Agile Product Lifecycle Management

Getting Started with
Recipe & Material Workspace

v9.3.1

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Preface

Oracle's Agile PLM documentation set includes Adobe® Acrobat PDF files. The Oracle Technology Network (OTN) Web site http://www.oracle.com/technetwork/documentation/agile-085940.html contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

Note	To read the PDF files, you must use the free Adobe Acrobat Reader version 9.0 or later. This program can be downloaded from the Adobe Web site http://www.adobe.com.

The Oracle Technology Network (OTN) Web site http://www.oracle.com/technetwork/documentation/agile-085940.html can be accessed through **Help** > **Manuals** in both Agile Web Client and Agile Java Client. If you need additional assistance or information, please contact My Oracle Support (https://support.oracle.com) for assistance.

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

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Readme

Any last-minute information about Agile PLM can be found in the Readme file on the Oracle Technology Network (OTN) Web site http://www.oracle.com/technetwork/documentation/agile-085940.html

Agile Training Aids

Go to the Oracle University Web page http://www.oracle.com/education/chooser/selectcountry_new.html for more information on Agile Training offerings.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Chapter 1

Introduction to Agile Recipe & Material Workspace

This chapter includes the following:

Welcome to the *Getting Started with Recipe & Material Workspace.* This manual describes the main features and capabilities of Agile Recipe & Material Workspace (RMW) within the Agile PLM application suite. It describes the concepts, actions, and navigational flows that are used in the RMW solution, and should be considered a starting point for new users of the application.

About this Guide

This manual primarily addresses RMW users who perform various roles within the pharmaceutical drug development process, from early experiments to pilot labs through scale-up. Once the process and recipe is proven, the recipe can be transferred to large scale commercial production. Typical users are Process Scientists, Analysts, Material Managers, Equipment Managers, and others involved in the drug manufacturing processes.

Before you start working in RMW, read this manual to understand the following:

- Concepts and components of RMW.
- Initial actions that you need to perform to begin working with the application, and basic navigation. See Navigating in Agile RMW on page 9.
- Task and workflow management. See Workflow Routings on page 21
- Searching for business objects in RMW. See Searches on page 29.
- Reporting capabilities. See Working with Agile RMW Reports on page 41.
- Standards you can create or associate with material or equipment. Standards can be reused and referenced in a recipe.
- Environmental aspects such as environmental conditions for container storage, or room temperature.

Recipe & Material Workspace Documentation

The complete list of RMW manuals is provided here for the benefit of users and administrators of the RMW solution.

- *Getting Started with Recipe & Material Workspace* — Describes common concepts, basic navigation, searches and workflows. Also covers how to work with reports, standards, and environmental conditions.
- *Recipe & Material Workspace Administrator Guide* — Describes all administration and configuration information including Agile PLM integration requirements.
- *Recipe & Material Workspace Process Management Guide* — Describes the features of the Process module, covering the creation and execution of projects and campaigns, control recipes, and work requests.
- *Recipe & Material Workspace Recipe Management Guide* — Describes the features of the Recipe module, covering the authoring and management of recipes and recipe templates.
- *Recipe & Material Workspace Material Management Guide* — Describes the features of the Materials module, covering how to work with material requests, inventory, and allocation. Also covers how to manage analytical activities.
- *Recipe & Material Workspace Equipment Management Guide* — Describes the features of the Equipment module, covering equipment qualification, loan, lease, and reservation.
- *Recipe & Material Workspace Export/Import Guide* — Describes how to export and import RMW business and administrator objects from a source system to a target system.

RMW is accessed only through the Agile PLM user interface. Refer to the *Getting Started with Agile PLM* along with the *Agile PLM Administrator Guide* for a thorough understanding of PLM processes. The complete set of Agile PLM documentation, including RMW documentation, is available on the Oracle Technology Network (OTN) Web site http://www.oracle.com/technetwork/documentation/agile-085940.html.

An Overview of Agile RMW

RMW is a Web-based solution provided with the Agile PLM suite to cater to the needs of the pharmaceutical development industry. It is made up of several dimensions such as Recipe (Instructions), Equipment, Material, Analytical (Test and Assays), Environment, Standards and People. These dimensions enable drug manufacturers to conduct the preparation, execution and analysis necessary during the scale-up life cycle of a substance across multiple pilot plants, located in disparate geographic locations. It also helps scale up material production in a systematic and reproducible manner.

Key Benefits

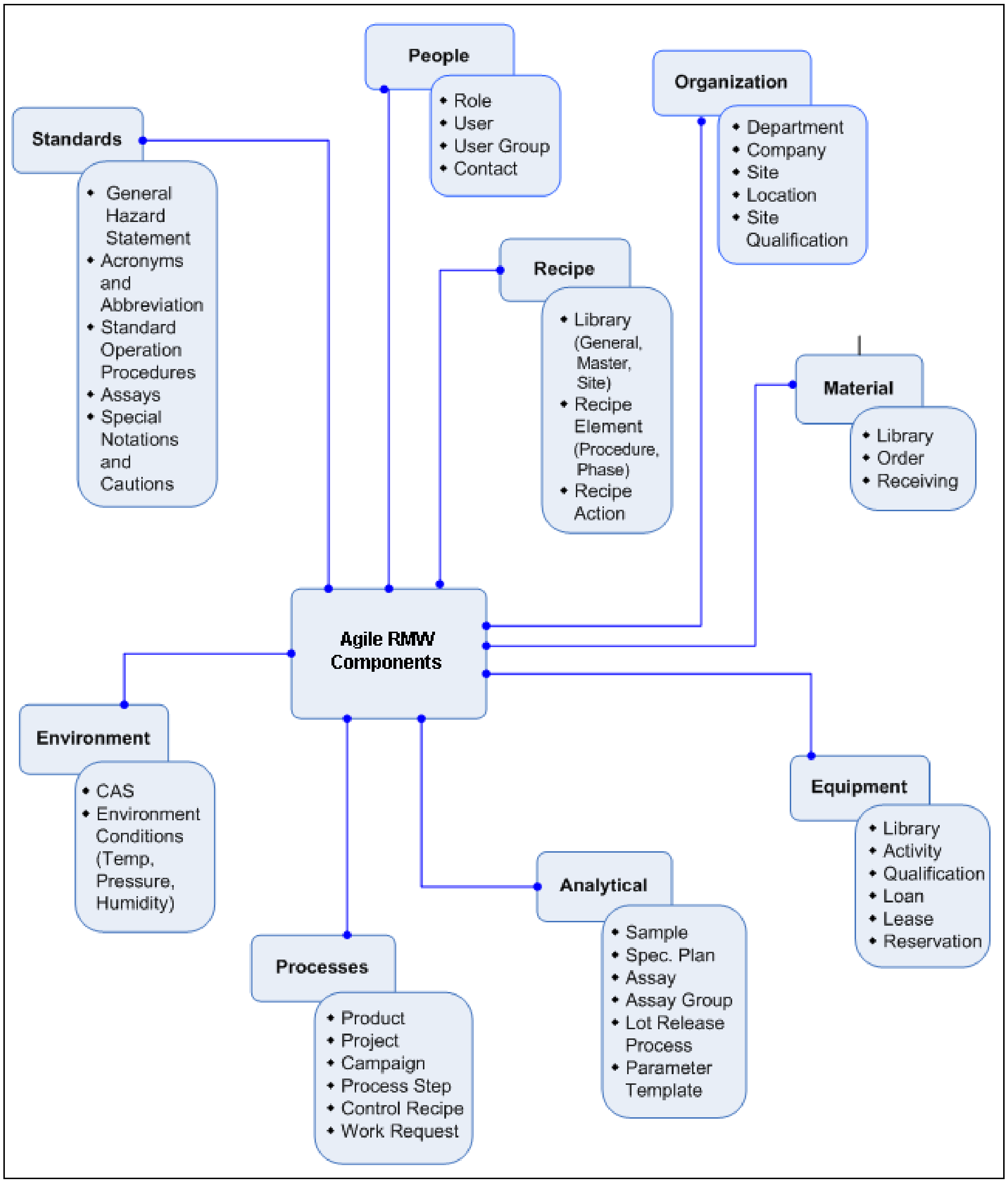
RMW provides an extensive view of all activities involved in drug manufacturing. It allows aggregation of information over the life cycle of a drug product and offers the following benefits:

- Information management of Product Development Lifecycle for drug substance and drug product.
- Planning, execution, and analysis of campaigns, process definitions, and work requests.
- Integrated view of processes, materials, equipment, environment, people, and standards data.
- Conformance to business, science, and compliance metrics.

- Easy access to data in order to enable tech transfers, reviews, submissions, collaborations, and distributed operations.
- Consolidated views of lots, campaigns, and so on.
- Product development record, creation of transaction traces (or material chain of custody,) material genealogy archives, and recipe genealogy archives.
- Secure role based access for all.
- Role management that defines various roles for access to the system.
- Efficient streamlining of work using alert management.
- Compliance for CFR Pact 11 through audit trials.
- Custom workflows support.
- Metamodeling ability to define and build a classification hierarchy for the custom object sets for Material, Equipment, and Standards.

RMW Components

RMW covers the entire lifecycle of a drug product from the lab to its commercial launch. The following diagram shows the major components of RMW.



