Oracle® Agile Product Lifecycle Management for Process

Administrator User Guide

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Preface

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

This preface contains these topics:

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

Audience

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

Variability of Installations

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

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

Documentation Accessibility

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visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Software Availability

Oracle Software Delivery Cloud (OSDC) provides the latest copy of the core software. Note the core software does not include all patches and hot fixes. Access OSDC at:

http://edelivery.oracle.com.

Related Documents

For more information, see the following documents in the Agile PLM for Process documentation set:

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

  http://www.oracle.com/technetwork/documentation/agile-085940.html#plmprocess

Conventions

The following text conventions are used in this document:

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

1

Introducing Administration

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

- Administration Overview

Administration Overview

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

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

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

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

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

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

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

2

Using ADMN to Manage Core Data

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

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

Types of Core Data

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

Custom data:

- Category tabs
- Custom sections (described in "Custom Sections" on page 3-33)
- Custom section column tags
- Custom section order
- Custom section row tags
- Custom section tab order
- Custom section tags
- Extended attributes (described in "Extended Attributes" on page 3-5)
- Extended attribute groups

- Extended attribute order
- Extended attribute tab order
- Extended attribute tags

Custom Portal: Custom portals and custom portal views

DRL (Document Reference Library) data: Catalogs and classifications

Global data:

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

GSM (Global Specification Management) Common data:

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

GSM Compliance data:

- Additives
- Allergens
- Complies with
- Intolerances

GSM FSIS data:

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

NPD (New Product Development) data:

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

PQM (Product Quality Management) data:

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

PQS (Product Quality Scorecard) data:

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

SCRM (Supply Chain Relationship Management) data:

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

Specification Categories

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

> **Note:** For the managing data using the Data submenu, refer to Chapter 3, "Using ADMN to Manage Custom Data".

Statuses

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

- **New**—The data is not yet ready to become available to Agile PLM for Process applications. When an item has a status of "new," its values remain editable.
- **Active**—The data is ready to become available (searchable and consumable) for use in Agile PLM for Process applications.
- **Inactive**—The data should no longer be used. All existing references to this item remain. The item is no longer available for assignment but is still searchable.
- **Archive**—The item is no longer available for searching or assignment. All existing references to this item remain.
- **System**—Used by the system. This item cannot be edited or removed.

Administrative Roles

There are two user roles associated with ADMN:

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

[SUPER_DATA_ADMIN] —Users with the role of [SUPER_DATA_ADMIN] can edit items regardless of the item's status. This role should be used with caution.

Navigating Core Data

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

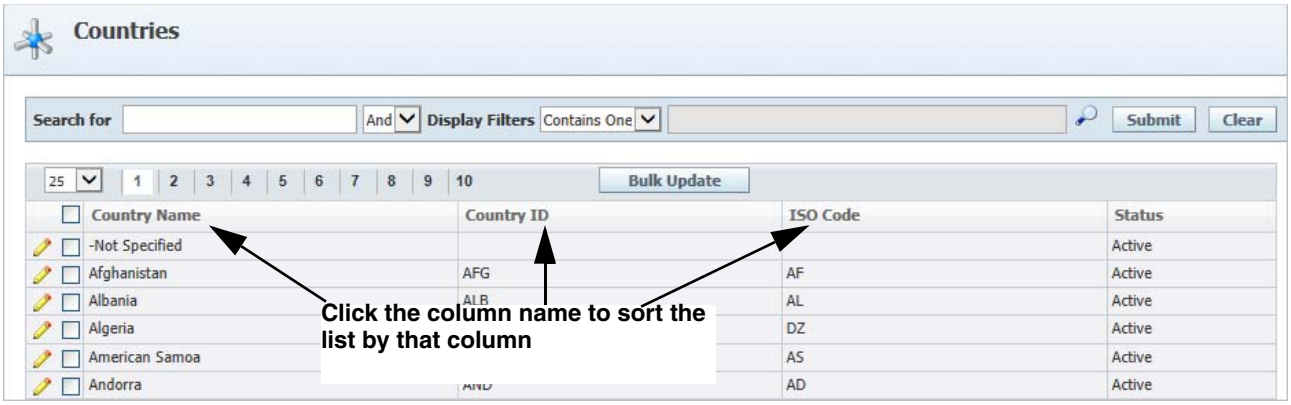
Figure 2–1 Manage option



Maintaining Simple Lists

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

Figure 2–2 Sample simple list of core data



To maintain data in a simple list:

