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September 29, 2007
## REVISIONS

<table>
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<th>Date</th>
<th>Pages Affected</th>
<th>Description</th>
</tr>
</thead>
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<td>A</td>
<td>9/29/07</td>
<td>All</td>
<td>Initial release of manual</td>
</tr>
</tbody>
</table>
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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 5.1 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 5.1. 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 5.1 user interface included in this manual may not match your installation. The user interface of Prodika PLM 5.1 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 5.1 information source.

Table 1: Prodika PLM 5.1 documentation topics, by source

<table>
<thead>
<tr>
<th>Information type</th>
<th>Getting Started Guide</th>
<th>PLM Admin. Guide</th>
<th>Readme file</th>
<th>Oracle/Agile training</th>
<th>Agile Help Desk</th>
<th>Oracle/Agile sales rep</th>
</tr>
</thead>
<tbody>
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<td>●</td>
<td>●</td>
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</tr>
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<td>Cache management</td>
<td>●</td>
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<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Core data management</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom data management</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature requests</td>
<td></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group management</td>
<td></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installing Prodika PLM</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Known issues</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last-minute changes</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profiles and preferences</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resolved issues</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Searching for data</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System-based roles</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System requirements</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical support</td>
<td></td>
<td></td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Using PLM applications</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Readme

Any last-minute information about Prodika PLM 5.1 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/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 5.1 documentation.

<table>
<thead>
<tr>
<th>Element</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<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>
<td>9 pt. monospace font</td>
<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></td>
<td>Minion 11.5 pt, with faint blue bar over &amp; under</td>
</tr>
<tr>
<td><strong>Caution!</strong></td>
<td>Minion 11.5 pt, with faint red bar over &amp; under</td>
</tr>
<tr>
<td><strong>Important</strong></td>
<td>Minion 11.5 pt, with thick red bar over &amp; under</td>
</tr>
</tbody>
</table>
This chapter provides an overview of Prodika’s Product Lifecycle Management software. It includes the following topics:
- Overview of Agile Prodika Solution
- Finding Prodika Data
- Profile and Preferences

### Overview of Agile Prodika Solution

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

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

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

### Agile Prodika Applications

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

Table 1-1: Agile Prodika Applications

<table>
<thead>
<tr>
<th>Application</th>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Specifications Management</td>
<td>GSM</td>
<td>Captures the entire product genealogy from ingredients and packaging to finished products, in multiple languages and cultures.</td>
</tr>
<tr>
<td>Supply Chain Relationship</td>
<td>SCRM</td>
<td>Enables technical, quality, and sourcing approval management of suppliers, companies, and facilities.</td>
</tr>
</tbody>
</table>
Table 1-1: Agile Prodika Applications (continued)

<table>
<thead>
<tr>
<th>Application</th>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting</td>
<td>RPT</td>
<td>Provides reporting capabilities on products and suppliers, based on user-defined criteria and reporting templates.</td>
</tr>
<tr>
<td>Content Synchronization and Syndication</td>
<td>CSS</td>
<td>Enables data synchronization to other internal systems and external trading partners and data pools.</td>
</tr>
<tr>
<td>Document Reference Library</td>
<td>DRL</td>
<td>Provides a central location for storing, cataloging, and publishing documents used in the solution. These can be exposed to internal users or external users via the Supplier Portal.</td>
</tr>
<tr>
<td>Formulation and Compliance Applications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Workbench</td>
<td>DWB</td>
<td>Enables the prototyping and design optimization of formulations.</td>
</tr>
<tr>
<td>Computer Aided Compliance Screening</td>
<td>CACS</td>
<td>Provides the ability to analyze and screen products through rules and regulations to ensure their compliance with customer, market, and regulatory constraints.</td>
</tr>
<tr>
<td>Product Quality Scorecard</td>
<td>PQS</td>
<td>Allows management of samples and scorecards to ensure that raw materials and finished good are conforming to specification.</td>
</tr>
<tr>
<td>Nutrition Surveillance Management</td>
<td>NSM</td>
<td>Enables users to capture and manage nutrition surveillance results and compare to nutrition data at the specification level.</td>
</tr>
<tr>
<td>Product Supplier Collaboration Applications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>eQuestionnaire</td>
<td>eQ</td>
<td>Provides users with a tool to obtain specification data from suppliers and manage their disposition in GSM.</td>
</tr>
<tr>
<td>Supplier Portal</td>
<td>SP</td>
<td>Enables suppliers to participate in the process of managing product and vendor data.</td>
</tr>
<tr>
<td>New Product Introduction and Development Applications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Product Development</td>
<td>NPD</td>
<td>Enables cross-functional, cross-location management of new product and packaging development projects from ideation to post-launch.</td>
</tr>
</tbody>
</table>
Finding Prodika Data

There are two basic ways of locating information in Prodika PLM 5.1:

- Searching
- Browsing by taxonomy

This section explores the first method. For guidance on using the browsing method, see *Understanding the Taxonomy Tab* on page 1-10.

