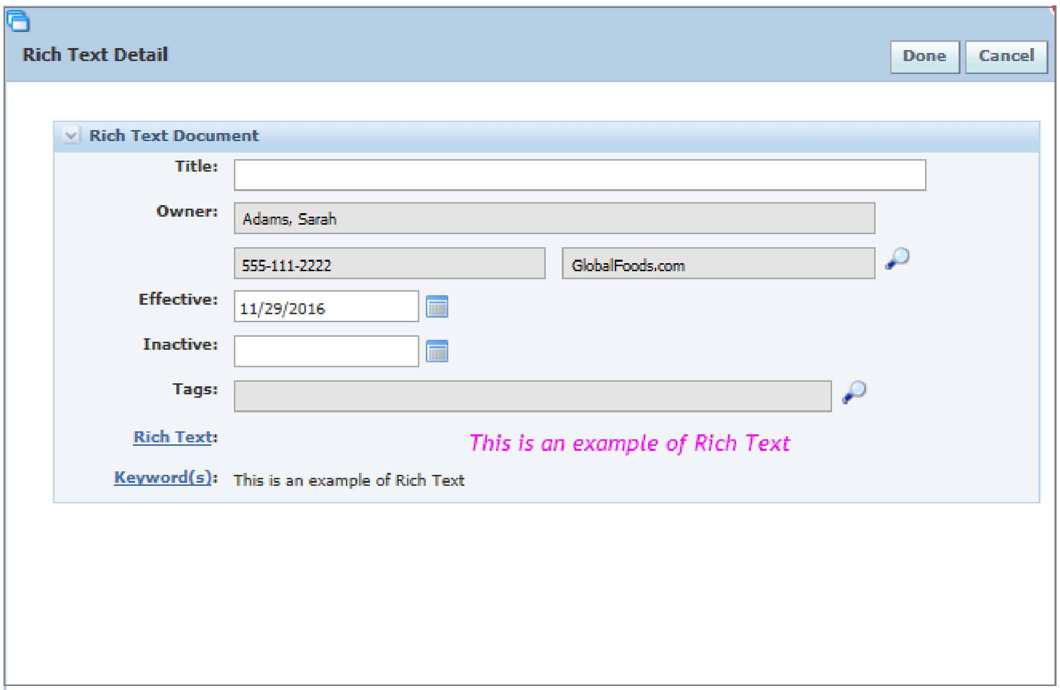


3. Use the rich text formatting dialog box to enter text and apply simple formatting (boldface, font color, font size, bullets, numbering, and so on.)
4. Click **Done**, or to enter keywords, complete the Keywords section as described below.

Keywords can be used to search against specifications that have rich text. To add keywords:

1. Click the **Keywords** header. Select one of the following radio buttons:
   - **Auto populate using text above**—Selected by default, the first 500 characters entered in the rich text field are automatically added to the Keywords section.
   - **Define Keywords**—Select to manually enter keywords.
2. Click **Done**. Agile PLM for Process closes the rich text formatting dialog box, and your changes are reflected in the Rich Text dialog box, as shown below:

Figure 6–13 Sample rich text dialog



Publishing to Supplier Portal

Where applicable, each attachment can be marked to publish to the Supplier Portal. When a supporting document contains an attachment with the "Publish to Supplier Portal" tag, it will be presented to associated suppliers. To learn more about this behavior see the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.

Searching for Supporting Documents

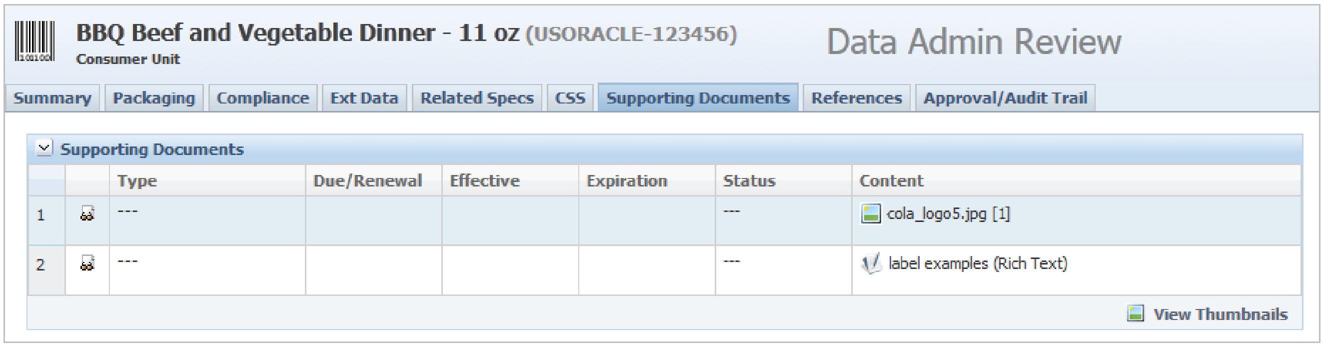
You can search for supplier documents tied to business objects. These choices are represented in the left navigation panel, in the Applications menu, and in the action menu within applications.

To search for a supporting document:

1. Select a search option from the navigation panel, Applications menu, or action menu.

2. Enter criteria in the search fields, then click **Search**. You can use using the following supporting document fields in your search, which vary by application: **Attachment Filename**, **Attachment Title, Supporting Doc Description**, **Supporting Doc Due/Renewal Date**, **Supporting Doc Effective Date**, **Supporting Doc Expiration Date**, **Supporting Doc Type** and **Rich Text Keywords, Rich Text Title**.

Figure 6–14 Supporting Documents tab



3. Click in a row to view the supporting document.

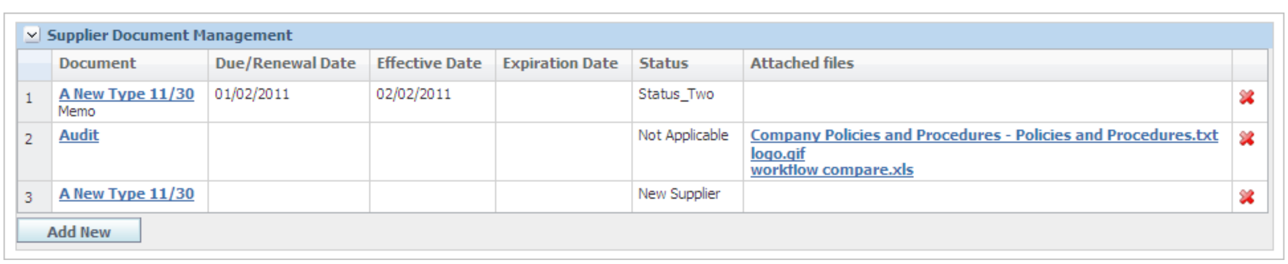
Editing Supporting Documents

To edit a supporting document, use the search feature or go to the business object to locate the document. Click the document to open it in the Supporting Document dialog box. Make changes to the fields as described in "Supporting Documents Dialog Box" on page 6-3. Click **Done** at the top right of the page.

Deleting Supporting Documents

To delete a supporting document, use the search feature or go directly to the business object to locate the document. With the page in edit mode, click the delete icon on the row of the document that you want to delete, as Figure 6–15 shows.

Figure 6–15 Business object document row in edit mode



Click **OK** in the confirm deletion dialog box. Click **Save**.