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

To add data to a simple list:

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

To edit a simple list:

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

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

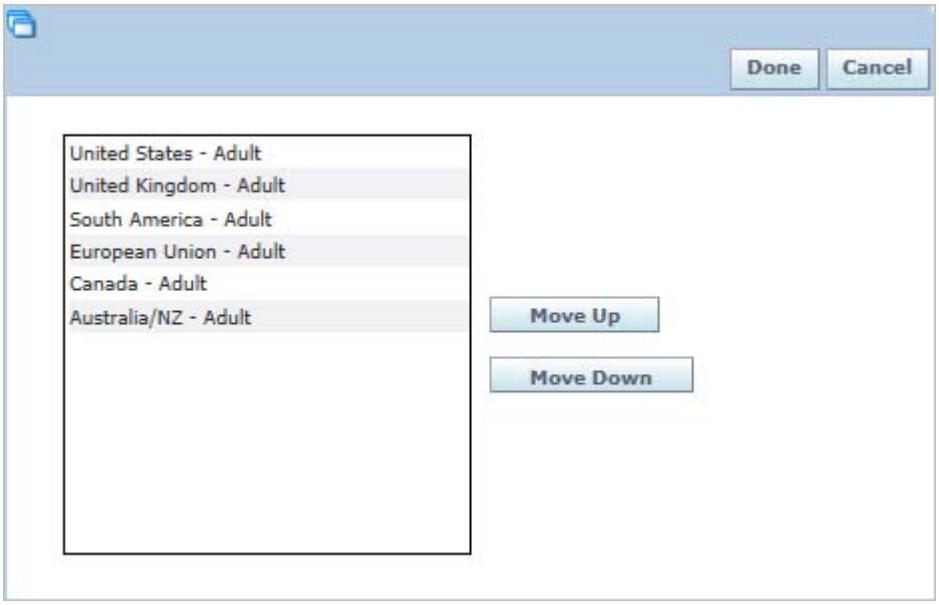
4. Click the apply changes icon to apply your changes.
5. Click **Save** to save your work.
6. Flush the administrator data cache group, as described in "Using the Cache Application" on page 4-3.

To reorder data in a simple list:

> **Note:** Only users with the role [SUPER_DATA_ADMIN] can reorder lists.

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

Figure 2–3 Reorder dialog box



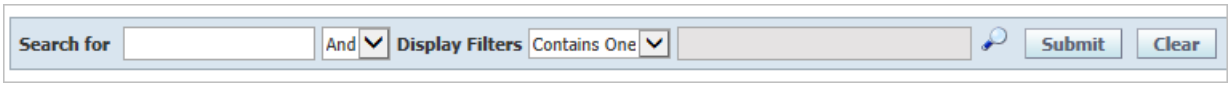
3. Select a list item, and then click **Move Up** and **Move Down** to set the preferred order.
4. Repeat as necessary to set the list order.
5. Click **Done**.
6. Click **Save** to save your work.
7. Flush the administrator data cache group, as described in "Using the Cache Application" on page 4-3.