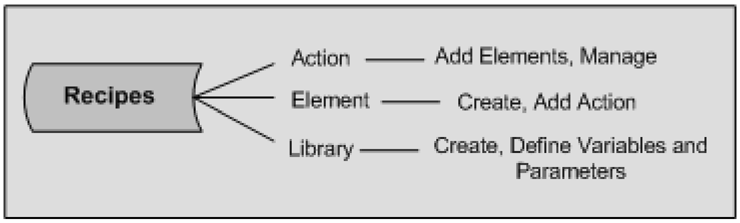
The capabilities of each component are described in the following topic. For detailed information and instructions on how to use these components effectively for your business process, see the relevant user guide of each component. Refer to the section, "Recipe and Material Workspace Documentation" to locate the relevant user guide.

An Overview of Agile RMW

Here is a brief description of each component appearing in RMW.

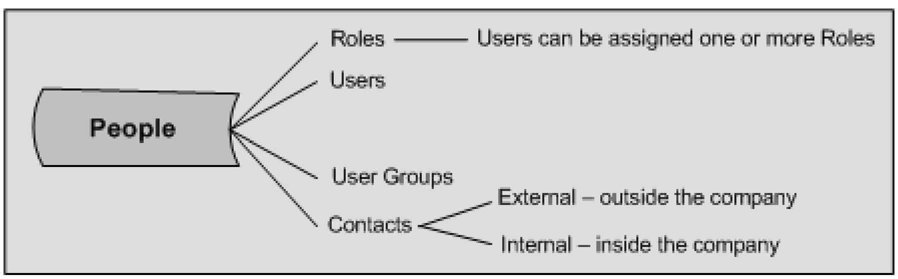
Recipes

A Recipe contains the minimum set of information about the developmental requirements of a specific product. Recipes generally include instructions about gathering and combining raw material, the type of equipment to be used, and processes to be followed to create the target product. For details, see *Recipe & Material Workspace Recipe Management Guide*.



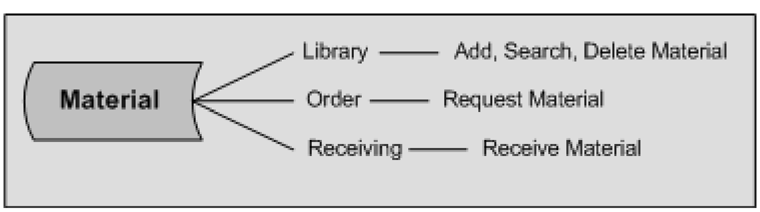
People

People Management enables you to set up users, roles, user groups, and contacts. This is done by the administrator.



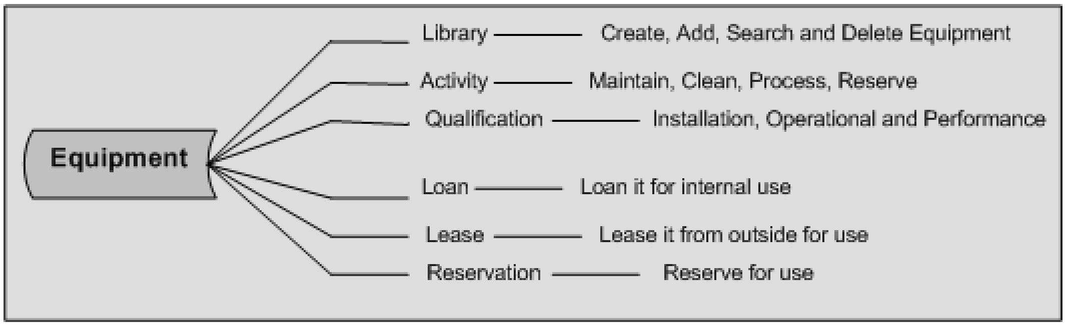
Material

Material Management enables you to classify and organize material used in the development process and track various inventory transactions. The system is similar to an ERP system, tracking resources in a fast-paced, changing development environment. The ultimate goal is to create a recipe which is well proven in a development area, before transferring to commercial operations. For details, see *Recipe & Material Workspace Material Management Guide.*



Equipment

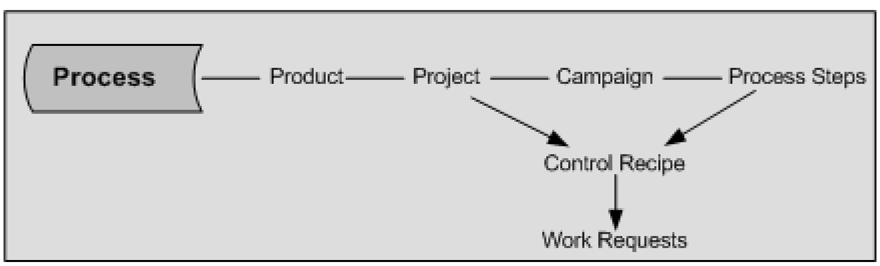
Equipment Management enables you to add, modify, search, and view equipment. Equipment can have contaminants that can affect the process. It is crucial to track the state of readiness of the equipment by performing various activities on it, such as cleaning, calibrating, and reserving. For details, see *Recipe & Material Workspace Equipment Management Guide.*



Process

Process Management aims at creating a Work Request, using information derived from a Recipe. A Work Request ultimately results in the material being made and placed into Inventory.

A Process can have several components - Product, Project, Campaign, Process Steps, Control Recipe and Work Request. Within a Project, you can have several campaigns which are small projects to track and make materials. For each campaign, you can create process steps, which can result in several lots being made. Each lot is planned using a Control Recipe and eventually completed with a Work Request. For details, see *Recipe & Material Workspace Process Management Guide.*



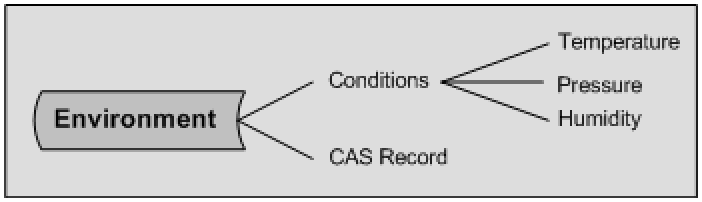
Standards

Standards enable you to create and maintain a library of predefined statements relating to safety, caution, and other general instructions for a manufacturing process. They can be embedded as variables in the text or instructions within a Recipe Action. You can also resolve these variables to a specific standard based on project or campaign requirement. It also comprises of acronyms and abbreviations used in the industry or organization.

Environmental

Environmental conditions enable you to track compliance against mandated environmental requirements of regulatory agencies.

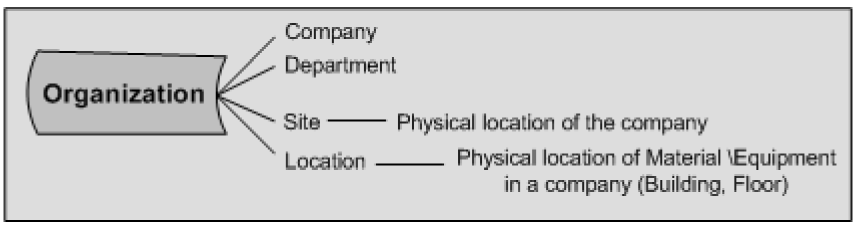
You can use environment conditions to ensure that the container of material is stored as per recommendation. For example, to ensure that a material sample is stored in a specified environment to prevent its deterioration.



Organization

Organization Management enables you to identify and associate RMW objects to geographical entities. An Organization houses multiple Companies, a Company is made of one or more Sites and one or more Locations make a Site.

Throughout the system, the Site entity is used for receiving materials (into a location), for planning the details within a control recipe (identifying the location from which you can consume material), and completing the work request (identifying the location where you can place the newly made material).



Chapter 2

Navigating in Agile RMW

This chapter includes the following:

Logging into RMW

RMW is one of the solutions of Agile PLM. You can access the RMW application *only* if you log in to Agile PLM with the necessary privileges. For details about logging in to Agile PLM, see the chapter 'Navigating in Agile Web Client' in *Getting Started with Agile PLM.*

To access RMW:

1. Log in to Agile PLM.
2. In the left navigation pane, click **Tools and Settings**.
3. Select **Recipe & Material Workspace**.

The RMW application appears, displaying the Home page. The Home page includes the Top pane, Navigation pane on the left and the Content pane.

To return to Agile PLM:

1. Click **Tools and Settings**.
2. Select **Product Collaboration**. You are back on the Agile PLM Home page.

To log out of RMW:

1. Click the **Logout** button on the left navigation pane.

Note	Logging out of RMW logs you out of Agile PLM as well. To return to RMW, you will have to log in again to Agile PLM.

My Preferences

You can personalize default settings to suit your requirements and set preferences using the **My Preferences** button, which appears on the left navigation pane of the Home page. You can view and edit settings in **My Preferences**. The profile displays in the content pane.

- **General**: General preferences such as company name, date, time, number formats and other basic factors required to set up and run the application.
- **Home page**: Specify the tables you want to display on the **Home** page.

To set general preferences:

1. Log in to the RMW application.
2. Click **My Preferences** on the Navigation pane toolbar.
3. In the General tab, click **Change** to change the Primary Site. The Site details are displayed.
4. Select a site from the tree view.

   Note By default, all the sites under the parent site selected by the user are assumed to be permitted and hence do not allow explicit selection.