Understanding the Search Form

The initial screen in most applications and sections of Prodika PLM 5.1 consists of a search form. The search form (or query tool) has a basic structure but can vary greatly based on application or other factors. See figure 1-2 for an illustration of the basic search form:

Figure 1-2: The basic GSM search form
The search form resides on the Search tab, one of two tabs on most initial screens, the other being Taxonomy (see *Understanding the Taxonomy Tab* on page 1-10). To find a specification using the search form, set search criteria using a combination of three basic fields in the Search Criteria section. As shown in figure 1-2, these fields are:

- Key field
- Operator
- Search term

The main search form includes the following buttons, as shown in figure 1-2:

**Search**—Displays your search results

**Reset**—Clears all search criteria fields

**Save Search**—Saves search criteria in a reusable library. Use this option if you use certain search criteria often (see *Saving Search Criteria* on page 1-7).

**Load Search**—Loads a saved search (see *To retrieve a saved search:* on page 1-8).

As mentioned in figure 1-2, *Improved search function*, on page 1-5, in most Prodika PLM 5.1 search forms, the first two search criteria fields contain a default value, in the case of a trade specification, Spec Name (as shown in figure 1-2, on page 1-3). The top few choices in the drop-down list are considered the most frequently used fields.

**Search Field Definitions**

See table 1-2 for a description of search fields that appear on the main search form.

Table 1-2: Fields on the main search form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key field list</td>
<td>Select from a list of search criteria based on the application menu search option that you chose.</td>
</tr>
<tr>
<td>Operator</td>
<td>Select from a list of operators based on the criteria that you chose in the key field list. A few examples include Equals, Not Equals, Contains, and Starts With.</td>
</tr>
<tr>
<td>Search term</td>
<td>The actual word or words that you are looking for. If this field is preceded by an Add Data icon (+), click it to view a dialog box with available choices. You can also enter a percent sign (%) to perform a wildcard search on a single character.</td>
</tr>
<tr>
<td>Results per page</td>
<td>Sets the number of search results to display at one time.</td>
</tr>
</tbody>
</table>

**Action Links**

In addition to the basic entry fields on the search form—key field list, operator, and search term—two action links appear, as shown in figure 1-3.
Chapter 1 Using Prodika PLM

Figure 1-3: The More Criteria and Additional Attributes action links on the main search form

More Criteria
When clicked, more criteria creates another row of the main three search fields. You can use additional rows to enter additional search parameters.

Additional Attributes
Where available, a second action link, additional attributes, opens the additional attributes dialog box allowing you to search for custom data. The dialog box contains two main sections: Extended Attributes and Custom Section, as shown in figure 1-4.

Figure 1-4: The Additional Attributes dialog box, Extended Attributes and Custom Section section

Searching Custom Data

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

Custom Sections
Custom Sections are configurable sets of extended attributes.
To search for values in a custom section:

1. In the Custom Section section, click **Add New**. A multiple-select popup window appears.
2. Select the Custom Section you want to search in, then click **Done**. Your selections display in the Custom Sections table.
3. Click the edit row icon ( ), shown in figure 1-5, to display the row in edit mode and further define the custom section value.

![Custom Section](image)

4. You must select the row and column where the value may exist. Once the row and column are selected you are able to define the condition and target values. Target fields will vary based on the section + row + column combination you have selected.
5. Click the green apply changes icon ( ✓ ) to save the changes to the row.
6. Click **Done**. The custom section search criteria is added to the search page.

To search for extended attribute values:

1. In the Extended Attributes section, click **Add New**. A multiple-select popup window appears.
2. Select the extended attributes you want to search for, then click **Done**. Your selections display in the Extended Attributes table.
3. Click the edit row icon ( ), shown in figure 1-10, to display the row in edit mode and further define the attribute you added. The target fields will vary based on the extended attribute selected.