Searching Simple Lists

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

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

Figure 2–4 Search bar



To search a simple list:

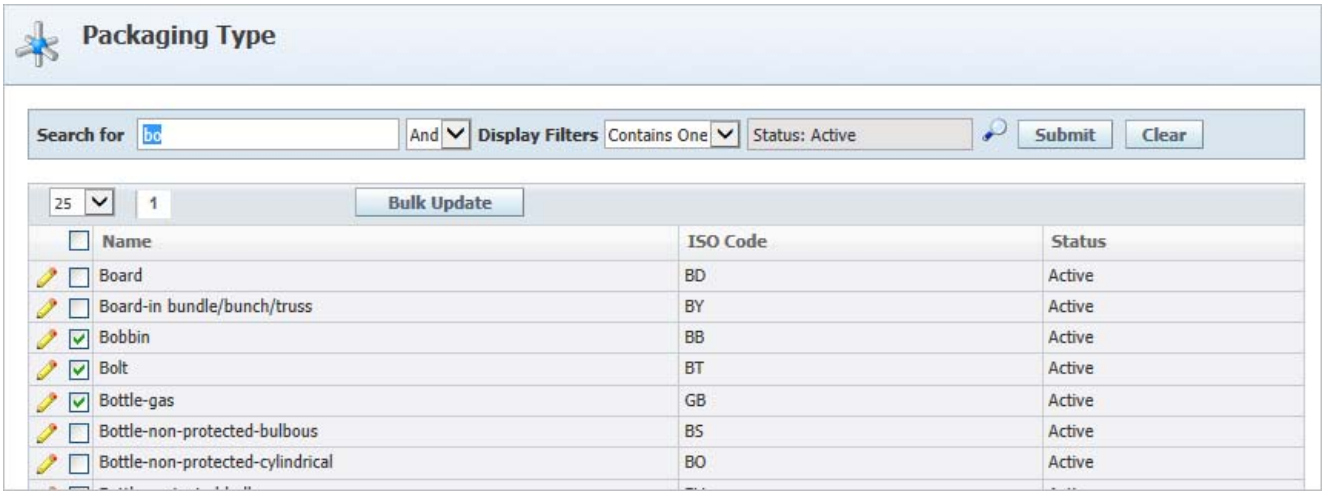
1. Enter a name in the Search for field.
2. Select an option from the Display Filters drop-down (optional).
3. Click the search icon to display a dialog box containing available filters, such as status.
4. Select a filter and then click Done. The dialog box closes and your selection displays in the filters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

Bulk Updating

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

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

Figure 2–5 Bulk Update



To perform a bulk update in simple lists:

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

Figure 2–6 Example of available bulk update choices



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

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

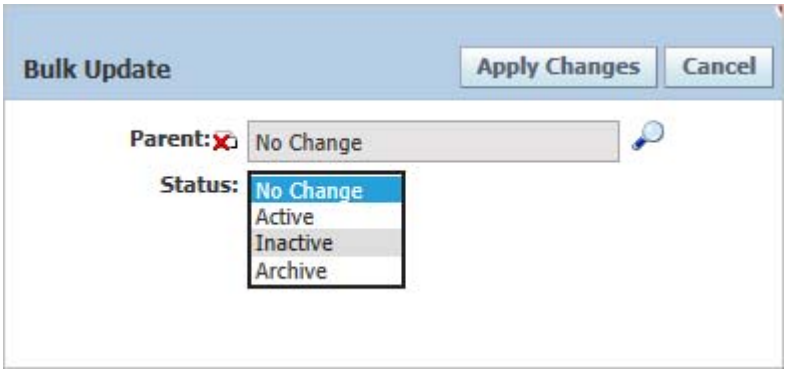
1. Using the search tool find all items that contain the string "Milk" and the display filter of "North America".
2. You would then select all items using the select all checkbox in the first column header and select **Bulk Update**.

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

To perform a bulk update in a tree list:

