

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

Administrator User Guide

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# Preface

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

This preface contains these topics:

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

## Audience

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

## Variability of Installations

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

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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers 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 User Group Management User Guide*
- *Agile Product Lifecycle Management for Process Workflow Administration User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*
- *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*
- *Agile Product Lifecycle Management for Process Document Reference Library User Guide*
- *Agile Product Lifecycle Management for Process Content Synchronization and Syndication User Guide*
- *Agile Product Lifecycle Management for Process Supplier Portal User Guide*
- *Agile Product Lifecycle Management for Process New Product Development User Guide*
- *Agile Product Lifecycle Management for Process Product Quality Management User Guide*
- *Agile Product Lifecycle Management for Process Extensibility Overview Guide*
- *Agile Product Lifecycle Management for Process Security Configuration Guide*
- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

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

# Conventions

The following text conventions are used in this document:

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



---

# Introducing Administration

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

- [Administration Overview](#)

## Administration Overview

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

**Data management**—Involves use of the Manage Core Data (ADMN) application to manage core data. In managing data, you maintain data lists and data. For details, see [Chapter 2, "Using ADMN to Manage Core Data"](#) and [Chapter 3, "Using ADMN to Manage Custom Data"](#).

**Workflow management**—Involves use of the Workflow Administration (WFA) application in Agile PLM for Process. In managing workflows, you create and edit workflow process templates. This task involves creating workflow statuses, transitions, owners, signature requests, and notifications. For details, see the *Agile Product Lifecycle Management for Process Workflow Administration User Guide*.

**Cache management**—Involves use of the Manage Data Caches (CACHE) application to manage data caches. In managing caches, you schedule cache flushes for various cache groups. For details, see [Chapter 4, "Using CACHE to Manage Caches"](#).

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

**Performance logging**—Involves use of Performance Logging to troubleshoot performance issues. You can view detailed performance information about activities performed on the system, as described in [Chapter 5, "Using Performance Logging"](#).

**Batch processing**—Involves use of Bulk Actions to process updates in batch. Current bulk actions available are GSM Change Workflow Owner and GSM Formulation Hierarchy Refresh. For details, see [Chapter 6, "Using Bulk Actions"](#).

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



---

## Using ADMN to Manage Core Data

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

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

### Types of Core Data

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

#### Custom data:

- |                            |   |                              |
|----------------------------|---|------------------------------|
| • Category tabs            | • Custom sections<br>(described in " <a href="#">Custom Sections</a> " on page 3-32)        | • Custom section column tags |
| • Custom section order     | • Custom section row tags   | • Custom section tab order   |
| • Custom section tags      | • Extended attributes<br>(described in " <a href="#">Extended Attributes</a> " on page 3-5) | • Extended attribute groups  |
| • Extended attribute order | • Extended attribute tab order  | • Extended attribute tags    |

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

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

**Global data:**

- |                           |                    |                            |
|---------------------------|--------------------|----------------------------|
| . Attachment tags         | . Countries        | . Cross-reference statuses |
| . Cross references        | . Data groups      | . Document tags            |
| . Restrictions            | . Segments         | . States/Provinces         |
| . Substitute restrictions | . Units of measure |                            |

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

- |                                       |                                     |   |
|---------------------------------------|-------------------------------------|---|
| . Brands (GSM)                        | . Business units (GSM)              | . Classifications                             |
| . Concepts                            | . Document statuses                 | . Document types                              |
| . Environmental waste                 | . Formula output types - external   | . Formula output types - internal             |
| . Formula output types - referenced   | . Formulation classifications       | . Formulation item types                      |
| . Formulation tags                    | . Label claims                      | . Label claims classifications                |
| . Label owners                        | . Menu item classes                 | . Menu item standards                         |
| . Nutrient profile special attributes | . Nutrient sources                  | . Packaging types                             |
| . Packaging item types                | . Raw material types                | . Shelf life types                            |
| . Smart issue status                  | . Storage and shipping requirements | . Storage requirements (trade specifications) |
| . Substitute material tags            | . Trade item types                  | . Trade tax types/rates                       |
| . Trade UNSPSC codes                  | . Trading companies                 | . UDEX classifications                        |

**GSM Compliance data:**

- |                |             |                 |
|----------------|-------------|-----------------|
| . Additives    | . Allergens | . Complies with |
| . Intolerances |             |                 |

**GSM FSIS data:**

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



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

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

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

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

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

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

**SCRM (Supply Chain Relationship Management) data:**

- . Business units (SCRM)
- . Classes
- . Company special attributes
- . Contact categories
- . Contact profile tags
- . Document statuses
- . Document types
- . Facility special attributes
- . Protocols
- . Sourcing types

**Specification Categories:**

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

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

---

**Note:** For the managing data using the Data submenu, refer to [Chapter 3, "Using ADMN to Manage Custom Data"](#).

---

**Statuses**

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

- . **New**—The data is not yet ready to become available to Agile PLM for Process applications. When an item has a status of “new,” its values remain editable.

- **Active**—The data is ready to become available (searchable and consumable) for use in Agile PLM for Process applications.
- **Inactive**—The data should no longer be used. All existing references to this item remain. The item is no longer available for assignment but is still searchable.
- **Archive**—The item is no longer available for searching or assignment. All existing references to this item remain.
- **System**—Used by the system. This item cannot be edited or removed.

### Administrative Roles

There are two user roles associated with ADMN:

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

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

### Navigating Core Data

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

**Figure 2–1** *Manage option*



## Maintaining Simple Lists

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

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

Country Name	Country ID	ISO Code	Status
-Not Specified			Active
Afghanistan	AFG	AF	Active
Albania	ALB	AL	Active
Algeria		DZ	Active
American Samoa		AS	Active
Andorra	AND	AD	Active

To maintain data in a simple list:

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

To add data to a simple list:

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

To edit a simple list:

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

---

**Note:** What you are allowed to edit depends on your user role as well as the status of the item. These rules are described in ["Statuses"](#) on page 2-3 and ["Administrative Roles"](#) on page 2-4.

---

4. Click the apply changes icon to apply your changes.

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

To reorder data in a simple list:

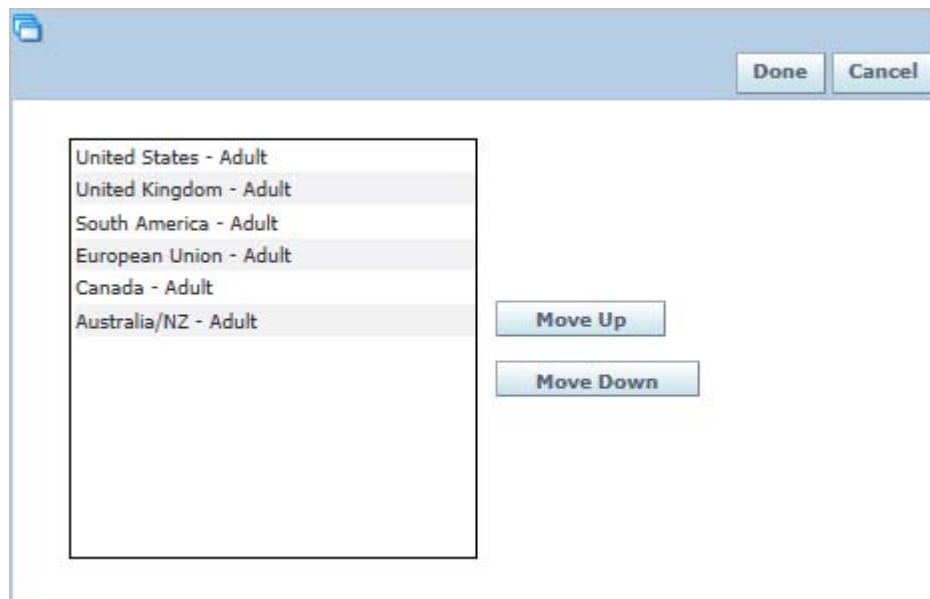
---

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

---

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

**Figure 2–3** Reorder dialog box



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

## Searching Simple Lists

Use the search feature to look for an attribute in a simple list. The search bar contains multiple options allowing you to perform a logical search.

The identity string field allows you to search for any string found in columns. This search includes all identity columns. For example, if the list contains a Name and ID column, the system searches both columns. You can find items based on status or data group filters by using the Display Filters search. Once submitted only matching items are shown in the list. All lists are paginated but the search still searches across all pages.

Figure 2–4 Search bar

Search for  And  Display Filters

To search a simple list:

1. Enter a name in the Search for field.
2. Select an option from the Display Filters drop-down (optional).
3. Click the search icon to display a dialog box containing available filters, such as status.
4. Select a filter and then click Done. The dialog box closes and your selection displays in the filters field.
5. Click **Submit**. Matching results are displayed.

### Bulk Updating

Users with the role of [SUPER\_ADMIN] can update multiple items at once in simple lists using bulk update. Bulk Update allows you to quickly change things like status or filters on multiple items at once.

- Status (Active, Inactive, Archive)
- Available In
- Type
- Is Distinct
- Any filters applied to the list

Figure 2–5 Bulk Update

**Packaging Type**

Search for  And  Display Filters

25  1... 1 2 3 4 5 6 7

<input type="checkbox"/>	Name	ISO Code	Status	Object Type > Object Subtype	Segment
<input type="checkbox"/>	Bolt	BT	Active		
<input type="checkbox"/>	Bottle-gas	GB	Active		
<input type="checkbox"/>	Bottle-non-protected-bulbous	BS	Active		
<input type="checkbox"/>	Bottle-non-protected-cylindrical	BO	Active		
<input type="checkbox"/>	Bottle-protected bulbous	BV	Active		
<input type="checkbox"/>	Bottle-protected cylindrical	BQ	Active		
<input type="checkbox"/>	Bottlecrate / bottlerack	BC	Active		

To perform a bulk update in simple lists:

1. Select items by clicking the corresponding checkbox.
2. Click **Bulk Update**. A dialog box lists all fields available for bulk update.

**Figure 2–6 Example of available bulk update choices**

The dialog box titled "Bulk Update" has two buttons at the top right: "Apply Changes" and "Cancel". Below the title bar, there are four fields:

- Status:** A dropdown menu showing "No Change" with a downward arrow.
- Object Type > Object Subtype:** A text field showing "No Change" with a red 'X' icon to its left and a magnifying glass icon to its right.
- Segment:** A text field showing "No Change" with a red 'X' icon to its left and a magnifying glass icon to its right.

3. Select the attributes to change, then click **Apply Changes**.
4. Click **Save** to save the changes, or **Cancel** to exit without saving your changes.

When combined with the admin list search tool you can quickly update multiple items at once. For example, let's say you want to archive all "Milk" related North American Allergens. You would do the following:

1. Using the search tool find all items that contain the string "Milk" and the display filter of "North America".
2. You would then select all items using the select all checkbox in the first column header and select **Bulk Update**.

When using Bulk Update in a tree list, you can quickly select all nodes below a parent by using the right click menu (shown in [Figure 2–11](#) on page 2-12) and choosing **Select All**. This action selects all nodes below the parent even though the node is not expanded. To remove selections select **Deselect All**. You can use this feature to quickly select the nodes you would like to bulk update.

To perform a bulk update in a tree list:

1. Select items by clicking the corresponding checkbox or using the right click menu.
2. Click **Bulk Update**.

**Figure 2–7 Example of available bulk update choices**

The dialog box titled "Bulk Update" has two buttons at the top right: "Apply Changes" and "Cancel". Below the title bar, there are three fields:

- Parent:** A text field showing "No Change" with a red 'X' icon to its left and a magnifying glass icon to its right.
- Status:** A dropdown menu showing "No Change" with a downward arrow.
- Segment:** A text field showing "No Change" with a red 'X' icon to its left and a magnifying glass icon to its right.

3. Select the attributes to change, then click **Apply Changes**.
4. Click **Save** to save the changes, or **Cancel** to exit without saving your changes.

## List Filtering

You can control when list items appear in the application by applying list filters to Admin lists. This is a usability helper that allows you to tailor the user experience preventing users from having to search through large lists of non relevant selections. For example, you can set the application to only show Pet Food brands when the specification is associated to the “Pet Care” segment and only show Coffee brands with the segment is “Coffee”.

User with the role [SUPER\_DATA\_ADMIN] can adjust the value of the Available Filters field; all other users will be able to read it.

**Figure 2–8 Brands list with filter applied**

The screenshot shows the 'Brands - (GSM)' interface. At the top, there is a search bar with 'Search for' and 'And' dropdowns, followed by 'Display Filters' and 'Contains One' dropdowns. Below this is a table with columns 'Name', 'Status', and 'Segment'. The table contains six rows of data, each with a checkbox and a pencil icon in the first column. Below the table is a 'Bulk Update' button. At the bottom, there is a 'List Attributes' section with an 'Available Filters' field containing the text 'Segment'.

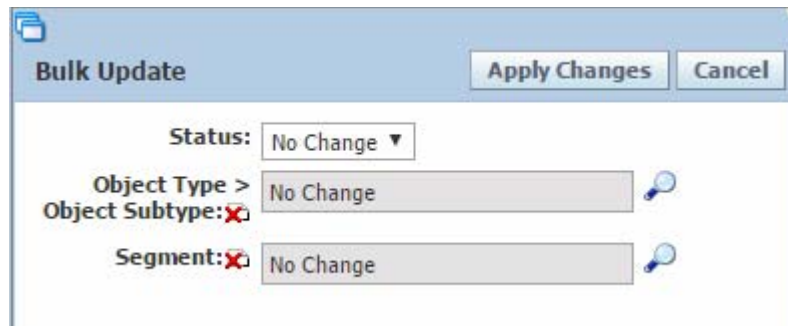
Name	Status	Segment
<input type="checkbox"/> Morning Blend	Active	Coffee
<input type="checkbox"/> Cat's Meow	Active	Pet Care
<input type="checkbox"/> Man's Best Friend	Active	Pet Care
<input type="checkbox"/> Natural Bean	Active	Coffee
<input type="checkbox"/> Pet Advantage	Active	Pet Care

### Adding a Filter

Filters can be added to lists using the Available Filters field inside the List Attributes section. For simple lists, once a filter is added, the column appears in the list. Once added you can now add the desired filter values using standard row edit procedures or bulk update. For tree lists, once a filter is added you can then add/remove filters using the right click contextual menu.

### Removing a Filter

You won't be allowed to remove an existing filter if it is a required filter OR if any items are still associated to the filter. To remove a filter first clear all existing associations using bulk update and the clear icon next to the applicable filter field.

**Figure 2–9 Bulk Update dialog box, showing clear icon**

## Filter Behavior

Most filters are configured as the type inclusion. If a filter is set to the type of inclusion then if an item does not have filters assigned to it, it will still appear in the application regardless of context. This is configurable and you may find a different behavior per filter. You can set a filter to be any of the following types:

**Table 2–1 Filter types**

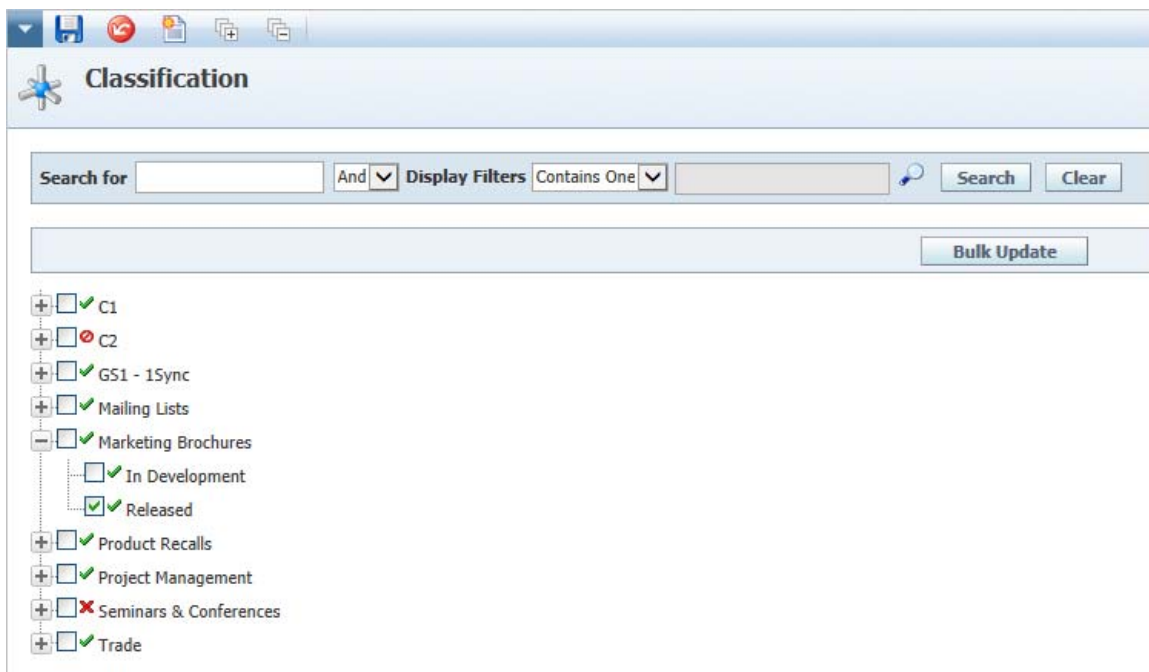
Type	Description
<b>Inclusion</b>	When this type is used items without a filter applied will still appear in lists. This is the default list behavior so out of the box most lists will follow this behavior.
<b>Intersection</b>	<p>When this type is used items without a filter applied will not appear in lists.</p> <p>Exception: All items with a status of system will continue to be shown since filters can't be applied to these rows.</p> <p>Examples:</p> <ol style="list-style-type: none"> <li>1. Data Group A-F exist in the system Additive X is added, Additive X will not appear for selection until a Data Group is added</li> <li>2. Additive Y has been added to data groups A-F Admin adds Data Group G to the data group list Additive Y is not included in data group G until its manually added to Additive Y</li> </ol>
<b>Exclusion</b>	<p>When this type is used new items will automatically have “All” filters applied upon creation. The string “All” will appear when no filters have been selected.</p> <p>Examples:</p> <ol style="list-style-type: none"> <li>1. Nutrient Y has been added to data groups A, B</li> <li>2. Admin adds Data Group G to the data group list</li> <li>3. Nutrient Y is automatically included in data group G without having to manually add the new data group to the Nutrient. Now Nutrient Y is in groups A, B, G.</li> </ol>



## Maintaining Tree Lists

Tree lists present core data in a hierarchal view. This view enables you to see the structure of the core data, including parent and child relationships, as [Figure 2–10](#) shows. Click the Expand and Collapse icons in the action menu to customize your view.

**Figure 2–10** Core data in tree lists



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

All nodes contain an icon indicating their status:

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

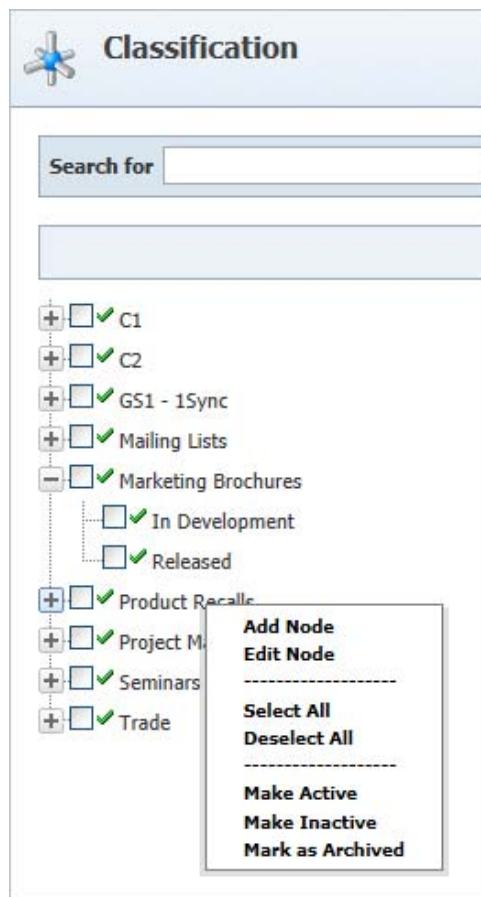
### Drag and Drop Feature

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

### Editing Actions

You can view available actions by right-clicking on a node.

**Figure 2–11** Sample tree list of core data, right-click menu for users with the role of [SUPER\_DATA\_ADMIN]



To add a root node:

1. From the left navigation panel, select **ADMN** > {name of menu} > {name of submenu}. Agile PLM for Process displays the tree list for the core data you selected.
2. Select **Add** from the action menu. A dialog box displays, as [Figure 2–12](#) shows.

**Figure 2–12** Add root node dialog box

3. You can move nodes by editing the Parent field. Only users with the role {SUPER\_DATA\_ADMIN} can click the search icon and select a node as parent. This field is read only for other users. Click the clear icon to remove the chosen parent and move the node to the root position. Moving a node to the root position is only supported in tree lists that have no level restrictions like business unit as opposed to specification category which requires 3 levels of nodes at all times.
4. Enter a name for the item (required) in the **Name** field.
5. Enter an external ID in the **External ID** field.
6. Enter an alias for the item (required) in the Alias field. This can be an abbreviation; for example, "NA" for North America. You can also auto generate this alias by clicking **Generate Alias**.
7. In the **Segment (+Children)** field, click the search icon and select a node as segment (child).
8. Click **Save** to add the item. The page refreshes and the new root node is added to the list in alphabetical order. The new node icon displays next to the node.
9. Right-click on the new node to display the submenu.
10. Click **Make Active**.
11. Click **Save**.
12. Flush the taxonomy cache option, as described in ["Using the Cache Application"](#) on page 4-3.

To add a child node:

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

To edit a node:

---

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

---

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

To make a node active:

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

To make a node inactive:

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

---

---

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

---

---

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

To archive a node:

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

---

---

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

---

---

3. Click **Mark as Archived**. The page refreshes and the node is archived, as indicated by the archived node icon.
4. Click **Save**.

5. Flush the taxonomy cache option, as described in ["Using the Cache Application"](#) on page 4-3.

## Searching Tree Lists

Use the search feature to look for an attribute in a tree list. When you click **Search**, all levels of nodes are searched.

To search a tree list:

1. Enter a name in the Search for field.
2. Select an operator in the operator drop down list. Options are And and Or.
3. Select a filter in the Display Filters drop down list. Options are Contains One and Contains All.
4. Click **Search**.

Matching results are displayed.

## Bulk Updating

Users with the role of [SUPER\_DATA\_ADMIN} can update multiple items at once in tree lists using bulk update. On lists where bulk update is available, a Bulk Update button appears above the tree list. Check boxes display next to nodes. After choosing **Bulk Update**, a dialog box displays attributes available for update.

You can also use the drag and drop feature to move nodes to a parent node.

The following attributes are available for bulk update:

- Parent
- Status (Active, Inactive, Archive)

To perform a bulk update:

1. Select items by clicking the corresponding checkbox.
2. Click **Bulk Update**. A dialog box lists all fields available for bulk update.
3. Select the attribute to change, then click **Apply Changes**.
4. Click **Save** to save the changes, or **Cancel** to exit without saving your changes.

# Custom Data

Customer-specific data, or custom data, is available in Agile PLM for Process in the form of custom sections and extended attributes. As an administrator, you can maintain custom data lists using the ADMN application. For more information about setting up custom sections and extended attributes, see [Chapter 3, "Using ADMN to Manage Custom Data"](#).

## Category Tabs

Use the Category Tabs list to create custom data categories. These categories display as inline tabs used to organized extended attributes and custom sections on objects. Category tabs are associated directly to the extended attribute or custom section, see ["Creating an Extended Attribute"](#) on page 3-27 and ["Creating a Custom Section"](#) on page 3-38 for more information.

**Figure 2–13 Category Tabs list**

 <b>Name</b>	<b>Behavior ID</b>	<b>Available In</b>	<b>Status</b>
  Compliance	1000	Custom Section, Extended Attribute	Active
  Composition	1002	Custom Section, Extended Attribute	Active
  MSDS	1001	Custom Section, Extended Attribute	Active
  Size and Dimensions	1003	Custom Section, Extended Attribute	Active

## Key Fields

**Table 2–2 Custom Data, CategoryTabs key fields**

<b>Name</b>	<b>Description</b>
<b>Name</b>	The category tab name
<b>Behavior ID</b>	The system-assigned category tab ID
<b>Available In</b>	Specify which custom data this category applies to. For example, if you only want to use this category tab for extended attributes then select Extended Attribute.
<b>Status</b>	The assigned status for the category tab. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Category Tab list, see ["Maintaining Simple Lists"](#) on page 2-5.


## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Custom Section Column Tags

Use the Custom Section Column Tags list in ADMN to maintain custom section columns tags, as [Figure 2–14](#) shows.

**Figure 2–14** Custom Section Column Tags list

<input type="checkbox"/>	Name	Behavior ID	Status
	Suppress Printing	2	System
	Supplier eQ - Create	8	System
	Do Not Publish To Supplier	1	System
	Hide Header	9	System
 <input type="checkbox"/>	Column Tags - Active	1026	Active

### Key Fields

**Table 2–3** Custom Data, Custom Section Column Tags key fields

Name	Description
Name	The custom section column tag name
Behavior ID	The system-assigned column tag ID
Status	The assigned status for the custom section column tag. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Section Column Tags list, see ["Maintaining Simple Lists"](#) on page 2-5.


### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Custom Section Order

Use the Custom Section Order list in ADMN to maintain the order of custom sections, as [Figure 2–15](#) shows. For instructions on setting order, see ["Setting Custom Section Order"](#) on page 3-58.


Figure 2–15 Custom Section Order list

 Custom Section Order

Location

Object TypeActivity Specification▼Display FiltersContains One▼SubmitClear

Custom Sections

	Order	Name	Category	Status	
1	1	Numico - Physical-chemical General		Active	
2	2	Adhesives - Time / Temperature		Active	
3	3	Contaminants and Residues		Active	

## Key Fields

Table 2–4 Custom Data, Custom Section Order key fields

Name	Description
Order	Order of custom sections
Name	The custom section name
Category	The associated category tab
Status	The assigned status for the custom section. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Display Filters

For instructions, see ["Searching Simple Lists"](#) on page 2-6.

## Editing Rules

For instructions on editing the Custom Section Order list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering





For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Custom Section Row Tags

Use the Custom Section Row Tags list in ADMN to maintain custom section row tags, as [Figure 2–16](#) shows.

**Figure 2–16** Custom Section Row Tags list

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

### Key Fields

**Table 2–5** Custom Data, Custom Section Row Tags key fields

Name	Description
Name	The custom section row tag name
Behavior ID	The system-assigned custom section row tag ID
Status	The assigned status for the custom section row tag. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Section Row Tags list, see ["Maintaining Simple Lists"](#) on page 2-5.

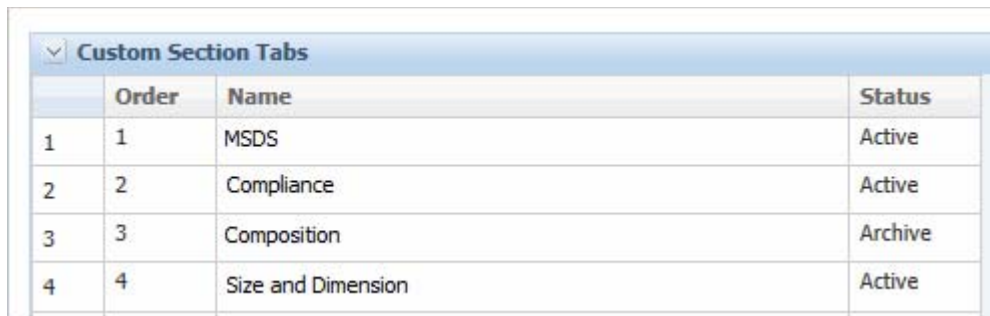
### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Custom Section Tab Order

Use the Custom Section Tab Order list in ADMN to maintain custom section tab order, as [Figure 2–21](#) shows. You can have a different tab order by object type. If no order is specified, tabs display in alphabetical order.

**Figure 2–17** Custom Section Tab Order list



Custom Section Tabs			
	Order	Name	Status
1	1	MSDS	Active
2	2	Compliance	Active
3	3	Composition	Archive
4	4	Size and Dimension	Active

### Key Fields

**Table 2–6** Custom Data, Custom section tab order key fields

Name	Description
Order	Order of custom section tab
Name	The custom section tab name
Status	The assigned status for the custom section tab. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Section Tab Order list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Custom Section Tags

Use the Custom Section Tags list in ADMN to maintain custom section tags, as [Figure 2–18](#) shows.

**Figure 2–18** Custom Section Tags list

<input type="checkbox"/>	Name	Behavior ID	Status
	Suppress Printing	2	System
	Insert Page Break - Above	4	System
	Landscape Printing	3	System
	Insert Page Break - Below	5	System
	Do Not Publish To Supplier	1	System

### Key Fields

**Table 2–7** Custom Data, Custom Section Tags key fields

Name	Description
Name	The custom section tag name
Behavior ID	The system-assigned custom section tag ID
Status	The assigned status for the custom section tag. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Section Tag list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Extended Attribute Groups

Use the Extended Attribute Groups list in ADMN to maintain extended attribute groups, as [Figure 2–19](#) shows.

Figure 2–19 Extended Attribute Groups list

<input type="checkbox"/>	Name	Status
	<input type="checkbox"/> Chemical	Active
	<input type="checkbox"/> Compliance Screening	Active
	<input type="checkbox"/> Cost	Active
	<input type="checkbox"/> Dairy	Active
	<input type="checkbox"/> Equipment	Active
	<input type="checkbox"/> Equipment (all)	Active
	<input type="checkbox"/> Equipment (Cooler)	Active
	<input type="checkbox"/> Equipment (Dispenser)	Active
	<input type="checkbox"/> Equipment (Vendor)	Active

## Key Fields

Table 2–8 Custom Data, Extended Attribute Groups key fields

Name	Description
Name	The extended attribute group name
Status	The assigned status for the extended attribute group. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Extended Attribute Group list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Extended Attribute Order

Use the Extended Attribute Order list in ADMN to maintain the order of extended attributes, as [Figure 2–20](#) shows. For instructions on setting order, see ["Setting Extended Attribute Order"](#) on page 3-30.

**Figure 2–20** *Extended Attribute Order list*

	Order	Name	Category	Status
1	999	Numeric-NoUOM		Active
2	999	Numeric - Mass		Active
3	999	Numeric - Mass		Active
4	999	Multi-lingual Text		Active
5	999	Multi-lingual Text		Active
6	999	Numeric-NoUOM		Active
7	999	Quantitative Range		Active
8	999	Quantitative Tolerance		Active

### Key Fields

**Table 2–9** *Custom Data, Extended Attribute Order key fields*

Name	Description
Order	Order of extended attributes
Name	The extended attribute name
Category	The associated category tab
Status	The assigned status for the extended attribute. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Display Filters

For instructions, see ["Searching Simple Lists"](#) on page 2-6.

### Editing Rules

For instructions on editing the Extended Attribute Order list, see ["Maintaining Simple Lists"](#) on page 2-5.

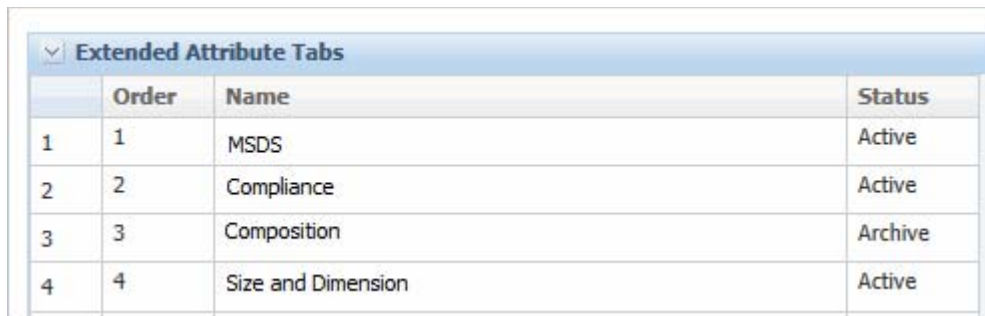
### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Extended Attribute Tab Order

Use the Extended Attribute Tab Order list in ADMN to maintain extended attribute tab order, as [Figure 2–21](#) shows. You can have a different tab order by object type. If no order is specified, tabs display in alphabetical order.

**Figure 2–21** *Extended Attribute Tab Order list*



	Order	Name	Status
1	1	MSDS	Active
2	2	Compliance	Active
3	3	Composition	Archive
4	4	Size and Dimension	Active

### Key Fields

**Table 2–10** *Custom Data, Extended attribute tab order key fields*

Name	Description
Order	Order of extended attribute tab
Name	The extended attribute tab name
Status	The assigned status for the extended attribute tab. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Extended Attribute Tab Order list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Extended Attribute Tags

Use the Extended Attribute Tags list in ADMN to maintain extended attribute tags, as [Figure 2–22](#) shows.

**Figure 2–22** *Extended Attribute Tags list*

<input type="checkbox"/>	Name	Behavior ID	Status
	Bold	1	System
	Is Design Attribute	2	System
	Is Distinct	4	System
	Suppress Printing	3	System
	Do Not Publish To Supplier	5	System
	Italic	6	System

### Key Fields

**Table 2–11** *Custom Data, Extended Attribute Tags key fields*

Name	Description
<b>Name</b>	The extended attribute tag name
<b>Behavior ID</b>	The system-assigned extended attribute tag ID
<b>Status</b>	The assigned status for the extended attribute tag. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Extended Attribute Tag list, see "[Maintaining Simple Lists](#)" on page 2-5.

### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.



# Custom Portal

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

## Custom Portals

Use the Custom Portals list in ADMN to maintain custom portals, as [Figure 2–23](#) shows.

Figure 2–23 Custom Portals list

	Name	Cache Timeout (minutes)	Status
	CP - Inactive	15	Active
	CP - Active	10	Active
	CP - Archive	20	New

### Key Fields

Table 2–12 Custom Portal, Custom Portals key fields

Name	Description
Name	The custom portal name
Cache Timeout (minutes)	The number of minutes that the search results are cached
Status	The assigned status for the custom portal. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Portals list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering


For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Custom Portal Views

Use the Custom Portal Views list in ADMN to maintain custom portal views, as [Figure 2–24](#) shows.

**Figure 2–24** Custom Portal Views list

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

### Key Fields

**Table 2–13** Custom Portal, Custom Portal Views key fields

Name	Description
<b>Name</b>	The custom portal view name
<b>Search Plugin</b>	Name of the search plugins used to display portal views
<b>Rendering Plugin</b>	Name of the rendering plugin configured for the view
<b>Filter Control</b>	Name of the filter control for the view
<b>Open New Window</b>	If checked, the view opens in a new window. If unchecked, it opens in the same window.
<b>Status</b>	The assigned status for the custom portal view. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Custom Portal Views list, see "[Maintaining Simple Lists](#)" on page 2-5.