![Extended Attributes](image)

4. Click the green apply changes icon ( ✓ ) to save the changes to the row.
5. Click **Done**. The extended attribute is added to the search page, as figure 1-7 shows on the next page.
You can add multiple extended attributes as search criteria.

**Saving Search Criteria**

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

*Note*  Search criteria added using the additional attribute link cannot be saved.

**To save search criteria:**

1. Enter your search criteria as described in *Understanding the Search Form* on page 1-3.
2. Click **Save Search**, as shown in figure 1-8. A **Save Search Criteria As** dialog box displays, as shown in figure 1-9, on page 1-8.
3 Type a descriptive name for the search criteria to save and click **Save**. The dialog box closes, and the search criteria is saved with the name that you provided.

**To retrieve a saved search:**

1 On any search form, click **Load Search**. A dialog box displays, showing a list of all of the searches that you have saved for a particular business object (specification, company, etc), as shown in figure 1-10.

2 Click the hyperlinked name of the saved search to load as shown in figure 1-11, on page 1-8
Exporting Search Results

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

To export search results to a local Excel file:

1. Perform a search. The system displays the search results, as shown in figure 1-12.

Figure 1-12: Search results list

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

Figure 1-13: Click Export to export search results to a file

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

**Note** Search results display in alphabetical order by default. To re-sort results, click any column head and the data redisplays sorted on that column. Click any column head a second time to reverse the sort order based on that column.
Understanding the Taxonomy Tab

The second method of finding data within Prodika PLM is the Taxonomy tab, which resides on the same screen as the main search form for certain applications (see figure 1-14). The Taxonomy tab allows you to navigate through a set of business objects based on their categorization in their particular taxonomy. Visibility of items in the taxonomy search may be limited based on user privileges.

Figure 1-14: Taxonomy tab, as seen from the main search form tab

Profile and Preferences

Use Profile and Preferences to edit and view your settings that span across select applications.

In the Profile and Preferences window, you can change your password (if available), update your contact information, change your language, and set key default values used across select applications.

To access this window, click Profile and Preferences on the top menu, as shown in figure 1-15, below.

Figure 1-15: Location of the Profile and Preferences menu item
The User Preferences dialog box displays, as shown in figure 1-16, below.

Figure 1-16: The User Preferences window.

Legend:
- **UI** User interface
- **UOM** Unit of measure

**Contact Information Fields**

You can update your contact information using the fields below:

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

**Business Units Field**

This is a read only view of the business units you have access to. Business units are assigned by your system administrator.
User Groups Field
This is a read only view of the user groups you are a member of. User groups are assigned by your system administrator.

Preferences Fields
UI Language—This field is used to denote your preferred user interface language. This includes a variety of items such as navigation controls, tab labels, and attribute labels.

Free Text Language—This field is used to denote your preferred language for data you enter into the system.

Global Spec UOM—This field is the default unit of measure selected when adding steps to a process or to a Design Workbench (DWB) specification.

System Code (GSM)—This field designates the default cross reference code to use for the equivalent column in GSM search results.

System Code (SCRM)—This field designates the default cross reference code to use for the equivalent column in SCRM search results.

System Code (GSM) and System Code (SCRM) are hyperlinked to small screens displaying a cascading list of external systems organized by taxonomy.

To select a GSM system code:
1 Click System Code (GSM). A small browser window appears.
2 Click the parent links to display the child links underneath until a list of cross reference systems appear, as shown in figure 1-17, below.

![Cascading list of external system codes](image)

3 Click your desired cross reference system. The small screen closes and the system that you selected appears in the System Code (GSM) field of the Basic Information screen.
4 To delete an existing system code from the Basic Information screen, click the delete icon (🗑️) next to the System Code (GSM) field. The field entry disappears.
5 Click Save & Close at the top right of the screen to save your changes.

Note Changes will take effect the next time that you log in to the system.

The procedure is the same for System Code (SCRM).
Change Password

If password management is enabled, the last link on the Basic Information screen is Change Password.

**To change your password:**

1. Click the **Change Password** link at the bottom of the Basic Information screen. A small Change User Password window opens.
2. Type your **Old Password** and type your new password in the **New Password** and **Confirm Password** fields.
3. Click **Submit**. The new password takes effect after you have saved the revised user profile.