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September 29, 2007
# Revisions

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<td>All</td>
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Prodika PLM Documentation

Oracle’s Prodika documentation set includes user guides, an administrator’s guide, and release notes, all in Adobe® Acrobat™ PDF format. The Oracle Documentation Web site contains the latest versions of the Prodika product lifecycle management (PLM) PDF files. You can view or download these manuals from the Web site, or you can ask your Prodika administrator if there is a Prodika PLM Documentation folder available on your network from which you can access the Prodika documentation (PDF) files. Visit the Oracle documentation Web site at:

http://www.oracle.com/technology/documentation/index.html

Note  The minimum software requirement for reading the PDF files is Adobe Reader™ version 6.0. You can download this free program from www.adobe.com.

If you need additional assistance or information, please contact support@agile.com or phone (408) 284-3900 for assistance.

Before calling Agile Support about a problem with an Agile PLM manual, please have ready the full part number, which is located on the title page.

Audience

This user guide is intended for food and beverage industry staff who are responsible for creating and editing specifications in Prodika PLM. Information about administering the system resides in the Prodika Product Lifecycle Management Administrator’s Guide.

Variability of Prodika Installations

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

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

Consult the table below to find specific information from the relevant Prodika PLM information source.

Table 1: Prodika PLM documentation topics, by source

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<tr>
<th>Information type</th>
<th>CACS User Guide</th>
<th>PLM Admin. Guide</th>
<th>Readme file</th>
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Readme

Any last-minute information about Prodika PLM can be found in the Readme file on the Oracle documentation Web site (http://www.oracle.com/technology/documentation/index.html).

Oracle/Agile Training

Oracle’s Agile offers end user, administrator, developer, and implementation training courses. For more information, contact your Oracle/Agile project manager or sales representative.
**Document Conventions**

The following formatting elements appear in Prodika PLM documentation.

<table>
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<th>Element</th>
<th>Meaning</th>
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<td><strong>Helvetica Condensed, 9 pt. bold type</strong></td>
<td>A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.</td>
</tr>
<tr>
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<td>Code samples</td>
</tr>
<tr>
<td>10 pt. monospace font</td>
<td>File names or directory names</td>
</tr>
<tr>
<td><strong>Blue italic font</strong></td>
<td>The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.</td>
</tr>
<tr>
<td>Minion Typeface, Title Case</td>
<td>A named UI element that a procedure is describing but not instructing you to click, select, or type into.</td>
</tr>
<tr>
<td><strong>Note</strong> Minion 11.5 pt, with faint blue bar over &amp; under</td>
<td>Alerts you to supplemental information.</td>
</tr>
<tr>
<td><strong>Caution!</strong> Minion 11.5 pt, with faint red bar over &amp; under</td>
<td>Alerts you to possible data loss, breaches of security, or other more serious problems.</td>
</tr>
<tr>
<td><strong>Important</strong> Minion 11.5 pt, with thick red bar over &amp; under</td>
<td>Alerts you to supplementary information that is essential to the completion of a task.</td>
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</table>
CHAPTER 1

Introduction

This chapter presents an overview of Prodika PLM 5.1 and describes a few basic features. Topics in this chapter include:

- Computer Aided Compliance Screening Application
- Application Touch Points
- Getting Started with Computer Aided Compliance Screening

Computer Aided Compliance Screening Application

Computer Aided Compliance Screening (CACS) is a configurable solution that enables companies to inspect materials for fitness against any number of user-defined screens. These screens can include regulatory, market-driven, or customer-driven constraints and can be nested to enable more complex screening scenarios. The constraints are designed around compliance standards, usage approval, nutritional attributes, and user-defined data that can be captured through the use of extended attributes.

CACS screens can be applied on up to three levels: raw materials, intermediate materials, and top level materials. The screens are available during the product development lifecycle. This can help you to achieve early detection of compliance issues and potentially save on development, rework, recalls, and withdrawal costs.