   Privilege flag set can be selected for site privilege assignment. In the Tree view, selection of a site is disabled, grayed, or not displayed for the following reasons:

   - It is a non-privileged site but is displayed to show the hierarchy of the privilege sites.
   - A site with no child and no privilege does not display on the screen.
5. To change the password, click the **Change** link next to the **Password** field. More fields requesting password confirmation appear.
6. Enter values in the **Old Password**, **Password** and **Confirm Password** fields.
7. To change **Approval Password**, fill in the fields as above.
8. Click the look-up icon to choose a Default Delegate.
9. Select a user from the search results and click **OK.**

   Note The language field is set by the Agile PLM Administrator and you cannot edit it. By default, the preference is set to English.
10. Choose the **Number Format** and **Time Zone** from the respective menus.

    The date format is set by the Administrator in Product Collaboration. The date format by default is dd-mm-yyyy.
11. Select a **Button Display** from the drop-down list.
12. Select the location to display toolbar buttons from the **Display Toolbar Buttons** drop-down list.
13. Select the number of columns to be displayed on the **Home** page.
14. Click **OK** to confirm, or **Cancel** to cancel the action.

A confirmation message informs you that you have successfully saved user preferences.

To customize the Home page:

The **Home** page tab displays the **Dashboard**, **My Notifications** and **Workflow Routings** tabs. The dashboard displays tables that you choose in the **My Preferences** page. You can view and edit the tables appearing on the **Dashboard** tab.

Example: You select content to display assigned tasks. The **Dashboard** displays all assigned tasks in the selected view, with the selected display name, either as a Table or Tree Table, in the selected number of rows to be displayed at one time.

1. Log in to the RMW application.
2. Click the **My Preferences** button in the navigation pane.
3. Click the **Home** tab.
4. Click **Add Rows**, select data from the drop-down list or enter values.
5. Click **OK.** You return to the **Home** page which displays your latest changes.

A confirmation message informs you that you have successfully customized the RMW **Home** page.

Business Objects in RMW

The table below lists and describes objects as they appear in RMW application.

Name	Description	Business Objects
Recipe	A unique set of information that defines the development requirements for a specific product. For details, see *RMW Recipe Management Guide*.	**Recipe Action**: The lowest level of instruction in a Recipe. **Recipe Element**: RMW allows users to create and manage templates using a set of elements, viz., Phase, Operation, Unit Procedure and Procedure. **Library**: A centralized repository within the system to retrieve data on Recipes.
Process	A sequence of activities intended to lead to a Work Request. For details, see *RMW Process Management Guide*.	**Product**: A completed dosage form that contains a drug substance. **Project**: Involves a group of inter-related activities that are planned and executed in a certain sequence to create a unique product within a specific time frame. **Campaign**: Planning and executing a set of defined process steps to synthesize a target API material. **Control Recipe**: Defines the manufacture of a single batch of a specific product. **Work Request**: Includes materials, equipment, and master recipes that combine to produce one lot of material.
Equipment	A non-depletable resource used in the development process of a product. For details, see *RMW Equipment Management Guide*.	**Library**: A centralized repository within the system to retrieve data on equipment. **Activity**: Activities (calibrating, cleaning) performed on equipment before using it in a process.

Name	Description	Business Objects
		Qualification: Documented evidence that a process or system consistently and reproducibly performs as intended and does what it purports to do. **Loan/Lease**: Lend equipment for internal use/ lease it for use from external sources. **Reservation**: Reserve equipment for a period.
Material	A substance used in the development process of a product. Materials can be chemicals, excipients, solvents, consumables and so on. For details, see *RMW Material Management Guide.*	**Library**: A centralized repository within the system to retrieve data on material. **Order**: A request placed for either material/equipment. **Receiving:** Receipt of Material lots/containers from a Supplier. **Allocation**: Reserve material for a process. **Dispense**: Allot/ transfer material as per request. **Stage**: Weighing the dispensed material before pick up. **Pickup**: Pick up the material ordered by a Process Scientist. **Consume**: Use the ordered material in a process/project/campaign. **Return**: Return unused material. **Disposal**: Disposing material which is contaminated or has exceeded the shelf life. Disposal is done as per EPA rules and regulations, and needs to be tracked carefully. **Inventory**: An itemized list of available stock (Material, Equipment, etc). **Manage Movement:** Movement of Material containers from one location to another. System allows users to track location of containers at all times. **Manage Shipping:** Shipment of Material containers from one location to another. System allows users to ship containers.
Analytical	'Analytical' relates to samples, assays and specification plans. The analytical method is a process used to characterize or detect a chemical or chemical mixture.	**Assay**: Assays are tests that are developed and run to verify the material composition of raw materials, intermediates and final product. **Parameter Template**: Library of parameters (control settings of equipment, material

Name	Description	Business Objects
		characteristics) that can be stored ahead of time in the system as a library. Process scientists use these templates to create recipe actions quickly instead of re-creating them from scratch each time. **Specification Plan**: A list of tests and/or references to analytical procedures, and appropriate acceptance criteria **Sample**: A portion of a specific material that needs to be analyzed and is evaluated against a spec plan. **Lot Release Process**: Process to gather together samples & results and send it to a group of people for final inspection before the formal release.
Standards	Sets standards to follow while creating chemicals keeping in mind the hazards that would ensue.	**Standards**: Predefined statements relating to safety, caution, general instructions in or around a manufacturing process and the acronyms and abbreviations used in the industry and the organization.
People	Internal and external users accessing RMW.	**Role**: Defines responsibilities and actions the User can perform. **User**: Person using RMW and assigned certain roles. **User Group**: Groups which are assigned roles to perform certain functions. **Contact**: People who serve the company directly or indirectly (external or internal).

Name	Description	Business Objects
Organization	An Organization represents the entity that is involved in the development of a product. An Organization can have multiple companies. A company is associated with one or more departments, sites and locations.	**Company**: A company is the first organizational element. You can have more than one company in an organization. You can associate companies with one or more departments, sites and locations. **Site**: A physical location for a company. It is mandatory to create sites while setting up companies. **Location**: Actual physical location of the Equipment/Material within a site. A location belongs to only one site and cannot be moved from one site to another. **Department**: Specific divisions in a company. A department can be assigned to many users but a user can access only one department. **Site Qualification:** Sites are qualified for certain types of materials, or categories of materials.

Creating Objects

You can create new objects using the **Create New** menu on the Top pane toolbar. The menu expands displaying business objects.

Note Creating, modifying, and working with business objects depends on the roles and privileges that you are assigned. For details about roles and privileges, contact the Administrator.

To create an object:

1. Choose any of the objects from the **Create New** menu. The menu expands.
2. Select a business object.
3. Follow instructions and complete the process of creating a new business object.

The object appears in the search results tables of respective categories. Selecting the object activates **Edit, Delete, Save As, Export, Add Note, Add Attachment, Show Deleted Item, Duplicate,** and **Delete** buttons, depending on the category of the object.

Viewing Objects

You can view any of the business objects in RMW using the Quick Search button.

To view objects:

1. In the **Quick Search** field, enter * and click the **Quick Search** button. The search displays results in a table.
2. Click the object ID of an object, to view object details.

Editing Objects

You can edit objects that appear in the search results, provided you have the appropriate **Modify** privileges. Use Quick Search to search for a specific object.

To edit objects:

1. From the search results, select the check box of the object you want to edit. This activates the **Edit** button.
2. Click the **Edit** button. A warning message appears if there are any other objects associated with the object.
3. Click **OK** to continue and **Cancel** to return to the search results page.
4. Make the necessary modifications and click **OK**.

A message confirms the modification.

Duplicating Objects

You can duplicate an object from the object that you have created and save it using a new name. The new object can continue to have all the existing attributes or you can modify it as required (by either deleting existing attributes or adding new attributes).

To duplicate an object:

1. Select an object from the search results.
2. Click the **More** menu.
3. Select **Save As** menu option.
4. In the **Save As** page that appears, enter a new name for the object.
5. To duplicate **Notes** attached to the object, select **Yes**. If not, select **No**.
6. To duplicate **Attachments** attached to the object, select **Yes**. If not, select **No**.

   Note Notes and Attachments are not duplicated by default.

7. To modify or change existing attributes, click the **Save and Edit** button. This opens up the new object for further modification. You can add new attributes or delete existing ones.
8. To save with existing attributes, click **OK**. A message confirms that you have successfully saved the new object.
9. To cancel duplication, click **Cancel**.

Deleting Objects

You can delete objects that you no longer use in RMW provided you have the appropriate privileges. The deleted object does not show up in the search results after deletion.

To delete objects:

1. In the search results, select the check box of the row you want to delete. The **Delete** button is activated.
2. Click **Delete**. The object is deleted. If the object is associated with other objects, a message informs you of the association.

   Note You cannot delete objects associated with other objects.

To view deleted objects:

1. Click the **Show Deleted Items** icon that appears on the search results table.
2. Search results return a list of objects. The **Deleted** column displays the icon <>in the row of the deleted object.

Note	You cannot view details of the deleted objects.

Home Page

The Preferred Start Page setting and the roles and privileges assigned to you by the Administrator determine the contents of the Home page. By default, the Home page displays the following:

Top Pane

- Home page
- Create menu
- Search controls

Navigation Pane

- Courtesy Controls (My Preferences, Tools and Settings, Help, Logout)
- Navigation Drawers (Folders and Reports)

Content pane

The content pane displays tabular data of business objects. Administrator settings govern display in the content pane.

- Dashboard
- My Assignments
- Workflow Routings

Top Pane

The toolbars in the Top pane allow you to perform tasks listed in the following table provided you hold appropriate roles and privileges.