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

Figure 2–7 Example of available bulk update choices



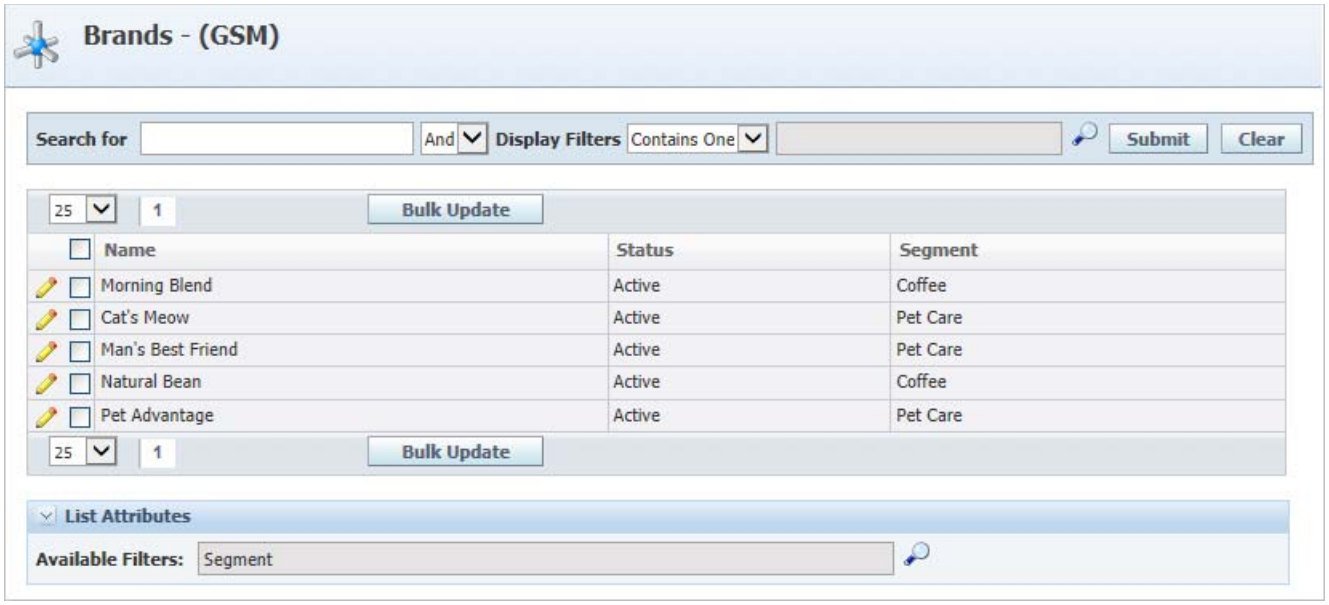
3. Select the attribute to change, then click **Apply Changes**.
4. Click **Save** to save the changes, or **Cancel** to exit without saving your changes.