When running a compliance screen, users obtain feedback on compliance issues in the User Interface (UI) through a red/green color code. Users can then examine the results to search for the root causes of compliance deviations.

New in Computer Aided Compliance Screening 5.1

CACS now supports the screening of extended attributes, including calculated extended attributes.

Application Touch Points

CACS is integrated with several types of specifications in Global Specification Management (GSM) and with Design Workbench (DWB) specifications. CACS is available throughout the product development lifecycle.
GSM
Compliance screens can be run against the following specification types in GSM:

- Trade specifications
- Process specifications
- Menu Item specifications
- Product specifications
- Ingredient specifications

DWB
Compliance screens are run against DWB specifications.

Getting Started with Computer Aided Compliance Screening

Accessing CACS

To access the CACS application, select CACS from the left navigation panel, shown in figure 1-1 below, or select CACS from the applications top menu bar.

Figure 1-1: Selecting CACS from left navigation panel

For general information on using Oracle’s Prodika Product Lifecycle Management software, see the Prodika Product Lifecycle Management Getting Started Guide.
CHAPTER 2

Using Computer Aided Compliance Screening

This chapter describes the capabilities and applied uses of the Computer Aided Compliance Screening product. It includes the following topics:

- Creating a New Compliance Screen
- Running Screens Against Specifications

Creating a New Compliance Screen

Compliance screens are created and managed inside the CACS application. A new screen is created by clicking Create New.

Figure 2-1: Computer Aided Compliance Screening Search page

Screens are composed of three tabs: Summary, CACS Constraints, and Related Screens.

Summary

The Summary tab of a CACS screen provides additional information that helps uniquely identify the screen when you are searching using the search form. The tab also identifies where the screen is available to be used for compliance checking in other applications. Figure 2-2 shows the Summary tab.
The Summary Information section consists of the following fields:

- **Title**—The user-defined title of the screen
- **Screen #**—A system-defined number associated with this screen
- **Description**—The user-defined description of the screen
- **Available In**—The specifications that are able to use the screen

When you create a new screen, Title is the only field required to save the screen. Once you have completed the title, click the **CACS Constraints** tab.

**Note** If the Available In data is not provided, the screen being created will not be available to run against specifications in GSM or DWB.

### CACS Constraints

The CACS Constraints tab is where you provide the parameters, or rules, that a specification must comply with in order to pass the screening process.

Constraints are built around the following parameters:

- Presence and/or concentration of allergens, additives, and sensitivities (intolerances)
- Country of origin
- General compliance (i.e. kosher, non-GM, organic, vegan, etc.)
- Nutrient levels
- Specification attributes
- Known usage restrictions (i.e. business unit, country, etc.)
- Custom attributes (using extended attributes)

Figure 2-3 on the next page shows the CACS Constraints tab.
To add a new constraint, identify which type of constraint needs to be added and then click **Add New** under the desired section. Each constraint category has a unique configuration.

For each compliance constraint, do the following:

1. Select a compliance attribute from the CACS Attributes drop-down list.
2. Define the value for the attribute in the Value field.
3. Set the constraint on the value in the Constraint fields.

These actions are reflected below in figure 2-4.

Once you have completed the setup for the constraint, select the green apply icon (✓) to save the new constraint. For example, you might want to make sure there is no peanut or peanut oil in your specification. To set up a constraint verifying this, create a screen and add the following constraint:

- CACS Attribute—KTC Allergen (Known to Contain Allergen)
- Value—Peanut / Peanut Oil
- Constraint = 0
When a specification is investigated with this screen, if there is any value defined on the specification for Peanut / Peanut Oil other than 0, this constraint would fail. As figure 2-5 shows below, for usage approval constraints, you will add a compliance attribute, define some combination of business unit, country, and concept and finally, set the constraint on the value.