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

### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Document Reference Library Data

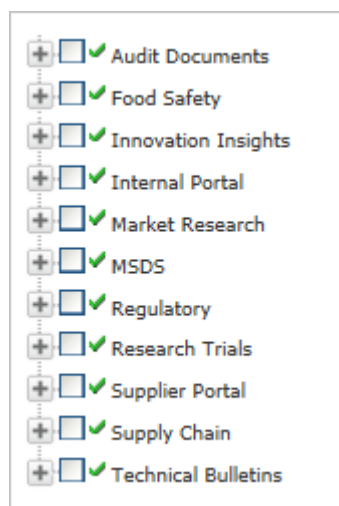
The Document Reference Library (DRL) is a repository for business documents. As an administrator, you can control the catalog and classification lists using the ADMN application. For more information about DRL, see the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

### Catalogs

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

Documents are associated with catalogs on the DRL document object. Use the Catalogs tree list in ADMN to maintain the data, as [Figure 2–25](#) shows.

**Figure 2–25** Catalogs tree list



### Editing Rules

For instructions on editing the Catalogs tree list, see ["Maintaining Tree Lists"](#) on page 2-11.

### List Filtering

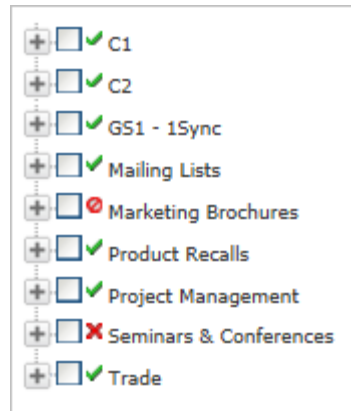
For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Classifications

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

Classifications are assigned on the DRL document object. Use the Classification list in ADMN to maintain the data, as [Figure 2-26](#) shows.

**Figure 2-26** *Classifications tree list*



## Editing Rules

For instructions on editing the Classification tree list, see ["Maintaining Tree Lists"](#) on page 2-11.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Global Data

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

## Attachment Tags

Use the Attachment Tags list in ADMN to maintain the data, as [Figure 2–27](#) shows.

Figure 2–27 Attachment Tags list

Name	Status	Object Type > Object Subtype
Proprietary	System	Actions, Activity Specifications, Audits, Delivered Material Packing Specifications, Equipment Specifications, Formulation Specifications, Issues, Labeling Specification, Master Specifications, Material Specifications, Menu Item Specifications, Nutrient Profile, Packaging Material Specifications, Packing Configuration Specifications, Printed Packaging Specifications, Product Specifications, Trade Specifications
Publish to Supplier	System	Actions, Activity Specifications, Audits, Company Profile, Delivered Material Packing Specifications, Equipment Specifications, Facility Profile, Formulation Specifications, Issues, Labeling Specification, Master Specifications, Material Specifications, Menu Item Specifications, Nutrient Profile, Packaging Material Specifications, Packing Configuration Specifications, Printed Packaging Specifications, Product Specifications, Specification Related Sourcing Approval, Trade Specifications

### Key Fields

Table 2–14 Global, Attachment Tags key fields

Name	Description
Name	The attachment tag name
Status	The assigned status for the attachment tag. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Object Type > Object Subtype	Select the object and or object subtype where you would like the item to appear. For example, if you select Material Specification > Raw Material, the item is only available for selection when the specification type is a Material Specification and the sub type is “Raw Material”.

### Editing Rules

For instructions on editing the Attachment Tags list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Countries

Use the Countries list in ADMN to maintain the data, as [Figure 2–28](#) shows.

**Figure 2–28** *Countries list*

	Country Name	Country ID	ISO Code	Status
	-Not Specified			Active
	Afghanistan	AFG	AF	Active
	Albania	ALB	AL	Active
	Algeria	DZA	DZ	Active
	American Samoa	ASM	AS	Active
	Andorra	AND	AD	Active
	Angola	AGO	AO	Active
	Anguilla	AIA	AI	Active
	Antarctica	ATA	AQ	Active

## Key Fields

**Table 2–15** *Global, Countries key fields*

Name	Description
Country Name	The country name
Country ID	The commonly recognized three-letter country ID
ISO Code	The commonly recognized two-letter ISO code for the country
Status	The assigned status for the country. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Countries list, see "[Maintaining Simple Lists](#)" on page 2-5.

## List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

# Cross Reference Statuses

The Cross Reference Status section lists statuses of systems that can be cross referenced, as [Figure 2–29](#) shows.

Figure 2–29 Cross Reference Status list

	Name	System Type	Status	Default
	<input type="text" value="Archive"/>	Inactive 	New 	<input type="checkbox"/>
	Active	Active	Active	
	Inactive	Inactive	Active	

## Key Fields

Table 2–16 Global, Cross Reference Status key fields

Name	Description
System Name	The name of the cross reference status.
System Type	The code assigned to the system during integration. Choices are Inactive and Active. This tells system how to treat the cross reference. This is a required field.
Status	The assigned status for the cross-reference status. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Default	Indicates the default cross reference status.

## Editing Rules

For instructions on editing the Cross Reference list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Reordering Cross Reference Statuses

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder cross reference statuses. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.

## Cross References

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

Administrators maintain the cross-references and can set whether the cross reference is managed by an external system, as [Figure 2–30](#) shows. When the Managed Externally Default box is checked, the corresponding system name is read only on the specifications.

---

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

---

**Figure 2–30 Cross References list**

<input type="checkbox"/> System Name	System Code	Managed Externally Default	Status
<input type="checkbox"/> BPCS System	USBPCS	<input type="checkbox"/>	Active
<input type="checkbox"/> JDE System	USJDE	<input type="checkbox"/>	Active
<input type="checkbox"/> Oracle System	USORACLE	<input type="checkbox"/>	Active
<input type="checkbox"/> SAP System	USSAP	<input type="checkbox"/>	Active

## Key Fields

**Table 2–17 Global, Cross References key fields**

Name	Description
Available In	Used to associate a system name to a Business Unit taxonomy.
System Name	The name of the system.
System Code	The code assigned to the system during integration.
Managed Externally Default	Check the box if you want external systems to provide the cross-reference equivalent number. If the box is checked, a GSM user cannot edit the Cross Reference field unless the GSM user has the role of [EXTERNALLY_MANAGED_CROSS_REF_ADMIN]. This field may not display based on configuration settings.
Status	The assigned status for the cross-reference. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Cross Reference list, see ["Maintaining Simple Lists"](#) on page 2-5 (simple list display) or ["Maintaining Tree Lists"](#) on page 2-11 (tree list display). For more information on user roles, refer to Appendix A, "System-Based Roles" of the *Agile Product Lifecycle Management for Process User Group Management User Guide*.









## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Data Groups

Data groups are used to organize and filter select data lists in consumption. Use the Data Group list in ADMN to maintain the data, as [Figure 2–31](#) shows.

**Figure 2–31** Data Groups list

	Name	Status
	 Asia	Active
	 Australia	Active
	 Canada	Active
	 European Union	Active
	 Japan	Active

## Key Field

**Table 2–18** GSM Common, Data Groups key field

Name	Description
Name	Name of the data group
Status	The assigned status for the data group. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Data Groups list, see "[Maintaining Simple Lists](#)" on page 2-5.

## List Filtering



For more information about List Filtering, see "[List Filtering](#)" on page 2-9.



## Document Tags

Use the Document Tags list in ADMN to maintain the data, as [Figure 2–32](#) shows.

**Figure 2–32** Document Tags list

<input type="checkbox"/>	Name	Status
	Publish to Supplier	System
 <input type="checkbox"/>	Publish to Supplier-archive	Archive
 <input type="checkbox"/>	Publish to Supplier-inactive	Inactive

### Key Fields

**Table 2–19** Global, Document Tags key fields

Name	Description
Name	The document tag name.
Status	The assigned status for the document tag. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Document Tags list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

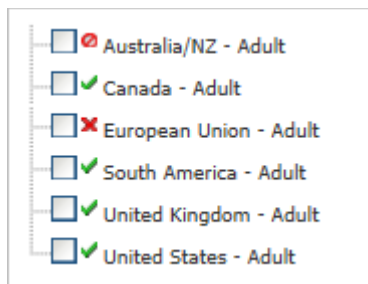
## Restrictions

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

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

Use the Restrictions tree list in ADMN to maintain the data, as [Figure 2–33](#) shows.

**Figure 2–33** *Restrictions tree list*



### Editing Rules

For instructions on editing the Restrictions tree list, see ["Maintaining Tree Lists"](#) on page 2-11.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Segments

Use the Segments tree list in ADMN to maintain the data, as [Figure 2–34](#) shows.

**Figure 2–34** *Segments tree list*



### Editing Rules

For instructions on editing the Segments tree list, see "[Maintaining Tree Lists](#)" on page 2-11.

### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

# States/Provinces

Use the States/Provinces list in ADMN to maintain the data, as shows.

Figure 2–35 States/Provinces list

 <input type="checkbox"/>	States/Provinces Name	States/Provinces ID	ISO Code	Country ID	Status
	<input type="checkbox"/> Alabama	AL	US-AL	USA	Active
	<input type="checkbox"/> Alaska	AK	US-AK	USA	Active
	<input type="checkbox"/> Arizona	AZ	US-AZ	USA	Active
	<input type="checkbox"/> Arkansas	AR	US-AR	USA	Active
	<input type="checkbox"/> California	CA	US-CA	USA	Active
	<input type="checkbox"/> Colorado	CO	US-CO	USA	Active
	<input type="checkbox"/> Connecticut	CT	US-CT	USA	Active

## Key Fields

Table 2–20 Global, States/Provinces key fields

Name	Description
States/Provinces Name	Name of the state or province.
States/Provinces ID	The commonly recognized abbreviation ID for the state or province.
ISO Code	The commonly recognized ISO code for the country and state or province.
Country ID	The commonly recognized abbreviation ID for the country.
Status	The assigned status for the state or province. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.







## Editing Rules

For instructions on editing the Substitute Restrictions list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Substitute Restrictions

Use the Substitute Restrictions list in ADMN to maintain substitute restrictions, as [Figure 2–36](#) shows.

**Figure 2–36** *Substitute Restrictions list*

<input type="checkbox"/>	Name	Status
	<input type="checkbox"/> United States - Adult	Active
	<input type="checkbox"/> United Kingdom - Adult	Active
	<input type="checkbox"/> South America - Adult	Active
	<input type="checkbox"/> European Union - Adult	Active
	<input type="checkbox"/> Canada - Adult	Active
	<input type="checkbox"/> Australia/NZ - Adult	Active

### Key Fields

**Table 2–21** *Global, Substitute Restrictions key fields*

Name	Description
Name	Name of the substitute restriction
Status	The assigned status for the substitute restriction. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Substitute Restrictions list, see "[Maintaining Simple Lists](#)" on page 2-5.

### Reordering Substitute Restrictions

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder substitute restrictions. For instructions on setting the order, see "[To reorder data in a simple list:](#)" on page 2-6.

### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## UOM

Use the UOM (Units of Measure) list in ADMN to maintain your own units of measures and categories that can be consumed in PLM for Process specifications and integrated with ERP systems, as [Figure 2–37](#) shows.

**Figure 2–37 UOM list**

Name	Abbreviation	Factor	ID	ISO Code	Status
Fluid Ounces (UK)	fl oz (UK)	0.0284130625	FL-OZ-UK	FZ	System
Milliliters	mL	0.001	MILI-L	ML	System
Gallons (UK)	gal (UK)	4.54609	GAL-UK	GI	System
Centiliter	cL	0.01	CENTI-L	C3	System
Fluid Ounces (US)	fl oz (US)	0.0295735296	FL-OZ-US	FO	System
Deciliter	dL	0.1	DECI-L	DL	System
Liters	L	1	LITER	LT	System
Gallons (US)	gal (US)	3.78541178	GAL-US	GA	System
Kiloliters	kL	1000	KILO-L	K6	System
Cubic Inches	Cu. In.	0.016387064	CU.IN	CI	System
Cubic Feet	Cu. Ft	28.3168466	CU. FT	CF	System
Cubic Meter	m3	1000	CU.M	CR	System
Cubic Centimeters	Cu. cm	0.001	CU. CM	CC	System

## Key Fields

**Table 2–22 Global, UOM key fields**

Name	Description
Category	The unit of measure category. Choices are: Length (M), Mass (KG), Volume (L), Unit (U), Time (SEC) and Other.
Base UOM	The base UOM abbreviation value defined for the selected category. This field is read-only.
Name	The name of the unit of measure. This is a translatable field.
Abbreviation	The commonly used abbreviation for the unit of measure. This is a translatable field.
Factor	The factor of convert to the base unit of measure.
ID	The unit of measure identification number.
ISO Code	The commonly recognized two-letter ISO code for the unit of measure.
Status	The assigned status for the unit of measure. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions. A system UOM is defined by default.

## Editing Rules

To add a unit of measure:

1. Click **Add**. Agile PLM for Process displays the UOM Summary page, shown in [Figure 2–38](#).

**Figure 2–38 UOM Summary page**

2. Provide data in the fields described in [Table 2–22](#) above. All fields are required and each UOM must be distinct.
3. Click **Save & Close**. The new unit of measure is added to the data list.
4. Flush the administrator data cache group, as described in ["Using the Cache Application"](#) on page 4-3.

## Reordering UOMs

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder UOMs. See ["To reorder data in a simple list:"](#) on page 2-6 for instructions on setting the order of UOM data.

# Global Specification Management Common Data

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

## Brands - (GSM)

Use the Brands - (GSM) list in ADMN to maintain the data, as [Figure 2–39](#) shows.

Figure 2–39 Brands - (GSM) list

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	A&W	Active
 <input type="checkbox"/>	Accent	Active
 <input type="checkbox"/>	Ades	Active
 <input type="checkbox"/>	Alive	Active
 <input type="checkbox"/>	Almdudler	Active
 <input type="checkbox"/>	Ambasa	Active
 <input type="checkbox"/>	American	Active

### Key Fields

Table 2–23 GSM Common, Brands - (GSM) key fields

Name	Description
Name	Name of the brand in GSM
Status	The assigned status for the brand. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Brands - (GSM) list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

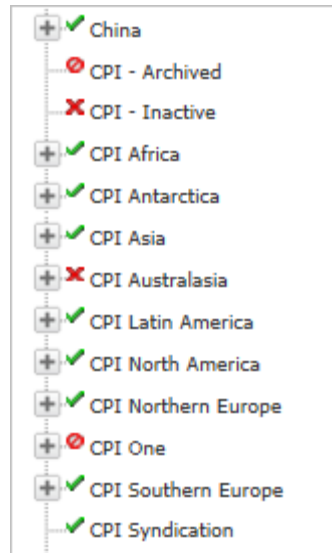
For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Business Units - (GSM)

Use the Business Units - (GSM) tree list in ADMN to maintain the data, as [Figure 2-40](#) shows.

**Figure 2-40** *Business Units - (GSM) tree list*



### Editing Rules

For instructions on editing the Business Units - (GSM) tree list, see ["Maintaining Tree Lists"](#) on page 2-11.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Classification

Use the Classification list in ADMN to maintain the data, as [Figure 2–41](#) shows.

Figure 2–41 Classification list

	Name	Status
	 3rd Party Audit Required	Active
	 Baby Food Ingredient	Active
	 Chemical	Active
	 Critical	Active
	 Demo	Active
	 High Acid	Active
	 Low Acid	Active
	 Medium Acid	Active
	 Micro Sensitive	Active

## Key Fields

Table 2–24 GSM Common, Classification key fields

Name	Description
Name	Name of the classification
Status	The assigned status for the classification. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Classification list, see ["Maintaining Simple Lists"](#) on page 2-5.

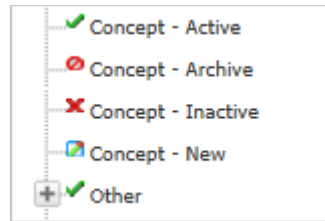
## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Concepts

Use the Concepts tree list in ADMN to maintain the data, as [Figure 2-42](#) shows.

**Figure 2-42** *Concepts tree list*



### Editing Rules

For instructions on editing the Concepts tree list, see ["Maintaining Tree Lists"](#) on page 2-11.





### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Document Status

Use the Document Status list in ADMN to maintain the GSM supporting document status list, as [Figure 2–43](#) shows.

Figure 2–43 Document Status list

	Name	Behavior ID	Default	Status
	Approved	103	<input type="checkbox"/>	Active
	Draft	101	<input checked="" type="checkbox"/>	Active
	Review	102	<input type="checkbox"/>	Active

### Key Fields

Table 2–25 GSM, Document Status key fields

Name	Description
Name	Name of the document status
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Document Status list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Document Type

Use the Document Type list in ADMN to maintain document type options for GSM supporting documents, as [Figure 2–86](#) shows.

Figure 2–44 Document Type list

	Name	Behavior ID	Status	Object Type > Object Subtype
 	Supporting Document	101	Active	Activity Specifications, Delivered Material Packing Specifications, Equipment Specifications, Formulation Specifications, Labeling Specification, Master Specifications, Material Specifications, Menu Item Specifications, Nutrient Profile, Packaging Material Specifications, Packing Configuration Specifications, Printed Packaging Specifications, Product Specifications, Trade Specifications

### Key Fields

Table 2–26 GSM, Document Type key fields

Name	Description
Name	Name of the document type.
Behavior ID	The unique behavior ID that is defined by the system.
Status	The assigned status for the document type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Object Type > Object Subtype	Select the object and or object subtype where you would like the item to appear. For example, if you select Material Specification > Raw Material the item will only be available for selection when the specification type is a Material Specification and the sub type is “Raw Material”. This function is only enabled when 'List Filtering' feature is enabled.

### Editing Rules

For instructions on editing the Document Type list, see ["Maintaining Simple Lists"](#) on page 2-5.















### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Environmental Waste

Use the Environmental Waste list in ADMN to maintain the data, as [Figure 2–45](#) shows.

**Figure 2–45** *Environmental Waste list*

	<input type="checkbox"/> Name	Status
	<input type="checkbox"/> ALUMINIUM	Active
	<input type="checkbox"/> BLUE GLASS	Active
	<input type="checkbox"/> BROWN GLASS	Active
	<input type="checkbox"/> CARDBOARD	Active
	<input type="checkbox"/> CLEAR GLASS	Active
	<input type="checkbox"/> GREEN GLASS	Active
	<input type="checkbox"/> HDPE	Active
	<input type="checkbox"/> LDPE (Low-density polyethylene)	Active
	<input type="checkbox"/> OTHER GLASS	Active
	<input type="checkbox"/> OTHER PACKAGING MATERIAL	Active
	<input type="checkbox"/> OTHER PLASTIC	Active
	<input type="checkbox"/> PAPERBOARD	Active
	<input type="checkbox"/> PET (Polyethylene terephthalate)	Active

### Key Fields

**Table 2–27** *GSM Common, Environmental Waste key fields*

Name	Description
Name	Name of the environmental waste
Status	The assigned status for the environmental waste. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Environmental Waste list, see "[Maintaining Simple Lists](#)" on page 2-5.

### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Formula Output Types - External

Use the Formula Output Type - External list in ADMN to maintain the data, as [Figure 2–46](#) shows.

Figure 2–46 Formula Output Type - External list

25 ▾		1		Bulk Update	
<input type="checkbox"/>	Name	System Type	Status	Default	
	<input type="checkbox"/> External - By-Product	External - By-Product	Active		
	<input type="checkbox"/> External - Product	External - Product	Active	✔	
	<input type="checkbox"/> External - Waste	External - Waste	Active		
25 ▾		1		Bulk Update	

### Key Fields

Table 2–28 Formula output type - external key fields

Name	Description
Name	Name of the formula output type.
System Type	System type of the formula output type. There are three different external types: 'External- By-Product', 'External - Product' and 'External - Waste'. Each product has a different function. Refer to the <i>Agile Product Lifecycle Management for Process Global Specification Management User Guide</i> for output type descriptions.
Status	The assigned status for the formula output type. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.
Default	A check indicates the default output type.

### Editing Rules

For instructions on editing the formula output types - external list, see "[Maintaining Simple Lists](#)" on page 2-5.





### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Formula Output Types - Internal

Use the Formula Output Type - Internal list in ADMN to maintain the data, as [Figure 2–46](#) shows.

**Figure 2–47** Formula Output Type - Internal list

25	▼	1	2	Bulk Update
<input type="checkbox"/>	Name		Status	Default
	<input type="checkbox"/>	Internal	Active	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	Internal Active	Active	
	<input type="checkbox"/>	Internal Archived	Archive	
	<input type="checkbox"/>	Internal Inactive	Inactive	

### Key Fields

**Table 2–29** Formula output type - internal key fields

Name	Description
Name	Name of the formula output type.
Status	The assigned status for the formula output type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Default	A check indicates the default output type.

### Editing Rules

For instructions on editing the formula output types - internal list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering







For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Formula Output Types - Referenced

Use the Formula Output Type - Referenced list in ADMN to maintain the data, as [Figure 2–46](#) shows.

**Figure 2–48** *Formula Output Type - Referenced list*

	Name	System Type	Status	Default
	Referenced - By-Product	Referenced - By-Product	Active	
	Referenced - By-Product Active	Referenced - By-Product	Active	
	Referenced - By-Product Inactive	Referenced - By-Product	Inactive	
	Referenced - Product	Referenced - Product	Active	

### Key Fields

**Table 2–30** *Formula output type - referenced key fields*

Name	Description
Name	Name of the formula output type.
System Type	System type of the formula output type. There are three different referenced types: 'Referenced- By-Product', 'Referenced - Product' and 'Referenced - Waste'. Each product has a different function. Refer to the <i>Agile Product Lifecycle Management for Process Global Specification Management User Guide</i> for output type descriptions.
Status	The assigned status for the formula output type. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.
Default	A check indicates the default output type.

### Editing Rules

For instructions on editing the formula output types - referenced list, see "[Maintaining Simple Lists](#)" on page 2-5.


### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Formulation Classification

Formula classifications are used to secure % breakdowns on material, product, and trade specifications. Use the Formula Classification list in ADMN to maintain the data, as [Figure 2–49](#) shows.

Figure 2–49 Formula Classifications list

	<input type="checkbox"/>	Name	Group(s)	Status
	<input type="checkbox"/>	All GSM Users	Testing Protocol Admin, GSM	New
	<input type="checkbox"/>	Restricted To Specs & Labeling	All Roles, Specs&Labeling	Active

### Key Fields

Table 2–31 GSM Common, Formula Classification key fields

Name	Description
Name	Name of the formula classification.
Group(s)	User groups that have access to the formula classification. User groups are managed using UGM. For more information, refer to the <i>Agile Product Lifecycle Management for Process User Group Management User Guide</i> .
Status	The assigned status for the formula classification. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Formula Classification list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Formulation Item Type

Use the Formulation Item Type list in ADMN to maintain the data, as [Figure 2–45](#) shows.

**Figure 2–50** *Formulation Item Type list*

	Name	Status	Default
	Formulation	Active	

### Key Fields

**Table 2–32** *GSM Common, Formulation Item Type key fields*

Name	Description
Name	Name of the formulation item.
Status	The assigned status for the formulation item type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Default	A check indicates the default formulation item type

### Editing Rules

For instructions on editing the Formulation Item Type list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Formulation Tags

Use the Formulation Tags list in ADMN to maintain the data, as [Figure 2–51](#) shows.

**Figure 2–51** *Formulation Tags list*

 Name	Behavior ID	Behaviors	Available In	Status
 Binder	1003	Material	Formulation Material Inputs, Breakdown	Active
 Processing Aid	1001	Moisture, Material	Formulation Material Inputs, Breakdown	Active
 Solvent	1004	Material	Formulation Material Inputs, Breakdown	Active
 Sweetener	1002	Material	Formulation Material Inputs, Breakdown	Active

## Key Fields

**Table 2–33** *Formulation Tags key fields*

Name	Description
Name	Name of the substitute material tag
Behavior ID	The system-assigned column tag ID
Behaviors	The specific attribute that is being targeted for loss
Available In	The output that the formulation is available in. This is a required field.
Status	The assigned status for the formulation tag. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Formulation Tags list, see "[Maintaining Simple Lists](#)" on page 2-5.

## List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Label Claims

Use the Label Claims list in ADMN to maintain the data, as [Figure 2–52](#) shows.

**Figure 2–52** *Label Claims list*

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

## Key Fields

**Table 2–34** *GSM Common, Label Claims key fields*

Name	Description
Name	Name of the label claim
Is Calculatable	Indicates whether the label claim is associated to a label claim determination rule. This flag is not editable through ADMN and must be scripted in.
Status	The assigned status for the label claim. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Label Claims list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Label Claims Classifications

Use the Label Claims Classifications list in ADMN to maintain label claims classifications, as [Figure 2–53](#) shows.

**Figure 2–53** *Label Claims Classifications list*

	Name	Status
	Dietary Supplement	System
	Individual Food	System
	Main Dish	System
	Meal	System

### Key Fields

**Table 2–35** *GSM Common, Label Claims Classifications key fields*

Name	Description
Name	Name of the label claim classification
Status	The assigned status for the label claim classification. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Label Claims Classifications list, see ["Maintaining Simple Lists"](#) on page 2-5.





### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Label Owner

Use the Label Owner list in ADMN to maintain the label owner data, as [Figure 2–54](#) shows.

**Figure 2–54** *Label Owner list*

<input type="checkbox"/>	Name	Status
	Branded Manufacturer Label	System
 <input type="checkbox"/>	Distributor/Wholesaler Branded Own Label	Active
 <input type="checkbox"/>	Distributor/Wholesaler Own Label	Active
 <input type="checkbox"/>	No Name Label	Active
 <input type="checkbox"/>	Retailer Branded Own Label	Active
	Retailer Own Label	System

### Key Fields

**Table 2–36** *GSM Common, Label Owner key fields*

Name	Description
Name	Name of the label owner
Status	The assigned status for the label owner. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Label Owner list, see ["Maintaining Simple Lists"](#) on page 2-5.
















### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Menu Item Class

Use the Menu Item Class list in ADMN to maintain the menu item classifications, as [Figure 2–55](#) shows.

**Figure 2–55** Menu Item Class list

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

### Key Field

**Table 2–37** GSM Common, Menu Item Class key field

Name	Description
Name	Name of the menu item class
Status	The assigned status for the menu item class. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Menu Item Class list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Menu Item Standard

Use the Menu Item Standard list in ADMN to maintain the menu item standards, as [Figure 2–56](#) shows.

**Figure 2–56** *Menu Item Standard list*

 <input type="checkbox"/>	Locality	Compliance	Name	Status
	<input type="checkbox"/> Global	Target	Global - Target "Gold" Standard	Active
	<input type="checkbox"/> Local	Target	Local - Reference Standard	Active
	<input type="checkbox"/> Local	Meets	Local - Meets Regional Standard	Active
	<input type="checkbox"/> Local	Alternative	Local - Acceptable Alternative	Active
	<input type="checkbox"/> Local	Non	Local - Not Standard	Active
	<input type="checkbox"/> Regional	Target	Regional - Target Standard	Active
	<input type="checkbox"/> Regional	Non	Regional - Not Standard	Active
	<input type="checkbox"/> Regional	Alternative	Regional - Acceptable Alternative	Active
	<input type="checkbox"/> Regional	Meets	Regional - Meets Global Standard	Active

## Key Fields

**Table 2–38** *GSM Common, Menu Item Standard key fields*

Name	Description
Locality	The region that the menu item standard applies to. This field is for administrative informational purposes only.
Compliance	The compliance value for the menu item standard. This field is for administrative informational purposes only.
Name	Name of the menu item standard.
Status	The assigned status for the menu item standard. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Menu Item Standard list, see ["Maintaining Simple Lists"](#) on page 2-5.









## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Nutrient Profile Special Attributes

Use the Nutrient Profile Special Attributes list in ADMN to maintain the data, as [Figure 2–57](#) shows.

**Figure 2–57** *Nutrient Profile Special Attributes list*

	<input type="checkbox"/> Name	Status
	<input type="checkbox"/> Five a Day Portion - 1 per Can	Active
	<input type="checkbox"/> Five a Day Portion - 2 per Can	Active
	<input type="checkbox"/> Five a Day Symbol- 2 Petal	Active
	<input type="checkbox"/> Five a Day Symbol - 1 Petal	Active
	<input type="checkbox"/> Five a Day Symbol - 3 Petal	Active
	<input type="checkbox"/> Five a Day Symbol - 4 Petal	Active
	<input type="checkbox"/> Five a Day Symbol - 5 Petal	Active

### Key Fields

**Table 2–39** *GSM Common, Nutrient Profile Special Attributes key fields*

Name	Description
Name	Name of the nutrient profile special attribute
Status	The assigned status for the nutrient profile special attribute. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Nutrient Profile Special Attributes list, see ["Maintaining Simple Lists"](#) on page 2-5.







### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Nutrient Source

Use the Nutrient Source list in ADMN to maintain the data, as [Figure 2–58](#) shows.

**Figure 2–58** *Nutrient Source list*

<input type="checkbox"/>	Name	Status
	<input type="checkbox"/> From CPI Lab	Active
	<input type="checkbox"/> From External Lab	Active
	<input type="checkbox"/> From Nutritional Database	Active
	<input type="checkbox"/> From M & W Database	Active
	From Manufacturer	System
	USDA Nutrient Database	System
	<input type="checkbox"/> UK Nutrient Bank	Active
	<input type="checkbox"/> From Design Workbench	Archive
	Theoretical	System

### Key Fields

**Table 2–40** *GSM Common, Nutrient Source key fields*

Name	Description
Name	Name of the nutrient source
Status	The assigned status for the nutrient source. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Nutrient Source list, see ["Maintaining Simple Lists"](#) on page 2-5.

### Reordering Nutrient Sources

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder nutrient sources. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.



### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Packaging Type

Use the Packaging Type list in ADMN to maintain the data, as [Figure 2–59](#) shows.

Figure 2–59 Packaging Type list

	Name	ISO Code	Status
	<input type="checkbox"/> Aerosol	AE	Active
	<input type="checkbox"/> Ampoule-non-protected	AM	Active
	<input type="checkbox"/> Ampoule-protected	AP	Active
	<input type="checkbox"/> Atomizer	AT	Active
	<input type="checkbox"/> Bag	BG	Active
	<input type="checkbox"/> Bag-multiply	MB	Active
	<input type="checkbox"/> Bale-compressed	BL	Active
	<input type="checkbox"/> Bale-non-compressed	BN	Active
	<input type="checkbox"/> Balloon-non-protected	BF	Active
	<input type="checkbox"/> Balloon-protected	BP	Active
	<input type="checkbox"/> Bar	BR	Active
	<input type="checkbox"/> Barrel	BA	Active
	<input type="checkbox"/> Bars-in bundle/bunch/truss	BZ	Active

## Key Fields

Table 2–41 GSM Common, Packaging Type key fields

Name	Description
Name	Name of the packaging type.
ISO Code	Name of the related ISO code.
Status	The assigned status for the packaging type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Packaging Type list, see ["Maintaining Simple Lists"](#) on page 2-5.




## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Packaging Item Type

Use the Packaging Item Type list in ADMN to maintain the data, as [Figure 2–60](#) shows.

**Figure 2–60** *Packaging Item Type list*

<input type="checkbox"/>	Name	Status	Default
 <input type="checkbox"/>	Packaging Material	Active	
 <input type="checkbox"/>	Printed Material	Active	

### Key Fields

**Table 2–42** *GSM Common, Packaging Item Type key fields*

Name	Description
Name	Name of the packaging item type.
Status	The assigned status for the packaging item type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Default	Indicates which packaging item type is set as default.

### Editing Rules

For instructions on editing the Packaging Item Type list, see ["Maintaining Simple Lists"](#) on page 2-5.





### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Raw Material Types

Use the Raw Material Types list in ADMN to maintain the data, as [Figure 2–61](#) shows.

Figure 2–61 Raw Materials list

	<input type="checkbox"/>	Name	Status	Default
	<input type="checkbox"/>	New Raw Material	New	
	<input type="checkbox"/>	Raw Material	Active	

## Key Fields

Table 2–43 GSM Common, Raw Materials key fields

Name	Description
Name	Name of the raw material.
Status	The assigned status for the raw material. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Default	The raw material type that is automatically selected when a new material specification is created.

## Editing Rules

For instructions on editing the Raw Materials list, see ["Maintaining Simple Lists"](#) on page 2-5.






## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Shelf Life Type

Use the Shelf Life Type list in ADMN to maintain the data, as [Figure 2–62](#) shows.

**Figure 2–62** Shelf Life Type list

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

### Key Fields

**Table 2–44** GSM Common, Shelf Life Type key fields

Name	Description
Name	Name of the shelf life type
ID	Unique identifier for the shelf life type
Status	The assigned status for the shelf life type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Shelf Life Type list, see ["Maintaining Simple Lists"](#) on page 2-5.

### Reordering Shelf Life Types

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder shelf life types. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Smart Issue Status

Use the Smart Issue Status list in ADMN to maintain the data, as [Figure 2–63](#) shows.

**Figure 2–63** Smart Issue Status list

	Name	Status
	Pending	System
	Executing	System
	Completed	System
	Failed	System

## Key Fields

**Table 2–45** GSM Common, Smart Issue Status key fields

Name	Description
Name	Name of the smart issue status.
Status	The assigned status for the smart issue status. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Smart Issue Status list, see "[Maintaining Simple Lists](#)" on page 2-5.

## Reordering Smart Issue Status

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder smart issue status types. For instructions on setting the order, see "[To reorder data in a simple list:](#)" on page 2-6.

## List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.















## Storage and Shipping Requirements

Use the Storage and Shipping Requirements list in ADMN to maintain the data, as [Figure 2–64](#) shows.

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

**Figure 2–64** *Storage and Shipping Requirements list*

<input type="checkbox"/>	Name	Status
	<input type="checkbox"/> Ambient	Active
	<input type="checkbox"/> Away from Strong Odors	Active
	<input type="checkbox"/> Chilled	Active
	<input type="checkbox"/> Cool	Active
	<input type="checkbox"/> Dark	Active
	<input type="checkbox"/> Dry	Active
	<input type="checkbox"/> Frozen	Active
	<input type="checkbox"/> Not Exposed to Sunlight	Active
	<input type="checkbox"/> Refrigerated	Active
	<input type="checkbox"/> Sanitary Conditions	Active
	<input type="checkbox"/> Unopened	Active
	<input type="checkbox"/> Ventilated	Active

### Key Fields

**Table 2–46** *GSM Common, Storage and Shipping Requirements key fields*

Name	Description
Name	Name of the storage and shipping requirement
Status	The assigned status for the storage and shipping requirement. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Storage and Shipping Requirements list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering













For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Storage Requirements (Trade Specs)

Use the Storage Requirements (Trade Specs) list in ADMN to maintain the data, as [Figure 2–65](#) shows.