List Filtering

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

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

Figure 2–8 Brands list with filter applied



Adding a Filter

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

Removing a Filter

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

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



Filter Behavior

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

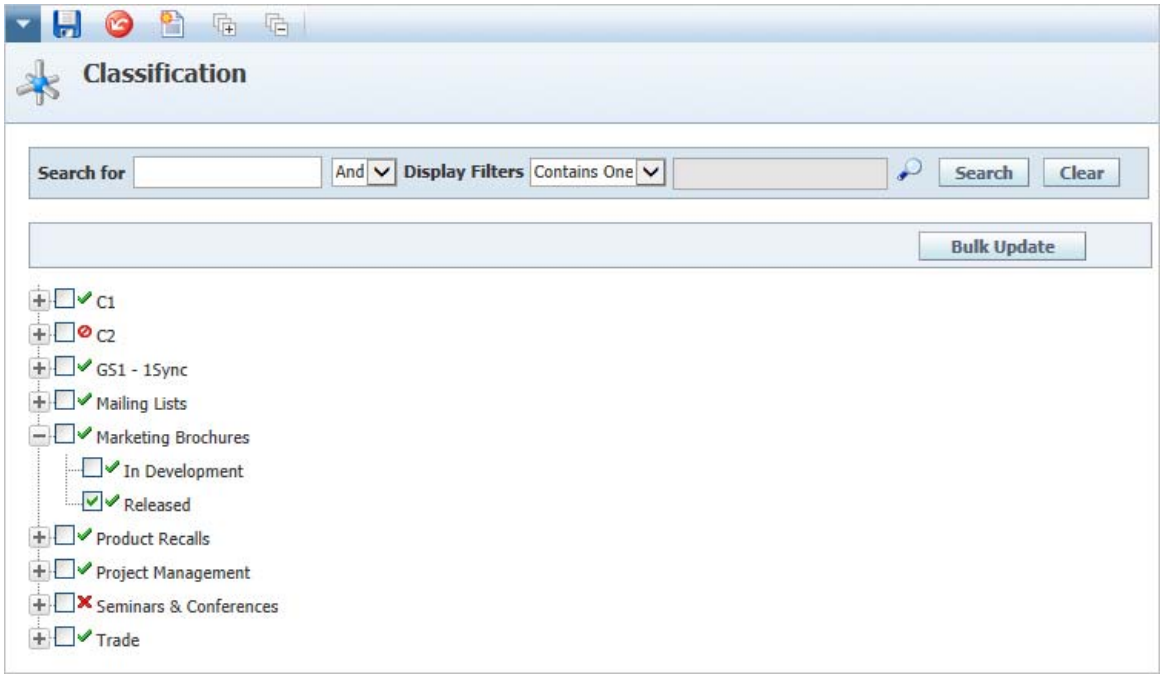
Table 2–1 Filter types

Type	Description
Inclusion	When this type is used items without a filter applied will still appear in lists. This is the default list behavior so out of the box most lists will follow this behavior.
Intersection	When this type is used items without a filter applied will not appear in lists. Exception: All items with a status of system will continue to be shown since filters can't be applied to these rows. Examples: 1. Data Group A-F exist in the system Additive X is added, Additive X will not appear for selection until a Data Group is added 2. Additive Y has been added to data groups A-F Admin adds Data Group G to the data group list Additive Y is not included in data group G until its manually added to Additive Y
Exclusion	When this type is used new items will automatically have "All" filters applied upon creation. The string "All" will appear when no filters have been selected. Examples: 1. Nutrient Y has been added to data groups A, B 2. Admin adds Data Group G to the data group list 3. Nutrient Y is automatically included in data group G without having to manually add the new data group to the Nutrient. Now Nutrient Y is in groups A, B, G.

Maintaining Tree Lists

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

Figure 2–10 Core data in tree lists



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

All nodes contain an icon indicating their status:

- ( )—Active item
- ( )—New item
- ( )—Inactive item
- ( )—Archived item

Drag and Drop Feature

Only users with the role of [SUPER_DATA_ADMIN] are allowed to move nodes that have been activated. Users with the role of [DATA_ADMIN] can only move nodes with a "New" status.

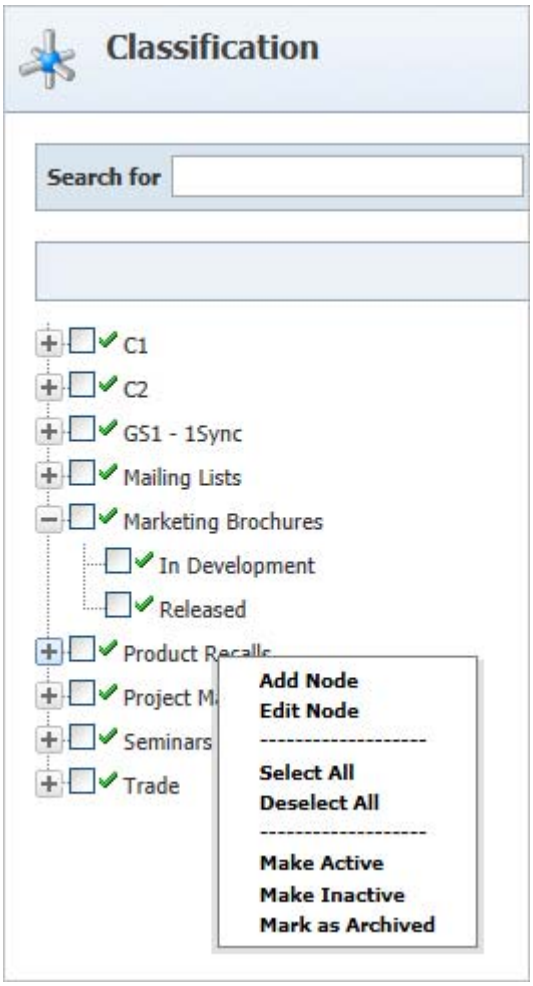
Figure 2–11 Dragging a node



Editing Actions

You can view available actions by right-clicking on a node, as Figure 2–12 shows.