Name	Description
Home	The Home page displays Dashboard, My Notifications and Workflow Routings (by default) based on settings defined by the Administrator.
Create New	Lets you create objects in all classes for which you have privileges.
Quick Search criteria box	Select a class from the menu and enter the search criteria. Searches all objects listed.
Execute a Quick Search	Searches for objects that match the criteria in the text box.
Custom Search	Searches for objects as per the criteria you set in the Custom search page.

Navigation Pane

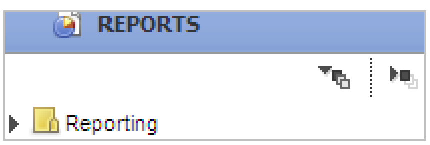
The left pane or the Navigation pane contains the Oracle logo and Collapse and Expand buttons.

Buttons	Name	Description
	My Preferences	Displays your preferences.
	Tools and Settings	Product Collaboration: Returns you to Agile PLM login page
	Help	Help: (Provides access to online documentation (Agile) and Oracle User Productivity Kit).
	Logout	Exits you from the application.

Folders and Reports

The Folders drawer contains sub-folders of Saved Searches. You can access them if you have the necessary roles and privileges. The folder contains searches that you have created and saved.

Click the icon to display all searches. Click icon to hide the searches. Click to display searches in that folder.



The Reports drawer contains reports which you can access if you have the required roles and privileges. You can search for reports and save them for use at a later date, and generate reports.

Click icon to display all reports. Click to hide all reports. Click to display reports in that folder.

You can Hide/Show the navigation pane using these buttons.

Collapse button

- Click the **Collapse** button to hide the Navigation pane.

Expand button

- Click the **Expand** button to show the Navigation pane.

Content Pane

When you click the **Home** page icon on the Top pane it opens with the Content pane. The Content pane displays tabs that the administrator has assigned to you. By default, it displays the following tabs:

- Dashboard on page 18
- My Notifications on page 19
- Workflow Routings on page 21

Dashboard

The **Dashboard** enables you to view and manage information available in the system, as required by you. You can create a number of dashboard tabs and display content in the form of tables (for projects, campaigns, tasks, reports).

Access to view the dashboard is based on roles and privileges assigned to you by the Administrator. Contact the Administrator for details of necessary roles and privileges.

Dashboard tabs are created by the Administrator. The user only has privilege to view the tabs assigned by the administrator.

Configuring the Dashboard

The **Dashboard** tab provides a view of specific data of projects and campaigns and related product information in the form of tables.

The Administrator creates channels and controls visibility of channels. Only users with the appropriate roles and privileges can view the channels. As a user, you can only select from an existing channel which information can be derived for display and where they appear. You can configure and view the information display, provided you hold appropriate privileges.

For details on configuring the **Dashboard** tab, see *RMW Administrator Guide.*

To view the dashboard:

1. Navigate to **My Preferences**> **Home page** tab in the navigation pane.
2. Click **Add Rows**.
3. Select channels you want to display from the menu.
4. Click **OK**.

The channels that you have chosen appear on the **Dashboard** as tabs.

Viewing the Dashboard

The **Dashboard** tab appears on the **Home** page of the RMW application along with **My Notifications** and **Workflow Routings** tabs.

To view the dashboard:

1. Click the **Home** page icon in the top pane to display the Home page. The Dashboard displays tabs depending on the roles and privileges assigned to you by the Administrator.
2. Click the **Dashboard** tab.

3. Click the subject link to open and view it.

Filtering Data on the Dashboard

The **Filter** icon on the **Dashboard** table enables you to create customized views of business objects you are reviewing or managing. You can use the options in the drop-down to filter the view and sort data by pre-defined views. For example: Sort data by different attributes in ascending or descending order.

The **Filter** icon appears on all the dashboard tables. For details, see Views on page 26.

To filter the view of the dashboard:

1. Click the **Dashboard** filter icon which appears on the top right hand corner of the Dashboard.
2. Choose any of the available attributes from the menu.

My Notifications

The **My Notifications** tab on the **Home** page lists action items that require your action and provides you with a set of tools that you can efficiently use to manage them. You can sort, select or view rows in the assignment tables. **My Notifications** tab includes:

- My Notifications on page 19
- My Subscriptions on page 20
- Possible Subscriptions on page 20

My Notifications

My Notifications contain a list of notifications that inform you of actions that you need to take on a pending or initiated task. It also informs you of completion of a task, generation of a report, and trigger actions on a workflow.

To view a notification:

1. Select a notification from the table. This activates action buttons. Action buttons on the notification include:
   - Delete
   - Mark as Unread
   - Mark as Read
   - Show
     - Unread Notifications
     - Read Notifications
     - All Notifications
   - Refresh
   - Export
   - Compare
2. Click the subject hyperlink. The notification displays the details.

To delete a notification:

1. Select a notification from the table.
2. Click **Delete**.

The notification table displays the following attributes:

- **Is Read**: Specifies if the Notification is read or unread.
- **Priority**: Specifies if the priority level is **High**, **Medium**, or **Low**.
- **Subject**: A link which states the title of the notification. Click the subject link to see details.
- **Type**: Type of notification - Informational or Warning.
- **Time of Alert**: Informs you of the time of alert.
- **Alert Name**: Name of the alert.
- **From Subscription**: The Subscription from which you trigger the alert.

My Subscriptions

My Subscriptions lists tasks to which you have subscribed. Notifications are sent to subscribers informing them of alerts for which they are responsible. Alerts are sent to their email address or Dashboards depending on the preference they have set. Refer My Preferences on page 9. Selecting a subscription enables **Edit, Unsubscribe, More, Compare**, and **Export** buttons.

To edit a subscription:

1. Select a subscription and click **Edit** to edit.

   Note You cannot edit mandatory alert subscriptions.

To unsubscribe from a subscription:

1. Select a subscription and click **Unsubscribe** to remove yourself from the list of subscribers.

   Note You cannot unsubscribe from mandatory alert subscriptions.

To export the subscription:

1. Click the **Export** button to export the subscription to any of the following output formats: Microsoft Excel, PDF, HTML, or XML.

Possible Subscriptions

Possible Subscriptions lists tasks to which you can subscribe. Selecting a subscription enables the **Subscribe, Compare,** and **Export** buttons.

To subscribe:

1. Select a subscription from the table and click **Subscribe.**
2. In the **Subscription: New** page,
   1. Enter **Subscription Name**. This is a mandatory field.
   2. Select a priority level from menu. **High, Medium,** or **Low.**
   3. Select the **Email** or **Dashboard** check boxes to indicate the preferred notification methods.
   4. Click **Next.**
   5. Enter condition details.
   6. Click **Finish.**

A message informs you of successful subscription to the alert and it appears in the **My Subscriptions** table.

Workflow Routings

The **Workflow Routings** tab appears on the **Home** page and lists Tasks, Workflows and Notifications that requires review or action. For example, it may list a Task that you need to take action, a Workflow that you need to approve or a Notification alert.

Tasks

Tasks are specific activities that you can distribute among people in an organization and complete over a specific period of time. Along with helping you manage time and resources efficiently and effectively, they also track progress in your schedule. The tabs that you can view in **Tasks** are:

- **Assigned tasks:** Lists Tasks assigned to you.
  - **Pending**: Tasks pending for approval from Approvers/Observers/Reviewers.
  - **Delegated**: Tasks delegated for action to specified delegates.
  - **Completed**: Lists completed tasks.
- **Initiated tasks**: Lists Tasks that you initiate and need to track.
  - **Pending**: Tasks pending for approval from Approvers/Observers/Reviewers.
  - **Completed**: Lists completed tasks.
- **Search**: Searches for tasks.

Viewing Tasks

You can view initiated tasks that are in **Pending** or **Completed** status.

To view initiated tasks:

1. On the **Home** page, click **Workflow Routings** > **Tasks** > **Initiated Tasks.**

   Note Pending tasks display by default.

2. Click **Task ID** to view task details.

To view completed tasks:

1. Click **Completed**, to view tasks that are complete.
2. Click **Task ID** to view task details.

Viewing Assigned Tasks

Tasks are attached to notifications that provide additional information. You can view workflow generated messages that require action and informational messages that do not require action, provided you hold the necessary privileges.

To view assigned tasks:

1. Click **Workflow Routings.**

   Note **Tasks** > **Assigned Tasks** > **Pending Tasks** display by default.

2. Select the **Task ID** link you wish to view. The task opens displaying details.

The **Assigned Tasks** tab also lists the following tasks:

- Delegated
- Completed

To take action on tasks:

1. By default, the Tasks tab displays details of the Pending Tasks assigned to you. The table below describes tabs in the Task: Take Action page.

Tabs	Description
Workflow Progress	It displays the Completed, Current, and Future states of tasks.
Task Details	Gives us details of the task.
Authorized Parties	The tab displays the Primary Party and Backup Party who are authorized to take action on the current state.
Opinions	Opinions and a list of users and optional reviewers.
History	Summary of actions taken and modifications made to the task.

The action buttons on the Task: Take Action page includes the following buttons. In the table below, the action buttons appearing before the Delegate button (Approve, Reject, and Submit, or any other action you choose to take) depends on the actions you can take in the current state.

Action Buttons	Description of the Actions
Approve	Click **Approve,** to move the task to the next state. In the confirmation message that appears, add comments and click **OK**.
Reject	Click **Reject,** to reject the task.
Submit	Select the Task ID and submit the task.
Delegate	Click **Delegate,** to delegate the task to another user. See Delegating Tasks on page 22 for more details.
Get Opinion	Click **Get Opinion**. Click **Add User** and select the user you want an opinion from.
Cancel	Click **Cancel,** to return to the search results page.