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

Figure 2–65 Storage Requirements (Trade Specs) list

<input type="checkbox"/>	Name	Status
	<input type="checkbox"/> Ambient	Active
	<input type="checkbox"/> Away from Strong Odors	Active
	<input type="checkbox"/> Chilled	Active
	<input type="checkbox"/> Cool	Active
	<input type="checkbox"/> Dark	Active
	<input type="checkbox"/> Dry	Active
	<input type="checkbox"/> Frozen	Active
	<input type="checkbox"/> Not Exposed to Sunlight	Active
	<input type="checkbox"/> Refrigerated	Active
	<input type="checkbox"/> Sanitary Conditions	Active
	<input type="checkbox"/> Unopened	Active
	<input type="checkbox"/> Ventilated	Active

## Key Fields

Table 2–47 GSM Common, Storage Requirements (Trade Specs) key fields

Name	Description
Name	Name of the trade specification storage requirement
Status	The assigned status for the trade specification storage requirement. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Storage Requirements (Trade Spec) list, see "[Maintaining Simple Lists](#)" on page 2-5.



## List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Substitute Material Tags

Use the Substitute Material Tags list in ADMN to maintain the data, as [Figure 2–66](#) shows.

**Figure 2–66** *Substitute Material Tags list*

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	material tag 2	Active
 <input type="checkbox"/>	material tag 1	New

### Key Fields

**Table 2–48** *Substitute Material Tags key fields*

Name	Description
Name	Name of the substitute material tag
Status	The assigned status for the substitute material tag. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Substitute Material Tags list, see "[Maintaining Simple Lists](#)" on page 2-5.

### Reordering Substitute Material Tags

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder substitute material tags. For instructions on setting the order, see "[To reorder data in a simple list:](#)" on page 2-6.

### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

# Trade Item Type

Use the Trade Item Type list in ADMN to maintain the Item Type field on a GSM trade specification. This list allows you to customize the Item Type name shown and tie it to a system type. The System type controls which sections and fields are shown on the trade specification. This list is shown in [Figure 2–67](#) below.

Figure 2–67 Trade Item Type list

<input type="checkbox"/>	Name	Is Discrete	System Type	Status	Default
	<input type="checkbox"/> Consumer Unit	<input type="checkbox"/>	Consumer Unit	Active	
	<input type="checkbox"/> Consumer Unit (co-pack)	<input type="checkbox"/>	Consumer Unit (co-pack)	Active	
	<input type="checkbox"/> Consumer Unit (not for resale - co-pack)	<input type="checkbox"/>	Consumer Unit (not for resale - co-pack)	Active	
	<input type="checkbox"/> Consumer Unit (not for resale)	<input type="checkbox"/>	Consumer Unit (not for resale)	Active	
	<input type="checkbox"/> Traded Unit	<input type="checkbox"/>	Traded Unit	Active	
	<input type="checkbox"/> Traded Unit (co-pack)	<input type="checkbox"/>	Traded Unit (co-pack)	Active	
	<input type="checkbox"/> Traded Unit (no children - co-pack)	<input type="checkbox"/>	Traded Unit (no children - co-pack)	Active	
	<input type="checkbox"/> Traded Unit (no children)	<input type="checkbox"/>	Traded Unit (no children)	Active	

## Key Fields

Table 2–49 Trade Item Type key fields

Name	Description
Name	Name of the trade item type that displays to the user.
Is Discrete	When an item type is flagged with isDiscrete, the trade specification hides the Nutrient Profile section, Related Material Specification section, and the Compliance, Allergens, Intolerances, Additives sections. Discrete always shows suppliers regardless of system type selected.
System Type	This type controls which fields are available on the trade specification when a trade item type is selected. Refer to <a href="#">Figure 2–68</a> detailing what each system type shows.
Status	The assigned status for the trade item type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Default	The trade type that is automatically selected when a blank trade specification is created.

[Figure 2–68](#) shows which sections and fields are displayed based on the system type selected. CU = Consumer Unit and TU = Traded Unit

Figure 2–68 System Types

System Types	CU Packaging Attributes	TU Packaging Attributes	Trade Children	% Breakdown	Suppliers	GTIN/UPC/EAN	
CU	Shown	Hidden	Shown	Hidden	Hidden	Shown	
CU (not for resale)	Shown	Hidden	Shown	Hidden	Hidden	Hidden	
TU	Hidden	Shown	Shown	Hidden	Hidden	Shown	
TU (no children)	Shown	Shown	Hidden	Hidden	Hidden	Shown	
CU (co-pack)	Shown	Hidden	Shown	Shown	Shown	Shown	
CU (co-pack) (not for resale)	Shown	Hidden	Shown	Shown	Shown	Shown	
TU (co-pack)	Hidden	Shown	Shown	Shown	Shown	Shown	
TU (co-pack) (no children)	Shown	Shown	Hidden	Shown	Shown	Shown	
System Types	PLU Description	POS Description	Brand Description	Product Name	UNSPSC Code	Tax Type	Stacking Height
CU	Shown	Shown	Shown	Shown	Shown	Shown	Hidden
CU (not for resale)	Hidden	Hidden	Shown	Shown	Hidden	Hidden	Hidden
TU	Shown	Shown	Hidden	Hidden	Shown	Shown	Shown
TU (no children)	Shown	Shown	Shown	Shown	Hidden	Shown	Shown
CU (co-pack)	Shown	Shown	Shown	Shown	Hidden	Shown	Hidden
CU (co-pack) (not for resale)	Shown	Shown	Shown	Shown	Hidden	Hidden	Hidden
TU (co-pack)	Shown	Shown	Hidden	Hidden	Shown	Shown	Shown
TU (co-pack) (no children)	Shown	Shown	Shown	Shown	Hidden	Shown	Shown

\* Coding and Variable Weight fields are always on all Trade Types. If the Packaging Attributes TU section exists they appear within this section, else they appear in the Packaging Attributes CU section.

## Editing Rules

For instructions on editing the Trade Item Type list, see ["Maintaining Simple Lists"](#) on page 2-5.





## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Trade Tax Type/Rate

Use the Trade Tax Type/Rate list in ADMN to maintain the trade tax type/rate, as [Figure 2–69](#) shows.

**Figure 2–69** Trade Tax Type/Rate list

	<b>Name</b>	<b>Status</b>
	 Trade Tax Type 1 - New	New
	 GST	Active
	 VAT	Active

## Key Fields

**Table 2–50** GSM Common, Trade Tax Type/Rate key fields

Name	Description
Name	Name of the trade tax type/rate
Status	The assigned status for the trade tax type/rate. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Trade Tax Type/Rate list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Trade UNSPSC Code

Use the Trade United Nations Standard Products and Services (UNSPSC) Code list in ADMN to maintain the list, as [Figure 2–70](#) shows.

**Figure 2–70** Trade UNSPSC Code list



### Editing Rules

For instructions on editing the Trade UNSPSC Code tree list, see ["Maintaining Tree Lists"](#) on page 2-11.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Trading Company

Use the Trading Company list in ADMN to maintain the fields, as [Figure 2–71](#) shows.

**Figure 2–71** Trading Company list

 <input type="checkbox"/>	Name	GLN	Status
	<input type="checkbox"/> 5000169000007	5000169000007	Active
	<input type="checkbox"/> 5000192072224	5000192072224	Active
	<input type="checkbox"/> 5010251000006	5010251000006	Active
	<input type="checkbox"/> 5010482000004	5010482000004	Active
	<input type="checkbox"/> 5013546057662	5013546057662	Active
	<input type="checkbox"/> 5024231000009	5024231000009	Active
	<input type="checkbox"/> 5024333099994	5024333099994	Active
	<input type="checkbox"/> 5027615000022	5027615000022	Active
	<input type="checkbox"/> 7867458908462	7867458908462	Active
	<input type="checkbox"/> Asda Stores Ltd	5015715444440	Active
	<input type="checkbox"/> Co-Operative Group Ltd	5000128000013	Active
	<input type="checkbox"/> CPI Company Ltd	5000157000002	Active

### Key Fields

**Table 2–51** GSM Common, Trading Company key fields

Name	Description
Name	Name of the trading company
GLN	The Global Location Number, a globally unique 13-digit number that identifies physical location, legal entity, and functional entity of the trading company
Status	The assigned status for the trading company. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Trading Company list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## UDEX Classifications

Use the UDEX Classifications list in ADMN to maintain the data, as [Figure 2–72](#) shows.

**Figure 2–72** *GSM Common, UDEX Classifications tree list*



### Editing Rules

For instructions on editing the UDEX Classifications tree list, see ["Maintaining Tree Lists"](#) on page 2-11.

### List Filtering













For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Global Specification Management Compliance Data

## Additives

Use the Additives list in ADMN to maintain the data, as [Figure 2–73](#) shows.

Figure 2–73 Additives list

	Name	External Id	UOM	Status	Data Groups
 	- None Known	_-NONE_KNOWN	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 	Acacia Gum	ACACIA_GUM	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 	Acesulfame K	ACESULFAME_K	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 	Acetic Acid	ACETIC_ACID	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 	Acetone	ACETONE	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 	Acetone peroxide	ACETONE_PEROXIDE	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA

### Key Fields

Table 2–52 GSM Compliance, Additives key fields

Name	Description
Name	Name of the additive
External Id	Unique identification for the additive
UOM	Unit of measure for the additive
Status	The assigned status for the additive. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Data Groups	Group used to filter the additives list

### Editing Rules

For instructions on editing the Additives list, see ["Maintaining Simple Lists"](#) on page 2-5.





### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Allergens

Use the Allergens list in ADMN to maintain the data, as [Figure 2–74](#) shows.

**Figure 2–74 Allergens list**

	Name	External Id	UOM	Status	Data Groups
 <input type="checkbox"/>	Abalone	ABALONE	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Acacia gum	ACACIA_GUM	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Albumen	ALBUMEN	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Allergen Free	ALLERGEN_FREE	lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA

### Key Fields

**Table 2–53 GSM Compliance, Allergens key fields**

Name	Description
Name	Name of the allergen
External Id	Unique identification for the allergen
UOM	Unit of measure for the allergen
Status	The assigned status for the allergen. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Data Groups	Group used to filter the allergens list

### Editing Rules

For instructions on editing the Allergens list, see ["Maintaining Simple Lists"](#) on page 2-5.








### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Complies With

Use the Complies With list in ADMN to maintain the data, as [Figure 2–75](#) shows.

Figure 2–75 Complies With list

	Name	Is Negative	Status	Data Groups
 <input type="checkbox"/>	Coeliac	<input type="checkbox"/>	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Halal	<input type="checkbox"/>	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Identity Preserved	<input type="checkbox"/>	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	ISO9000 compliant	<input type="checkbox"/>	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Kosher	<input type="checkbox"/>	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Kosher - Meat	<input type="checkbox"/>	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
 <input type="checkbox"/>	Kosher - Mehadrin	<input type="checkbox"/>	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA

## Key Fields

Table 2–54 GSM Compliance, Complies With key fields

Name	Description
Name	Name of the compliance item
Is Negative	Indicates whether the item is negative. This flag is used when complies with items are rolled up during formulation. If an item is marked as Negative it is rolled up as present if it appears at all in the group of formulation inputs. If an item is not marked as Negative, then it only roll ups as present if all formulation inputs contain the complies with item.
Status	The assigned status for the compliance item. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Data Groups	Group used to filter the complies with list

## Editing Rules

For instructions on editing the Complies With list, see ["Maintaining Simple Lists"](#) on page 2-5.













## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Intolerances

Use the Intolerances list in ADMN to maintain the data, as [Figure 2–76](#) shows.

**Figure 2–76** *Intolerances list*

 	Name	External Id	UOM	Status	Data Groups
 	Abalone	ABALONE	ppb, lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, United Kingdom, USA
 	Acacia gum	ACACIA_GUM	ppb, lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Inactive	Asia, Australia, Canada, European Union, Japan, Netherlands, United Kingdom, USA
 	Albumen	ALBUMEN	ppb, lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, United Kingdom, USA Intolerances
 	Allergen Free	ALLERGEN_FREE	ppb, lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, United Kingdom, USA
 	Allspice	ALLSPICE	ppb, lb, Cnt, kg, oz, ppm, g, units, mg, µg, per mil	Active	Asia, Australia, Canada, European Union, Japan, Netherlands, United Kingdom, USA

### Key Fields

**Table 2–55** *GSM Compliance, Intolerances key fields*

Name	Description
Name	Name of the intolerance
External Id	Unique identification for the intolerance
UOM	Unit of measure for the intolerance
Status	The assigned status for the intolerance. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.
Data Groups	Group used to filter the intolerances list

### Editing Rules

For instructions on editing the Intolerances list, see "[Maintaining Simple Lists](#)" on page 2-5.

### List Filtering






For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

# Global Specification Management FSIS Data

## Application Status

Use the Application Status list in ADMN to maintain the data, as [Figure 2–77](#) shows.

Figure 2–77 Application Status list

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	Draft	Active
 <input type="checkbox"/>	Pending	Active
 <input type="checkbox"/>	Failed	Active
 <input type="checkbox"/>	Approved	Active
 <input type="checkbox"/>	Rescinded	Active

## Key Fields

Table 2–56 GSM FSIS, Application Status key fields

Name	Description
Name	Name of the FSIS application status
Status	The assigned status for the FSIS application status. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Application Status list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Reordering Application Statuses

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder application statuses. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## CFIA Approval Type

Use the CFIA Approval Types list in ADMN to maintain approval types, as [Figure 2–78](#) shows.

**Figure 2–78** CFIA Approval Types list

Name	Status
Proof	System
Final	System
Temporary	System
Update	System

### Key Fields

**Table 2–57** GSM FSIS, CFIA Approval Type key fields

Name	Description
Name	Name of the FSIS CFIA approval type
Status	The assigned status for the FSIS CFIA approval type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the CFIA Approval Type list, see ["Maintaining Simple Lists"](#) on page 2-5.

### Reordering CFIA Approval Types

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder CFIA approval types. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.





### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# CFIA Payment Method

Use the CFIA Payment Method list in ADMN to maintain payment methods, as [Figure 2–79](#) shows.

Figure 2–79 CFIA Payment Method list

	Name	Status
	Immediate Payment	Active
	Credit Card	Active
	CFIA Account No.	Active

## Key Fields

Table 2–58 GSM FSIS, CFIA Payment Method key fields

Name	Description
Name	Name of the FSIS CFIA payment method
Status	The assigned status for the FSIS CFIA payment method. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the CFIA Payment Method list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Reordering CFIA Payment Methods

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder CFIA payment methods. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.

## List Filtering



For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## CFIA Product Type

Use the CFIA Product Type list in ADMN to maintain the product type data, as [Figure 2–80](#) shows.

**Figure 2–80** CFIA Product Type list

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	Processed Products	Active
 <input type="checkbox"/>	Processed Meat Products	Active

### Key Fields

**Table 2–59** GSM FSIS, CFIA Product Type key fields

Name	Description
Name	Name of the FSIS CFIA product type
Status	The assigned status for the FSIS CFIA product type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the CFIA Product Type list, see ["Maintaining Simple Lists"](#) on page 2-5.

### Reordering CFIA Product Types

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder CFIA product types. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.




















### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# USDA HACCP Category

Use the USDA HACCP Category list in ADMN to maintain the data, as [Figure 2–81](#) shows.

Figure 2–81 USDA HACCP Category list

	Name	Status
 	Slaughter - All Species	Active
 	Raw product - ground	Active
 	Raw product - not ground	Active
 	Thermally processed - commercially sterile	Active
 	Not heat treated - shelf stable	Active
 	Heat treated - shelf stable	Active
 	Fully cooked - not shelf stable	Active
 	Heat treated but not fully cooked - not shelf stable	Active
 	Product with secondary inhibitors - not shelf stable	Active

## Key Fields

Table 2–60 GSM FSIS, USDA HACCP Category key fields

Name	Description
Name	Name of the USDA HACCP category
Status	The assigned status for the USDA HACCP category. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the USDA HACCP list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Reordering USDA HACCP Categories

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder USDA HACCP categories. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.

## List Filtering








For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# New Product Development Data

## Brands - (NPD)

Use the Brands - (NPD) list in ADMN to maintain the data, as [Figure 2–82](#) shows.

**Figure 2–82** Brands - (NPD) list

	Name	Status
	 Corporate Brand	Active
	 Dog Treats	Active
	 Infant Gourmet	Active

## Key Fields

**Table 2–61** NPD, Brands - (NPD) key fields

Name	Description
Name	Name of the brand in NPD
Status	The assigned status for the brand. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Brands - (NPD) list, see "[Maintaining Simple Lists](#)" on page 2-5.

## List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Business Units - (NPD)

Use the Business Units - (NPD) tree list in ADMN to maintain the data, as [Figure 2–83](#) shows.

**Figure 2–83** *Business Units - (NPD) tree list*



### Editing Rules

For instructions on editing the Business Units - (NPD) tree list, see ["Maintaining Tree Lists"](#) on page 2-11.






### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Channels

Channels are used to define distribution strategies in projects and strategic briefs. Use the Channels list in ADMN to maintain the data, as [Figure 2–84](#) shows.

**Figure 2–84** *Channels list*

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	Club (member-based)	Active
 <input type="checkbox"/>	Convenience	Active
 <input type="checkbox"/>	Discounters	Active
 <input type="checkbox"/>	Distributor	Active
 <input type="checkbox"/>	Drug	Active
 <input type="checkbox"/>	Foodservice	Active
 <input type="checkbox"/>	Grocery	Active
 <input type="checkbox"/>	Hardware	Active
 <input type="checkbox"/>	Health Food Stores	Active

## Key Fields

**Table 2–62** *NPD, Channels key fields*

Name	Description
Name	Name of the channel
Status	The assigned status for the channel. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Channels list, see ["Maintaining Simple Lists"](#) on page 2-5.










## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Consumer Value Perception

Use the Consumer Value Perception list in ADMN to maintain the data, as [Figure 2–85](#) shows.

Figure 2–85 Consumer Value Perception list

	Name	Status
	 Breakthrough / Category Growth	Active
	 Consumer Neutral (i.e. Value Engineering)	Active
	 Share Growth	Active
	 Share Maintenance	Active

## Key Fields

Table 2–63 NPD, Consumer Value Perception key fields

Name	Description
Name	Name of the consumer value perception
Status	The assigned status for the consumer value perception. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Consumer Value Perception list, see ["Maintaining Simple Lists"](#) on page 2-5.















## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Demographic Categories

Demographics are used when defining projects and strategic briefs. Use the Demographics list in ADMN to maintain the data, as [Figure 2–86](#) shows.

**Figure 2–86** *Demographics list*

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

### Key Fields

**Table 2–64** *NPD, Demographics key fields*

Name	Description
Name	Name of the demographic category.
Status	The assigned status for the demographic category. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Demographics list, see ["Maintaining Simple Lists"](#) on page 2-5.





### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Document Status

Use the Document Status list in ADMN to o maintain the NPD supporting document status list, as [Figure 2–86](#) shows.

**Figure 2–87 Document Status list**

	Name	Behavior ID	Default	Status
	Approved	103	<input type="checkbox"/>	Active
	Draft	101	<input checked="" type="checkbox"/>	Active
	Review	102	<input type="checkbox"/>	Active

### Key Fields

**Table 2–65 NPD, Document Status key fields**

Name	Description
Name	Name of the document status
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Document Status list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering




For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Document Type

Use the Document Type list in ADMN to maintain document type options for NPD supporting documents, as [Figure 2–86](#) shows.

**Figure 2–88 Document Type list**

 Name	Behavior ID	Status	Object Type > Object Subtype
  Supporting Document	101	Active	Innovation/Sales Pipeline, Innovation/Sales Pipeline Template, NPD Activity Template, Project, Project Template, Strategic Brief, Strategic Brief Template

### Key Fields

**Table 2–66 NPD, Document Type key fields**

Name	Description
Name	Name of the document type.
Behavior ID	The unique behavior ID that is defined by the system.
Status	The assigned status for the document type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Object Type > Object Subtype	Select the object and or object subtype where you would like the item to appear. For example, if you select Project > Project Template the item is only available for selection when the object type is a Project and the sub type is "Project Template". This function is only enabled when 'List Filtering' feature is enabled.

### Editing Rules

For instructions on editing the Document Type list, see ["Maintaining Simple Lists"](#) on page 2-5.






### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Enabling Technology

Use the Enabling Technology list to maintain the data, as [Figure 2–89](#) shows.

**Figure 2–89** *Enabling Technology list*

	<input type="text" value="Name"/>	Status
	<input type="text" value="Base"/>	Active
	<input type="text" value="Incremental"/>	Active
	<input type="text" value="Next generation"/>	Active
	<input type="text" value="Radical"/>	Active

## Key Fields

**Table 2–67** *NPD, Enabling Technology key fields*

Name	Description
Name	Name of the enabling technology.
Status	The assigned status for the enabling technology. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Enabling Technology list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Functional Area - (NPD)

Use the Functional Area - (NPD) list in ADMN to maintain the data, as [Figure 2–90](#) shows.

**Figure 2–90** *Functional Area - (NPD) list*

 Available In	Name	Status
  CPI Europe	Capital Engineering	Active
  CPI Australasia - Consumer Products	Channel Marketing/Sales	Active
  CPI Europe	Chemistry	Active
  CPI Australasia - Consumer Products	Consumer Services	Active
  CPI Europe	CPI Legal Department	Active
  CPI North America, CPI Australasia - Consumer Products, CPI Latin America	Engineering	Active
  CPI Europe	European Regulatory Affairs	Active
  CPI North America, CPI Australasia - Consumer Products, CPI Latin America	Executive	Active
  CPI Australasia - Consumer Products	FGI Data Controller	Active
  CPI North America, CPI Australasia - Consumer Products, CPI Latin America	Finance	Active

### Key Fields

**Table 2–68** *NPD, Functional Area - (NPD) key fields*

Name	Description
Available In	The NPD business unit that the functional area is available in. This is a required field.
Name	Name of the functional area.
Status	The assigned status for the enabling technology. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Functional Area - (NPD) list, see ["Maintaining Simple Lists"](#) on page 2-5.








### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Global Categories

Use the Global Categories list in ADMN to maintain the data, as [Figure 2–91](#) shows.

**Figure 2–91** *Global Categories list*

<input type="checkbox"/>	Name	Status
	<input type="checkbox"/> Applied	Active
	<input type="checkbox"/> Baby Care	New
	<input type="checkbox"/> Beer	Active
	<input type="checkbox"/> Beverages	Active
	<input type="checkbox"/> Breakfast Snacks	Active
	<input type="checkbox"/> Cleaners/Removers	Active
	<input type="checkbox"/> Clothing Care	New

### Key Fields

**Table 2–69** *NPD, Global Categories key fields*

Name	Description
Name	Name of the global category
Status	The assigned status for the global category. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Global Categories list, see "[Maintaining Simple Lists](#)" on page 2-5.




### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Metrics - Basis

Use the Metrics - Basis list to maintain the data, as [Figure 2–92](#) shows.

**Figure 2–92 Metrics - Basis list**

<input type="checkbox"/>	Name	Description	Code	Status
	<input type="checkbox"/> Absolute	Ignores cannibalization	ABS	Active
	<input type="checkbox"/> Incremental	Takes cannibalization into consideration	INC	Active
	<input type="checkbox"/> No Basis	Metric not tied to a basis	NOB	Active

## Key Fields

**Table 2–70 NPD, Metrics - Basis key fields**

Name	Description
Name	Name of the metrics basis
Description	Description of the metrics basis
Code	Alphanumeric code assigned to the metrics basis
Status	The assigned status for the metrics basis. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Metrics - Basis list, see ["Maintaining Simple Lists"](#) on page 2-5.









## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Metrics - Category

Use the Metrics - Category list to maintain the data, as [Figure 2–93](#) shows.

**Figure 2–93** Metrics - Category list

<input type="checkbox"/>	Name	Status
	<input type="checkbox"/> Capital	Active
	<input type="checkbox"/> Consumer Testing	Active
	<input type="checkbox"/> Expense	Active
	<input type="checkbox"/> Other	Active
	<input type="checkbox"/> Product	Active
	<input type="checkbox"/> Resources	Active
	<input type="checkbox"/> Revenue	Active
	<input type="checkbox"/> Volume	Active

### Key Fields

**Table 2–71** NPD, Metrics - Category key fields

Name	Description
Name	Name of the metrics category
Status	The assigned status for the metrics category. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Metrics - Category list, see ["Maintaining Simple Lists"](#) on page 2-5.




### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Metrics - Fiscal Year

Use the Metrics - Fiscal Year list to maintain the data, as [Figure 2-94](#) shows.

**Figure 2-94** *Metrics - Fiscal Year list*

 	Name	Description	Code	Status
 	FY04	Fiscal Year 2004	FY04	Active
 	FY05	Fiscal Year 2005	FY05	Active
 	FY06	Fiscal Year 2006	FY06	Active
 	FY07	Fiscal Year 2007	FY07	Active
 	FY08	Fiscal Year 2008	FY08	Active
 	FY09	Fiscal Year 2009	FY09	Active
 	FY10	Fiscal Year 2010	FY10	Active
 	FY11	Fiscal Year 2011	FY11	Active
 	FY12	Fiscal Year 2012	FY12	Active
 	FY13	Fiscal Year 2013	FY13	Active
 	FY14	Fiscal Year 201	FY14	Active
 	FY15	Fiscal Year 2015	FY15	Active
 	FY16	Fiscal Year 2016	FY16	Active
 	FY17	Fiscal Year 2017	FY17	Active
 	FY18	Fiscal Year 2018	FY18	Active
 	FY19	Fiscal Year 2019	FY19	Active

## Key Fields

**Table 2-72** *NPD, Metrics - Fiscal Year key fields*

Name	Description
Name	Name of the metrics fiscal year
Description	Description of the metrics fiscal year
Code	Alphanumeric code assigned to the metrics fiscal year
Status	The assigned status for the fiscal year. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Metrics - Fiscal Year list, see ["Maintaining Simple Lists"](#) on page 2-5.






## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Metrics - Phase

Use the Metrics - Phase list to maintain the data, as [Figure 2–95](#) shows.

**Figure 2–95** Metrics - Phase list

	Name	Description	Code	Status
	Launch	Occurring/Forecasted at the time of launch	LNCH	Active
	No Phase	Metric not tied to a phase	NOPH	Active
	Post-Launch	Occurring/Forecasted post-launch	POST	Active
	Pre-Launch	Occurring/Forecasted before launch	PREL	Active

### Key Fields

**Table 2–73** NPD, Metrics - Phase key fields

Name	Description
Name	Name of the metrics phase
Description	Description of the metrics phase
Code	Alphanumeric code assigned to the metrics phase
Status	The assigned status for the metrics phase. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Metrics - Phase list, see "[Maintaining Simple Lists](#)" on page 2-5.

### List Filtering











For more information about List Filtering, see "[List Filtering](#)" on page 2-9.



## Priorities

Use the Priorities list in ADMN to maintain the data, as [Figure 2–96](#) shows.

**Figure 2–96** *Priorities list*

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	1	Active
 <input type="checkbox"/>	2	Active
 <input type="checkbox"/>	3	Active
 <input type="checkbox"/>	4	Active
 <input type="checkbox"/>	5	Active
 <input type="checkbox"/>	I	Inactive
 <input type="checkbox"/>	II	Inactive
 <input type="checkbox"/>	III	Inactive
 <input type="checkbox"/>	Importance	Inactive
 <input type="checkbox"/>	Urgency	Inactive

## Key Fields

**Table 2–74** *NPD, Priorities key fields*

Name	Description
Name	Name of the priority
Status	The assigned status for the priority. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Priorities list, see ["Maintaining Simple Lists"](#) on page 2-5.

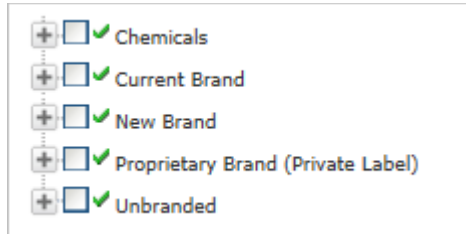
## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Project Type Categories

Use the Project Type Categories tree list in ADMN to maintain the data, as [Figure 2–97](#) shows.

**Figure 2–97** *NPD Project Type Categories list*









### Editing Rules

For instructions on editing the Project Type Categories list, see "[Maintaining Tree Lists](#)" on page 2-11.

## Project Types

Use the Project Types list in ADMN to maintain the data, as [Figure 2–98](#) shows.

**Figure 2–98** *Project Types list*

<input type="checkbox"/>	Available In	Name
 <input type="checkbox"/>	Technical Support	Alternate Supplier/New Supplier
 <input type="checkbox"/>	New Brand » Existing Product Category (for This Business Unit)	Artwork Revision
 <input type="checkbox"/>	New Brand » Existing Product Category (for This Business Unit)	Line Extension
 <input type="checkbox"/>	Existing CPI Product Category (for This Business Unit)	Line Extension/Range Extension/New Variety
 <input type="checkbox"/>	Existing CPI Product Category (for This Business Unit)	Line Extension/Range Extension/New Variety
 <input type="checkbox"/>	Chemicals	New Chemistry

### Key Fields

**Table 2–75** *NPD, Project Types key fields*

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

### Editing Rules

For instructions on editing the Project Types list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Project Visibilities

Use the Project Visibility list in ADMN to maintain the data, as [Figure 2–99](#) shows.

Figure 2–99 Project Visibility list

	Name	Status
	 Alf's Pizza	Active
	 BBQ Sauce	Active
	 Beverages	Active
	 Blue Cheese Dressing	Active
	 Business Unit(s)	Active
	 Cake	Active
	 Canned Soup	Active
	 Cheesecake	Active

### Key Fields

Table 2–76 NPD, Project Visibility key fields

Name	Description
Name	Name of the project visibility
Status	The assigned status for the project visibility. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Project Visibility list, see ["Maintaining Simple Lists"](#) on page 2-5.


















### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Risk

Use the Risk list in ADMN to maintain the data, as [Figure 2–100](#) shows.

**Figure 2–100** Risk list

	Name	Status
	 1	Active
	 2	Active
	 3	Active
	 4	Active
	 5	Active
	 Low	Inactive
	 Menace	Inactive
	 Peril	Inactive

## Key Fields

**Table 2–77** NPD, Risk key fields

Name	Description
Name	Name of the risk
Status	The assigned status for the risk. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Risk list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.









## Product Quality Management Data

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

### Action Type

Use the Action Type list in ADMN to maintain action types for PQM, as [Figure 2–101](#) shows.

**Figure 2–101** Action Type list

 <input type="checkbox"/>	Name	Abbreviation	System Code	Status
	<input type="checkbox"/> Corrective and Preventative Action	CAPA	Corrective and Preventative Action	Active
	<input type="checkbox"/> Illness/Injury CAPA	ILLINJCAPA	Corrective and Preventative Action	Active
	<input type="checkbox"/> Labeling CAPA	LBLCAPA	Corrective and Preventative Action	Active
	<input type="checkbox"/> Packaging CAPA	PKGCAPA	Corrective and Preventative Action	Active
	<input type="checkbox"/> Product CAPA	PRDCAPA	Corrective and Preventative Action	Active
	<input type="checkbox"/> Product Recall	PRDRCLL	Corrective and Preventative Action	Active
	<input type="checkbox"/> Supplier Corrective Action Request	SCAR	Corrective and Preventative Action	Active

### Key Fields

**Table 2–78** PQM, Action Type key fields

Name	Description
Name	Name of the action type
Abbreviation	Abbreviation for the action type
System Code	The system type assigned to the action type. This system type controls which core fields are displayed to the user when this type is selected. Only one system type of actions is available: Corrective and Preventative Action.
Status	The assigned status for the action type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Action Type list, see ["Maintaining Simple Lists"](#) on page 2-5.






### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Audit Result

Use the Audit Result list in ADMN to maintain audit results for PQM, as [Figure 2–102](#) shows.

**Figure 2–102**    *Audit Result list*

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

### Key Fields

**Table 2–79**    *PQM, Audit Result key fields*

Name	Description
Name	Name of the audit result
External Id	Unique identification for the audit result
Status	The assigned status for the audit result. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Audit Result list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Audit Type

Use the Audit Type list in ADMN to maintain audit types for PQM, as [Figure 2–103](#) shows.

**Figure 2–103** Audit Type list

 Name	Abbreviation	System Code	Status
  Audit	Audit	Audit	Active
  Facility Audit	Facility Audit	Audit	Active
  General Audit	General Audit	Audit	Active
  Product Audit	Product Audit	Audit	Active
  Steritech Operational Excellence	Steritech Operational Excellence	Audit	Active

### Key Fields

**Table 2–80** PQM, Audit Type key fields

Name	Description
Name	Name of the audit type
Abbreviation	Abbreviation for the audit type
System Code	The system type assigned to the audit type. This system type controls which core fields are displayed to the user when this type is selected. Only one system type of Audit is available: Audit.
Status	The assigned status for the audit type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Audit Type list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering















For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Customers

Use the Customers list in ADMN to maintain customers for PQM, as [Figure 2–104](#) shows.

**Figure 2–104** *Customers list*

 <input type="checkbox"/>	Name	External Id	Status
	Consumer	13	Active
	C-Store 3	12	Active
	C-Store 2	11	Active
	C-Store 1	10	Active
	Retail Grocer 3	9	Active
	Retail Grocer 2	8	Active
	Retail Grocer 1	7	Active
	Fast Food 3	6	Active
	Fast Food 2	5	Active
	Fast Food 1	4	Active
	Casual Dining 3	3	Active
	Casual Dining 2	2	Active
	Casual Dining 1	1	Active

### Key Fields

**Table 2–81** *PQM, Customers key fields*

Name	Description
Name	Name of the customer
External Id	Unique identification for the customer
Status	The assigned status for the customer. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Customers list, see "[Maintaining Simple Lists](#)" on page 2-5.







### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Document Status

Use the Document Status list in ADMN to maintain the PQM supporting document status list, as [Figure 2–104](#) shows.

**Figure 2–105 Document Status list**

	 Name	Behavior ID	Default	Status
	 Approved	103	<input type="checkbox"/>	Active
	 Draft	101	<input checked="" type="checkbox"/>	Active
	 Review	102	<input type="checkbox"/>	Active

## Key Fields

**Table 2–82 PQM, Document Status key fields**

Name	Description
Name	Name of the document status
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Document Status list, see ["Maintaining Simple Lists"](#) on page 2-5.



## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Document Type

Use the Document Type list in ADMN to maintain document type options for PQM supporting documents, as [Figure 2–106](#) shows.