Figure 2-5: Usage Approval Constraints section

Once you have completed the setup for the constraint, select the green apply icon (✓) to save the new constraint. For example, you might want to make sure that all the specifications in a formulation are approved for use in Canada. To make sure that is the case, create a screen and add the following constraint:

- CACS Attribute—AFUI Country (Approved for Use in Country)
- Country—Canada
- Constraint = 100

When a specification is investigated with this screen, if there is any specification in the formula that is not approved for use in Canada, the constraint would fail.

For nutrient constraints, add a nutrient item and set the constraint on the nutrient, as figure 2-6 show below.

Figure 2-6: Nutrient Constraints section

Once you have completed the setup for the constraint, select the green apply icon (✓) to save the new constraint. For example, you might want to make sure there is at least 10g of Vitamin C in a formula. To ensure that is the case, create a screen and add the following constraint:

- Nutrient—Vitamin C
- Constraint >= 10g

When a specification is investigated with this screen, if the formula has a Vitamin C content that is less than 10g/100g, the constraint will fail.

For extended attribute constraints, add an extended attribute type and set the value on the extended attribute, as figure 2-7 shows on the next page.
Once you have completed the setup for the constraint, select the green apply icon (✓) to save the new constraint. The constraint varies based on the type of attribute you are using, but the results are returned similarly to all other constraints.

You can add multiple constraints to any given screen.

### Lower Level Screens

CACS screens are nested within a given screen to enable you to create complex screening scenarios in a modular way. To link a screen to the screen that you are creating, click **Add New** and use the CACS searching capability to select the screens that you want to nest. Figure 2-8 shows the Lower Level Screens section and the Add New button.

*Note*  When the screen is investigating a specification, it will return the results for all nested screens at the same time.

### Related Screens

The Related Screens tab shows parent screens based on the relationship established in the Lower Level Screens control. When a screen is added as a lower level screen, it displays the specification that it was added to as a parent screen when you are looking at it individually.

### Running Screens Against Specifications

In order to investigate a specification using a compliance screen, you must first select the specification to investigate. Once you access the specification, click **CACS**. This action opens a dialog box that you use to set up the review parameters for screening.
CACS Review Parameters

CACS review parameters define the rules of investigation for the system. You must select the scope of the investigation and the screens to use. Figure 2-9 shows the CACS Review Parameters section of the tab.

The scope is the level of the hierarchy that you want to run the screens against. The following levels are available:

- Top Level—Interrogates the specification that you are currently on
- Intermediate Processes—Interrogates any process or menu item specifications that are used within another process or menu item specification.
- Raw Materials—Interrogates the raw materials level of the hierarchy.

![CACS Review Parameters section](image)

**Note** When running nutritional screens on process, trade or menu item specifications, CACS will only screen the nutrient information on the nutrient profile attached to the top level specification. It is not possible to screen nutritional information on a process, trade, or menu item specification below the top level.

The screens are the previously defined rules that you want to use to determine whether the specifications are in line with the compliance rules. You can add screens to this list by clicking the **CACS Screens** link. You will see a dialog box, shown in figure 2-10 on the next page, with all the names of the screens that have been built and that are available to be used in the top level specification type. To include a screen in the compliance check, click the screen name in the left column, then click the move right arrow button ( ). You can select more than one screen by holding down the **Shift** or the **Control** key on your keyboard. You can remove screens from the list by clicking the screen name in the right column and clicking the move left arrow button ( ).
Once you have selected all the screens to be run, click **Done** to return to the screening page. The selected screens appear in a comma-delimited list.

To begin the investigation, click **Review**. The results of the screening will be displayed in the screen results area, as figure 2-11 shows below.
Screen Results/Details

When CACS has finished its review, it will return the results with immediate feedback on compliance issues using a red/green color code. If a constraint has passed, it will be displayed in green. If the constraint has failed, it will be displayed in red. In order to see the details of the constraint results, click the **Details** icon. When you click the icon, a dialog box will be displayed with the constraint details, as figure 2-12 shows below.

![Figure 2-12: CACS Details](image)

The details will contain the specification being screened along with the attribute, value, and levels that were found during investigation of the constraint. This view will help you quickly determine and remedy the root cause of any compliance deviations.