Delegating Tasks

You can delegate tasks for necessary action to a specified delegate. Once you delegate a task, you share all e-mails, notifications, and alerts with the delegate. The person to whom you delegate a task cannot re-delegate the task.

To delegate a task:

1. On the Home page, click **Tasks**. By default the Tasks tab displays the pending tasks assigned to you.
2. Select the **Task** you want to delegate.
3. Click **Delegate**.
4. Click the icon and select the User ID of the person to whom you want to delegate the task.
5. Click **OK**.

A message confirms successful delegation.

Workflows

Workflows are a sequence of status changes that an object goes through in a quality control process. You can create workflows if you hold the necessary roles and privileges. You can view, delegate, un-delegate, activate, deactivate, set permission, set status, and search for workflows.

Workflow State is the current status of a workflow at a given point. Standard states include Draft, Release for Review, Approved, Rejected, and On Hold. In addition to these states, you can create your own workflow states.

A component needs to be in an appropriate workflow state before it can move forward. The table below gives you the initial status on creation of workflow for a component and the statuses it can move to.

Menu objects	Active/ Inactive	Initial Status	Possible Statuses	Usable Only if in this State
Recipe	Active	Draft	Draft-Submitted-Approved/Rejected	Any state other than Canceled
Material	Active	Draft	Draft-Submitted-Approved/Rejected	Approved
Equipment	Active	Draft	Draft-Available-Offline-InUse-Hold-ReleaseToProcess-Clean-Retired	Available
Project	Active	Draft	Draft-In Development-In Progress-Completed	In Development

Workflow Actions are actions you can perform on any workflow state. Standard workflow actions include Approve, Delete, Edit, Need More Info, Reject, Save, and Submit. In addition to these operations, you can create your own workflow actions.

The Workflows tab lists the following:

- **My Workflows**: Lists favorite workflows that need approval of Approvers or Reviewers or Observers.
- **Delegated**: Lists workflows you have delegated.
- **Search**: Allows you to search for workflows.

Lifecycle Phase

Lifecycle phase involves the statuses an object goes through from its creation. When you create a material it is in the pending status. Depending on the object, you can move it to the next applicable status. The options in the menu of a lifecycle phase changes according to the current status of the object. Only phases applicable to the object appear in the drop-down list. For example, the lifecycle phase of a material can be changed manually or through a workflow.   A material can be used in a process only if it is in the **Approved** status and you can edit a material only if it is in the **Draft** status.

To change the lifecycle phase of a material:

1. Search **Materials > Library** and select a material record.
2. Click **Change > Lifecycle Phase**.
3. Select an appropriate status:
   - **Draft**, to add a new material.
   - **Submitted**, to submit the material for approval.

- **Approved**, to approve the submitted material. You have to first submit a material before it can be approved.
- **Rejected**, to disapprove the submitted material. You have to first submit a material before it can be rejected.

Viewing Workflows

The **My Workflows** tab lists workflows assigned to you. You can view workflows assigned to you and also workflows delegated by you.

To view workflows:

1. On the Home page, click **Workflow Routings**> **Workflows**.
2. By default, **My Workflows** tab displays a list of initiated workflows.
3. Click **Workflow ID** link to view details.
4. Selecting a workflow activates the **Delegate** and **Export** buttons for that workflow.

Delegating Workflows

Workflow delegation implies assigning your workflow to a specified delegate to take action. You can delegate a task to multiple users and set a start date and an end date for the workflow delegation. Once you delegate a task, you share all e-mails, notifications and alerts with the delegated user. The person to whom you delegate a task cannot re-delegate the task. You can also set a default user to whom you can delegate the task.

To delegate a workflow:

1. On the Home page, click **Workflow Routings**> **Workflows**.
2. Select a workflow and click **Delegate**.
3. Enter information in the required fields:
   - Delegated User: User ID.
   - Starting Date: The day you delegate the task.
   - End Date: The day the task is automatically delegated back to you.
4. Click **OK**.

A pop-up displays a confirmation message.

To retain responsibilities on a delegated workflow tasks before the specified end date, un-delegate the workflow task.

To un-delegate workflows:

1. In the Home page, click **Workflow Routings**> **Workflows**.
2. Select a workflow and click **Un-delegate**.
3. Click **OK**.

A pop-up displays a confirmation message.

Searching for Workflows

You can search for workflows and take required action on them, provided you have the appropriate privileges to access the task. The Task Details pane displays action buttons when you select the Task ID hyperlink of the workflow.

Note Action buttons do not appear on the Workflow, if you do not hold appropriate privileges.

To perform a search for the workflow:

1. In the Home page, click **Workflow Routings**> **Workflows**.
2. In the Workflows tab, click **Search**. The search results return a list of workflows. See also: Searches on page 29.
3. Click the **Workflow ID** or **Workflow Name** link to view details.

Notifications

Notifications can be either informational messages or alerts about actions you need to perform. Alerts also notify you of pending approvals to workflows. Default notifications are sent to Approvers, Reviewers or Observers.

The Notifications tab lists the following:

- **Workflow Notifications**: Notifies you about pending or complete actions that need your attention.
- **Workflow Delegation Notifications**: Notifies you about workflows delegations.

Workflow Notifications

To view workflow notifications:

1. Navigate to **Workflow Routings** > **Notifications** > **Workflow Notifications**. The **Workflow Notifications** displays by default. On selecting a workflow notification, several action buttons are activated.
2. Click the **Task ID** link to view details.

To delete workflow notifications:

1. Select a **Workflow Notification** from the table.
2. Click **Delete**.

Workflow Delegation Notification

To view workflow delegation notifications:

1. Navigate to **Workflow Routings** > **Notifications** > **Workflow Delegation Notifications**. On selecting a Workflow Notification, several action buttons are activated.
2. Click **Task ID** to view details.

To delete workflow delegation notifications:

1. Select a **Workflow Delegation Notification** from the table.
2. Click **Delete.**

Views

Views allow you to customize how you view objects. You can sort search results by pre-defined views. The drop-down list contains all the views which you have saved. The **Views** field appears at the top right corner of the search results table. Use **Views** to sort and display data that you want.

For example: You want to view Sites pertaining to geographical location. In the **Views** field, enter North America. The search results table returns all sites which are in North America.

Tables

A table displays search results (data) arranged in rows and columns. It displays objects that you have sorted initially with the **Default View.** A **Basic View** is also available for each table. You can define multiple personal views and add them to the table. You can select any of the views in the table as your default view.

Viewing Objects in a Table

In RMW, business object details are found in a tabular form. Search results display name and number links of relevant business objects in a table.

Note Object ID is generated by the RMW application.

To view objects in a table:

1. Click the **Name/Number ID** in the table. The object opens displaying details.

   Note Place the cursor over an object to obtain a brief description of the object.

2. Click **Close** to close the dialog.

Filtering Table Views

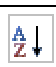
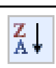
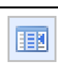
The **Filter** icon enables you to create customized views of data. You can use the options in the drop-down list to filter the view and sort data by pre-defined views. For example: Sort data by different attributes in ascending or descending order.

The filter icon appears on all tables. If not applicable, you can only see a disabled **Filter** icon.

To filter the view on a table:

1. Click the **Filter** icon.
2. Choose any of the available attributes from the menu.

The filter displays the following options:

Icon	Description
	Sorts the data in the table in ascending order.
	Sorts the data in descending order.
	Locks an object. A lock icon appears next to the object, indicating that it is in use. No two users can access the object at the same time.
	Unlocks the object.
	Displays all columns available on the table. Select the check box to display the column and de-select it to hide the column.

Sort Order in Tables

A table is initially sorted according to the **Default View.** A **Base View** is also available for each table. You can define additional personal views for each table, and select any view as your default view.

You can change the sort order of any table. To sort a table, click the column header of the column by which you want to sort. For example, to sort the **Equipment** table by **Equipment ID** click the **Equipment ID** column header. On a search results table, you can sort all columns. Click the column header to sort the table one way and click again to sort it the other way (ascending or descending order).

An indicator in the column header indicates how the table is currently sorted:

	Ascending: The table is sorted by the column attribute in ascending order.
	Descending: The table is sorted by the column attribute in descending order.

Selecting Rows in Tables

You can perform various actions on objects in the table. You can select single rows or multiple rows as required.

- To select a single row, select the check box at the beginning of the row.
- To select multiple rows in a table, select the check box at the left-hand corner of the table.

Selecting rows in tables activates the buttons at the top of the table which allows you to perform various actions.

Chapter 3

Searches

This chapter includes the following:

You can perform a search to find specific RMW related objects, Attachments, Workflows or other information related to RMW. User privileges determine the objects you can search for.

The Folders drawer in the Navigation pane contains Saved Searches. The Saved Searches folder contains several sub-folders.

Saved Searches include searches created and saved for future use; global searches created by the Administrator and pre-defined searches.

To view a search folder:

1. In the Navigation pane of the **Home** page, click **Folders** to display the Search folder. The Search folder has several search sub-folders.
2. Click the **Expand All** icon to display all **Saved Searches**.
3. To view a specific folder, click the icon next to the folder.

Note If you do not have the Discovery and Read privileges for an object, it may not appear in the search results. Some objects may not appear in the search results depending on Administrator settings, roles, and privileges assigned to you. Contact your Administrator for more details.