Figure 2–106 Document Type list

	Name	Behavior ID	Status	Object Type > Object Subtype
	Supporting Document	101	Active	Actions, Audits, Issues

### Key Fields

Table 2–83 PQM, Document Type key fields

Name	Description
Name	Name of the document type.
Behavior ID	The unique behavior ID that is defined by the system.
Status	The assigned status for the document type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Object Type > Object Subtype	Select the object and or object subtype where you would like the item to appear. For example, if you select Actions, the item is only available for selection when the object type is an Action. This function is only enabled when 'List Filtering' feature is enabled.

### Editing Rules

For instructions on editing the Document Type list, see ["Maintaining Simple Lists"](#) on page 2-5.












### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Failure Type

Use the Failure Type list in ADMN to maintain failure types for PQM, as [Figure 2–107](#) shows. Failure types are associated to an affected item on an issue, action or audit.

**Figure 2–107** Failure Type list

	Name	External Id	Status
	<input type="checkbox"/> Packaging Non-Conformance	10	Active
	<input type="checkbox"/> Material Non-Conformance	9	Active
	<input type="checkbox"/> Improper Shipping Conditions	8	Active
	<input type="checkbox"/> Improper Equipment Settings	7	Active
	<input type="checkbox"/> Improper Loading	6	Active
	<input type="checkbox"/> Metal Detector Malfunction	5	Active
	<input type="checkbox"/> Process Equipment Failure	4	Active
	<input type="checkbox"/> Freezer Temperature NC	3	Active
	<input type="checkbox"/> Storage Temperature NC	2	Active
	<input type="checkbox"/> Improper Scaling/Mixing	1	Active

### Key Fields

**Table 2–84** PQM, Failure Type key fields

Name	Description
Name	Name of the failure type
External Id	Unique identification for the failure type
Status	The assigned status for the failure type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Failure Type list, see ["Maintaining Simple Lists"](#) on page 2-5.








### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Issue Types

Use the Issue Type list in ADMN to maintain issue types for PQM, as [Figure 2–108](#) shows.

Figure 2–108 Issue Type list

	Name	Abbreviation	System Code	Status
	Consumer Complaint	Consumer Complaint	Non Conformance Report	Active
	Customer Complaint	Customer Complaint	Non Conformance Report	Active
	Incoming Goods Inspection Failure	Incoming Goods Failure	Non Conformance Report	Active
	Injury Report	Injury Report	Problem Report	Active
	Non-Conformance Report	NCR	Non Conformance Report	Active
	Problem Report	PR	Problem Report	Active

## Key Fields

Table 2–85 PQM, Issue Type key fields







Name	Description
Name	Name of the issue type
Abbreviation	Abbreviation for the issue type
System Code	The system type assigned to the issue type. This system type controls which core fields are displayed to the user when this type is selected. Only two system types of Issues are available: Problem Report and Non Conformance Report. Non Conformance Reports contain extra fields. These fields are shown by selecting the non conformance icon (  ) in the Affected Items grid. See <a href="#">Figure 2–109</a> below.
Status	The assigned status for the issue type. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

Figure 2–109 Affected Items grid

Affected Items										
	System #	Equivalent #	Description	Rev Found	Failure Type	Qty	Rev Fixed	SKU / GTIN	Site Affected	
1	 5081781	USORACLE-558899	Popper's Oatmeal Bites [Draft]	001	Packaging Non-Conformance	1 units				
										

## Editing Rules

For instructions on editing the Issue Type list, see "[Maintaining Simple Lists](#)" on page 2-5.
























## List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Product Line

Use the Product Line list in ADMN to maintain product lines for PQM, as [Figure 2–110](#) shows.

**Figure 2–110** *Product Line list*

	Name	External Id	Status
	 Seeds/Nuts	11	Active
	 Fruits	10	Active
	 Natural Snacks	9	Active
	 Pastries	8	Active
	 Cookies	7	Active
	 Noodles	6	Active
	 Doughy/Floury	5	Active
	 Chips/Crisps	4	Active
	 Cheese	3	Active
	 Bread/Sandwiches	2	Active
	 Crackers	1	Active

## Key Fields

**Table 2–86** *PQM, Product Line key fields*

Name	Description
Name	Name of the product line
External Id	Unique identification for the product line
Status	The assigned status for the product line. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Product Line list, see ["Maintaining Simple Lists"](#) on page 2-5.










## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Resolution

Use the Resolution list in ADMN to maintain resolutions for PQM, as [Figure 2–111](#) shows. This list controls the resolution options found on a PQM issue.

**Figure 2–111** Resolution list

	<input type="checkbox"/> Name	External Id	Status
	<input type="checkbox"/> Replaced Material	8	Active
	<input type="checkbox"/> Replaced Supplier	6	Active
	<input type="checkbox"/> Retrained Employees	5	Active
	<input type="checkbox"/> Modified Equipment PM Plan	4	Active
	<input type="checkbox"/> Modified Product Specification	3	Active
	<input type="checkbox"/> Changed Shipping Temperature	2	Active
	<input type="checkbox"/> Supplier Evaluation	1	Active
	<input type="checkbox"/> Replace Packaging	7	Active

### Key Fields

**Table 2–87** PQM, Resolution key fields

Name	Description
Name	Name of the resolution
External Id	Unique identification for the resolution
Status	The assigned status for the resolution. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Resolution list, see ["Maintaining Simple Lists"](#) on page 2-5.






### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Severity

Use the Severity list in ADMN to maintain severities for PQM, as [Figure 2–112](#) shows.

**Figure 2–112** Severity list

 <input type="checkbox"/>	Name	External Id	Status
 <input type="checkbox"/>	S1	S1	Active
 <input type="checkbox"/>	S2	S2	Active
 <input type="checkbox"/>	S3	S3	Active
 <input type="checkbox"/>	S4	S4	Active

### Key Fields

**Table 2–88** PQM, Severity key fields

Name	Description
Name	Name of the severity
External Id	Unique identification for the severity
Status	The assigned status for the severity. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Severity list, see "[Maintaining Simple Lists](#)" on page 2-5.

### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.







# Product Quality Scorecard Data

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

## Lot Samples Quantity UOMs

Use the Lot Samples Quantity UOMs list in ADMN to maintain units of measure for lot sample quantities, as [Figure 2–113](#) shows.

Figure 2–113 Lot Samples Quantity UOMs list

	Name	Status
	 Cases	Active
	 Cartridges	Active
	 Pieces	Active
	 kg	Active
	 g	Active
	 mg	Active
	 lb	Active
	 oz	Active
	 L	Active

### Key Fields

Table 2–89 PQS, Lot Samples Quantity UOMs key fields

Name	Description
Name	Name of the lot sample quantity unit of measure
Status	The assigned status for the lot sample quantity unit of measure. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Lot Samples Quantity UOMs list, see ["Maintaining Simple Lists"](#) on page 2-5.






### Reordering Lot Samples Quantity UOMs

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder lot sample quantity UOMs. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.

# Sample Types

Use the Sample Type list in ADMN to maintain sample types, as [Figure 2–114](#) shows.

**Figure 2–114** Sample Type list

	 Name	ID	Status
	 Competing Product	CP	Active
	 Experimental (R&D Prototypes)	EX	Active
	 Factory Production	FP	Active
	 Incoming Material	IM	Active

## Key Fields

**Table 2–90** PQS, Sample Type key fields

Name	Description
Name	Name of the sample type
ID	Unique identification assigned to the sample type
Status	The assigned status for the sample type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.




## Editing Rules

For instructions on editing the Sample Type list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Scorecard Qualifications

Use the Scorecard Qualifications list in ADMN to maintain scorecard qualifications, as [Figure 2–115](#) shows.

**Figure 2–115** *Scorecard Qualifications list*

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	Final Score	Active
 <input type="checkbox"/>	Training	Active
 <input type="checkbox"/>	Certified Evaluation	Active

### Key Fields

**Table 2–91** *PQS, Scorecard Qualifications key fields*

Name	Description
Name	Name of the scorecard qualification
Status	The assigned status for the scorecard qualification. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Scorecard Qualifications list, see ["Maintaining Simple Lists"](#) on page 2-5.

### Reordering Scorecard Qualifications

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder scorecard qualifications. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.

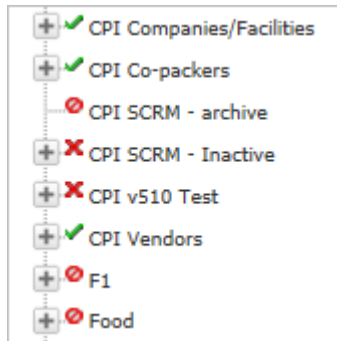
## Supply Chain Relationship Management Data

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

### Business Units - (SCRM)

Use the Business Units - (SCRM) tree list in ADMN to maintain the data, as [Figure 2–116](#) shows.

**Figure 2–116** *Business Units - (SCRM) tree list*



### Editing Rules

Use the instructions provided for editing tree lists provided in "[Maintaining Tree Lists](#)" on page 2-11.





### List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

# Class

Use the Class list in ADMN to maintain the data, as [Figure 2–117](#) shows.

**Figure 2–117** *Class list*

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	1	Active
 <input type="checkbox"/>	2	Active
 <input type="checkbox"/>	3	Active
 <input type="checkbox"/>	4	Active

## Key Field

**Table 2–92** *SCRM, Class key field*

Name	Description
Name	Name of the class
Status	The assigned status for the class. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Class list, refer to ["Maintaining Simple Lists"](#) on page 2-5.

## Reordering Classes

Only users with the role of [SUPER\_DATA\_ADMIN] can reorder classes. For instructions on setting the order, see ["To reorder data in a simple list:"](#) on page 2-6.
















## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Company Special Attributes

Use the Company Special Attributes list in ADMN to maintain the data, as [Figure 2–118](#) shows.

Figure 2–118 Company Special Attributes list

	Name	Status
	 Co-Packer	Active
	 HACCP	Active
	 ISO9000	Active
	 Minority	Active
	 Operator	Active
	 Printer	Active
	 Trade	Active

## Key Field

Table 2–93 SCRM, Company Special Attributes key field

Name	Description
Name	Name of the special attribute for companies
Status	The assigned status for the special attribute for companies. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Company Special Attributes list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Contact Category

Contact categories for company and facility profiles are maintained in the ADMN Contact Category list, as [Figure 2–119](#) shows.

**Figure 2–119** *Contact Category list*

	<input type="checkbox"/> Name	Status
	<input type="checkbox"/> Audit Remittance	Active
	<input type="checkbox"/> Business Contact	Active
	<input type="checkbox"/> Corporate QA	Active
	<input type="checkbox"/> Order	Active
	<input type="checkbox"/> Other	Active
	<input type="checkbox"/> Plant QA	Active
	<input type="checkbox"/> R&D	Active
	<input type="checkbox"/> Remittance	Active
	<input type="checkbox"/> Sales/Service	Active
	<input type="checkbox"/> Shipping	Active

### Key Field

**Table 2–94** *SCRM, Contact Category key field*

Name	Description
Name	Name of the contact category
Status	The assigned status for the contact category. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Contact Category list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Contact Profile Tags

Use the Contact Profile Tags list in ADMN to maintain contact profile tags, as [Figure 2–13](#) shows.

**Figure 2–120** *Contact Profile Tags list*

	Name	Type	Behavior ID	Status
	Default	Print Template	1	System
	Publish To Supplier Portal	System Action	2	System

### Key Fields

**Table 2–95** *SCRM Data, Contact Profile Tags key fields*

Name	Description
Name	The contact profile tag name
Type	The type of contact profile tag
Behavior ID	The system-assigned contact profile tag ID
Status	The assigned status for the contact profile tag. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Contact Profile Tag list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering








For more information about List Filtering, see ["List Filtering"](#) on page 2-9.



## Document Status

Use the Document Status list in ADMN to maintain the SCRM supporting document status list, as [Figure 2–121](#) shows.

**Figure 2–121** Document Status list

	Name	Behavior ID	Default	Status
	 Approved	103	<input type="checkbox"/>	Active
	 Draft	101	<input checked="" type="checkbox"/>	Active
	 Review	102	<input type="checkbox"/>	Active

### Key Fields

**Table 2–96** SCRM, Document Status key fields

Name	Description
Name	Name of the document status
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Document Status list, see ["Maintaining Simple Lists"](#) on page 2-5.

### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Document Type

Use the Document Type list in ADMN to maintain document type options for SCRM supporting documents, as [Figure 2–122](#) shows.

**Figure 2–122 Document Type list**

 <input type="checkbox"/>	Name	Behavior ID	Status	Object Type > Object Subtype
	<input type="checkbox"/> Audit	101	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval
	<input type="checkbox"/> Business Relationship Agreement (BRA)	102	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval
	<input type="checkbox"/> Code of Conduct	103	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval
	<input type="checkbox"/> Confidentiality Agreement	104	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval
	<input type="checkbox"/> Insurance	105	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval
	<input type="checkbox"/> Motor Vehicle Third Party	106	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval
	<input type="checkbox"/> Other	107	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval
	<input type="checkbox"/> Product and/or Public Liability	108	Active	Company Profile, Facility Profile, Non-Specification Related Sourcing Approval, Specification Related Sourcing Approval

## Key Fields

**Table 2–97 SCRM, Document Type key fields**

Name	Description
Name	Name of the document type.
Behavior ID	The unique behavior ID that is defined by the system.
Status	The assigned status for the document type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.
Object Type > Object Subtype	Select the object and or object subtype where you would like the item to appear. For example, if you select Company Profile > Specification Related Sourcing Approval, the item is only available for selection when the object type is a Company Profile and the sub type is Specification Related Sourcing Approval. This function is only enabled when 'List Filtering' feature is enabled.

## Editing Rules

For instructions on editing the Document Type list, see ["Maintaining Simple Lists"](#) on page 2-5.





## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

## Facility Special Attributes

Use the Facility Special Attributes list in ADMN to maintain the data, as [Figure 2–123](#) shows:

**Figure 2–123** Facility Special Attributes list

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	Environment	Active
 <input type="checkbox"/>	Equipment	Active
 <input type="checkbox"/>	Food	Active
 <input type="checkbox"/>	Service Providers	Active

### Key Fields

**Table 2–98** SCRM, Facility Special Attributes key fields

Name	Description
Name	Name of the facility special attribute
Status	The assigned status for the facility special attribute. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

### Editing Rules

For instructions on editing the Facility Special Attributes list, see ["Maintaining Simple Lists"](#) on page 2-5.






### List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.

# Protocol

Use the Protocol list in ADMN to maintain the data, as [Figure 2–124](#) shows.

**Figure 2–124** Protocol list

<input type="checkbox"/>	Name	Status
 <input type="checkbox"/>	A	Active
 <input type="checkbox"/>	B	Active
 <input type="checkbox"/>	C	Active
 <input type="checkbox"/>	U	Active
 <input type="checkbox"/>	X	Active

## Key Field

**Table 2–99** SCRM, Protocol key fields

Name	Description
Name	Name of the protocol
Status	The assigned status for the protocol. Refer to " <a href="#">Statuses</a> " on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Protocol list, see "[Maintaining Simple Lists](#)" on page 2-5.










## List Filtering

For more information about List Filtering, see "[List Filtering](#)" on page 2-9.

## Sourcing Type

Use the Sourcing Type list in ADMN to maintain the data, as [Figure 2–125](#) shows.

**Figure 2–125 Sourcing Type list**

	Name	Status
	 Agent	Active
	 Co-Packer	Active
	 Distributor	Active
	 Licensees	Active
	 Other	Active
	 Producer	Active
	 Reworker	Active
	 Sorter	Active
	 Svc Provider	Active
	 Transporter	Active
	 Warehouse	Active

## Key Field

**Table 2–100 SCRM, Sourcing Type key field**

Name	Description
Name	Name of the sourcing type
Status	The assigned status for the sourcing type. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Sourcing Type list, see ["Maintaining Simple Lists"](#) on page 2-5.

## List Filtering

For more information about List Filtering, see ["List Filtering"](#) on page 2-9.







# Workflow Administration Data

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

## Functional Area - (WFA)

The Functional Area - (WFA) list is used when evaluating workflow participants in WFA. Global Specification Management (GSM), Supply Chain Relationship Management (SCRM), and Product Quality Management (PQM) organize workflow participant selection by functional area. Functional areas are defined according to the needs of each customer. Functional areas may be divided according to company departments (Human Resources, Marketing, Sales, and so on). Use the Functional Area list in ADMN to maintain the data, as [Figure 2–126](#) shows.

Figure 2–126 Functional Area - (WFA) list

	Name	Status
	 Analytical Services	Active
	 Corporate	Active
	 Data Admin	Active
	 Engineering	Active
	 Executive	Active
	 Factory QA	Active
	 Finance	Active
	 Food Safety	Active
	 HQ Quality	Active

## Key Field

Table 2–101 WFA, Functional Area - (WFA) key fields

Name	Description
Name	Name of the functional area in WFA
Status	The assigned status for the functional area. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Functional Area - WFA list, see ["Maintaining Simple Lists"](#) on page 2-5.

## Tags

Global Specification Management (GSM), Supply Chain Relationship Management (SCRM), and Product Quality Management (PQM) workflow templates use tags as part of defining steps in workflows. Use the Tags list in ADMN to maintain the data, as [Figure 2–127](#) shows.

**Figure 2–127** Tags list

<input type="checkbox"/>	Name	Type	Behavior ID	Is Distinct	Available In	Status
	Publish To Supplier Portal	Supplier Action	2	<input type="checkbox"/>	GSM, SCRM, PQM	System
	Send Notification to Sourcing Supplier	Supplier Action	5	<input type="checkbox"/>	SCRM	System
	Publish Template	Feature	103	<input type="checkbox"/>	GSM, SCRM, PQM	System
	Released	Workflow Action	204	<input checked="" type="checkbox"/>	PQM	System
	Review	Workflow Action	203	<input checked="" type="checkbox"/>	PQM	System
	Supplier Approved	Supplier Action	7	<input type="checkbox"/>	SCRM	System
	Supplier Rejected	Supplier Action	8	<input type="checkbox"/>	SCRM	System
	Submitted	Workflow Action	202	<input checked="" type="checkbox"/>	PQM	System
	Supplier Review	Supplier Action	6	<input type="checkbox"/>	SCRM	System
	Is Developmental	Workflow Action	3	<input type="checkbox"/>	GSM	System
	Is Approved	Workflow Action	4	<input type="checkbox"/>	GSM, PQM	System
	Initial Load	Workflow Action	10	<input checked="" type="checkbox"/>	GSM, SCRM, PQM	System
	Hide Specs	Workflow Action	1	<input type="checkbox"/>	GSM	System
	Hide SAs	Workflow Action	11	<input type="checkbox"/>	SCRM	System
	Designable	Feature	102	<input type="checkbox"/>	GSM	System
	Complete	Workflow Action	205	<input checked="" type="checkbox"/>	PQM	System
	Pending	Workflow Action	201	<input checked="" type="checkbox"/>	PQM	System
	Cancelled	Workflow Action	206	<input checked="" type="checkbox"/>	PQM	System
	All Users	Visibility	101	<input type="checkbox"/>		System

## Key Fields

**Table 2–102** WFA, Tags key fields

Name	Description
Name	Name of the tag

**Table 2–102 WFA, Tags key fields**

Name	Description
Type	<p>Type of tags are as follows:</p> <p><b>Workflow Action</b>—Tags in this group apply to general actions that should happen when the specification reaches a certain status. For example, Hide Specs flags the specification as hidden, so the specification does not appear in search results for all users. Other workflow actions include tags that are used by outside systems. For example, IsApproved is used signify that the specification must be in an “Approved” status to kick off integration processes.</p> <p><b>Feature</b> —Tags in this group apply to specific feature behavior. For example, when the designable tag is present in a formulation specification’s workflow, certain design tools appear within the UI.</p> <p><b>Supplier Action</b>—Tags in this group apply to specific supplier related actions that should happen when the specification reaches a certain status. For example, Publish to Supplier Portal is used when the specification should be available to suppliers.</p> <p><b>Visibility</b>—Tags in this group are used to specify visibility rules. Visibility tags are used to filter specifications from search results in GSM. See the WFA chapters of the <i>Agile Product Lifecycle Management for Process Workflow Administration User Guide</i> to learn more about visibility tags. Additional information can be found in the <i>Agile Product Lifecycle Management for Process Security Configuration Guide</i>.</p>
Behavior ID	The unique behavior ID that is defined by the system.
Is Distinct	If a tag is flagged as Is Distinct, the tag can only be applied to one Active workflow step per WFA workflow template.
Available In	Select which WFA templates these tags should be available in. Options are GSM WFA templates and/or SCRM WFA templates and/or PQM WFA templates. <b>Note:</b> Visibility tags are not supported in SCRM.
Status	The assigned status for the tag. Refer to <a href="#">"Statuses"</a> on page 2-3 for status descriptions.

## Editing Rules

For instructions on editing the Tags list, see ["Maintaining Simple Lists"](#) on page 2-5.

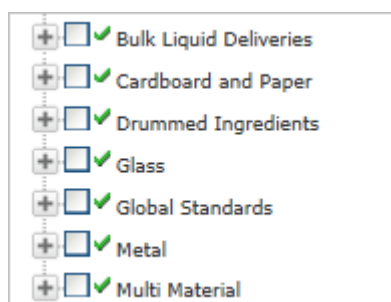


## Spec Category

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

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

**Figure 2–128 Selected specification category (Delivered Material Packing Specifications)**



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

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

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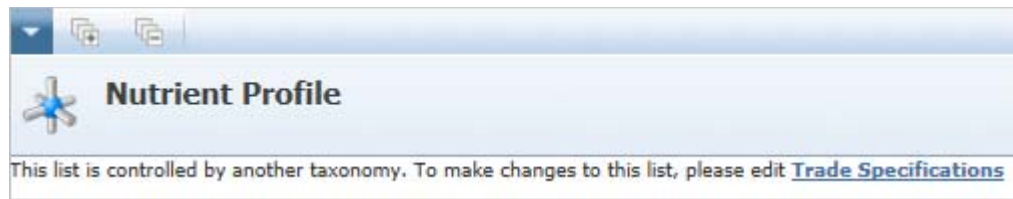
## Node Statuses

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

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

## Editing Specification Categories

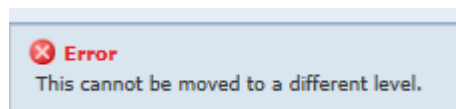
For information on adding and editing specification categories, see ["Editing Actions"](#) on page 2-11. Depending on your configuration, some lists may be controlled by another specification category. These lists are called referenced lists. If you select a referenced list, Agile PLM for Process displays an information message, shown in [Figure 2–129](#).

**Figure 2–129 Referenced list redirect message**

## Parent-Child Relationship Guidelines

Use the following guidelines when working with specification categories:

- Relationship rules between the states of parents and children within a specification category must be respected. Once a node has been activated it must remain in the same level of the hierarchy. For example, if the node is a third level position, it can only be dragged to another third level position. If you attempt to drag an item to a location that disrupts the hierarchy, an error message displays, as [Figure 2–130](#) shows:

**Figure 2–130 Drag and drop warning**

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

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

---



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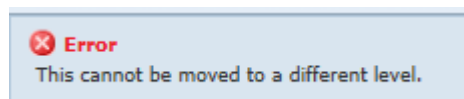
**Warning:** All specification categories must have three active levels as indicated by the active node symbol (✓).

---



---

- You can move an active node only to another node with a status of "Active." If you attempt to move an active node to an inactive or archived node, the error message shown in [Figure 2–131](#) displays.

**Figure 2–131 Active node movement to non-active node warning**


---



---

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

---



---

## Activities

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

### Generate Token

"Token Section" on page 2-134 explains how tokens are used for exporting data.

To generate a token:

1. Log in to the target environment.
2. Access the **ADMN** application in the left navigation panel.
3. Click **Activities > Generate Token** on the left navigation panel. ADMN displays the Generate Token page, as [Figure 2–132](#) shows.

**Figure 2–132** Generate Token page



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

---

---

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

---

---

## Export

You can export data from a centralized export page in the staging environment. A user can access the page by selecting **ADMN > Activities > Export** from the left navigation panel or by clicking Export at the top of each individual data type page. The Export page, shown in [Figure 2–133](#), contains fields for uploading a token from a target environment and a drop-down list to select data types.

**Figure 2–133** Export page

### Token Section

Tokens are generated from a target environment. If there are multiple target environments, each one must generate its own token for import. Tokens help the system decide which data to include in the export package.

**Update Token**—Tokens must be uploaded into the staging environment before a data type can be packaged for export. Click **Choose File** to select a token.

---

**Note:** A new token should be generated when the data in your target environment has changed.

---

To upload a token:

1. Click **Choose File**. A dialog box displays.
2. Select the token to upload.

---

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

---

3. Click **Open**. The file you selected displays in the Update Token field.
4. Click **Upload Token** to upload the token. The token, once uploaded, displays the target environment name and the date that the token was generated.

## Export Data Section

Select the data to package and export using this section.

**Data**—This drop-down list contains each export data type. Each selected data type creates an export package. The package is an encrypted file that contains the exported data.

To export data from a staging environment into the target environment:

1. Log in to the staging environment and generate a token as explained in "[To generate a token:](#)" on page 2-133.
2. Log in to the staging environment.
3. Access the **ADMN** application in the left navigation panel.
4. Click **Activities > Export** in the ADMN left navigation panel. The Export page displays.
5. Click **Choose File** to locate the folder that contains the token.
6. Navigate to the folder that contains the token.
7. Click **Open** and then click **Upload Token**.
8. Select the data types from the **Data** drop-down list.
9. Click **Export**. A dialog box displays with the file name of the export package.
10. Click **Save**.
11. Navigate to a local folder to store the export packages.
12. Click **Save** again.
13. Repeat steps 5 through 12 for as many data types as needed.

## Import

You import data from a centralized import page in a target environment. You can access the import page from selecting **ADMN > Activities > Import** from the left navigation panel. [Figure 2–134](#) shows the Import page.

**Figure 2–134** Import page

Name	Description	Submitted By	Date Submitted	Date Completed	Status	
GSM+Common_Brands++(GSM+Legacy+Free+Text)635633121235763300.exp	62 release252 brand	Sarah Jones	Mar 29, 2015 10:39:39 PM	Mar 29, 2015 10:43:26 PM	<span style="color: green;">■</span>	<span style="color: red;">✖</span>
GSM+Common_Brands++(GSM+Legacy+Free+Text)635633121235763300.exp	62 release252 brand	Sarah Jones	Mar 29, 2015 10:36:13 PM	Mar 29, 2015 10:39:04 PM	<span style="color: green;">■</span>	<span style="color: red;">✖</span>
GSM+Common_Brands++(GSM+Legacy+Free+Text)635633121235763300.exp	62 release252 brand	Sarah Jones	Mar 29, 2015 10:36:03 PM	Mar 29, 2015 10:39:03 PM	<span style="color: green;">■</span>	<span style="color: red;">✖</span>

## Initiate Import Section

Select and name a file to import using this section.

**File**—Click the **Browse** button to locate your export package.

**Description**—Provide a description in this text field.

Click **Schedule Import** to schedule the import. The file you selected displays in the table in the Import Queue section.

### Import Queue Section

This section contains a table showing imports that are queued. The table contains the following fields:

- . **Name**—The package name
- . **Description**—The package description
- . **Submitted By**—The name of the user who submitted the package
- . **Date Submitted**—The date that the package was submitted
- . **Date Completed**—The date that the import was completed
- . **Status**—A green, amber or red status icon. The green icon indicates “Completed.” The amber icon indicates “In Progress.” The red icon indicates “Not Imported.” “Not Imported” indicates that there was an error during import. The red status icon links to the error. Once a package is imported, the system emails the person who scheduled the import and flushes the associated cache group.

Click the delete icon to delete an import package’s reference in the queue. This action does not cancel the import; it only removes the record in the queue.

To import data into your target environment:

1. Log in to your production environment.
2. Access the **ADMN** application in the left navigation panel.
3. Click **Activities > Import** in the left navigation panel.
4. Click **Browse** to locate the export package that you exported from the staging environment and select the file.
5. Click **Open**.
6. Enter a description for the export package.
7. Click **Schedule Import**. The package is added to the import queue.
8. Repeat Steps 4-7 to add more export packages to your queue.

---

## Using ADMN to Manage Custom Data

This chapter explains how to maintain custom data using the Manage Core Data (ADMN) application. Topics in this chapter include:

- [Introducing Custom Data](#)
- [Extended Attribute Groups](#)
- [Creating or Editing Extended Attribute Groups](#)
- [Extended Attributes](#)
- [Creating an Extended Attribute](#)
- [Setting Extended Attribute Order](#)
- [Custom Sections](#)
- [Creating a Custom Section](#)
- [Creating a Table](#)
- [Previewing a Custom Section](#)
- [Copying a Custom Section](#)
- [Setting Custom Section Order](#)

### Introducing Custom Data

Agile Product Lifecycle Management (PLM) for Process administrators use the ADMN (Manage Core Data) application to maintain data lists and extended attributes that are used across Agile PLM for Process applications. In addition to maintaining core data, you can define custom data (customer-specific data). This chapter explains how to create and maintain custom data. [Chapter 2, "Using ADMN to Manage Core Data"](#), explains how to create and maintain core data within Agile PLM for Process.

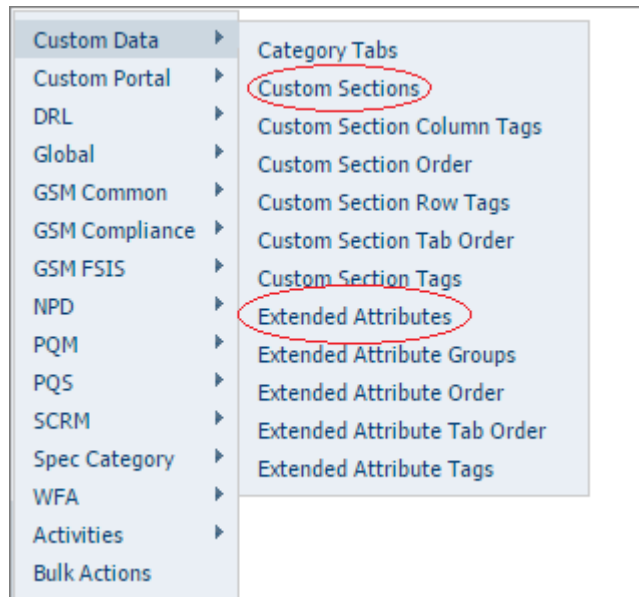
### Custom Data Types

There are two types of custom data that administrators create:

- **Extended attributes**—Customer-defined and maintained fields that are available on some business objects. Customers use extended attributes to capture custom information and elements that are unique to their business. Extended attributes can capture textual, numeric, boolean, calculated, date, and range data.
- **Custom sections**—Custom sections are configurable sets of extended attributes. Custom sections allow you to organize a group of extended attributes in table format.

The **ADMN > Custom Data** submenu lists available custom data types, as [Figure 3–1](#) shows, along with other options:

**Figure 3–1 Custom Data menu**



## Statuses

Custom data contain statuses that are defined as follows:

- **New**—The data is not yet ready to become available to Agile PLM for Process applications. When an item has a status of “New,” its values remain editable.
- **Active**—The data is available (searchable and available for assignment) for use in Agile PLM for Process applications.
- **Inactive**—The data should no longer be used. All existing references to this item remain. The item is no longer available for assignment but is still searchable.
- **Archive**—The item is no longer available for searching or assignment. All existing references to this item remain.

## Administrative Roles

There are several user roles associated with ADMN:

**[DATA\_ADMIN]**—Can add and edit new items, but edit rights are limited.

**[SUPER\_DATA\_ADMIN]**—Can edit most items regardless of the item’s status.

**[EA\_SECTION\_CREATOR]**—Can see the Create New and Edit buttons on custom sections.

**[CUSTOM\_SECTION\_DENORM\_ENABLER]**—The user must have this role to include a custom section in the de-normalization process.

**[DENORMALIZED\_CUSTOM\_SECTION\_EDITOR]**—Once a custom section has been activated (status of active, inactive, archived) and is flagged as **Include in De-normalization** a user needs this role to make any edits to the custom section.

If the user doesn’t have this role they will not see the Edit action button and instead sees the following information panel message. “This section has been marked for inclusion in the de-normalization process. You do not have the proper privileges to edit this Custom Section.”

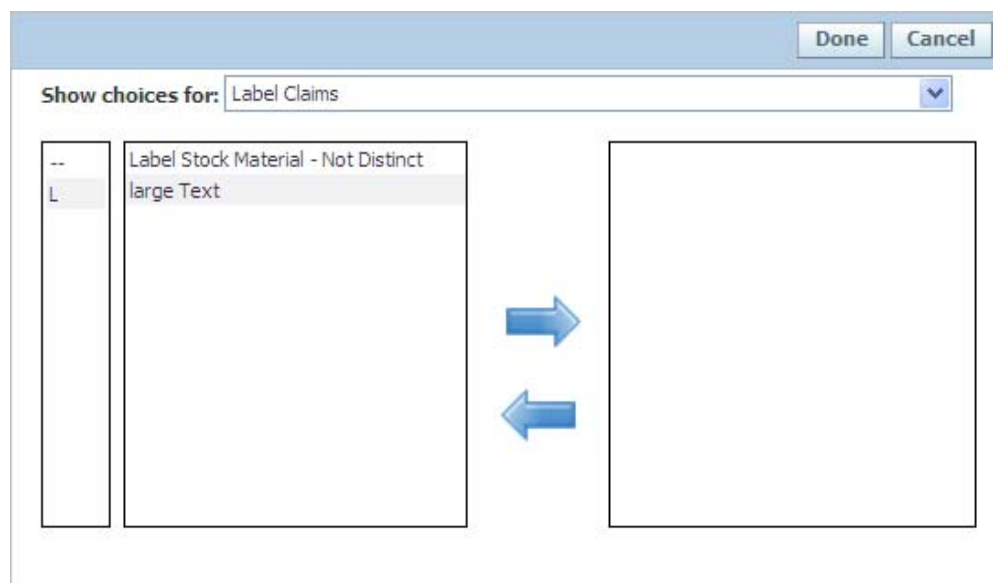


These roles are explained more later in this chapter.

## Extended Attribute Groups

Extended attribute groups are used to organize attributes. These groups can be used to filter available extended attributes during consumption. For example, when users are adding attributes in GSM they can filter the extended attributes list by group name. See [Figure 3–2](#) showing the extended attributes dialog box in GSM filtered by the group “Label Claims.”

**Figure 3–2** Extended attributes filtered by “Label Claims” group



An extended attribute cannot be saved unless its been assigned to a group. If you do not have any extended attribute groups defined in Agile PLM for Process, you must create these prior to creating extended attributes.

# Creating or Editing Extended Attribute Groups

To create extended attribute groups:

- 1. Click **ADMN > Custom Data > Extended Attribute Groups**. Extended attribute groups display in the Extended Attribute Groups list, as [Figure 3–3](#) shows:

Figure 3–3 Custom Data, Extended Attribute Groups list

<input type="checkbox"/>	Name	Status
	<input type="text" value="Chemical"/>	Active
	<input type="text" value="Compliance Screening"/>	Active
	<input type="text" value="Cost"/>	Active
	<input type="text" value="Dairy"/>	Active
	<input type="text" value="Equipment"/>	Active
	<input type="text" value="Equipment (all)"/>	Active
	<input type="text" value="Equipment (Cooler)"/>	Active
	<input type="text" value="Equipment (Dispenser)"/>	Active
	<input type="text" value="Equipment (Vendor)"/>	Active

- 2. Optionally, choose one of the following:
  - **Add a new extended attribute group**—Click **Add** in the action menu. A new row displays at the top of the Extended Attribute Groups list. Enter the new extended attribute group name in the empty text field. Click the apply changes icon to apply your change.

---

**Note:** Only a user with the role [ADD\_EXT\_ATT] can add an extended attribute group. For more information on roles, see the *Agile Product Lifecycle Management for Process User Group Management User Guide*.

---

- **Edit an existing extended attribute group**—Click the edit icon to the left of the group name and edit the extended attribute group name in the provided text field. Click the apply changes icon to apply your change.

---

**Note:** Only a user with the role [SUPER\_DATA\_ADMIN] can edit an existing extended attribute group. For more information on roles, see the *Agile Product Lifecycle Management for Process User Group Management User Guide*.

---

- 3. Click **Save**.
- 4. Flush the administrator data cache, as described in ["Using the Cache Application"](#) on page 4-3.

## Extended Attributes

You can create new extended attributes using the ADMN application. Extended attributes are found in the following objects:

### GSM

- Activities
- Equipment specifications
- Formulation specifications
- Product specifications
- Smart Issue requests
- Testing protocols
- Trade specifications
- Packing configuration specifications
- Packaging material specifications
- Master specifications
- Material specifications
- Menu item specifications
- Nutrient profiles
- Output items

**NPD**—Projects, innovations/sales pipelines, activities, and strategic briefs

**PQM**—Issues, actions, and audits

**SCRM**—Companies, facilities, and sourcing approvals

**eQ**—Material, packaging, product questionnaires, and trade questionnaires

**CSS**—Publications

Figure 3-4 shows the Extended Attribute Template page.

**Figure 3-4** *Extended Attribute Template page*

The screenshot shows the 'Extended Attribute Template' page. At the top, there's a header bar with a sun icon, the text 'Extended Attribute Template', and a large 'New' button. Below this is a 'Summary' tab. The main content area is titled 'Attribute Configuration' and contains several form fields: 'Attribute Name' (text box), 'Attribute ID' (text box), 'Type' (dropdown menu), 'Status' (dropdown menu with 'New' selected), 'Distinct' (checkbox), 'Segment(s)' (text box with a search icon), 'Available In' (text box with a search icon), 'Class' (text box with a search icon), 'Tags' (text box with a search icon), 'Category Tab' (text box with a search icon), and 'Group(s)' (text box with a search icon).

## Summary Tab

### Attribute Configuration Section

Enter the following information in the Attribute Configuration section.

**Attribute Name**—Name for the extended attribute. This field is required. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved. This is the name displayed when the attribute is added to the extended attributes section and can also be used when searching for extended attributes and custom sections.

**Attribute ID**—A unique identifier. This is a required field. This ID is used to reference the extended attribute during calculations and integrations.

**Type**—The type of extended attribute. Choices are: Boolean, Calculated Boolean, Calculated Numeric, Calculated Text, Date, Free Text, Long Free Text, Long Multi-lingual Text, Multi-lingual Text, Numeric, Qualitative, Qualitative Lookup, Qualitative Range, and Qualitative Tolerance. These are defined in detail beginning on page 3-7. This is a required field.

**Distinct**—Select to indicate that this extended attribute is intended to occur only once (a single cell instance) within a specification or profile. An attribute must be distinct to be rolled up during formulation. This flag cannot be edited once the attribute has been activated. If the attribute will be accessed during reporting or integration, it is ***strongly recommended*** you make the attribute distinct. This flag keeps the attribute unique per specification and increases performance when accessing it.

**Status**—Click the drop-down list to assign a status to the extended attribute with one of the following:

- **New**—The extended attribute is not yet ready to become available to Agile PLM for Process applications. When an extended attribute has a status of “new”, its values remain editable.
- **Active**—The extended attribute is ready to become available for use in Agile PLM for Process applications.
- **Inactive**—The extended attribute should no longer be used. Inactive extended attributes are no longer available for assignment, however, they are not removed from existing objects that reference them. Inactive extended attributes are still available for searching.
- **Archived**—The extended attribute is not available for searching or assignment. Archived extended attributes are not removed from existing objects that reference them.

**Segment(s)**—Assign a segment to the extended attribute. This field may not display based on configuration settings.

**Available In**—Click the link to display a selection dialog box containing a list of areas where you can make the attribute available. This field is required.

---

**Note:** eQuestionnaire extended attribute availability is based on the related GSM specification type. For example, when creating a material questionnaire you are only allowed to add attributes that are available in material specifications.

---

**Class**—Class indicates if you plan on using the attribute in a custom section and/or the simple extended attribute list. An attribute can be made available to both. This field is required. Click the link to display a selection dialog box containing the following options:

- **Custom Sections**—Makes the attribute available for assignment to a custom section. For more information, see ["Custom Sections"](#) on page 3-32.
- **Simple**—Makes the attribute available to the extended attribute lists.

**Tags**—Tags allow you to apply special behaviors to your attribute. Multiple tags can be attached to an attribute. Click the link to display a selection dialog box containing the following options:

- **Bold**—Extended attribute is bolded anywhere it appears in consumption.
- **Do Not Publish to Supplier**—Extended attribute is not published to Supplier Portal and is unavailable in eQuestionnaire.
- **ERP\_Owner**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **ERP\_Owning\_Org**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **Is Design Attribute**—Extended attribute is automatically added to a formulation output item. This happens when the attribute is marked as distinct and present on one of the formulation inputs. This is a usability helper only, keeping the user from having to manually add attributes to the formulation output item. This tag does not control roll ups.
- **Is Distinct**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **IS\_ERP\_ENGINEERING\_ITEM**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **Italic**—Extended attribute is italicized anywhere it appears in consumption.
- **Suppress Printing**—Extended attribute is not included in the specification print out.

**Category Tabs**—Click the link to display a selection dialog box containing a list of extended attribute category tabs.

**Groups**—Click the link to display a selection dialog box containing a list of extended attribute groups, as defined in ["Extended Attribute Groups"](#) on page 3-3. Attributes can be added to multiple groups. This is a required field.

**Security Classification**—This field is only available if Object Level Security is enabled. A classification can be used to limit access to the extended attribute in Agile PLM for Process applications. Refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide* for more information.

## Type

Use the Type field to assign a type to the extended attribute. This is a required field. The type of extended attribute decides what interface is displayed to users. For example, the “Free Text” type displays a text area to the user. The choice you make in the type field determines which additional options display under it. The type cannot be changed once the attribute is activated.

Select one of the following choices for the Type field. These are defined further on the following pages.

- [Boolean](#)
- [Calculated Boolean](#)
- [Calculated Numeric](#)

- [Calculated Text](#)
- [Date](#)
- [Free Text](#)
- [Long Free Text](#)
- [Long Multi-lingual Text](#)
- [Multi-lingual Free Text](#)
- [Numeric](#)
- [Qualitative](#)
- [Qualitative Lookup](#)
- [Quantitative Range](#)
- [Quantitative Tolerance](#)

**Date** This type allows the user to enter a date, as [Figure 3–5](#) shows. The user will be provided a calendar control to help select the appropriate date, as [Figure 3–6](#) shows.

**Figure 3–5** *Type field, Date*

A screenshot of a 'Type' dropdown menu. The label 'Type:' is on the left, and the dropdown box shows 'Date' with a downward arrow on the right.

**Figure 3–6** *Date extended attribute*

A screenshot of a date selection interface. A calendar for March 2011 is displayed, with the date '8' selected. The calendar is titled 'Please select a date' and has a close button (X). The calendar shows days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 31. The date '8' is highlighted with a black border. The calendar is overlaid on a form with other fields, including 'End Available Date:' and a date field showing 'Tuesday, February'.

**Free Text** This type allows the user to enter free text, as [Figure 3–7](#) shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. [Figure 3–8](#) shows an example of what the user might see.

**Figure 3–7 Type field, Free Text**

This screenshot shows the configuration form for a 'Free Text' attribute. The 'Type' dropdown is set to 'Free Text' and the 'Status' dropdown is set to 'New'. The 'Distinct' checkbox is unchecked. The 'Segment(s)', 'Available In', 'Class', 'Tags', 'Category Tab', and 'Group(s)' fields are all empty text boxes, each with a magnifying glass icon to its right. The 'Multi-line' checkbox is also unchecked.

**Figure 3–8 Free text extended attribute (multi-line)**

This attribute is a multi-line free text field and can be used to capture 1,024 characters (including spaces).

**Long Free Text** This type allows the user to enter long free text, as [Figure 3–9](#) shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. [Figure 3–10](#) shows an example of what the user might see.

**Figure 3–9 Type field, Long Free Text**

This screenshot shows the configuration form for a 'Long Free Text' attribute. The 'Type' dropdown is set to 'Long Free Text' and the 'Status' dropdown is set to 'New'. The 'Distinct' checkbox is unchecked. The 'Segment(s)', 'Available In', 'Class', 'Tags', 'Category Tab', and 'Group(s)' fields are all empty text boxes, each with a magnifying glass icon to its right. The 'Multi-line' checkbox is unchecked.

Figure 3–10 Long free text extended attribute

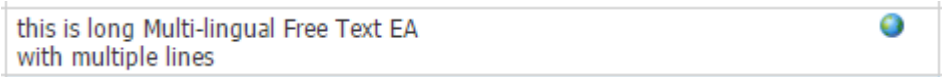


**Long Multi-lingual Text** This type allows the user to enter long multi-lingual text, as [Figure 3–11](#) shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. [Figure 3–12](#) shows an example of what the user might see.

Figure 3–11 Type field, Long Multi-lingual Free Text

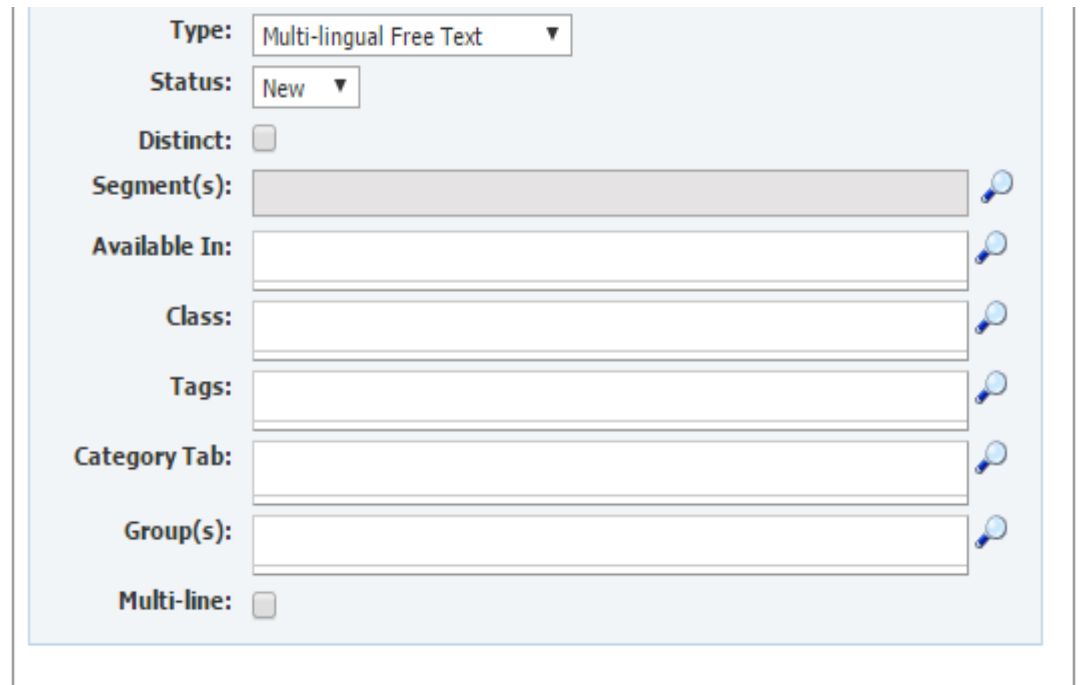
A screenshot of a configuration window for an extended attribute. The window has a light blue background. At the top, there's a "Type:" dropdown menu set to "Long Multi-lingual Free Text". Below it is a "Status:" dropdown menu set to "New". Then there's a "Distinct:" checkbox which is unchecked. Below that are several fields: "Segment(s):", "Available In:", "Class:", "Tags:", "Category Tab:", and "Group(s):". Each of these fields has a magnifying glass icon to its right. At the bottom, there's a "Multi-line:" checkbox which is also unchecked.

Figure 3–12 Long multi-lingual free text extended attribute



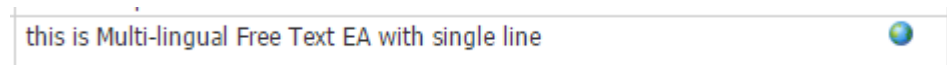
**Multi-lingual Free Text** This type allows the user to enter multi-lingual text, as [Figure 3–13](#) shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. [Figure 3–14](#) shows an example of what the user might see.



**Figure 3–13** Type field, Multi-lingual Free Text


The screenshot shows a configuration form for a 'Multi-lingual Free Text' extended attribute. The form is set against a light blue background. It includes the following fields and controls:

- Type:** A dropdown menu with 'Multi-lingual Free Text' selected.
- Status:** A dropdown menu with 'New' selected.
- Distinct:** An unchecked checkbox.
- Segment(s):** A text input field with a magnifying glass icon to its right.
- Available In:** A text input field with a magnifying glass icon to its right.
- Class:** A text input field with a magnifying glass icon to its right.
- Tags:** A text input field with a magnifying glass icon to its right.
- Category Tab:** A text input field with a magnifying glass icon to its right.
- Group(s):** A text input field with a magnifying glass icon to its right.
- Multi-line:** An unchecked checkbox.

**Figure 3–14** Multi-lingual text extended attribute


The screenshot shows a single-line text input field for a multi-lingual text extended attribute. The text 'this is Multi-lingual Free Text EA with single line' is entered. A small globe icon is visible on the right side of the input field.

**Numeric** Provide a numeric field for the extended attribute, as [Figure 3–15](#) shows.

**Figure 3–15** *Type field, Numeric*

The screenshot shows a configuration form for a 'Numeric' type field. The fields are as follows:

- Type:** Numeric (dropdown)
- Status:** New (dropdown)
- Distinct:** ☐
- Segment(s):** [Empty text box with a magnifying glass icon]
- Available In:** [Empty text box with a magnifying glass icon]
- Class:** [Empty text box with a magnifying glass icon]
- Tags:** [Empty text box with a magnifying glass icon]
- Category Tab:** [Empty text box with a magnifying glass icon]
- Group(s):** [Empty text box with a magnifying glass icon]
- UOM Category:** None (dropdown)
- Available UOMs:** [Empty text box with a magnifying glass icon]
- Default UOM:** [Empty dropdown]
- Decimal Precision:**
  - ☒ As Entered
  - ☐ Specified Precision 1 (dropdown)

Figure 3–16 shows what this type looks like when assigned.

**Figure 3–16** *Numeric extended attribute*

The screenshot shows a small rectangular input field with the number '11' inside.

Additional options associated with this type are:

**UOM Category**—Select the unit of measure category that you want to include with your numeric field (for example, “Length,” “Mass,” “Time,” and “Volume”). The UOMs in the category of “Other” can be extended by editing the UOM list discussed on page 2-40. Select “None” to not display a UOM option next to the numeric field.

**Available UOMs**—Choose the unit of measure options that you want to be available to the user.

**Default UOM**—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, '---' is selected as the default. A blank selection is allowed.

**Decimal Precision**—Set the decimal precision as follows:

- **As Entered**—The user entered value is not altered.
- **Specified Precision**—The user entered value is altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros are appended to the value. If the user exceeds the number of decimals, the value is rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value is altered to "1.6."

**Quantitative Range** Provide a quantitative range of fields for the extended attribute, as Figure 3–17 shows.

**Figure 3–17** Type field, Quantitative Range

The screenshot shows a configuration form for a 'Quantitative Range' type. The fields are as follows:

- Type:** Quantitative Range (dropdown)
- Status:** New (dropdown)
- Distinct:** ☐
- Segment(s):** [Empty text field]
- Available In:** [Empty text field]
- Class:** [Empty text field]
- Tags:** [Empty text field]
- Category Tab:** [Empty text field]
- Group(s):** [Empty text field]
- UOM Category:** None (dropdown)
- Available UOMs:** [Empty text field]
- Default UOM:** [Empty dropdown]
- Decimal Precision:**
  - ☒ As Entered
  - ☐ Specified Precision 1 (dropdown)
- Range Values:**
  - ☐ Target
  - ☐ Min
  - ☐ Max

Figure 3–18 shows what this type looks like when assigned.

**Figure 3–18** Quantitative range extended attribute

The screenshot shows the 'Quantitative range extended attribute' with the following fields:

- target:** [Empty text field]
- min:** [Empty text field]
- max:** [Empty text field]
- (dropdown)

Additional options are:

**UOM Category**—Select the unit of measure category that you want to include with your numeric field (for example, “Length,” “Mass,” “Time,” and “Volume”). The UOMs in the category of “Other” can be extended by editing the UOM list discussed on page 2-40. Select “None” to not display a UOM option next to the numeric field.

**Available UOMs**—Choose the unit of measure options that you want to be available to the user.

**Default UOM**—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list is selected as the default. A blank selection is allowed.

**Decimal Precision**—Set the decimal precision as follows:

- **As Entered**—The user entered value is not altered.

- **Specified Precision**—The user entered value is altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros are appended to the value. If the user exceeds the number of decimals, the value is rounded. For example, if the specified number is “1” and the user enters “1.58,” when the row is submitted the value is altered to “1.6.”

**Range Values**—Check the range value of Target, Min, and/or Max. This selection determines which fields the user will see.

**Quantitative Tolerance** Set up a quantitative tolerance extended attribute to provide tolerance fields to the user, as [Figure 3–19](#) shows.

Figure 3–19 Type field, Quantitative Tolerance

The screenshot shows a configuration window for a 'Type' field. The 'Type' dropdown is set to 'Quantitative Tolerance'. The 'Status' dropdown is set to 'New'. The 'Distinct' checkbox is unchecked. The 'Segment(s)' field is empty with a search icon. The 'Available In' field is empty with a search icon. The 'Class' field is empty with a search icon. The 'Tags' field is empty with a search icon. The 'Category Tab' field is empty with a search icon. The 'Group(s)' field is empty with a search icon. The 'UOM Category' dropdown is set to 'None'. The 'Available UOMs' field is empty with a search icon. The 'Default UOM' dropdown is empty. The 'Decimal Precision' section has two radio buttons: 'As Entered' (selected) and 'Specified Precision' (unselected). The 'Specified Precision' radio button is followed by a dropdown set to '1'.

[Figure 3–20](#) shows what this type looks like when assigned.

Figure 3–20 Quantitative tolerance extended attribute

The screenshot shows a text input field with a tolerance range. The input field is empty, followed by a plus-minus symbol (±), a text input field containing the number '0', and a closing parenthesis (). To the right of the parenthesis is a dropdown menu showing 'oz' with a downward arrow.

Additional options are:

**UOM Category**—Select the unit of measure category that you want to include with your numeric field (for example, “Length,” “Mass,” “Time,” and “Volume”). The UOMs in the category of “Other” can be extended by editing the UOM list discussed on page 2-40. Select “None” to not display a UOM option next to the numeric field.

**Available UOMs**—Choose the unit of measure options that you want to be available to the user.

**Default UOM**—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list is selected as the default. A blank selection is allowed.

**Decimal Precision**—Set the decimal precision as follows:

- **As Entered**—The user-entered value is not altered.
- **Specified Precision**—The user entered value is altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros are appended to the value. If the user exceeds the number of decimals, the value is rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value is altered to "1.6."

**Qualitative** Set up a qualitative extended attribute to display selectable options to the user, as [Figure 3–21](#) shows.

**Figure 3–21** *Type field, Qualitative, Checkboxes option*

The screenshot shows the configuration interface for a Qualitative extended attribute. The top section has the following fields:

- Type:** Qualitative (dropdown)
- Status:** New (dropdown)
- Distinct:** ☐
- Segment(s):** [Text field with search icon]
- Available In:** [Text field with search icon]
- Class:** [Text field with search icon]
- Tags:** [Text field with search icon]
- Category Tab:** [Text field with search icon]
- Group(s):** [Text field with search icon]
- Style:** Multi Select - Checkboxes (dropdown)

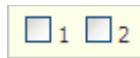
The bottom section, titled "Qualitative Options", contains a table with the following structure:

Qualitative Option	Status	Default

Below the table is an "Add New" button.

**Style**—Select the style you want to use to display your attribute options to the user. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved. The following styles are available:

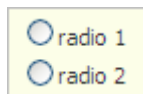
- **Multi Select - Checkboxes**—Display attribute options to the user in the form of checkboxes. This style is recommended when you have a small amount of options (1-3 items) and you want to give the user the opportunity to select multiple options. [Figure 3–22](#) shows how the user will see this style.

**Figure 3–22 Checkboxes style**

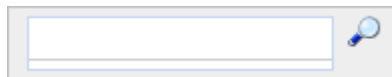
- **Single Select - Pull down**—Display attribute options to the user in the form of a pull down list. This style is recommended when you have a medium amount of options (3-25) and you want to restrict the user to a single selection. [Figure 3–23](#) shows how the user will see this style.

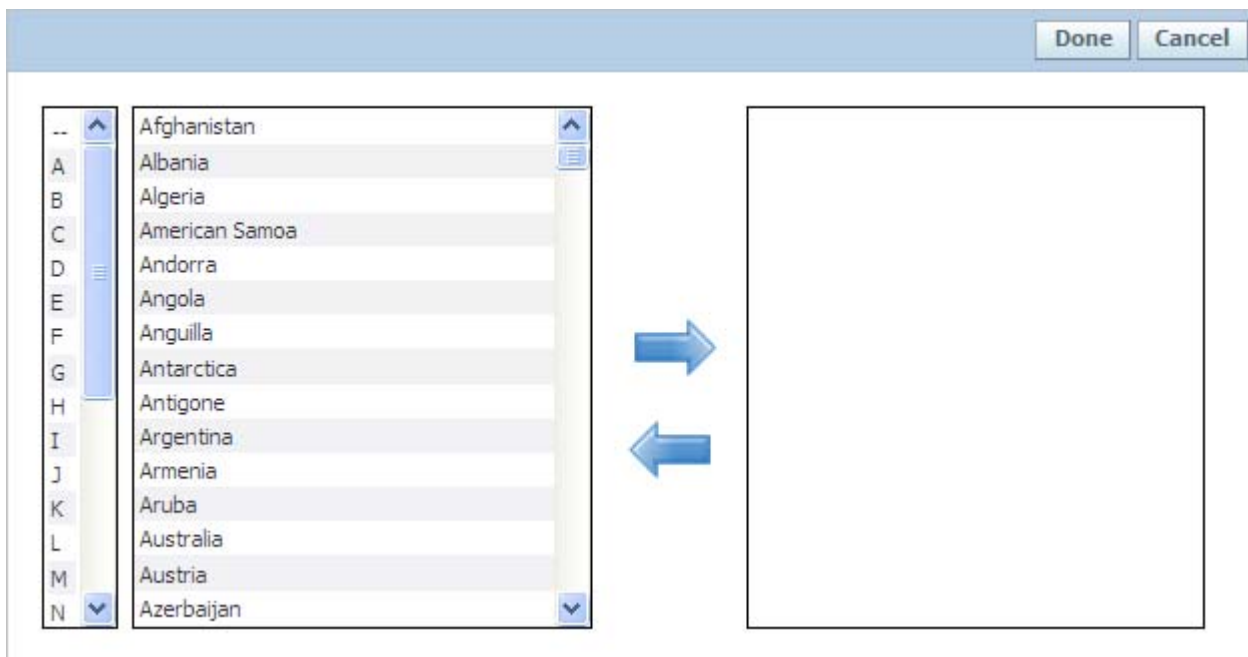
**Figure 3–23 Pull-down style**

- **Single Select - Radio buttons**—Display attribute options to the user in the form of radio buttons. This style is recommended when you have a small amount of options (3-20 items) and you want to restrict the user to a single selection. [Figure 3–24](#) shows how the user will see this style.

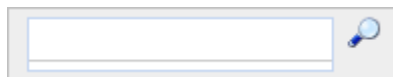
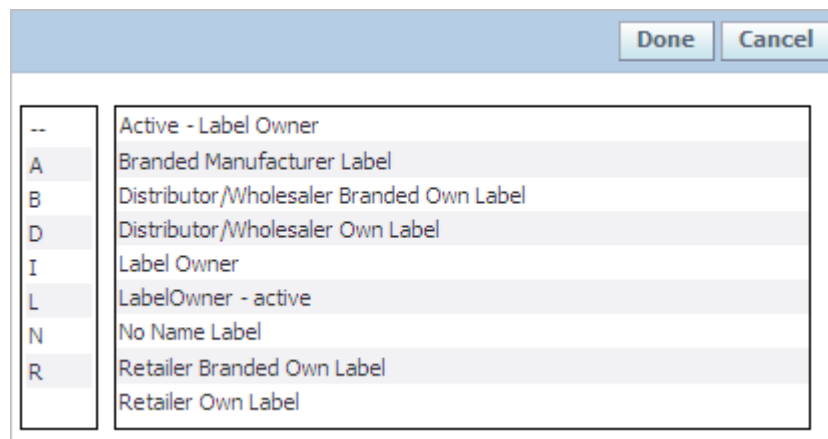
**Figure 3–24 Radio buttons style**

- **Multi Select - Dialog**—Display attribute options to the user in the form of a multi-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to give the user the opportunity to select multiple options. The multi-select dialog automatically sorts your options alphabetically. [Figure 3–25](#) and [Figure 3–26](#) show how the user will see this style.

**Figure 3–25 Multi-select dialog style**

**Figure 3–26 Sample multi-select dialog box**

- **Single Select - Dialog**—Display attribute options to the user in the form of a single-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to restrict the user to a single selection. The single-select dialog automatically sorts your options alphabetically. [Figure 3–27](#) and [Figure 3–28](#) show how the user will see this style.

**Figure 3–27 Single select dialog style****Figure 3–28 Sample single-select dialog box**

To add options for the Qualitative type:

1. Select "Qualitative" from the **Type** drop-down list.

2. Select a style from the **Style** drop-down list. A table displays which you use to define the options that are available for the user upon consumption, as [Figure 3–29](#) shows.

**Figure 3–29 Checkboxes style, Add New**

Qualitative Option	Status	Default
<input type="text"/>	Inactive	<input type="checkbox"/>

3. Click **Add New**. The first row opens in edit mode.
4. In the Qualitative Option field, define a value for the option.
5. In the Status field, select **Active**.
6. In the Default field, click the checkbox if you want to make this option the default.
7. Click the apply changes icon.
8. Repeat step 3 through step 7 to add additional options. [Figure 3–30](#) shows what a completed table may look like:

**Figure 3–30 Qualitative type, Checkboxes options defined**

Qualitative Option	Status	Default
Option A	Active	<input checked="" type="checkbox"/>
Option B	Active	<input type="checkbox"/>
Option C	Active	<input type="checkbox"/>

9. Optionally, click the **Order Items** button to set the order of item.

---

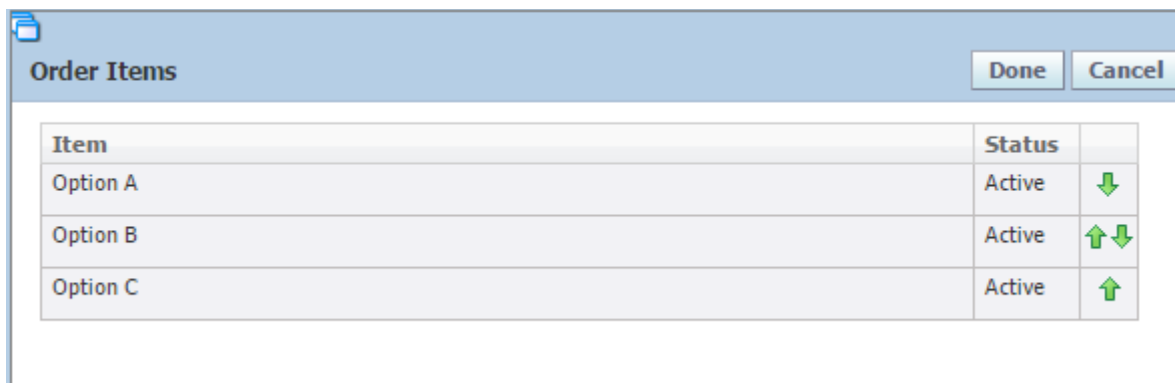
**Note:** The Order Items button is displayed when user has role [SUPER\_DATA\_ADMIN].

---

When you click **Order Items**, ADMN displays the Order Items dialog box:



Figure 3–31 Order Items dialog box



- a. Use the reorder rows icons to set the order of the items.
  - b. Click **Done**. The items reflect the chosen order.
10. Click **Save**.

---

**Note:** Because of the larger number of items included in the list, the single and multi select styles list items alphabetically. This order is only respected when using checkboxes, radio buttons, and pull-downs.

---

**Qualitative Lookup** Set up a qualitative lookup extended attribute to create extended attributes that reference existing ADMN lists for core fields such as allergens, additives, or countries. Most common lookups are available. This type is also used when referencing a custom database table. Refer to *Agile Product Lifecycle Management for Process Data Administration Toolkit Guide* for instructions on creating a custom qualitative lookup. This attribute will display selectable options to the user, as Figure 3–33 through Figure 3–37 show.

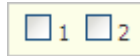
Figure 3–32 Type field, Qualitative Lookup

**Type:** Qualitative Lookup ▼  
**Status:** New ▼  
**Distinct:** ☐  
**Segment(s):**  🔍  
**Available In:**  🔍  
**Class:**  🔍  
**Tags:**  🔍  
**Category Tab:**  🔍  
**Group(s):**  🔍  
**Style:** Single Select - Pull down ▼  
**Category:**  🔍

**Style**—Select the style you want to use to display your attribute options to the user. The following styles are available:

- **Multi Select - Checkboxes**—Display attribute options to the user in the form of checkboxes. This style is recommended when you have a small amount of options (1-3 items) and you want to give the user the opportunity to select multiple options. [Figure 3–33](#) shows how the user will see this style.

**Figure 3–33 Checkboxes style**



- **Single Select - Pull down**—Display attribute options to the user in the form of a pull down list. This style is recommended when you have a medium amount of options (3-25) and you want to restrict the user to a single selection. [Figure 3–34](#) shows how the user will see this style.

**Figure 3–34 Pull-down style**



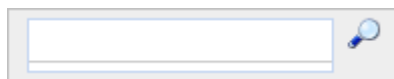
- **Single Select - Radio buttons**—Display attribute options to the user in the form of radio buttons. This style is recommended when you have a small amount of options (2-3 items) and you want to restrict the user to a single selection. [Figure 3–35](#) shows how the user will see this style.

**Figure 3–35 Radio buttons style**



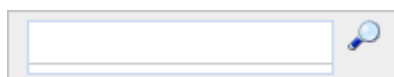
- **Multi Select - Dialog**—Display attribute options to the user in the form of a multi-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to give the user the opportunity to select multiple options. The multi-select dialog automatically sorts your options alphabetically. [Figure 3–36](#) shows how the user will see this style.

**Figure 3–36 Multi select dialog style**



- **Single Select - Dialog**—Display attribute options to the user in the form of a single-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to restrict the user to a single selection. The single-select dialog automatically sorts your options alphabetically. [Figure 3–37](#) shows how the user will see this style.

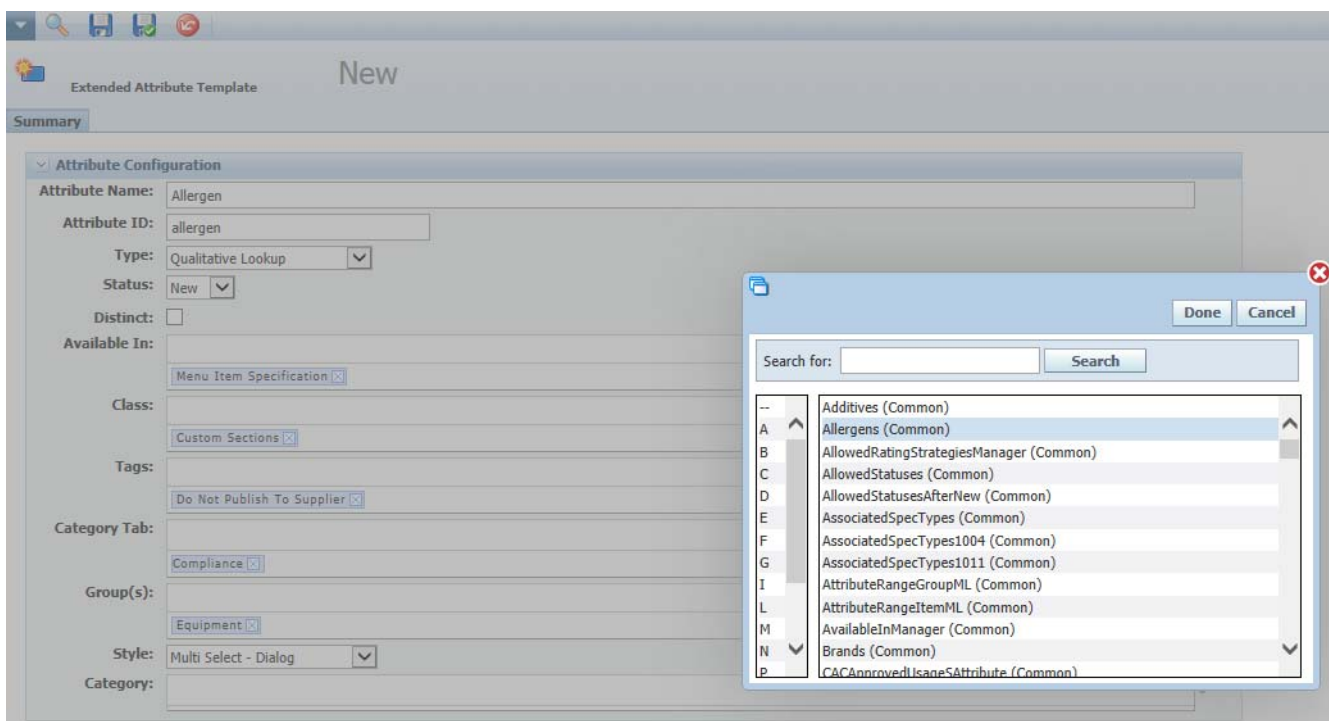
**Figure 3–37 Single select dialog style**



After setting the qualitative lookup style, click the search icon at the end of the **Category** field to set the category for the extended attribute. This category can be an existing common lookup category (allergens, additives, etc.) or can be a configured custom table. Refer to the *Agile Product Lifecycle Management for Process Data Administration Toolkit Guide* for more information on custom table implementation.