Types of Searches

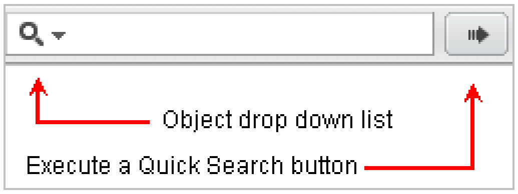
RMW provides you with two types of searches:

- Quick Search: Allows you to quickly locate objects. It searches for objects whose name, number ID, or description matches the set criteria.
- Custom Search: Opens Custom Search page which allows you to run a search using parameters defined by Agile Administrator. You can then run an Advanced Search, defining multiple conditions.

Quick Search

Quick Search helps you locate objects quickly. It searches for objects whose name, number ID, or description matches the set criteria. You require appropriate privileges to search for objects.

The main toolbar on the Top pane contains the **Quick Search** field. It searches by the specific business object that you select in the menu.



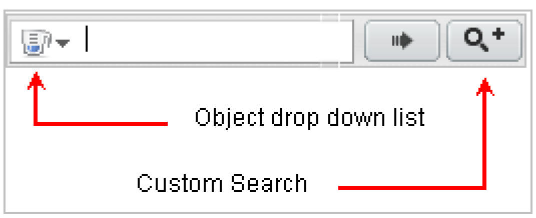
To execute a quick search:

1. Select a business object you want to search from the object menu.
2. Enter a wildcard, or a specific name, or number. The search criteria can be a single word or multiple words, a wildcard and a part of a word or a wildcard and part of a number. Example: It can be *Mat for Material or * 0003.
3. Click the **Execute Search** button. A table displays search results based on the search criteria.

Custom Search

Custom Search allows you to narrow your search for objects by defining additional conditions and filtering the search results.

The Top pane of the main toolbar contains the **Custom Search** button along with the **Quick Search** button.



To execute a custom search:

1. Select an object from the menu in the Top pane toolbar.
2. Click the **Custom Search** button.

   For more information click the **Search Tips** icon. It contains parameters you can use to search for business objects. See also: Search Tips on page 34.
3. Select appropriate values from the menu.
4. From the **View** field, select an appropriate **View**.
5. Click **Search**.

Search results display in a table. Place the cursor over an object link to open a pop-up window that displays important details about the object and allows you to edit, accept, or decline the object.

Adding a Favorite Search

Once you search for an object, you can save the search for use at a later stage.

To save a favorite search:

1. Click the **Custom Search** button.
2. Enter details in any field by which you want to search in the Search pane.

3. Click **Search.**
4. Select a Search from the search results that return.
5. Click **Save**.
6. In the **Save Search As** palette,
    - **Search Name** - Enter a Search Name (mandatory).
    - **Public** - Select **Yes** for the search to be global and **No** for the search to be personal.
7. Click **Save**.

A message confirms the search is saved successfully.

To view the saved search:

1. Click the **Custom Search** button.
2. In the S**earch Recipe** page, click the arrow in the **Load Saved Search** field.
3. Select from the list of saved searches.

The search result appears displaying details.

Selecting a row in the table activates buttons, which allow you to perform tasks. You can also use the filter, which allows you to view relevant information by narrowing the search.

Searching for Records

You can search for a record, save the search criteria and use the saved search.

To search for records:

1. In the **Search** tab, select a search view from the **View** list.
2. You can search in one of the following ways:
    - Enter search criteria in the field and click **Search**.
    - Select the required value from the menu provided. Click **Search**. For details on search values, click **Search Tips** . The search can be saved for use at a later search. To save the search click **Save**.
    - Leave all the fields blank and click **Search**.
      You can use the following search expressions to search.

Expression	Description
Wildcards	
*	Matches zero or more occurrences of the character. For example: API* — All items beginning with API. *API — All items ending with API. *API* — All items containing API.
?	Matches zero or one occurrence of the character. For example, specify ‘admi?’ as your search criteria. The search result is all attributes that have “admi” as a prefix and any one character after that. That is “admin”or “admia”

<table>
<tr><th>Expression</th><th>Description</th></tr>
<tr><td colspan="2">Individual expressions</td></tr>
<tr><td>@</td><td>Null</td></tr>
<tr><td>!@</td><td>Not null</td></tr>
<tr><td>=</td><td>Equal</td></tr>
<tr><td>!=</td><td>Not Equal</td></tr>
<tr><td>></td><td>Greater than</td></tr>
<tr><td><</td><td>Less than</td></tr>
<tr><td>>=</td><td>Greater than or equal</td></tr>
<tr><td><=</td><td>Less than or equal</td></tr>
<tr><td>|</td><td>OR</td></tr>
<tr><td>&</td><td>AND</td></tr>
<tr><td>“'|'”, “'&'”, “'|' and '&'”, “|”, “!=”, “> &<=”(Numerical fields only), “= |= |< &>”(Numerical fields only) Character</td><td>Multipart Expression Examples

'Red'|'Blue' —> Matches Red OR Blue where 'Red' and 'Blue' are individual expressions.

'Ma*'&'Mau*' —> Matches 'Mauve' but not 'Magenta' where 'Ma*' and 'Mau* are individual expressions.

'Red'|'Ma*'&'Mau*' —> Matches 'Red' OR 'Mauve' but not 'Magenta' where 'Red' and 'Ma* and 'Mau*' are individual expressions.

Jack|Jill —> Matches ‘Jack’ OR ‘Jill’

!=Jack&!=Jill —> Matches neither ‘Jack’ nor ‘Jill’

>100&<=120 —> Matches greater than 100 AND less than or equal to 120

=135|=125|<122&>115 — Matches (equal to 135 OR equal to 125 OR (less than 122 AND greater than 115))</td></tr>
<tr><td colspan="2">Ignoring Expression Characters</td></tr>
<tr><td>\</td><td>Use \ to treat the *, +, or ? characters as an ordinary character. For example, *.</td></tr>
</table>

If any of these characters need to be present in a search string, then they should be specified as an escape sequence as shown in the following table.

<table>
<tr><th>Character Sequence</th><th>Escaped Character</th></tr>
<tr><td>@</td><td>\\@</td></tr>
<tr><td>!@</td><td>\\!\\@</td></tr>
<tr><td>=</td><td>\\=</td></tr>
<tr><td>!=</td><td>\\!\\=</td></tr>
<tr><td>></td><td>\\></td></tr>
<tr><td><</td><td>\\<</td></tr>
<tr><td>>=</td><td>\\>\\=</td></tr>
<tr><td><=</td><td>\\<\\=</td></tr>
<tr><td>|</td><td>\\|</td></tr>
<tr><td>&</td><td>\\&</td></tr>
<tr><td>*</td><td>*</td></tr>
<tr><td>?</td><td>\\?</td></tr>
</table>

Records/Results display the list of records based on the search.

To search for objects:

1. Click the **Filter** icon to further reduce the scope of search. For each column, text boxes appear. Enter required values.
2. Click **Filter**. The results appear based on the values.

- You can sort data in each column on **Records/Results** in ascending or descending order. Click on the column header.
- You can also choose the number of records to appear in **Results**. Select the number from the **Results Per Page** menu.
- Buttons on the **Records/Results** page allow you to perform actions such as Add, Edit, Save As and change status for the record.

Note If a search criterion is entered for a numeric field with UOM, user can also select the UOM for the search value from a menu next to the field showing all the valid UOM(s) for the search. The UOM(s) shown in the menu is in the UOMGroup associated with the field and having a simple formula-based conversion. All UOMs having Web service-based conversions will not appear in this menu.

Search Tips

The **Search Tips** palette suggests search values you can use in the search fields while searching for objects in the database. The palette displays details of values you can use to get the best results while searching for objects.

Search Tips

Blank field	This field will not be used to limit the results
Dropdown list set to "(Any)"	This field will not be used to limit the results
Text field with letters or numbers	Only records with this exact value for this field will be shown
Numerical field (numbers only)	Only records with this exact value for this field will be shown. The numerical value is used; if the search field contains "7.000" for example then a record with a field value of 7 and a record with a field value of 7.0 will both be shown.
"*" character	"*" is a wildcard character that can have any value. "A*" will show all records with that field value beginning with "A". "*ide" will show all records with that field value ending in "ide".

Chapter 4

Working with RMW Records

This chapter includes the following:

This section describes the actions that are common to all types of records, irrespective of the RMW solution and business process.

Editing a Record

You can modify the content of the record provided you hold Modify privileges.

To edit a record:

1. In the search results select the row of the desired record.
2. Click **Edit**.

   Wherever applicable, you can edit a record to save as **Current Version** or **As New Version**.

   - Click **Edit > Current Version** to save as current version.
   - Click **Edit > As New Version** to save as a new version.
3. Modify the desired fields and click **OK** to confirm changes.

Note RMW does not support editing of notes and attachments in the **Notes and Attachments** tab. To edit notes and attachments, see Working with Notes on page 36 and Working with Attachments on page 38.

Duplicating a Record

You can duplicate a record and save it with a different name. In the duplicated record, you can use all or most of the attributes (data values) of the original record.

To duplicate a record:

1. From the search results, select a record.
2. Click **Save As** from the **More** menu.
3. In the **Save As** page, enter a new **Name**, modify the **Name;** or click **Clear** to clear the **Name** field.
4. To duplicate notes and attachments, select the **Yes** option. If not, select **No.**

   Note By default, notes and attachments are not duplicated.
5. Click **Save and Edit** to modify the desired attributes.
6. Click **OK** to save the duplicated record. The record retains all existing attributes.