Figure 3–38 shows an example of adding the Lookup Category to the extended attribute. In this case you are adding “Allergens”.

**Figure 3–38 Example 1: Lookup category added to extended attribute**



Note that the Style must be carefully thought through in order to determine the most efficient method for managing data. In this example, we do not recommend using the multi-select check boxes functionality for Allergens because the list is so large. Only single/multi select dialogs should be used.

**Calculated Boolean** Set up Boolean extended attributes in which users are provided a True/False drop-down.

**Figure 3–39 Type field, Calculated Boolean**

Type:    
 Status:    
 Distinct: ☐   
 Segment(s):    
 Available In:    
 Class:    
 Tags:    
 Category Tab:    
 Group(s):    
 Display Text:    
 Default State:    
 Rollup Behavior: Rollup as true if the following condition is true.    
 Behaviors: ☐ Allow Nulls ☐ Show Error Details   
 Calculation Script:    
 Calculate   
 Calculation Result:

Figure 3–40 shows what this type looks like assigned.

**Figure 3–40 Calculated Boolean extended attribute**

Display Text: False

Additional options associated with this type are:

**Display Text**—Enter text to show before the drop-down. This field is optional. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved.

**Default State**—Select the default state. Options are blank, 'True,' and 'False.'

**Rollup Behavior**—When Boolean attributes are set as distinct and included on formulation inputs, they can be rolled up. Define rollup behavior by selecting an option from the following drop-down list:

**Rollup as true if the following condition is true—**

- **All items are Selected**—This option sets the rolled up boolean extended attribute value to “True” if all attributes on the formulation input materials are set to “True.” If any of the attributes are set to “False” the boolean rolls up as “False.”
- **One item is Selected**—This option sets the rolled up boolean extended attribute value to “True” if one or more attributes on the formulation input materials are set to “True.” If this condition is not “True,” the boolean rolls up as “False.”

**Behaviors**—Check the **Allow Nulls** box to calculate even when there is no user entered value for the referenced items.

When a calculation is performed and the system cannot find a referenced item or an error occurs, the warning icon appears next to the attribute. Check the **Show Error Details** box when the calculation is not sensitive information. When **Show Error Details** is selected, the end user

is able to click the warning icon and see calculation error details. These details could include formulation details, referenced variable names, etc.

---

**Note:** Warnings can be turned off using methods during your calculation. For more information, refer to the “Extended Attribute Calculations” section of the *Agile Product Lifecycle Management for Process Extensibility Overview Guide*.

---

**Calculation Script**—Click the **Calculation Script** link to display the calculation dialog box for entering a calculation script. See the “Extended Attribute Calculations” section of the *Agile Product Lifecycle Management for Process Extensibility Overview Guide* for help in writing calculation scripts. Click **Calculate** to test your calculation.

**Calculated Numeric** Calculated Numerics allow you to create a read-only extended attribute that displays results of a calculation to the user. [Figure 3–41](#) shows the options available when a calculated numeric type is selected.

**Figure 3–41** Type field, *Calculated Numeric*

The screenshot shows a configuration window for a 'Calculated Numeric' attribute. The 'Type' dropdown is set to 'Calculated Numeric'. Below it, 'Status' is set to 'New'. There is a 'Distinct' checkbox. Several fields for 'Segment(s)', 'Available In', 'Class', 'Tags', 'Category Tab', and 'Group(s)' are present, each with a search icon. 'UOM Category' is set to 'None'. 'Display UOM' has a search icon. 'Decimal Precision' has two radio buttons: 'As Entered' (selected) and 'Specified Precision' (with a value of 1). 'Behaviors' includes 'Allow Nulls' and 'Show Error Details' checkboxes. A 'Calculation Script' link is above a large text area. At the bottom are a 'Calculate' button and a 'Calculation Result' field.

When this type is assigned the user sees a read-only view showing the results of the calculation.

Additional options are:

**UOM Category**—Select the unit of measure category that you want to include with your numeric field (for example, “Length,” “Mass,” “Time,” and “Volume”). The UOMs in the category of “Other” can be extended by editing the UOM list discussed on page 2-40. Select “None” to not display a UOM option next to the numeric field.

**Display UOM**—Choose the unit of measure you want to display with the calculated attribute.

**Default UOM**—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list is selected as the default. A blank selection is allowed.

**Decimal Precision**—Set the decimal precision as follows:

- **As Entered**—The calculated value is not altered.
- **Specified Precision**—The calculated value is altered to match the specified number of decimal places. If the calculated value does not include the specified number of decimals, zeros are appended to the value. If the calculated value exceeds the number of decimals the value is rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value is altered to "1.6."

**Behaviors**—Check the **Allow Nulls** box to calculate even when there is no user entered value for the referenced items.

When a calculation is performed and the system cannot find a referenced item or an error occurs, the warning icon appears next to the attribute. Check the **Show Error Details** box when the calculation is not sensitive information. When **Show Error Details** is selected, the end user is able to click the warning icon and see calculation error details. These details could include formulation details, referenced variable names, etc.

---

**Note:** Warnings can be turned off using methods during your calculation. For more information, refer to the “Extended Attribute Calculations” section of the *Agile Product Lifecycle Management for Process Extensibility Overview Guide*.

---

**Calculation Script**—Click the **Calculation Script** link to display the calculation dialog box for entering a calculation script. See the “Extended Attribute Calculations” section of the *Agile Product Lifecycle Management for Process Extensibility Overview Guide* for help in writing calculation scripts. Click **Calculate** to test your calculation.

**Calculated Text** This type allows the user to enter calculated free text, as [Figure 3–42](#) shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. [Figure 3–43](#) shows an example of what the user might see.

**Figure 3–42** *Type field, Calculated Text*

This screenshot shows the configuration form for a 'Calculated Text' extended attribute. The form includes the following fields and options:

- Type:** Calculated Text (dropdown)
- Status:** New (dropdown)
- Distinct:** ☐
- Segment(s):** [Empty text field]
- Available In:** [Empty text field]
- Class:** [Empty text field]
- Tags:** [Empty text field]
- Category Tab:** [Empty text field]
- Group(s):** [Empty text field]
- Behaviors:** ☐ Allow Nulls ☐ Show Error Details
- Calculation Script:** [Empty text area]
- Buttons:** Calculate (button)
- Calculation Result:** [Empty text field]

**Figure 3–43** *Calculated text extended attribute (multi-line)*

Contains less than 2%.

**Boolean** Set up Boolean extended attributes in which users are provided a True/False drop-down.

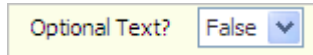
**Figure 3–44** *Type field, Boolean*

This screenshot shows the configuration form for a 'Boolean' extended attribute. The form includes the following fields and options:

- Type:** Boolean (dropdown)
- Status:** New (dropdown)
- Distinct:** ☐
- Segment(s):** [Empty text field]
- Available In:** [Empty text field]
- Class:** [Empty text field]
- Tags:** [Empty text field]
- Category Tab:** [Empty text field]
- Group(s):** [Empty text field]
- Display Text:** [Empty text field]
- Default State:** False (dropdown)
- Rollup Behavior:** Rollup as true if the following condition is true. All items are Selected (dropdown)

Figure 3–45 shows what this type looks like assigned.

**Figure 3–45 Boolean extended attribute**



Additional options associated with this type are:

**Display Text**—Enter text to show before the drop-down. This field is optional. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved.

**Default State**—Select the default state. Options are blank, 'True,' and 'False.'

**Rollup Behavior**—When Boolean attributes are set as distinct and included on formulation inputs, they can be rolled up. Define rollup behavior by selecting an option from the following drop-down list:

**Rollup as true if the following condition is true—**

- **All items are Selected**—This option sets the rolled up boolean extended attribute value to “True” if all attributes on the formulation input materials are set to “True.” If any of the attributes are set to “False” the boolean rolls up as “False.”
- **One item is Selected**—This option sets the rolled up boolean extended attribute value to “True” if one or more attributes on the formulation input materials are set to “True.” If this condition is not “True,” the boolean rolls up as “False.”



## Creating an Extended Attribute

To create an extended attribute:

1. On the left navigation panel click **New > Extended Attribute**. ADMN displays the Extended Attribute Template page, as shown in [Figure 3–46](#).

**Figure 3–46** *Extended Attribute Template page*

2. Enter extended attribute information, as described in ["Summary Tab"](#) on page 3-6 and ["Type"](#) on page 3-7.
3. Click **Save & Close**.
4. To make the attribute available, flush the extended attributes / custom sections cache, as described in ["Using the Cache Application"](#) on page 4-3.

## Displaying Extended Attributes as Bold or Italic Text

To format an extended attribute, perform the following steps:

1. Create the extended attribute following the same steps as outlined above.
2. Select the bold and/or italics tags, as shown below:

Figure 3–47 Selecting bold or italic tags

**Extended Attribute Template** New

**Summary**

**Attribute Configuration**

Attribute Name: Flavor

Attribute ID: Flavor

Type: Boolean

Status: New

Distinct: ☐

Segment(s): Baked Goods

Available In: Menu Item Specification

Class: Custom Sections

Tags: **Bold** **Italic**

Category Tab:

Figure 3–48 shows an extended attribute with the Bold tag applied.

Figure 3–48 Bolded extended attributes

Flavors (Custom Section)				
	Flavor	Value		Comments
✓✗+	Cherry	45 g		
	Grape	10 g		
	Banana	5 g		

## Editing an Extended Attribute

To edit an extended attribute:

- On the left navigation panel click **ADMN > Custom Data > Extended Attributes**. ADMN displays the Extended Attribute Template Search page.
- Using the search feature, search for and select the extended attribute to edit. (For instructions on the search feature, see ["Searching for Extended Attributes"](#) on page 3-29.) The Extended Attributes page displays.
- In the action menu, click **Edit**. The Extended Attributes page reloads. Depending on your role and the attribute's status, the screen displays several fields in edit mode.
- Edit extended attribute information in the Summary tab, as described in ["Summary Tab"](#) on page 3-6 and ["Type"](#) on page 3-7.

5. Click **Save & Close**.
6. To make your edits available, flush the extended attributes / custom sections cache, as described in ["Using the Cache Application"](#) on page 4-3.

## Searching for Extended Attributes

To search for extended attributes:

1. On the left navigation panel click **ADMN > Custom Data > Extended Attributes**. ADMN displays the Extended Attribute Template search page.
2. Enter search criteria for extended attributes:
  - a. In the key field drop-down list, select your search criteria as follows:
    - -- — Searches for all extended attributes
    - **Attribute ID**—Searches for extended attributes by unique identifier
    - **Attribute Name**—Searches for extended attributes by name
    - **Available In**—Searches for extended attributes according to the specification, company/facility profile, publication, testing protocol, NPD project, or sourcing approval in which it is used
    - **Category Tag**—Searches for extended attributes by category tab
    - **Class**—Searches for extended attributes by class
    - **Group**—Searches for extended attribute by extended attribute group
    - **Most Recently Used**—Searches for the most recently used extended attributes
    - **Segment (+Children)**—Searches for extended attributes by segment, including segments that exist as a child in the hierarchy
    - **Segment (+Exact Match)**—Searches against the exact match of the segment
    - **Segment (+Hierarchical)**—Searches against the hierarchy (both up and down) that the segment exists in
    - **Status**—Searches for extended attribute by status
  - b. In the operator drop-down list, your options are determined by the choice you made in the first drop-down list. Choices may include:
    - **Null {empty field}**—Searches for all extended attributes.
    - **Contains**—Used for character searches, alphabetical, or numerical (for example, "Description Contains Admin" will produce only extended attributes with descriptions that contain the word "Admin").
    - **Contains All**—Searches for extended attributes that contain all of the values you specify. This options is used for character searches, alphabetical, or numerical (for example, "Attribute Name Contains Color Coding" will produce only extended attributes with names that contain the words "Color Coding").
    - **Contains One**—Used for character searches, alphabetical, or numerical (for example, "Attribute ID Contains 123456" will produce only the extended attribute containing the ID "123456").
    - **Ends With**—Searches for extended attributes that ends with the character(s) you specify

- **Equals**—Used to quantify search criteria entered in the field to the right (for example, “Attribute Name Equals Allergy” will produce only extended attributes with the name of Allergy).
  - **Is True**—Searches for extended attributes matching your selection. Used with Most Recently Used criterion.
  - **Not Equals**—Used to quantify search criteria entered in the field to the right (for example, “Attribute Name Not Equals Allergy” will produce only extended attributes that do not contain the name of Allergy).
  - **Starts With**—Searches for extended attributes that start with the character(s) you specify
- c. Use the empty search criteria field to the right of the operator drop-down list to qualify the selections you made above. For example, if you are searching by “Available In - Contains All,” choose the specification type, such as “Equipment Specifications.” All extended attributes with an available in value of “Equipment Attribute” are provided in the search results. You can also enter the percent (%) sign to perform a wildcard search matching any one character.
3. Click **Search**. The Search Results table displays extended attributes matching the search criteria.

---

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

---

## Setting Extended Attribute Order

The display order of extended attributes is defined using ADMN. You can set the display order of extended attributes by object type. The order you set also determines the print order of extended attributes. If no sort order is applied the system displays them in alphabetical order.

To change the order of extended attributes:

1. Click **ADMN > Custom Data > Extended Attribute Order**. The Extended Attribute Order page is displayed, as [Figure 3–49](#) shows.

**Figure 3–49** *Extended Attribute Order page*

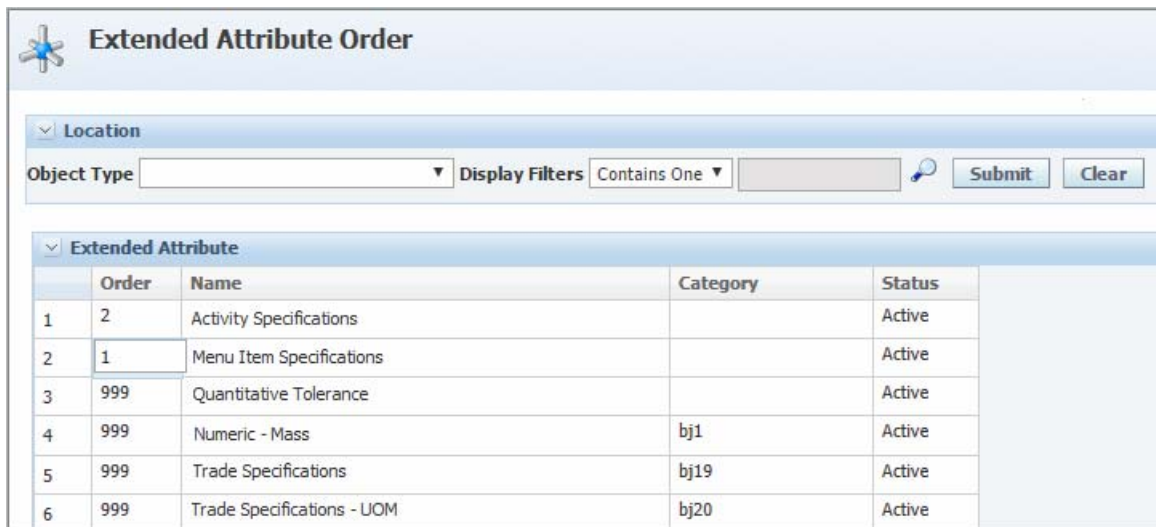
	Order	Name	Category	Status
1	999	Activity Specifications		Active
2	999	Menu Item Specifications		Active
3	999	Quantitative Tolerance		Active
4	999	Numeric - Mass	bj1	Active
5	999	Trade Specifications	bj19	Active
6	999	Trade Specifications - UOM	bj20	Active

2. Select an object type from the **Object Type** drop-down list.
3. Select an option from the **Display Filters** drop-down list. Options are Contains One (default) and Contains All.
4. Click the search icon at the end of the Display Filters field. A popup window displays available filters. Select desired filters, and then close the popup window. All extended attributes available in that object type are displayed in the **Name** column. The **Status** column displays the current status.

You can change the sort order by clicking the linked column names.

5. Click **Edit**.
6. In the **Order** column, set the order of display by assigning a number to each extended attribute, as [Figure 3–50](#) shows.

**Figure 3–50** Order column in edit mode



The screenshot shows a window titled "Extended Attribute Order" with a star icon. Below the title bar, there is a "Location" section with a dropdown menu for "Object Type" and a "Display Filters" dropdown menu set to "Contains One". To the right of these are a search icon, a "Submit" button, and a "Clear" button. Below this is a table titled "Extended Attribute" with the following data:

	Order	Name	Category	Status
1	2	Activity Specifications		Active
2	1	Menu Item Specifications		Active
3	999	Quantitative Tolerance		Active
4	999	Numeric - Mass	bj1	Active
5	999	Trade Specifications	bj19	Active
6	999	Trade Specifications - UOM	bj20	Active

7. Click **Save**.
8. To set the extended attribute order for another object type, repeat step 2 through step 7.

---

**Note:** When new extended attributes are added, they are displayed at the bottom of this list.

---

# Custom Sections

Custom sections are essentially configurable sets of extended attributes. Custom sections are found in the following objects:

**GSM**

- . Activities
  - . Equipment specifications
  - . Material specifications
  - . Formulation specification
  - . Product specifications
  - . Smart Issue requests
  - . Trade specifications
- . Output items
  - . Packing configuration specifications
  - . Packaging material specifications
  - . Master specifications
  - . Menu item specifications
  - . Nutrient profiles

**NPD**—Project, innovations/sales pipelines, strategic briefs, and activities

**PQM**—Issues, actions, and audits

**SCRM**—Companies, facilities, and sourcing approvals

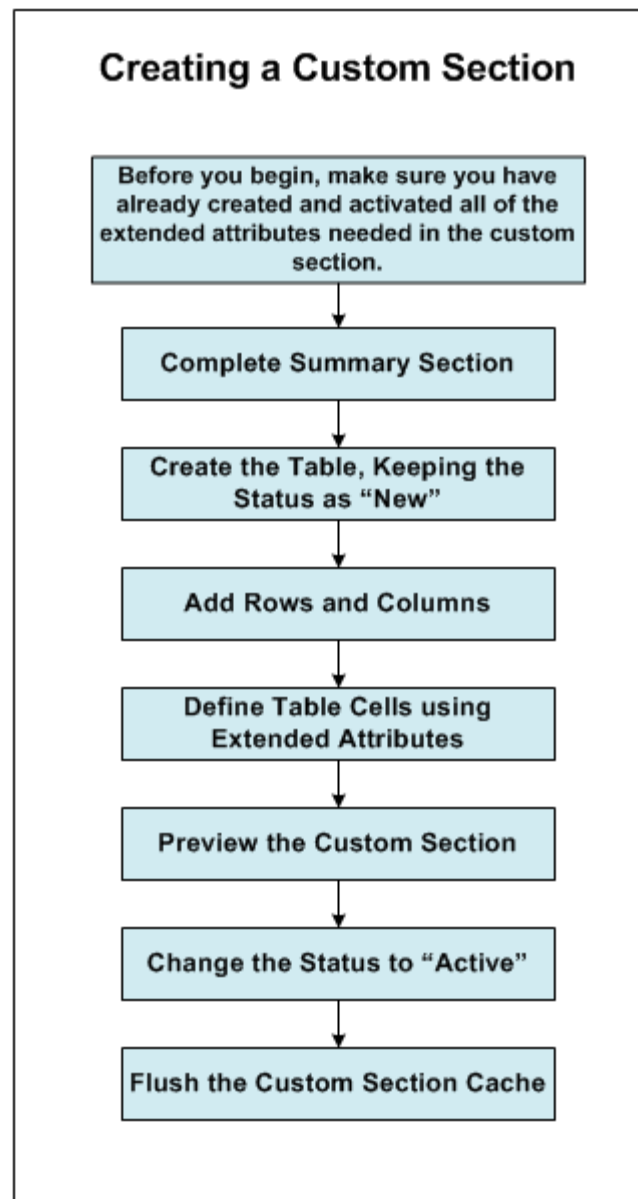
**eQ**—Material, packaging, product, and trade questionnaires

The following table is an example of the type of data that can be built as a custom section using extended attributes:

**Table 3–1** *Data to be built as a custom section table using extended attributes*

	Amount	Soy Hydration Factor
Min Soy Protein Isolate	Numeric UOM% Extended Attribute	Numeric No UOM Extended Attribute
Min Soy Protein Concentrate	Numeric UOM% Extended Attribute	Numeric No UOM Extended Attribute

Figure 3–51 shows the steps required to build a custom section.

*Figure 3–51 Steps for creating a custom section*

Use the Custom Section Template page to build custom sections, as shown in [Figure 3–52](#).

Figure 3–52 Custom Section Template page

The screenshot displays the 'Custom Section Template' page for a new section. The page is titled '(1001154) Custom Section Template' and 'New'.

**Summary Section:**

- Section Number: 1001154
- Section Name:
- ID: 1001154
- Hide Header: ☐
- Status: New (dropdown)
- Segment(s):  (with search icon)
- Available In:  (with search icon)
- Tags:  (with search icon)
- Category Tab:  (with search icon)

**De-normalization Process Section:**

- Denorm Model: (dropdown)
- Section Alias:
- Include In De-normalization: ☐
- De-normalization Type: Direct Map (dropdown)
- De-normalization Status: Will Not Be Included in the Denorm Process (-1)

**Custom Section Section:**

Visual representation of the custom section table with a grid of colored cells (green, purple, yellow) and icons for adding, editing, and deleting rows and columns.

Buttons: Add New Row, Add New Column, Reorder Rows, Reorder Columns

Legend:

- New (purple)
- Default (green)
- Active (yellow)
- Inactive and Archived (grey)
- Include In De-normalization (blue icon)
- Is De-normalized (green icon)

Buttons: Validate, Preview, ☒ Include all "New" items

## Summary Section

The Summary section contains the following fields.

**Section Number**—A unique identifier. This field is defined by the system.

**Section Name**—The name of the custom section. This field is required. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved.

**ID**—A user-defined unique identifier. This field is required. This field is populated by the system but can be changed. This ID can be used during integration and reporting.

**Hide Header**—Indicates whether the header is displayed with the table. This option allows you to group two or more sections underneath one header. Use the order feature to set positions as described in ["Setting Custom Section Order"](#) on page 3-58.

**Security Classification**—This field is only available if Object Level Security is enabled. A classification can be used to limit access to the custom section in Agile PLM for Process



applications. For more information on Object Level Security, refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

**Status**—Click the drop-down list to assign a status to the custom section with one of the following:

- **New**—The custom section is not yet ready to become available to Agile PLM for Process applications. When an custom section has a status of “New”, its values remains editable.
- **Active**—The custom section is ready to become available for use in Agile PLM for Process applications.
- **Inactive**—The custom section should no longer be used. Inactive custom sections are no longer available for assignment, however, they are not removed from existing objects that reference them. Inactive custom sections are still available for searching.
- **Archived**—The custom section is not available for searching or assignment. Archived custom sections are not removed from existing objects that reference them.

**Segment**—Assign a segment to the custom section. This field may not display based on configuration settings.

**Available In**—Click the link to display a selection dialog box containing a list of areas where you can make the custom section available. This field is required.

---

**Note:** eQuestionnaire extended attribute availability is based on the related GSM specification type. For example, when creating a material questionnaire you are only allowed to add custom sections that are available in material specifications.

---

**Tags**—Tags allow you to apply special behaviors to your custom section. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:

- **Do Not Publish to Supplier**—Custom section is not published to Supplier Portal and is unavailable in eQuestionnaire.
- **Insert Page Break - Above**—Adds a page break above the custom section when printing.
- **Insert Page Break - Below**—Adds a page break below the custom section when printing.
- **Landscape Printing**—Sets the custom section to print in landscape mode. This tag is recommended when the custom section table is wider than portrait printing allows.
- **Suppress Printing**—The custom section is not printable.

**Category Tags**—Used to categorize extended attributes and custom sections in understandable groupings. The categories are presented as tab groups that hold the extended attributes and custom sections.

## De-normalization Process Section

Customers wishing to use custom section data for reporting purposes can use the Custom Section Denormalization process to simplify report writing and improve SQL query performance. The Custom Section Denormalization (CS Denorm) feature provides the ability to convert the complex internal data storage of custom sections and extended attributes into simplified data structures that can be defined in the user interface.

In the Custom Section Admin user interface, users select which custom sections, rows, and columns to denormalize and indicate how the target database table(s) should be set up. The CS Denorm process then reads this information, pulls the relevant custom section data from specifications (or other business objects), and populates that data into a simplified database table(s) created solely for that custom section.

CS Denorm uses database scripts to generate the new denormalized database tables for each custom section. Therefore, it requires some database administrator assistance. The denormalization scripts are available in the core release, located in [ProdikaHome]\Installer\Extensions\DenormServices\Scripts, along with detailed documentation.

The De-normalization Process section allow users to specify if the custom section should be denormalized, how it should be denormalized, and the names of the tables that will be created. A custom section can be denormalized into multiple tables. This allows for splitting up the denormalization of very large custom sections into multiple target tables, and for better handling of mixed data types within columns and/or rows.

**Figure 3–53 De-normalization Process section**

The section contains the following fields:

**Denorm Model**—A Denorm Model represent how the custom section should be denormalized. Multiple denorm models can be defined, with each model resulting in a different database table, with different columns and rows selected for denormalization. The drop-down field allows you to switch between the defined denorm models, if any. Denorm Models are named by the Section Alias field below. Once a valid denorm model has been created and validated, additional denorm models can be created by clicking the Add New button.

**Section Alias**—This field determines the table name that will be used for the denormalized custom section table. The value must be unique across all custom sections, and must be no longer than a configurable number of characters (default is 30). Click the calculate icon to pull the section name into the field replacing spaces with underscores. See the *Agile Product Lifecycle Management for Process Custom Section Denormalization Guide* for important details about field sizes.

**Include in De-normalization**—Check to include the custom section the in de-normalization process once the custom section becomes “Active.”

---

**Warning:** If a custom section has already been de-normalized, and then this checkbox is unchecked, then the generated de-normalized custom section table will no longer be included in the data de-normalization process. Additionally, the next time the table creation process is performed this denormalized custom section table will be deleted from the database.

---

**De-normalization Type**—Determines how the custom section should be denormalized, for example, should the columns in the user interface directly map to columns in the new database table, or should the rows in the user interface be pivoted to columns (and columns to rows) in the new database table. Select one of the following:

- **Direct Map**—The custom section is created as a table structure that mimics the view of a custom section in the UI of the application, where columns in the UI are mapped as columns in the database table. Using this approach requires that the base extended attribute data types must match for all rows (marked for denorm) in a column (marked for denorm). For examples, you cannot have a numeric extended attribute in column 1, row 1, and a date extended attribute in column 1, row 2. In this scenario, the Pivot de-normalization type may be used.
- **Pivot**—This approach “pivots” a given custom section into a table structure where each row turns into a column and each column is represented by a row. Repeatable rows cannot be de-normalized using the pivot approach. Using this approach requires that the base extended attribute data types must match for all columns (marked for denorm) in a row (marked for denorm).

---



**Note:** When direct map or pivot is selected, it is required that you select at least one column and one row to include in de-normalization before you can save your custom section. This is in place to guarantee that proper data setup rules are being followed.

---

- **None**—Prevents this section from ever being denormalized. Once a section has been marked with a de-normalization approach of “None,” it cannot be changed. Note that this option is turned off by default, but can be enabled for all users or restricted to users in certain groups, by modifying configuration settings. This option would be used if you never want to run reports off of this custom section data.

To see the base data types of the custom section cells, click the **Show/Hide Data Types** link. This changes the custom section grid to display a color-coded base data type for each cell, to help plan the denormalization approach. Clicking the link again restores the original view.

**Figure 3–54** Show/Hide Data Types selected

Custom Section						
	+ Test Type	+ Temperature	+ Target	+ Minimum	+ Maximum	+ Comments
	Solid Fat Content	[Numeric]	[Numeric]	[Numeric]	[Numeric]	[Text]
	Solid Fat Index	[Numeric]	[Numeric]	[Numeric]	[Numeric]	[Text]

**De-normalization Status**—Depending on the status of the custom section and whether the Include in De-normalization box is checked, choices are -1, 0, 1, and 2, as described below:

Include in De-normalization checked?	Custom Section Status	De-Normalization Status	Notes
No	any	<b>-1:</b> Not for de-normalization	The custom section is not de-normalized
Yes	New	<b>0:</b> Not ready for de-normalization	De-normalization meta data (alias, etc.) is stored, but the custom section is ignored by the de-normalization scripts.  Once the custom section is made Active, this status is promoted to a 1.
Yes	Active, Archived, Inactive	<b>1:</b> Ready for table generation	A de-normalized table can now be created for the custom section.  Once the table generation scripts are executed, the status is moved to 2: Ready for de-normalization.
Yes	Active, Archived, Inactive	<b>2:</b> Ready for de-normalization	Custom sections in this status can now be picked up in the data de-normalization process.

For more information on the de-normalization process, see the *Agile Product Lifecycle Management for Process Custom Section Denormalization Guide*.

## Creating a Custom Section

To create a custom section:

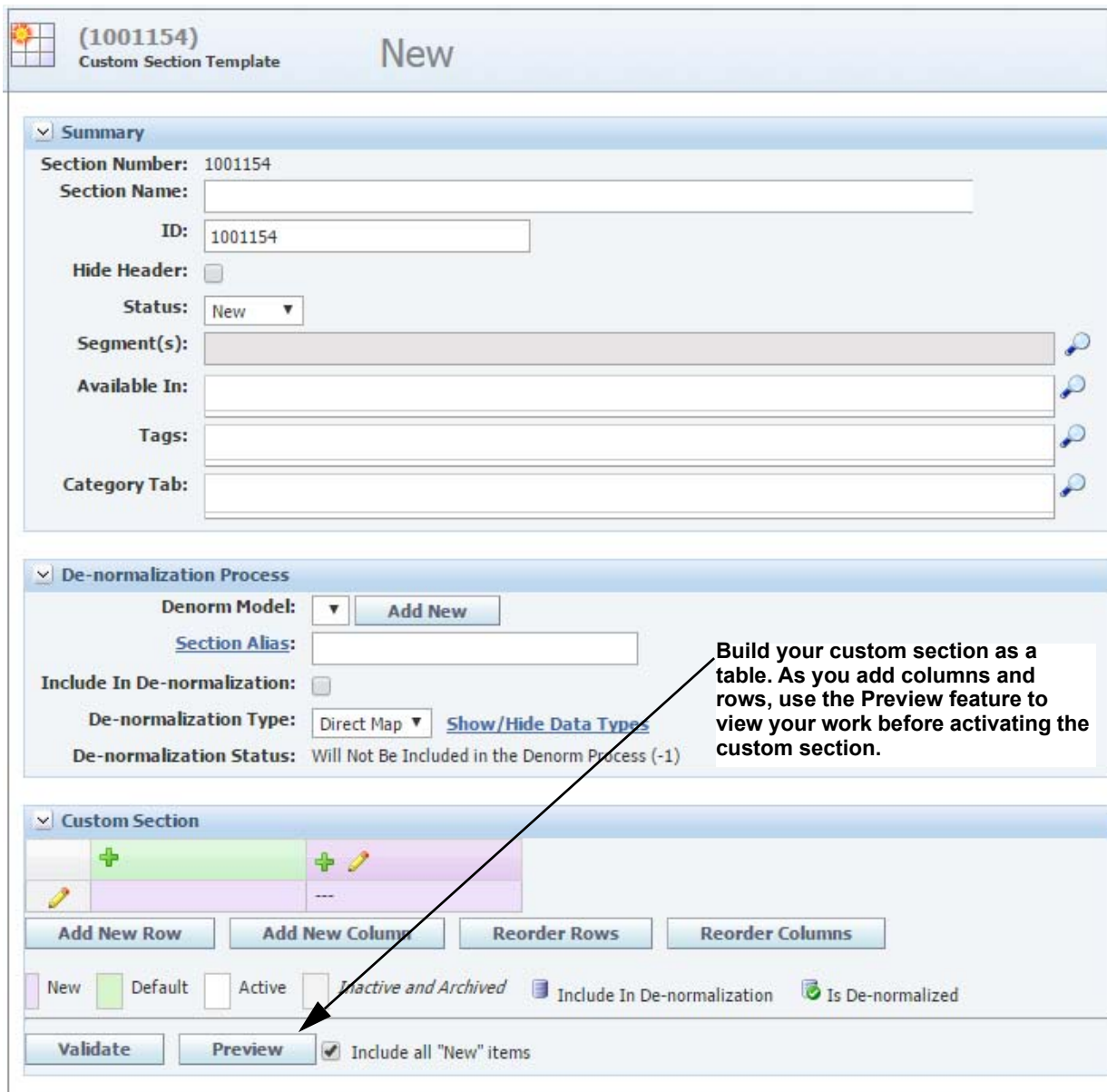
1. On the left navigation panel click **New > Custom Sections**. ADMN displays the Custom Section Template page, shown in [Figure 3–55](#).

---

**Note:** You can preview custom sections as you are building them by using the Preview feature. See ["Previewing a Custom Section"](#) on page 3-54 for instructions.