7. Click **Cancel,** to cancel the duplication process.

Deleting a Record

You can delete unused records.

To delete a record:

1. In the search results, select the record you wish to delete.
2. Click **Delete**.

Comparing Records

You can compare various records, wherever applicable.

To compare the records:

1. In the search results, select two or more records.
2. Click **Compare**. In the *Compare Records* page, selected records display rows of all fields for comparison in a tabular format.
3. To drop records click **Delete** in the corresponding record.
4. Click **OK**.

Exporting Records

The **Export** button enables you to export files, folders and object information from RMW into output formats such as Microsoft Excel, PDF, HTML, and XML.

To export a record:

1. In the search results, select a record you want to export. Click the **Export** icon.
2. Select the report format and click **Export**.

Working with Notes

Notes contain additional information or data relevant to the object or process.

Adding Notes

You can add notes to any business object.

To add a note (for the first time):

1. In the search results, select the desired record.
2. Click **Add Note.**
3. Enter the **Subject**.
4. Select the **Type** of note from the menu.
5. Enter content for the **Note**.
6. Click **OK**.

To add a note from the Notes page:

1. In the search results, click the **Notes** button of the desired record. In the *Notes* page, click **Add.**
2. Enter the **Subject.**
3. Select the **Type** of note from the menu.
4. Enter content for the **Note**.
5. Click **OK**.

Deleting Notes

You can delete unused or irrelevant notes.

To delete a note:

1. In the search results, click the **Add Notes** icon of the desired record.
2. In the *Notes* page, select one or more rows of the Notes records. The **Delete** button is activated.
3. Click **Delete**.
4. Click **OK**.

Editing Notes

You can edit notes to modify or change content.

To edit the notes:

1. In the search results, click the **Notes** button of the desired record.
2. Select the row of the **Notes** you wish to edit.
3. Click **Edit** and modify the content in the *Edit Notes* page.
4. Click **OK** to return to the **Notes** page.

Comparing Notes

Notes attached to business objects can be compared to verify data or to check if data differs in versions.

To compare notes:

1. In the search results, select the desired record.
2. Click **Edit** as **Current Version** or **As New Version.**
3. In the *Edit* page, go to **Notes and Attachments** tab.
4. In the **Notes** sub-tab, select two or more rows of the notes you wish to compare.
5. Click **Compare.** In the *Compare Notes* page, the selected records display rows of all fields for comparison in tabular format.
6. To drop the **Notes** you do not wish to compare, click **Delete.**
7. Click **OK** to return to the **Notes** page.

Working with Attachments

Attachments contain additional information or data relevant to the object. These can be URLs, relevant documents, images, compressed files etc. All documents attached to RMW objects use Agile's File Vault.

Adding Attachments

You can add attachments to a business object.

To add an attachment:

1. Search and select the desired record.
2. Click **Add Attachment.**
3. In the *Attachments* page, click **Add**.
4. In the *Add Attachment* page, enter **Name.**
5. Select the **Document Type** from the menu.
6. Enter **Description**.
7. Select the attachment **Source.**
    - If the attachment Source is a File, enter the file path in the **File** field or click **Browse** to pick a file from your system.
    - If the attachment Source is a URL, enter the complete URL in **URL** field.
8. Click **OK** to return to the Attachments page.

Deleting Attachments

You can delete unused and irrelevant attachments.

To delete an attachment:

1. In the search results, click the **Add Attachment** icon in the desired record.
2. In the *Attachments* page, select one or more rows of the Attachment records.
3. Click **Delete**.
4. Click **OK** to return to the search results page.

Editing Attachments

You can edit the Attachment to modify, change or add content.

To edit an attachment:

1. In the search results, click Attachments in the desired record.
2. In the *Attachments* page, select a row of the Attachment records.
3. Click **Edit**.
4. In the *Edit Attachment* page, modify the contents and click **OK** to save.
5. Click **OK** to return to the search results page.

Comparing Attachments

You can compare attachments associated to a particular record with earlier versions, to verify data.

To compare attachments:

1. In the search results, click the **Add Attachment** icon in the desired record.
2. In the *Attachments* page, select one or more rows of the Attachment records.
3. Click **Compare.** In the *Compare Attachment* page, the selected records display rows of all fields for comparison in tabular format.
4. To drop the attachments you do not wish to compare, click **Delete.**
5. Click **OK** to return to the Attachments page.

Working with RMW Reports

This chapter includes the following:

The RMW application provides you predefined queries to generate reports of various activities in the **Environment** and **Material** modules. The output of reports is based on predefined template and is rendered in Excel, PDF, XML, and HTML formats.

The application stores all the reports that you generate. You can view them on-screen, or export them to be stored in your system.

Generating Reports

You can generate reports for various activities performed in the **Environment** and **Material** modules of RMW application.

To generate a report:

1. In the **Left Navigation** menu, open **Reports** drawer.
2. Click **Material Not Used Report** under **Reporting > Material.** Enter values in mandatory fields.

   Note The system records a report request even if you do not complete fields marked mandatory.

3. Click **Lookup** icon to search and select desired values. Enter values in the optional fields.
4. Click **Generate Report.**
5. Click **OK.**

A message confirms that the request for a report is successful.

Managing Reports

The RMW application stores all the reports that you generate. You can view these reports on-screen or export them to be saved on your system. For complete details on how to export the reports, refer to Exporting Records on page 36. You can access generated reports from **Manage**.

To view a report:

1. In the **Left Navigation p**ane, open the Reports drawer.
2. In **Reporting,** click **Manage**.
3. In the **Report Request** page, select the desired parameters and click **Search**.
4. In the **Results in Report Request**, click the desired report to view on the screen.

   You can save this report in your system by exporting to a desired format.

To delete a report:

1. Search and select the report you wish to delete.
2. Click **Delete.**

Environment Reports

The following **Environment** Reports can be generated in the RMW application:

Name	Description
SARA 311/312 Report	SARA 311/312 is Section 311 or 312 of Environmental Protection Agency's Superfund Amendments Reauthorization Act. Section 311 requires that hazardous chemicals with Material Safety Data Sheet as prescribed by Occupational Safety and Health Administration (OSHA) be stored in specific environments. A list of such chemicals must be submitted to the concerned authorities. Section 312 requires that the emergency and hazardous chemical inventory form, called Tier II form, is submitted annually. Tier II forms provide the following information for each substance: ▫ The chemical name or the common name as indicated on the MSDS. ▫ An estimate (in ranges) of the maximum amount of the chemical present at any time during the preceding calendar year and the average daily amount. ▫ A brief description of the hazards and manner of storage of the chemical. ▫ The location of the chemical at the facility. ▫ An indication of whether the owner elects to withhold location information from disclosure to the public. The SARA 311/312 report uses information from RMW Daily Material Inventory. It includes storage details of the chemical. This report lists out all material inventory for the site/location for a given time period.

Material Reports

The following Material Reports can be generated in the RMW application:

Name	Description
Restock Report	The Restock Report provides details of all materials in the Material Inventory at the selected site where the Quantity Available is less than the Inventory Restock Level. Material Manager uses this report to take decision on restocking of the inventory.
The Material Not Used Report	The Material Not Used Report is used for tracking all the material lots that were not used since a specified date. This report helps the Material Managers to know the materials that are not being used and hence can be freed up from the inventory.
Material Dispensing and Adjustment Report	The Material Dispensing and Adjustment Report provides details of all inventory adjustment transactions, such as dispenses and corrections for each Lot or Container. You have to specify the Lot ID.

Name	Description
Lots without Dispensing Activity Report	The Lots without Dispensing Activity Report provides details of all the lots that remained without dispensing activity during a specified date range.
Containers without Dispensing Activity Report	The Containers without Dispensing Activity Report provides the details of all the Containers that remained without dispensing activity during a specified date range.
Daily Inventory Report	The Daily Inventory Report provides the balances of the specified Materials or all the materials in the inventory on a given day. Material field is mandatory.
Daily Inventory by CAS/TPQ Report	The Daily Inventory by CAS/TPQ Report provides the balances of Materials by their CAS (Chemical Abstract Service) and Threshold Planning Quantity.

Chapter 6

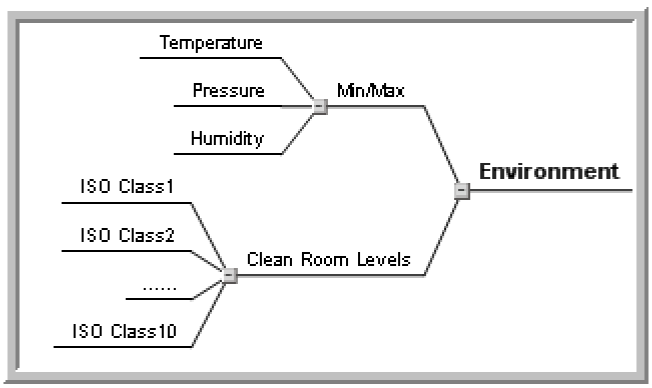
Working with RMW Environment

This chapter includes the following:

When you create a new material, you need to specify its storage environment. This is used to prepare the SARA 311/312 report, where each material's storage condition over a period of time is reviewed and reported.

A storage environment constitutes of:

- Ambient Conditions - Temperature, pressure, humidity and clean room levels.
- Chemical Abstract Service (CAS) number.