---

Figure 3-55 New custom section



**(1001154)**  
Custom Section Template

## New

**Summary**

Section Number: 1001154

Section Name:

ID:

Hide Header: ☐

Status: New

Segment(s):

Available In:

Tags:

Category Tab:

**De-normalization Process**

Denorm Model:  Add New

Section Alias:

Include In De-normalization: ☐

De-normalization Type: Direct Map [Show/Hide Data Types](#)

De-normalization Status: Will Not Be Included in the Denorm Process (-1)

**Custom Section**

--	--	--	--

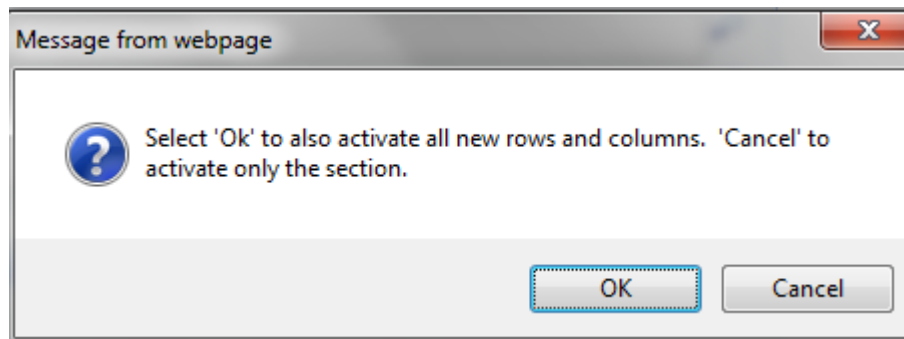
Add New Row Add New Column Reorder Rows Reorder Columns

☐ New ☐ Default ☐ Active ☐ Inactive and Archived ☐ Include In De-normalization ☐ Is De-normalized

Validate Preview ☒ Include all "New" items

**Build your custom section as a table. As you add columns and rows, use the Preview feature to view your work before activating the custom section.**

2. Define the **Section Name**, **ID**, **Security Classification**, **Segment**, **Available In**, and **Tags** fields in the Summary Section, as described beginning on page 3-34.
3. Define whether the custom section is included in the de-normalization process, as described beginning on page 3-35.
4. Create the custom section table as described beginning in "Creating a Table" on page 3-40. Keep all table items (rows and columns) in the status of "New" while creating your table. All items can be activated at once when you activate the entire custom section.
5. Preview your table to make sure it is built correctly as described in "Previewing a Custom Section" on page 3-54.
6. In the Summary area, select "Active" in the **Status** field drop-down list. ADMN displays the following dialog box asking if you want to activate all items (rows and columns.)

**Figure 3–56** Activate all new rows and columns dialog box

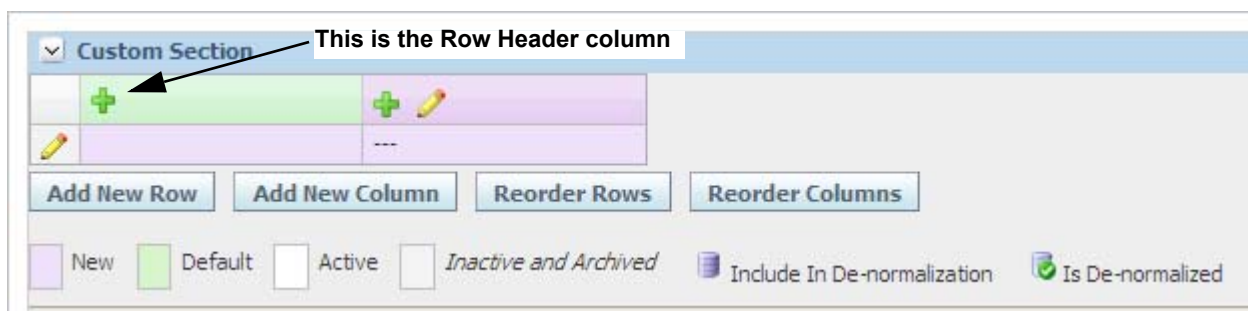
7. Click **OK**.
8. Click **Save & Close**.
9. Flush the extended attributes/custom sections cache, as described in ["Using the Cache Application"](#) on page 4-3.

## Creating a Table

As you create a table for your custom section, be sure to keep items in “New” status until you are ready to activate the entire section. Use the Preview feature as described on page 3-54 to check that all headings, columns, and rows are arranged as you would like. Activate the section only when the table is ready for use in Agile PLM for Process applications.

To create a table:

1. Define the column row header and add additional columns as described in ["Creating Columns"](#) on page 3-40.

**Figure 3–57** Custom section table

2. Add additional rows as needed as described in ["Creating Rows"](#) on page 3-44.
3. Click **Save**.

## Creating Columns

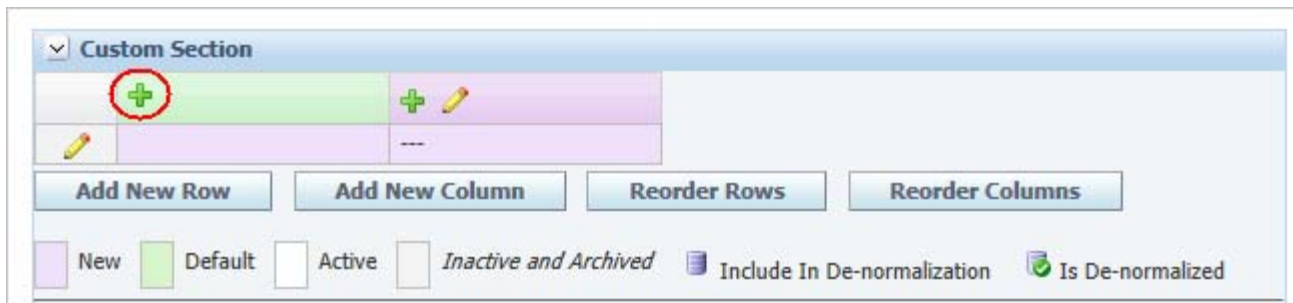
You can add as many columns as you need in a custom section table by clicking **Add New Column** and defining the column values. Two columns are provided by default. The first (left-most) column is the Row Header column, as shown in [Figure 3–57](#) above.

## Defining the Row Header Column

To define the first (left most) row header column:

1. Click the lifetimes add data icon, shown in [Figure 3–58](#), to display a Column Header Information dialog box, shown in [Figure 3–59](#).

**Figure 3–58** Row header



**Figure 3–59** Column Header Information dialog box

2. Enter the **Name** of the column. The first column in a custom section can remain un-named.
3. Enter the unique **ID** of the column.
4. Enter the display width of the column in the **UI Width** field. This is the width of the column in the user interface.

---

**Note:** Certain UI elements require a minimum space to display properly. If you are referencing a single or multi-select style extended attribute, the UI width must be as wide as your longest selectable item.

---

5. Enter the print width of the column in the **Print Width** field. This is the width of the column when the custom section is printed. If a print width is not provided, the printed custom section will be unreadable.
6. Click the search icon at the end of the **Tags** field to select the tags (if any) to assign to this column. Tags allow you to apply special behaviors to your column. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:

- **Do Not Publish to Supplier**—This column will not be published to Supplier Portal and will be unavailable in eQuestionnaire.
  - **Suppress Printing**—This column will not be included when printing the custom section.
  - **Supplier eQ - Create**—Allows the supplier to add or remove these columns in a questionnaire.
7. Click **Done** to confirm your choices.

## Copying Columns

To copy an existing column:

1. In the Column Header column, click the add data icon to display the Column Header Information dialog box.
2. Check the **Create copies of this column** box to add one or more copies of this column to the table. The # of Copies field appears.
3. Enter the number of columns to create in the # of Copies field. [Figure 3–60](#) shows these entries.

**Figure 3–60 Copying column fields**

**Column Header Information** [Done] [Cancel]

**Summary**

**Name:** Brand

**ID:** 2

**Status:** Active

**UI Width:** 100 px

**Print Width:** 5.00 cm  
(in x 2.54 = cm)

**Tags:**

☒ Add this item when section is created

☒ Create copies of this column  
# of Copies: 5

**De-normalization Process**

**Selected Denorm Model:**

**Include In De-normalization:** ☒

**De-normalization Alias:**

4. Click **Done**. The table displays the copied columns. A dialog box displays asking if you want to proceed with the copy.
5. Click **OK**. The new column(s) displays next to the last column.
6. Define each column following the procedure above.



## Defining Additional Columns

To define additional columns:

1. Click **Add New Column** to add an additional column to the table. The Column Header Information dialog box is displayed, as [Figure 3–61](#) shows. If you are defining a column that already exists, click the add data icon to display the Column Header Information dialog box.

**Figure 3–61** Column Header Information dialog box

**Column Header Information** [Done] [Cancel]

**Summary**

Name:

ID:

Status:  [Delete](#)

UI Width:  px

Print Width:  cm  
(in x 2.54 = cm)

Tags:

☐ Add this item when section is created

**De-normalization Process**

Selected Denorm Model:

Include In De-normalization: ☐

De-normalization Alias:

2. Enter the **Name** of the column.
3. Enter the unique **ID** of the column. This field is automatically numbered by the system but can be modified. This field has to be unique within the custom section set of columns. This ID can be used when using cell location awareness in calculated extended attributes.
4. Set the column **Status** by selecting a status from the drop-down list. Keep the status of the column set to “New” until your entire section and/or column is ready to be activated.
5. Enter the display width of the column in the **UI Width** field. This is the width of the column in the user interface.

---

**Note:** Certain UI elements require a minimum space to display properly. If you are referencing a single or multi-select style extended attribute, the UI width must be as wide as the longest selectable item.

---

6. Enter the print width of the column in the **Print Width** field. This is the width of the column when the custom section is printed. If a print width is not provided, the printed custom section will be unreadable.

7. Click the search icon at the end of the **Tags** field to select the tags (if any) to assign to this column. Tags allow you to apply special behaviors to your column. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:
  - **Do Not Publish to Supplier**—This column is not published to Supplier Portal and is unavailable in eQuestionnaire.
  - **Supplier eQ - Create**—Allows the supplier to add or remove these columns in a questionnaire.
  - **Suppress Printing**—This column is not included when printing the custom section.
8. Check the **Add this item when section is created** box to automatically add this column to the table when the section is created by the user.
9. Check the **Create copies of this column** box to add one or more copies of this column to the table. Enter the number of columns to create in the **# of Copies** text field. The recommended maximum number is 20. This feature is better used when all cells have already been defined. Refer to ["Copying Columns"](#) on page 3-42.
10. To include the column in the de-normalization process for the given denorm model, select the **Include in De-normalization** checkbox.
11. Enter a unique name in the **De-normalization Alias** field, or click the calculate action icon to auto-generate one.

---

**Note:** When columns are in a “New” status they can be deleted. To delete a column, select the red **Delete** link.

---

12. Click **Done** to confirm your choices. [Figure 3–63](#) shows the defined columns.

**Figure 3–62** Defined columns

The screenshot shows a web interface for creating a custom section. At the top, there's a dropdown menu labeled 'Custom Section'. Below it is a table with three columns and three rows. The first row is the header, with a green background for the first column, a purple background for the second column labeled '+ Amount', and a purple background for the third column labeled '+ Soy Hydration Factor'. The second and third rows have purple backgrounds and contain three dashes ('---') in each column. To the left of each row in the second and third rows is a yellow pencil icon. Below the table are four buttons: 'Add New Row', 'Add New Column', 'Reorder Rows', and 'Reorder Columns'. At the bottom, there's a legend with color-coded boxes: a purple box for 'New', a green box for 'Default', a white box for 'Active', and a grey box for 'Inactive and Archived'. To the right of the legend are two checkboxes: 'Include In De-normalization' (unchecked) and 'Is De-normalized' (checked).

## Creating Rows

You can add as many rows as you need in a custom section table.

## Defining Additional Rows

To add a new row:

1. Click **Add New Row** to add an additional row to the table. The Row Header Information dialog box is displayed, as [Figure 3–63](#) shows. If you are defining a row that already exists, click the edit icon to make the row editable. Click the add data icon to display the Row Header Information dialog box.

Figure 3–63 Adding a new row

**Row Header Information** [Done] [Cancel]

**Summary**

Name:

ID:

Status:  [Delete](#)

Tags:

☐ Add this item when section is created

☐ Create copies of this row

**De-normalization Process**

Selected Denorm Model:




Include In De-normalization: ☐

De-normalization Alias:

2. Enter a name for the row in the **Name** field.
3. Enter a unique identifier in the **ID** field. This field is automatically numbered by the system but can be modified. This field has to be unique within the custom section set of rows. This ID can be used when using cell location awareness in calculated extended attributes.
4. Set the row **Status** by selecting a status from the drop-down list. Keep the status of the row set to “New” until your entire section and/or row is ready to be activated.
5. Click the search icon at the end of the **Tags** field to select the tags (if any) to assign to this row. Tags allow you to apply special behaviors to your row. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:
  - **Do Not Publish to Supplier**—This row is not published to Supplier Portal and is unavailable in eQuestionnaire.
  - **Hide Header**—The header for this row is not displayed in consumption or printing. When all visible rows in a custom section include the hide header tag, the entire header column does not appear. This tag is beneficial when using repeatable rows. See ["Formatting Custom Sections"](#) on page 3-49 for an example of what a custom section looks like leveraging this tag.
  - **Repeatable**—This row template can be re-used during consumption. This tag should only be used when the use case is absolutely necessary. It is recommended to use distinct rows containing distinct attributes. For more information, see ["Re-using a Custom Section Row Template"](#) on page 3-52.

- **Supplier eQ - Create**—Allows the supplier to add or remove these rows in a questionnaire.
  - **Suppress Printing**—This row is not included when printing the custom section.
6. Check the **Add this item when section is created** box to automatically add this row to the table when the section is created by the user.
  7. Check the **Create copies of this row** box to add one or more copies of this row to the table; enter the number of rows to create in the # of Copies text field. This feature is better used when all cells have already been defined. Refer to ["Copying Rows"](#) on page 3-47.
  8. To include the column in the de-normalization process for the given denorm model, select the **Include in De-normalization** checkbox.
  9. Enter a unique name in the **De-normalization Alias** field, or click the calculate action icon to auto-generate one.
  10. Click **Done** to confirm your choices. [Figure 3-64](#) shows the newly created row in edit mode. You can now define the cells.

**Figure 3-64** Added row

	+	+ Amount 	+ Soy Hydration Factor 
	Min Soy Protein Isolate	---	---
Add New Row	Add New Column	Reorder Rows	Reorder Columns

## Defining Cells

Custom section cells contain extended attributes.

To define a cell in a table:

1. Click the edit icon to make the row or column editable.
2. In the cell that you are adding an attribute to, click the add data icon to display the Extended Attribute dialog box. This list contains extended attributes that have been marked with a class of “Custom Sections” and have an “Active” status.
3. Select an extended attribute from the list. For more information on creating extended attributes, refer to ["Creating an Extended Attribute"](#) on page 3-27.

---

**Note:** When you add an extended attribute to the cell, a clear field icon is displayed to the right of the selection. You can click this icon to delete the extended attribute from the table, as long as the statuses of the associated row/column are “New.”

---

4. Click **Done** to confirm your choice.
5. Continue this process until all cells in the row contain an extended attribute.
6. Click the apply changes icon to apply your changes.

---

**Warning:** Cells cannot be edited once the row or column has been activated.

---

Figure 3–65 Defined cells

	+ Amount	+ Soy Hydration Factor
Min Soy Protein Isolate	Numeric - Percent UOM	Numeric - No UOM
Min Soy Protein Concentrate	Numeric - Percent UOM	Numeric - No UOM

☐ New
 ☐ Default
 ☐ Active
 ☐ Inactive and Archived
 ☐ Include In De-normalization
 ☒ Is De-normalized

**Note:** The extended attribute's Attribute ID value is displayed in brackets after the extended attribute name.

Clicking a cell with an extended attribute launches a read-only popup displaying the extended attribute information.

## Copying Rows

To copy an existing row:

1. Click the edit icon of the row you would like to copy. This makes the row editable.
2. In the Row Header column, click the add data icon to display the Row Header Information dialog box.
3. Check the **Create copies of this row** box to add one or more copies of this row to the table. The # of Copies field appears.
4. Enter the number of rows to create in the # of Copies field. Figure 3–66 shows these entries.

Figure 3–66 Copying row fields

**Row Header Information**

☒ Add this item when section is created  
☒ Create copies of this row  
 # of Copies: 1

5. Click **Done**. The table displays the copied rows. A dialog box displays asking if you want to proceed with the copy.
6. Click **OK**. The new row(s) display under the copied row.
7. Define each row following the procedure above.

## Reordering Columns

The order the columns appear in during consumption is set through the custom section template.

To reorder the columns in your table:

1. With the page in edit mode, click **Reorder Columns**. A dialog box is displayed, as [Figure 3–67](#) shows.

**Figure 3–67** Reorder columns dialog box



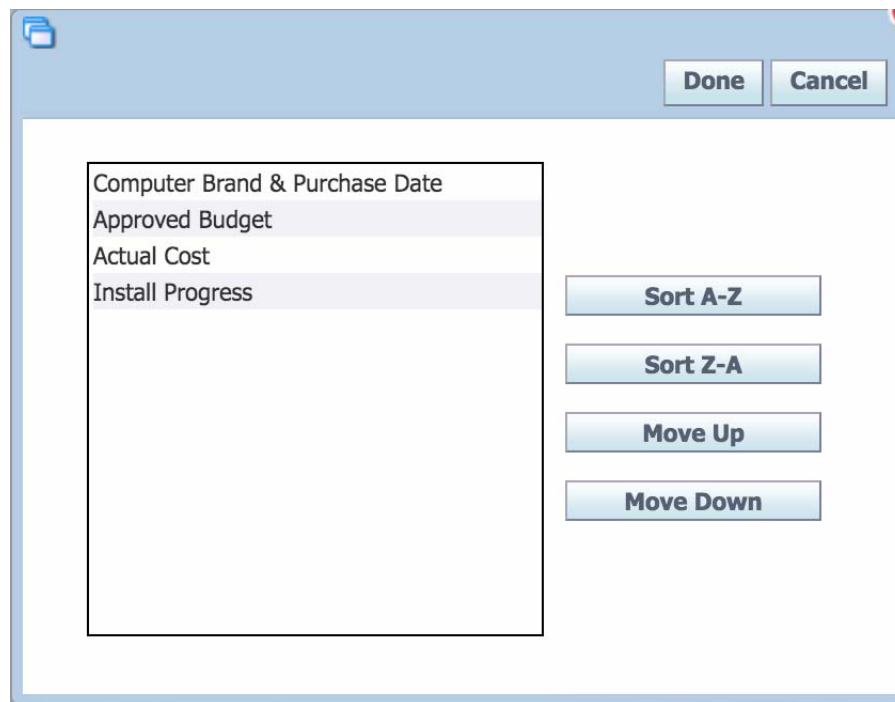
2. Click a column value in the list, and then click **Move Up** or **Move Down** to set the desired position, or click **Sort A-Z** or **Sort Z-A** to set all the columns alphabetically.
3. Repeat step 2 as needed to move other columns to the desired position.
4. Click **Done**.

## Reordering Rows

The order the rows appear in during consumption is set through the custom section template.

To reorder the rows in your table:

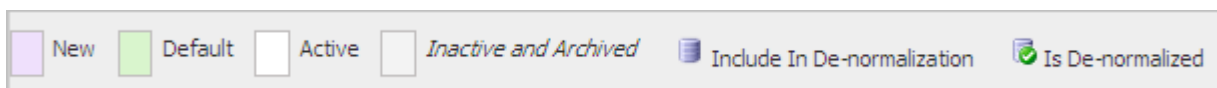
1. With the page in edit mode, click **Reorder Rows**. A dialog box is displayed, as [Figure 3–68](#) shows.

**Figure 3–68 Reorder rows dialog box**



2. Click a row value in the list, and then click **Move Up** or **Move Down** to set the desired position. You can also select **Sort A-Z** to sort all rows in ascending alphabetic order, or select **Sort Z-A** to sort all rows in descending alphabetic order.
3. Repeat step 2 as needed to move other rows to the desired position.
4. Click **Done**.

### Legend

Rows and columns are colored to represent status and whether an item is default. The following legend is provided.

**Figure 3–69 Custom Section statuses**

See "Status" on page 3-35 for more information on statuses. De-normalization icons are defined below:

-  —The Include in De-normalization icon is displayed if both the column and row for that cell are marked as Include In De-normalization, but their statuses are not Ready For Denormalization (meaning those columns and rows have not been created in the new de-normalization table.)
-  —The De-normalized icon displays when both the column and row have been created in the denormalized table.

### Formatting Custom Sections

You now have some formatting options when working with custom data.

**Hide Row Header** Depending on your use case and searching needs, you may not feel the need to repeat the row header over and over again throughout the section. You can add the “hide header” tag to the repeatable row's Row Header Information dialog box to accomplish this as described on page 3-45. [Figure 3–70](#) and [Figure 3–71](#) show what a custom section looks like before and after Hide Header tag is applied.

Figure 3–70 Custom section displaying row headers

Flavors (Custom Section)					
		Flavor	Value	Comments	
✓✕	✚	Cherry	45 g		✕
		Grape	10 g		
		Banana	5 g		

Figure 3–71 Same section leveraging the hide header tag

Flavors (Custom Section)					
		Flavor	Value	Comments	
✓✕	✚	Cherry	45 g		✕
		Grape	10 g		
		Banana	5 g		

This tag can be used on all row types, repeatable and none repeatable. When all rows of a custom section contain the Hide Header tag the entire row header column is hidden. If only a few rows out of the set have the Hide Header tag the bold text in the cell is hidden on those rows.

**Note:** Error messages and advanced custom section searching still leverage the row header name.

**Hide Custom Section Header** Depending on your use case and searching needs, you may want to display multiple sections under one header. When a column contains this tag the header text is hidden when the custom section is being consumed in GSM, SCRM, PQM, eQ, etc. This header does not print.

To create a section with a hidden header:

1. Create the custom sections following the same steps as outlined beginning on page 3-40.
2. Select the **Hide Header** checkbox on the Custom Section template as shown in the following figure:



Figure 3–72 Hide Header checkbox

**Summary**

Section Number: 1001157

Section Name: Fact Panel Nutrient Panel

ID: 1001157

**Hide Header:** ☒

Status: Active ▼

Segment(s):

Available In:

Nutrient Profile X

Tags:

Category Tab:

3. Make sure to adjust the display order of the custom sections so they display appropriately using the Custom Section Order tool, as shown below.

Figure 3–73 Custom Section order tool

Done Cancel

Per Serving

Rounded

Overrides

Final Per Serving

%DV

Move Up

Move Down

---

**Note:** Remember that if users are using the Advanced custom data search method they need to reference the name of the section with the hidden header. So the name of the section must be very descriptive. These values can also be searched using the quick method where the section name is not needed.

---

## Re-using a Custom Section Row Template

You can re-use a custom section row template using the “Repeatable” tag.

---

---

**Important:** This feature should be used only when absolutely necessary and is not intended as a quick custom section creation tool. It is still our recommendation to use distinct custom section rows and extended attributes whenever possible. Using distinct rows and extended attributes allows for better performing reporting, integration and searching.

---

---

### Use Case Example

The simplest of use cases this solution is addressing revolves around a qualitative list of 1500 possible flavors. At most a section could contain 50 flavors; previously a custom section administrator would have to create 50 row templates with ambiguous row header names: Flavor 1, Flavor 2, Flavor 3, and so on. When consumed these identifiers make it unusable when searching, because the row header has to be identified. Alternatively the administrator would be required to create 1500 row templates for the custom section; this was unreasonable and depending on the number of rows needed, unsupported.

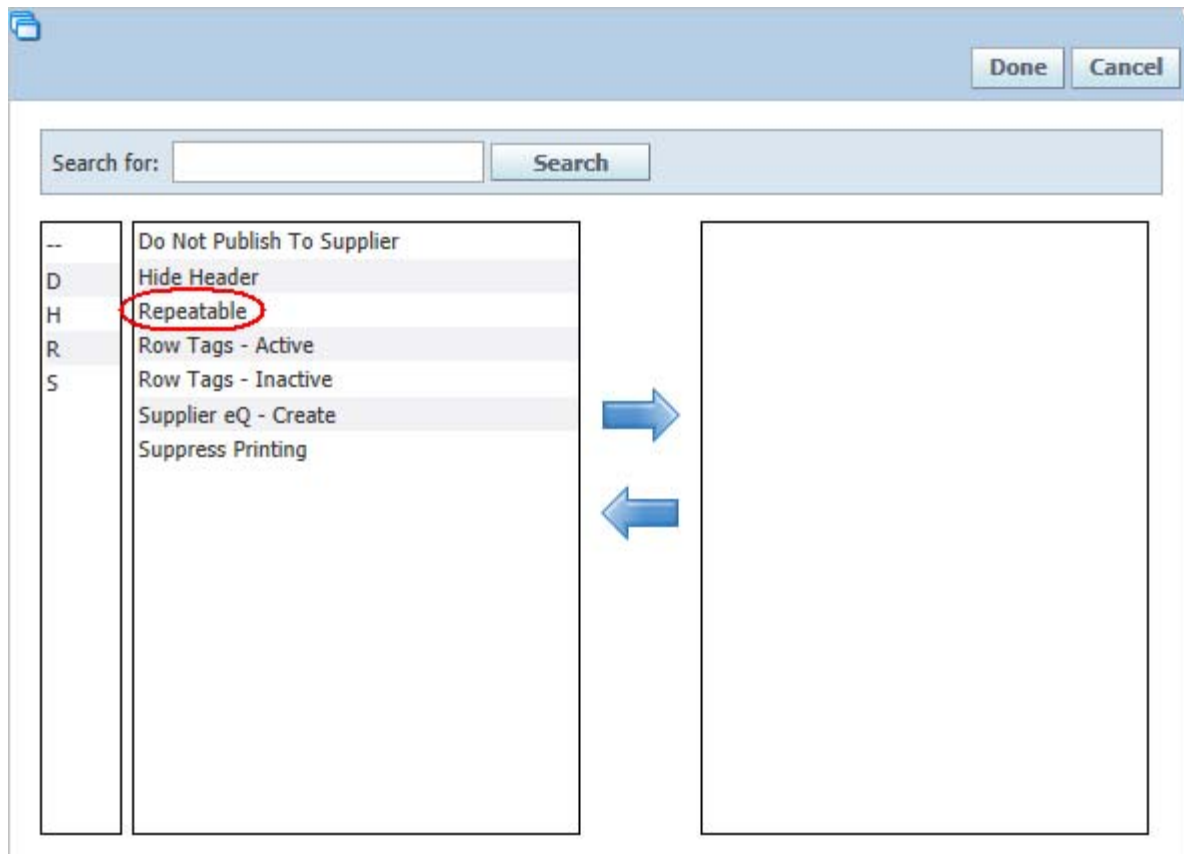
### The Solution

The ability to re-use a custom section row template provides a possible solution. Now the administrator just needs to create one row called “Flavor” and include the qualitative single select extended attribute as the first cell of that row.

To create a repeatable row:

1. Create a custom section as described in ["Creating a Custom Section"](#) on page 3-38.
2. For the row you would like to be repeatable to the end user, add the tag of “Repeatable” to the row header information as shown in the following figure:

Figure 3-74 Repeatable tag




---

**Note:** Because the row is repeated on the specification, distinct extended attributes cannot be used within the row.

---

Figure 3-75 shows what this custom section could look like in consumption:

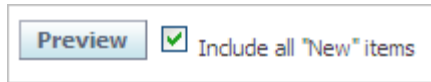
Figure 3-75 Custom section containing repeatable row

Flavors						
		Flavors	Flavor	Target		
1			Cherry	g		
2			Banana	g		
3			Grape	g		
4		Total	---	kg		

## Previewing a Custom Section

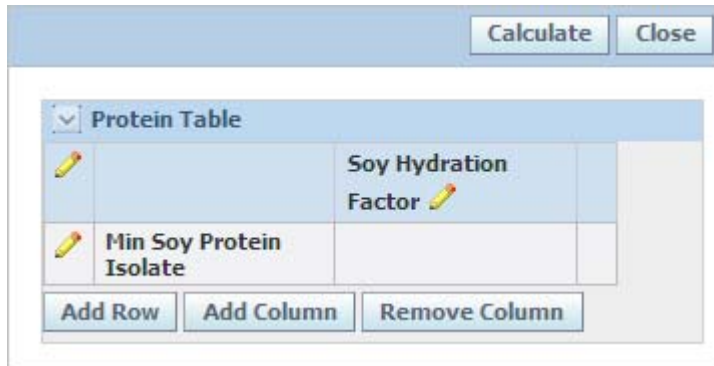
Preview custom sections by clicking **Preview** at the bottom of the page. You can use this feature to view the section as the user would see it. The preview includes all items in the status of “Active” and “New.” If you don’t wish to include “New” items, uncheck the Include all “New” items box. Preview mode allows you to mimic the user’s experience. Preview also allows you to see UI column widths.

**Figure 3–76 Custom Section page, Preview button**



When you click **Preview**, the current custom section, including default values, is displayed in a dialog box, as [Figure 3–77](#) shows.

**Figure 3–77 Custom Section in preview mode**



To make further changes to the custom section, click **Close**. Agile PLM for Process closes the preview dialog box and returns to the Custom Section page.

### Calculating Extended Attributes

While in preview mode, you can click the **Calculate** button to calculate extended attribute values. This button works only with calculate attributes that are referencing attributes present in the previewed section. Depending on your calculated extended attributes, the system may pull in the mock values for items referenced by ID. Refer to the “Extended Attribute Calculations” section of the *Agile Product Lifecycle Management for Process Extensibility Overview Guide* for more information.

## Editing Custom Sections

To edit a custom section:

1. Click **ADMN > Custom Data > Custom Sections**.
2. Using the search feature, search for the custom section to edit. (For instructions on the search feature, see ["Searching for Custom Sections"](#) on page 3-57.)
3. Click **Edit**.
4. Edit custom section summary information, as described in ["Summary Section"](#) on page 3-34.

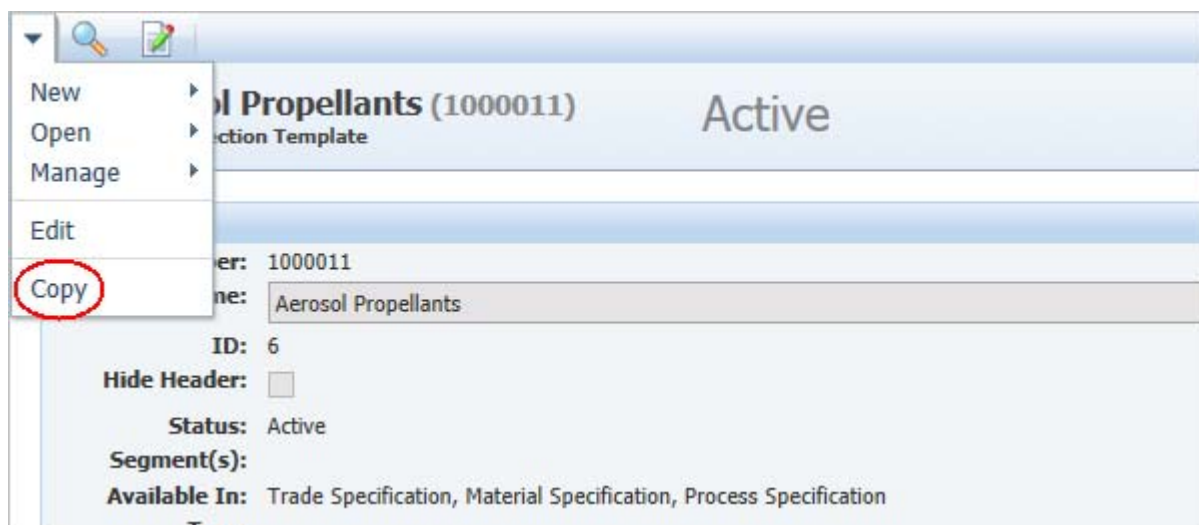
5. To edit the table, complete the procedures referenced below:
  - ["Creating Columns"](#) on page 3-40
  - ["Defining the Row Header Column"](#) on page 3-41
  - ["Defining Additional Columns"](#) on page 3-43
  - ["Creating Rows"](#) on page 3-44
  - ["Defining Additional Rows"](#) on page 3-44
  - ["Defining Cells"](#) on page 3-46
  - ["Copying Rows"](#) on page 3-47
  - ["Copying Columns"](#) on page 3-42
  - ["Reordering Columns"](#) on page 3-48
  - ["Reordering Rows"](#) on page 3-48
6. Activate all new rows and/or columns.
7. Click **Save & Close**.
8. Flush the extended attributes / custom sections cache, as described in ["Using the Cache Application"](#) on page 4-3.

## Copying a Custom Section

To copy a custom section:

1. Click **ADMN > Custom Data > Manage Custom Sections**.
2. Use the search feature to select the custom section to copy. [Figure 3-78](#) shows an existing custom section.

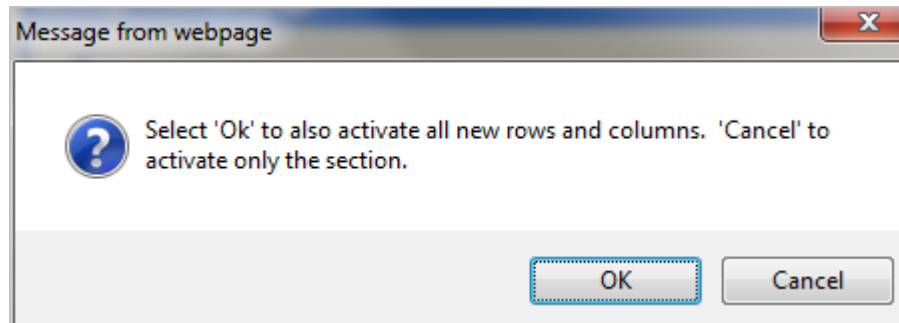
**Figure 3-78 Custom section with Copy button**



3. Click **Copy**. (This button does not appear if the page is in edit mode.) All items for the custom section are copied over to a new page, including rows, column, and cells.
4. Define the **Section Name**, **ID**, **Hide Header**, **Security Classification**, **Available In**, and **Tags** fields in the Summary Section, as described beginning on page 3-34.

5. Define the fields in the De-normalization Process section, as described beginning on page 3-35.
6. Edit the custom section table as described in ["Editing Custom Sections"](#) on page 3-54.
7. Preview your table to make sure it is built correctly as described in ["Previewing a Custom Section"](#) on page 3-54.
8. In the Summary area, select “Active” in the Status drop-down list. ADMN displays the following dialog box asking if you want to activate all items (rows and columns.)

**Figure 3–79** *Activate all new rows and columns dialog box*



9. Click **OK**.
10. Click **Save & Close**.
11. Flush the extended attributes / custom sections cache, as described in See ["Using the Cache Application"](#) on page 4-3.

## Searching for Custom Sections

To search for custom sections:

1. Click **ADMN > Custom Data > Custom Sections**. The Custom Section Template Search page displays.
2. Enter search criteria for custom sections using a combination of three search fields:
  - a. In the key field drop-down list, select your search criteria as follows:
    - -- —Searches for all custom sections
    - **Category Tab**—Searches by category tab
    - **Column Name**—Searches by column name
    - **Created**—Searches by creation date
    - **Last Edit**—Searches by last edit date
    - **Most Recently Used**—Searches for custom sections most recently used
    - **Row Name**—Searches by row name
    - **Segment (+Children)**—Searches for custom sections by segment, including segments that exist as a child in the hierarchy
    - **Segment (+Exact Match)**—Searches against the exact match of the segment
    - **Segment (+Hierarchical)**—Searches against the hierarchy (both up and down) that the segment exists in
    - **Section ID**—Searches by section identifier
    - **Section Name**—Searches by section name
    - **Status**—Searches by status
  - b. In the operator drop-down list, your options are determined by the choice you made in the key field drop-down list. Choices may include:
    - **Contains**—Used for character searches, alphabetical, or numerical (for example, “Column Name Contains Admin” will produce only custom sections containing a column name of “Admin”).
    - **Equals**—Used to quantify search criteria entered in the field to the right (for example, “Section ID Equals 123456” will produce only the custom section with the section ID of “123456”).
    - **Greater Than**—Searches for custom sections with a value greater than a value you specify (for example “Last Edit Greater Than 8/1/09” will produce only custom sections edited after “8/1/09”).
    - **Is True**—Used only with the Most Recently Used criterion and allows you to find your most recently viewed custom sections.
    - **Less Than**—Searches for custom sections with a value less than a value you specify (for example “Created Less Than 1/1/09” will produce only custom sections created before “1/1/09”).
    - **Starts With**—Searches for custom sections that start with the character(s) you specify
  - c. Use the empty search criteria field to the right of the operator drop-down list to qualify the selections you made above. You can also enter the percent (%) sign to perform a wildcard search matching any one character.

3. Click **Search**. The Search Results table displays custom sections matching the search criteria.

## Setting Custom Section Order

The display order of custom sections is defined using ADMN. You can set the display order of custom sections by object type. The order you set also determines the print order of custom sections. If no sort order is applied, the system displays them in alphabetical order.

To change the order of custom sections:

1. Click **ADMN > Custom Data > Custom Section Order**. The Custom Section Order page is displayed, as [Figure 3–80](#) shows.

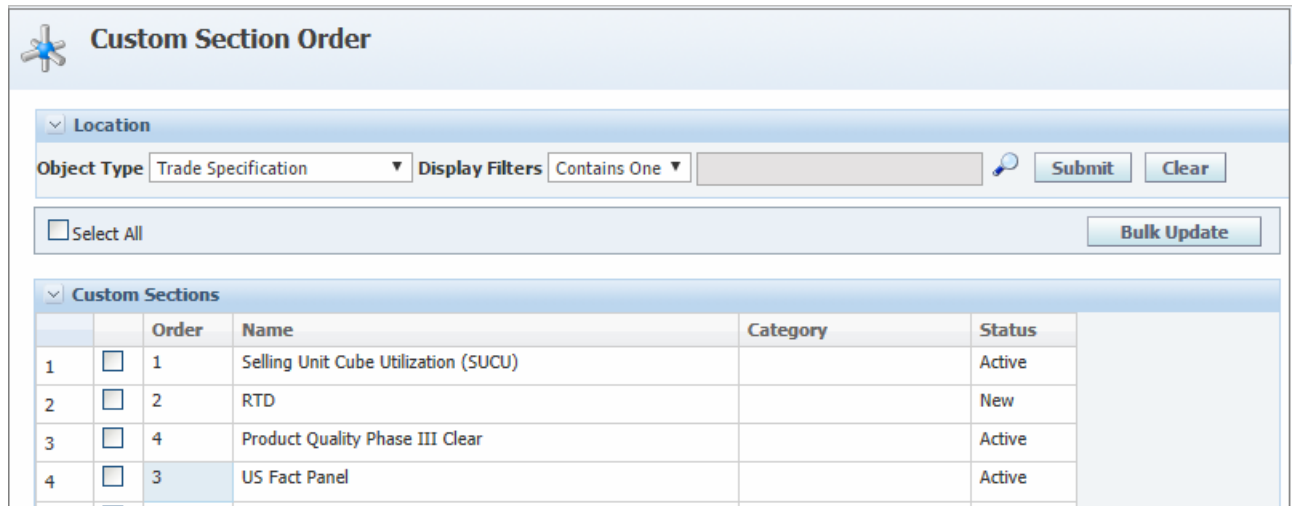
**Figure 3–80 Custom Section Order page**

Custom Section Order				
Location				
Object Type		Activity Specification ▼		
Display Filters		Contains One ▼		
		<input type="button" value="Submit"/> <input type="button" value="Clear"/>		
Custom Sections				
	Order	Name	Category	Status
1	1	Numico - Physical-chemical General		Active
2	2	Adhesives - Time / Temperature		Active
3	3	Contaminants and Residues		Active

2. Select an object type from the **Object Type** drop-down list. All custom sections available in that object type are displayed in the **Name** column. The **Status** column displays the current status.
3. If needed, use the Display Filters selection to view only the new and active custom sections. You can change the sort order by clicking the linked column names.
4. Click **Edit**.
5. In the **Order** column, set the order of display by assigning a number to each custom section, as [Figure 3–81](#) shows.



Figure 3–81 Order column in edit mode



**Custom Section Order**

Location

Object Type: Trade Specification Display Filters: Contains One Submit Clear

☐ Select All Bulk Update

Custom Sections

		Order	Name	Category	Status
1	<input type="checkbox"/>	1	Selling Unit Cube Utilization (SUCU)		Active
2	<input type="checkbox"/>	2	RTD		New
3	<input type="checkbox"/>	4	Product Quality Phase III Clear		Active
4	<input type="checkbox"/>	3	US Fact Panel		Active

6. Click **Save**.
7. To set the custom section order for another object type, repeat step 2 through step 7.

---

**Note:** When new custom sections are added, they are displayed at the bottom of this list.

---



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## Using CACHE to Manage Caches

This chapter explains the cache management feature. Topics in this chapter include:

- [Scheduling Data Cache Flushes](#)
- [Using the Cache Application](#)

### Scheduling Data Cache Flushes

Caches are temporary storage areas for frequently or recently accessed data. Caches must be routinely flushed. Modified data that belongs to one process must be written out of the cache to main memory so that the cache can be used by another process.

The CACHE (Manage Data Caches) application provides administrators with an application for managing data caches. You can access the CACHE application on the left navigation panel. For more information see "[Using the Cache Application](#)" on page 4-3.

You should flush caches after the following activities:

- After creating/editing/importing users using the UGM application
- After creating/editing/importing groups using the UGM application
- After creating/editing/importing workflows using the WFA application
- After creating/editing data using the ADMN application
- After creating/editing core data using the ADMN application

### Workflow Groups and Workflows

When creating workflow groups and workflows, flush the cache after you have completed each of the following steps:

- After creating/editing workflow groups in UGM
- When creating workflow groups in UGM, after adding or changing assigned roles to the groups

---

**Warning:** When creating new workflow groups in UGM, be sure to flush the cache before adding new users to the group to avoid encountering system issues.

---

- After creating workflows in WFA
- Before exporting workflows or workflow groups from the staging environment to the production environment

- After importing workflows or workflow groups into the production environment from the staging environment

## Data Administration

When working in the ADMN (Manage Core Data) application, flush the cache after you have created/edited any data using the ADMN application. You must also flush the cache from the production environment after you have exported completed data changes from a staging environment to a production environment.

For example, flush the cache as follows:

- After creating/editing extended attribute groups
- After creating/editing extended attributes
- After creating/editing sections (customer-specific data)
- After creating/editing taxonomies
- After creating/editing any core data

## Using the Cache Application

Access the CACHE application by selecting **CACHE** from the left navigation panel. By default, CACHE displays the Schedule Cache Flush page, as [Figure 4-1](#) shows.

**Figure 4-1** Schedule Cache Flush page

**Schedule Cache Flush**

Select Cache Group:  
Taxonomy ▼

Select a Date and Time:

≤ January 2017 ≥

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

8 : 46 PM

**Schedule Cache Flush**

**Scheduled Cache Flush Queue** **Refresh**

Flush Request	Cache Group	Requested By
<a href="#">Oct 21, 2014 3:18 PM</a>	Extended Attributes / Custom Sections	Markus Stone
<a href="#">Oct 21, 2014 3:14 PM</a>	Extended Attributes / Custom Sections	Markus Stone
<a href="#">Oct 07, 2014 10:11 PM</a>	Workflow Cache Group	Markus Stone
<a href="#">Oct 07, 2014 10:11 PM</a>	Extended Attributes / Custom Sections	Markus Stone
<a href="#">Sep 30, 2014 9:53 AM</a>	Extended Attributes / Custom Sections	Markus Stone
<a href="#">Sep 30, 2014 7:30 AM</a>	Extended Attributes / Custom Sections	Markus Stone
<a href="#">Oct 01, 2014 7:30 AM</a>	Extended Attributes / Custom Sections	Markus Stone
<a href="#">Oct 01, 2014 7:30 AM</a>	Admin Data Cache Group	Markus Stone
<a href="#">Sep 30, 2014 12:33 AM</a>	Workflow Cache Group	Markus Stone
<a href="#">Sep 28, 2014 10:04 PM</a>	Workflow Cache Group	Markus Stone

1 2 3 4 5 6 7

**Refresh**

The Select Cache Group drop-down list contains several cache flush selections:

- **Taxonomy**—Select this option to flush the taxonomy cache after you have made changes to any tree lists/taxonomies using the ADMN (Manage Core Data) application.
- **Workflow Cache Group**—Select this option to flush the workflow cache after you have made workflow changes using the WFA (Workflow Administration) application.
- **User Cache Group**—Select this option to flush the user/group cache after you have made user/group changes using the UGM (User Group Management) application.
- **Admin Data Cache Group**—Select this option to flush the administrator data cache after you have made core data changes using the ADMN (Manage Core Data) application. This option is used for all ADMN data changes other than taxonomies, extended attributes, and custom sections. These data types have their own cache flush groups.

- **Extended Attributes / Custom Sections**—Select this option to flush the extended attributes/ sections cache after you have made extended attribute/ section changes using the ADMN (Manage Core Data) application.

After you have selected a cache group from the drop-down list, use the **Select a Date and Time** feature to schedule your cache flush.

When you have made your selection, click **Schedule Cache Flush**.

## Scheduled Cache Flush Queue

This section displays a queue showing scheduled cache flushes has been added. The queue shows which applications have been flushed, and indicates whether each execution was successful.

---

# Using Performance Logging

This chapter explains the performance logging feature. Topics in this chapter include:

- [Overview](#)
- [Enabling Performance Logging](#)
- [Performance Log File](#)
- [Performance Analysis](#)

## Overview

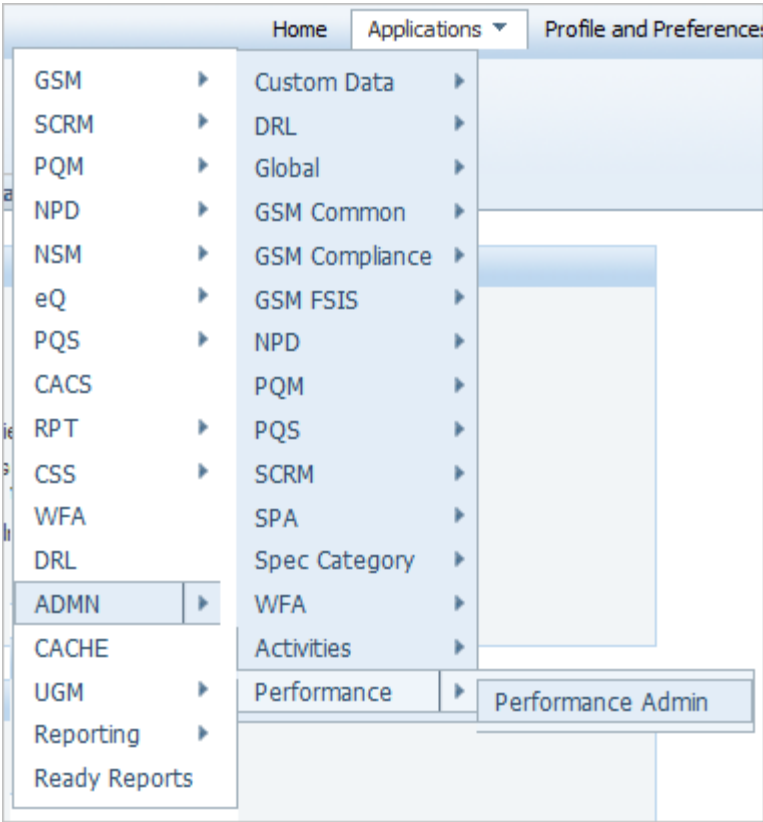
Performance Logging is a feature that helps troubleshoot performance issues. When enabled, a .csv file will be created on the server with detailed performance information about activities performed on the system. When this feature is enabled, there is little impact to the user's experience, however, we recommend only enabling it while troubleshooting.

## Enabling Performance Logging

By default Performance Logging is disabled. Follow these steps to enable performance logging:

1. Assign the [PERFORMANCE\_ADMIN] role to a group of users designated as performance administrators. Follow your normal UGM process for assigning the new role, including export and import, if necessary. Refer to the *Agile Product Lifecycle Management for Process User Group Management User Guide* for instructions.
2. With the admin user that has the above role, login to PLM for Process. If already logged in, then logout and re-login to have the new role respected. Open the Performance Admin UI by navigating to the Performance Admin menu item from the portal navigation, as [Figure 5–1](#) shows below.

Figure 5–1 Menu navigation



3. In the Performance Admin dialog box, set the **Enabled Flag** to “True”.

Refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for more details on performance logging configurations.

## Performance Log File

The location of the performance log file can be configured on the Performance Admin UI by setting the Log File Path field. The default is "%PRODIKA\_HOME%\Logs\\".

The name of the performance log file is "PLM4P\_Performance\_Log\_0".csv. When the file reaches a certain size or if the file is locked, preventing it from being written to, another log file is created with the "0" incremented.

## Performance Analysis

### Logging the Action

If an area of the application has been identified as poor performing, for example, slow response time, then Performance Logging should be used to capture the execution detail. If possible, isolate the use case to a single user performing a single UI action. For example, save a specification.

To log the action detail, follow these steps:

1. Make sure Performance Logging is turned on and test that the log file is being written to.



2. Have a user navigate to the location in the application just prior to the user action that will be analyzed.
3. Wait until the performance log file is updated. The frequency in which this file is updated is configured in the Admin UI with the **Log Frequency (in seconds)**: field. The default is 30 seconds.
4. Delete the performance log file.
5. Have the user perform the action.
6. Wait until the log file is updated.
7. Create a copy of the log file. Do NOT open this file directly as this will lock the file.
8. Open the copied file with an appropriate application such as Microsoft Excel.
9. Check to see if the action the user performed was captured. This can be accomplished by looking at the first column in the file called **Root Event**. If you are uncertain, then wait another 30 seconds and copy the file once again and open it.

## Interpreting the Data

Most of the data in the log file is intended to be analyzed by an Agile PLM for Process developer, though customers can use this data to determine if any SQL is executing slowly. To analyze SQL, see the ["Finding SQL Performance Issues"](#) section below.

The other area that can be used by the customer is for capturing the execution of custom code. Most extensibility points have a line in the log file that represents this custom code. There is a lot of data in the log file and the explanation is beyond the scope of this document, so to keep it simple just look at the columns titled **Event Type** and **DurationInMilliseconds**. This information tells you how long that item took, in milliseconds.

If you want Oracle to investigate the issue in more detail, please go through Oracle Support and upload the spreadsheet to a service request.

## Finding SQL Performance Issues

Poor performance can often be attributed to poor performing SQL. The execution time for SQL depends on many factors such as, network traffic and bandwidth, amount of data retrieved, amount of data in the database tables and hardware specifications. Sometimes execution time of SQL can be improved by the addition of indexes. Because the need for indexes is specific to the customers' implementation, it is their responsibility to ensure the proper indexes are present. Oracle provides some out-of-the box indexes that are useful to the majority of customers but additional indexes should be created by the customer. Performance Logging is a tool that can simplify the identification of inefficient SQL.

Much of the SQL executed by the application is captured in the log file on lines that have "SQL" in the **Event Type** column. The **DurationInMilliseconds** column shows the time in milliseconds, taken to execute the SQL. The **Details** column displays the actual SQL executed. This column should be looked at to find any potential SQL issues. This assumes the network between the PLM for Process web/application server and the database server is not an issue.

First it is easiest to find any single SQL statement that exceeds an acceptable duration threshold. This threshold varies between implementations. A general rule of thumb is to investigate anything over 200ms.

Next it would be useful to look at all similar SQL statements where the combined time is large.

Once all the SQL statements are identified as a potential issue, a database administrator should do further analysis to determine if the addition of indexes might help. Note that adding indexes can drastically help performance, but adding too many unnecessary ones could hurt performance. Retesting after the indexes are added should be performed to ensure the addition produces the desired improvements.

## User Interface and Field Definitions

Figure 5–2 below shows the Performance Admin user interface.

**Figure 5–2 Performance Admin page**

The Performance Admin page contains the following fields:

- **Enabled**—Indicates whether or not the performance logger is enabled. It only logs data when set to “True”.
- **Log File Path**—The directory path to the location of the log file.
- **Log Frequency (in seconds)**—The frequency in which the logger writes to the log file.
- **Sample Rate**—If it is desired that user activity in general should be logged without targeting an identified area that needs improvements, it is likely that not every user action needs to be logged and instead a sampling can be logged. The Sample Rate determines at what interval to capture the user’s actions. For example, when set to **0** or **1** every action is logged. When set to **2** every 2nd action is logged and the others are ignored. When set to **3** every 3rd action is logged, and so on. This allows for less of a performance impact and less data captured.
- **Default Rollup**—Rollup can be used to combine all events of the same name and parent, onto one line instead of multiple lines in the log file. The

**Occurrences** column shows the number of times the event was executed. This helps reduce the size of the log file.

This value is the default value for all event types and can be configured individually for each event in the event grid.

- **Default Duration Filter (in milliseconds)**—Duration Filter can be used to filter out events (lines in the log file, not user actions) that do not take longer than a given duration threshold. For instance if you are not interested in seeing any event that takes under 50ms, then set this field to 50. Only events with a duration of greater than 50 are shown. This helps reduce the size of the log file.

This value is the default value for all event types and can be configured individually for each event in the event grid. A value of **-1** in the Duration Filter of the individual event indicates that the default should be used.



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## Using Bulk Actions

This chapter explains the bulk change feature. Topics in this chapter include:

- [Overview](#)
- [Using GSM Change Owner](#)
- [Using GSM Refresh Hierarchy](#)

### Overview

The following bulk actions are available:

**GSM Change Owner**—Allows you to change the workflow owners on GSM specifications in batch.

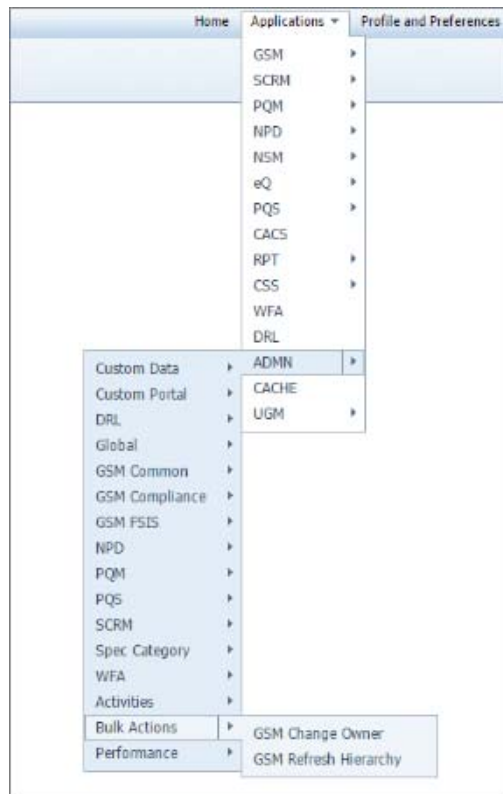
**GSM Refresh Hierarchy**—Allows you to refresh GSM Formulation Hierarchies in batch.

### Using GSM Change Owner

GSM Change Owner allows you to remove or add workflow owners to specifications in batch.

Users must have the ADMN site access role [DATA\_ADMIN] or [SUPER\_DATA\_ADMIN] and the [CHANGE\_OWNER] role to access the GSM Change Owner bulk action.

Navigate to GSM Change Owner by using the Bulk Actions menu item from the portal navigation, as [Figure 6–1](#) shows below.

**Figure 6–1 Menu navigation**

PLM for Process displays the GSM Change Owner page.

## GSM Change Owner Page

Figure 6–2 below shows the GSM Change Owner user interface.

**Figure 6–2 GSM Change Owner page**

**GSM Change Owner**

Initiate Change

File:  Browse...

Description:

Template Download Schedule Change

Change Queue

Name	Description	Submitted By	Date Submitted	Date Completed	Status	
<a href="#">PatrickBUChange-2.xlsx</a>	Removing Randal	Patrick Rodika	Mar 30, 2017 10:17:31 AM	Mar 30, 2017 10:17:53 AM	<span style="color: green;">■</span> 1/1	<span style="color: red;">✗</span>
<a href="#">PatrickBUChange.xlsx</a>	Patrick taking over for Randal	Patrick Rodika	Mar 30, 2017 9:59:59 AM	Mar 30, 2017 10:05:16 AM	<span style="color: green;">■</span> 9/9	<span style="color: red;">✗</span>

Refresh

■ In Progress
■ Completed
■ Not Imported

Sections in the GSM Change Owner page include Initiate Change and Change Queue.

## Initiate Change Section

The Initiate Change section contains the following fields:

- **File**—Click **Browse** to select an Excel file containing the fields required for bulk change.
- **Description**—Enter notes about this bulk update request. Reason for change is a common use case for this field.

To schedule a bulk update:

1. Click the **Template Download** button to download the Change Owner Excel template. The template contains the following fields:

**Specification #**—Specification number and issue number to be updated. This field is required.

**Current Owner to Replace (User)**—Users currently assigned as the specification owner you would like to remove. Specify users by user login names. This field is optional.

**Current Owner to Replace (Group)**—Groups currently assigned as the specification owner you would like to **remove**. Specify groups by full name. This field is optional.

**New Owner (User)**—Users you would like to add as specification owner. Specify users by user login name. This field is optional.

**New Owner (Group)**—Groups you would like to add as specification owner. Specify groups by full name. This field is optional.

Use a semicolon to separate multiple entries.

2. Click **Browse** to select your completed change owner excel template. Specify a description.
3. Click **Schedule Change**. The update request is added to the Change Queue and set to the status of “In Progress”. Remoting Container will pick up this request and perform the update.

After the request is processed:

- Owners will be added/removed from selected specifications.
- Each specification’s event history is updated with the change.
- An email is sent to the new owner, listing the specifications they are now the owner of.
- Status on the Change Queue table will be updated.

## Change Queue Section

This table lists bulk changes that have been scheduled and includes the following fields:

**Name**—Uploaded file name. Click the link to review the Excel file that has been uploaded.

**Description**—Description of the change request.

**Submitted By**—Name of user who submitted request.

**Date Submitted**—Date of submission.

**Date Completed**—Date of completion.

**Status**—Status of the request. When the request is in the waiting list, the status is amber with [0/total number]; when the request is completed and all items were run successfully, the status is green with [number success/total number]; when the request is completed and one or more of the items fail, the status is red with [number success/total number].

## Using GSM Refresh Hierarchy

GSM Refresh Hierarchy allows you to refresh to GSM formulation hierarchies in batch.

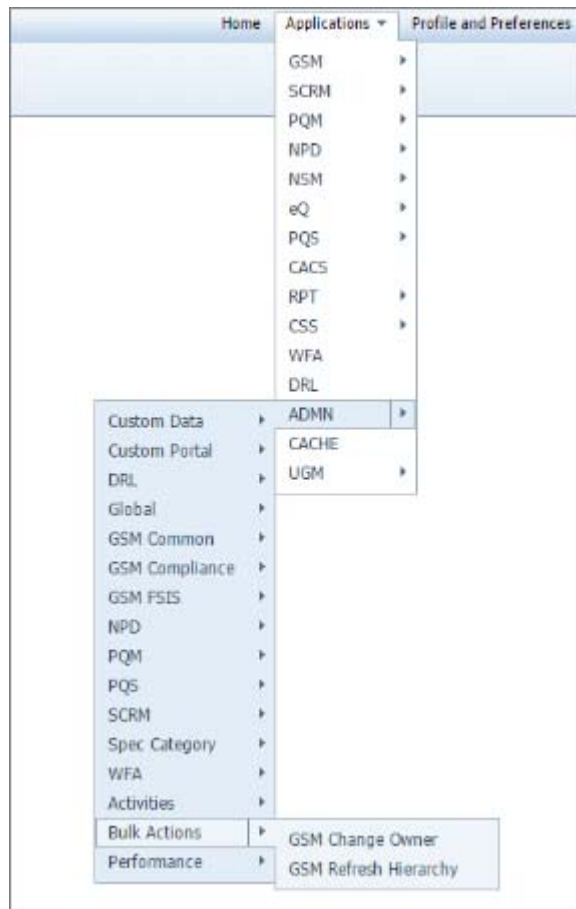
This action will find the formulation specifications you provide and refresh all formulation specifications below it within its hierarchy. You only need to provide the top level specification of the hierarchy you would like to refresh.

This tool should be used with caution and only be given to a small set of trusted users. Hierarchy Refresh will recalculate and push all new theoretical output attributes regardless of workflow status or edit permissions. This action will potentially change material attributes throughout the hierarchy.

Users must have the ADMN site access role [DATA\_ADMIN] or [SUPER\_DATA\_ADMIN] and the [FRM\_REFRESH\_HIERARCHY] role to access the GSM Refresh Hierarchy bulk action.

Navigate to GSM Refresh Hierarchy by using the **Bulk Actions > GSM Refresh** Hierarchy menu item from the portal navigation, as [Figure 6–3](#) shows below.

**Figure 6–3 Menu navigation**

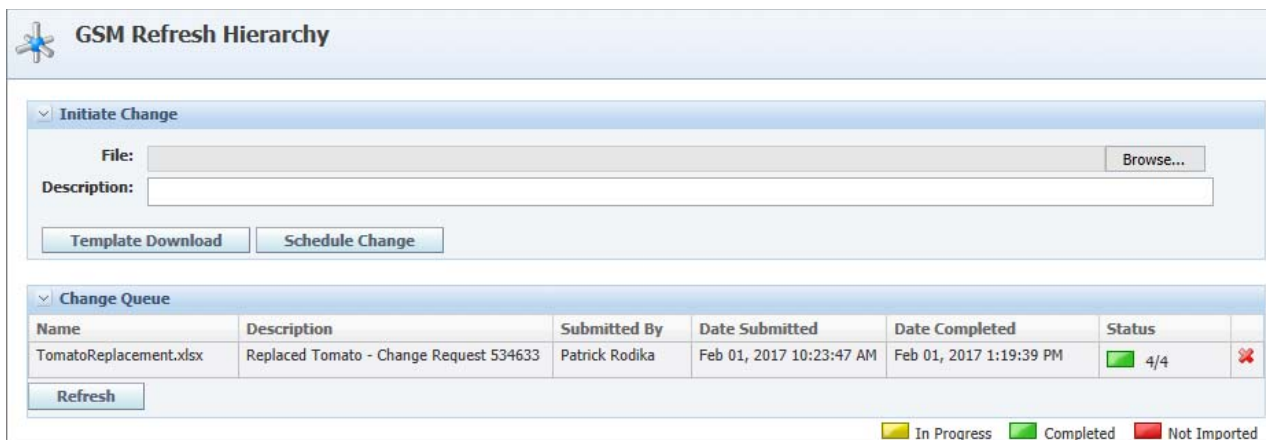




## Refresh Hierarchy Bulk Page

Figure 6–2 below shows the Refresh Hierarchy user interface.

Figure 6–4 Refresh Hierarchy Bulk page



**GSM Refresh Hierarchy**

**Initiate Change**

File:  Browse...

Description:

Template Download Schedule Change

**Change Queue**

Name	Description	Submitted By	Date Submitted	Date Completed	Status	
TomatoReplacement.xlsx	Replaced Tomato - Change Request 534633	Patrick Rodika	Feb 01, 2017 10:23:47 AM	Feb 01, 2017 1:19:39 PM	Completed 4/4	

Refresh

In Progress Completed Not Imported

Sections in the Refresh Hierarchy Bulk page include Initiate Change and Change Queue.

### Initiate Change Section

The Initiate Change section contains the following fields:

- **File**—Click **Browse** to select an Excel file containing fields required for bulk refresh.
- **Description**—Enter notes about this request.

To schedule a bulk hierarchy refresh:

1. Click the **Template Download** button to download the Hierarchy Refresh Excel template. The template contains a single field:  
**Specification #**—Specification number and issue number of the hierarchy you would like to refresh. You only need to provide the top most formulation specification of the hierarchy you would like to refresh.
2. Click **Browse** to select your completed hierarchy refresh Excel template. Specify a description.
3. Click **Schedule Change**. The refresh request is added to the Change Queue.

After the request is made:

- All lower level input materials of the provided specification hierarchies will be refreshed.
- All calculated theoretical attributes will be pushed to owned output materials.
- All lower level input materials within the hierarchy are refreshed.
- The refresh date on affected input materials is updated.
- Change Queue status is updated.

### Change Queue Section

This table lists bulk changes that have been scheduled and includes the following fields:

**Name**—Uploaded file name.

**Description**—Description of the file.

**Submitted By**—Name of user who submitted request.

**Date Submitted**—Date of submission.

**Date Completed**—Date of completion.

**Status**—Status of the request. When the request is in waiting list, the status is amber with [0/total number]; when the request is completed and all items run successfully, the status is green with [number success/total number]; when the request is completed and one or more of the items fail, the status is red with [number success/total number].

## InFoods IDs

This appendix includes information on:

- [InFoods IDs](#)

### InFoods IDs

The following InFoods IDs are currently available in GSM for use in calculated attributes.

*Table A-1 InFoods IDs*

Name	InFoods ID	UNID	Sequence ID
ALCOHOL	ALC	ALC	520
AOAC Fibre	FIBTG	FIBTG	60
ASH	ASH	ASH	210
CALCIUM	CA	CA	350
CALORIES	ENERC_KCAL	ENERC_KCAL	10
CARBOHYDRATES (AVAILABLE)	CHOAVL	CHOAVL	45
CARBOHYDRATES	CHOCDF	CHOCDF	40
CAROTENE	CARTB	CARTB	490
CASEIN (Nx6.38)	CASN	CASN	34
CHLORIDE	CLD	CLD	354
CHOLESTEROL	CHOLE	CHOLE	190
CHOLINE	CHOLN	CHOLN	435
CHOLINE CHLORIDE	CHOLNCLD	CHOLNCLD	440
CHROMIUM	CR	CR	357
COBALAMIN-B12	VITB12	VITB12	280
COPPER	CU	CU	450
d-BIOTIN	BIOT	BIOT	430
DIETARY FIBER	FIBTS	FIBTS	50
Energy kJ	ENERC_KJ	ENERC_KJ	20
FOLIC ACID	FOLAC	FOLAC	320
FRUCTOSE	FRUS	FRUS	530

**Table A-1 InFoods IDs**

<b>Name</b>	<b>InFoods ID</b>	<b>UNID</b>	<b>Sequence ID</b>
<b>GLUCOSE</b>	GLUS	GLUS	85
<b>IODINE</b>	ID	ID	360
<b>IRON</b>	FE	FE	370
<b>LACTOSE</b>	LACS	LACS	97
<b>LYCOPENE</b>	LYCPN	LYCPN	540
<b>MAGNESIUM</b>	MG	MG	380
<b>MALTOSE</b>	MALS	MALS	94
<b>MANGANESE</b>	MN	MN	480
<b>MOLYBDENUM</b>	MO	MO	485
<b>MONOUNSATURATED FAT</b>	FAMS	FAMS	140
<b>NIACIN-B3</b>	NIA	NIA	250
<b>POTENTIAL NIACIN</b>	NIAEQ	NIAEQ	260
<b>NITROGEN</b>	NAM	NAM	500
<b>OLIGOSACCHARIDES</b>	OLSAC	OLSAC	65
<b>OMEGA-3</b>	F18D3N3	F18D3NS	160
<b>OMEGA-6</b>	F18D3N6	F18D3N6	170
<b>ORGANIC ACIDS</b>	ORGACD	ORGACD	110
<b>PANTHOTHENIC</b>	PANTAC	PANTAC	340
<b>PHOSPHORUS</b>	P	P	390
<b>POLYOLS</b>	POLYOLS	POLYOLS	215
<b>POLYUNSATURATED FAT</b>	FAPU	FAPU	150
<b>POTASSIUM</b>	K	K	400
<b>PROTEIN</b>	PROCNT	PROCNT	30
<b>PROTEIN (Nx6.25)</b>	PROCNT_NX625	PROCNTx625	32
<b>PYRIDOXINE - B6</b>	VITB6A	VITB6A	270
<b>RIBOFLAVIN - B2</b>	RIBF	RIBF	240
<b>SATURATED FAT</b>	FASAT	FASAT	130
<b>SELENIUM</b>	SE	SE	460
<b>SODIUM</b>	NA	NA	410
<b>STARCH</b>	STARCH	STARCH	510
<b>SUCROSE</b>	SUCS	SUCS	92
<b>SUGARS: DI</b>	SUGARDI	SUGARDI	90
<b>SUGARS: MONO</b>	SUGARMO	SUGARMO	80
<b>SUGARS: OTHER</b>	SUGARM	SUGARM	100
<b>TAURINE</b>	TAU	TAU	470
<b>THIAMIN - B1</b>	THIA	THIA	230
<b>TOTAL FAT</b>	FAT	FAT	120

**Table A–1 InFoods IDs**

<b>Name</b>	<b>InFoods ID</b>	<b>UNID</b>	<b>Sequence ID</b>
<b>TOTAL SOLIDS</b>	TTLSOLID	TTLSOLID	205
<b>TOTAL SUGAR</b>	SUGAR	SUGAR	70
<b>TRANS FATTY ACID</b>	FATRNL	FATRNL	180
<b>VITAMIN A - IU</b>	VITA_IU	VITA_IU	223
<b>VITAMIN A - TOTAL</b>	VITA-	VITA-	220
<b>VITAMIN C</b>	VITC	VITC	290
<b>VITAMIN D</b>	VITD-	VITD-	300
<b>VITAMIN E</b>	VITE	VITE	310
<b>VITAMIN K</b>	VITK	VITK	330
<b>WHEY (NX6.38)</b>	WHEY	WHEY	37
<b>ZINC</b>	ZN	ZN	420