Creating a New Environmental Condition

Environmental conditions are specified at the time of material definition, to ensure material containers are stored as per conditions specified. RMW records environment and storage conditions specified for the materials. You can add new environment conditions and manage them.

To create new environmental condition:

1. From the **Create New** menu, select **Environmental > Condition.**
2. In the **General** tab, enter the information.

   Significant inputs:

   - Name
   - Clean Room Levels
   - Min. Temperature
   - Max Temperature
   - Min. Pressure
   - Max. Pressure

- Min. Humidity
- Max. Humidity

3. Click **Finish**.

Working with Chemical Abstract Service (CAS)

CAS indicates the constituents of a material and is a part of material definition. RMW provides recording and retrieval details of Chemical Abstract Services (CAS) for materials. For details, see *RMW Material Management Guide*.

Creating a New CAS

To add a CAS record:

1. From the **Create New** menu, select **Environmental > CAS.**
2. In the **General** tab, enter the unique Chemical Abstract Service Number of the chemical.

   Significant points to note:

   - **CAS Number** - Enter a unique number for the chemical.
   - **CAS Name** - Enter a unique name of the chemical.
   - **Mass Balance Required Flag** - Select **Yes** if you require Mass Balance report for this material.
   - **SARA 312/EPCRA TPQ** - Select **Yes** if the Inventory quantity limit for the material is set by Superfund Amendments Reauthorization Act, Section 312 regulation.

     EPCRA stands for Emergency Planning and Community Right-to-Know Act.
   - **Is Tracked By SARA 302** - Select **Yes** if the material is in Environmental Protection Agency's Superfund Amendments Reauthorization Act, Section 302.
   - **SARA 313 Reportable Flag** - Select **Yes** if the material is listed in Environmental Protection Agency's Superfund Amendments Reauthorization Act, Section 313.
   - **OSHA Reportable Flag** - Select **Yes** if the material is listed in Occupational Safety and Health Administration.
   - **OSHA TPQ** - Enter the inventory quantity limit for the material as set by Occupational Safety and Health Administration and select a unit of measurement.
   - **OSHA TPQ Alert %** - Specify the percentage of amount in the inventory at which the RMW should send alerts.
   - **HAP Flag** - Select **Yes** if the material is a Hazardous Air Pollutant. If you select Yes this CAS ID appears in the Air Emissions report.
   - **CERCLA TPQ -** Enter the inventory quantity limit for the material that is set by Comprehensive Environmental Response, Compensation, and Liability Act.
   - **VOC Flag** - Select **Yes** if the material is a Volatile Organic Compound material.
   - **RCRA** - Enter Resource Conservation and Recovery Act code.
3. Click **Finish** to save and exit.

You can also create a new CAS in the **Safety & CAS** sub-tab, while adding a chemical to the Material library. For more details, see *RMW Material Management Guide.*

Chapter 7

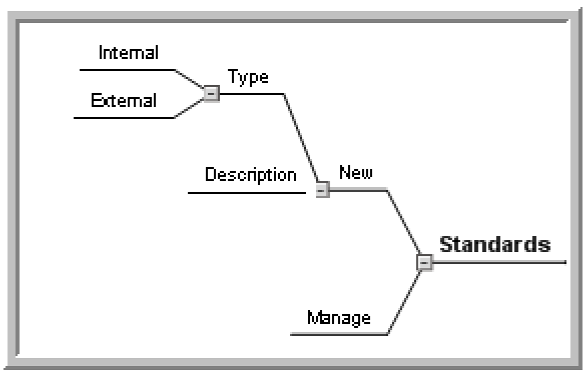
Working with RMW Standards

This chapter includes the following:

A Standard is a library of predefined statements relating to safety, caution and general instructions for a manufacturing process. It contains guidelines and specifications, which you have to adhere to while handling equipment and material. It also comprises of acronym and abbreviations used in the industry and organization.

For example, an equipment standard may specify that a certain reactor must be switched on 10 minutes before use, or a material standard may indicate how to handle a particularly hazardous material.

You can attach a Standard to a process, in particular, to a Recipe Action.



Classification of Standards

A Standard is grouped into one of the following categories:

- Abbreviations and Acronyms
- Cautions
  - Hazard Statements
  - Special Notations and Precautions
- General
- Standard Operation Procedures (SOP)
  - General Building Procedures
  - General Process Procedures

- Job Aids

Each Standard has options to indicate where the Standard is displayed when you view and print the Work Request. These Standards are used while authoring Unit Operations and creating Work Requests from the Control Recipe.

You have to enter the summary content of the actual hazard, SOP document or the expanded form of acronym and abbreviations as the description of the document. This is printed along with the Work Request that uses this Standard.

Note	RMW does not store actual hazard or safety documents. It tracks the names and simple descriptions to refer them while authoring a ticket.

Versioning of Standards is applicable in RMW. Major versions are incremental on approval, while the minor versions are incremental at the creation or at first edit after each approval of these Standards.

You can browse, search, edit, duplicate, and set status for a Standard. You can also add attachments or notes to provide more information, compare records of two or more Standards and export the records to either Excel or PDF file.

Creating a New Standard

To create a new standard:

1. From the **Create New** menu, select **Processes > Standard**.
2. In the **Preface** tab, select a category under which you wish to place this standard.
3. Click **Next.**
4. In the **General** tab, enter **Name** and select the **Operating Mode.**
5. Click **Finish**.

Note	You can also create a new Standard when you perform a search on standards. In the Search results, click **Save As** to duplicate existing standard.

Editing a Standard

To edit a standard:

1. Search and select the desired Standard record. For information on search, see Searching for Records on page 31.
2. To edit the Standard as current version, click **Edit > Current Version**.
   To edit the Standard as a new version, click **Edit > As New Version**.
3. In the **General** tab, modify the desired data and click **OK**.

   A message confirms the modifications in the Standard record.

Note	RMW does not support the editing of notes and attachments in the **Notes and Attachments** tab. To edit the notes and attachments, see the chapters Working with Attachments on page 38 and Working with Notes on page 36.

Browsing the Standards

When you perform a search, the system displays all records in **Standard** in the **Browse** tab. To view records of a specific category only, select the desired category from the Standard tree.

Deleting a Standard

To delete a Standard:

1. Search and select the Standards you wish to remove.

   For information on search, see Searching for Records on page 31.
2. Click **Delete**.

Managing Associations to a Standard

Standards represent cautions you need to comply with to ensure quality and safety. Using Equipment or Material which does not conform to standards can be hazardous to health or result in contamination of the end product.

For example:

1. Not wearing gloves while handling chemicals can be harmful.
2. Presence of moisture in the equipment can contaminate material.

You can associate the following to a **Standard**:

- Equipment Category
- Equipment
- Material Category
- Material

To associate equipment category and equipment to a standard:

1. Search and select a **Standard**.
2. Click **Manage Associations**.
3. In the **Equipment** tab, click **Add Category** under **Associated Equipment Categories.**
4. Select the desired Equipment Categories that you wish to associate to the selected Standard and click **OK**.
5. From **Associated Equipment,** click **Add Equipment**.
6. Select the desired Equipment you wish to associate to the selected Standard and click **OK**.

To associate material category and material to a standard:

1. Search and select a Standard.
2. Click **Manage Associations.**
3. In the **Material** tab, click **Add Category** under **Associated Material Categories.**
4. Select the desired Material Categories that you wish to associate to the selected Standard and click **OK**.
5. Under the **Associated Material,** click **Add Material.**
6. Select the desired Material you wish to associate to the selected Standard and click **OK**.

To disassociate equipment category and equipment from a standard:

1. Search and select a Standard.
2. Click **Manage Associations.**
3. In the **Equipment** tab, select the **Associated Equipment Categories** that you wish to delete.
4. Click **Delete**.
5. Select the desired **Associated Equipment** that you wish to delete and click **Delete**.
6. Click **OK**.

To disassociate material category and material from a standard:

1. Search and select a **Standard**.
2. Click **Manage Associations**.
3. In the **Material** tab, select the **Associated Material Categories** that you wish to delete.
4. Click **Delete.**
5. Select the **Associated Material** that you wish to delete and click **Delete**.
6. Click **OK**.

Changing the Workflow Status of a Standard

If a **Standard** has a workflow associated to it, and you have the access permission assigned to your role and user ID, you can change the workflow status of a **Standard**.

To change the workflow status of a standard:

1. Search and select a **Standard**.
2. Click **Change** > **Workflow Status** > and select the applicable status.

   Note If the selected object does not have an active workflow, you cannot change the status.

Purging Revisions of a Standard

A **Standard** has minor intermediate revisions, until you approve and release a revision as the next version. These minor revisions of the **Standard** can be deleted from the database when one version is finalized (approved for release). You cannot delete a revision, if an active workflow is associated with it.

To purge revisions of a standard:

1. Search and select a standard with revisions which you want to purge.

   Note Ensure the selected standard is in **Approved** status.

2. Click **More > Purge Revisions.**

Changing Status of a Standard

A **Standard** can be in one of the following status:

- **Draft** - when the standard is created.
- **Submitted** - when the standard is submitted for approval.

- **Approved** - when the standard is approved.
- **Obsolete** - when the standard is not in use.

To manually change the status of the standard:

1. Search and select the desired **Standard** records.
2. Click **Change > Lifecycle Phase** and select the applicable status.

Note	For a newly created standard, the Lifecycle Phase shows only 'Submit' option. When the standard is in 'Submitted' state, the Lifecycle Phase displays other applicable options.