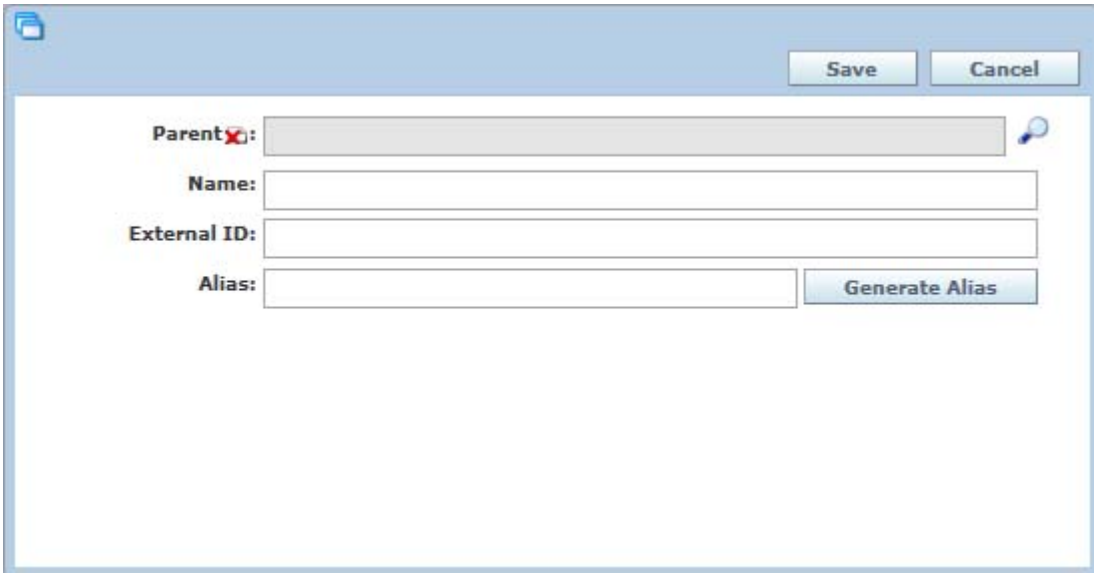
Figure 2–12 Sample tree list of core data, right-click menu for users with the role of [SUPER_DATA_ADMIN]



To add a root node:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays the tree list for the core data you selected.
2. Select **Add** from the action menu. A dialog box displays, as Figure 2–13 shows.

Figure 2–13 Add root node dialog box



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

To add a child node:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays the tree list for the core data you selected.

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

To edit a node:

Note: Users with the role of [SUPER_DATA_ADMIN] can edit a node. The node must have a status of "New."

---

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

To make a node active:

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

To make a node inactive:

1. From the left navigation panel, select **ADMN > {name of menu} > {name of submenu}**. Agile PLM for Process displays a tree list for editing purposes.

2. Right-click on the node to edit. Agile PLM for Process displays the submenu with available choices.

> **Note:** You can only inactivate nodes with "Active" or "Archived" status.

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

To archive a node:

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

> **Note:** You can only archive nodes with "Active" or "Inactive" status.

3. Click **Mark as Archived**. The page refreshes and the node is archived, as indicated by the archived node icon.
4. Click **Save**.
5. Flush the taxonomy cache option, as described in "Using the Cache Application" on page 4-3.

Searching Tree Lists

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

To search a tree list:

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

Matching results are displayed.

Bulk Updating

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

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

The following attributes are available for bulk update:

- Parent

- Status (Active, Inactive, Archive)

To perform a bulk update:

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

Custom Data

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

Category Tabs

Use the Category Tabs list to create custom data categories. These categories display as inline tabs used to organized extended attributes and custom sections on objects. Category tabs are associated directly to the extended attribute or custom section, see "Creating an Extended Attribute" on page 3-27 and "Creating a Custom Section" on page 3-39 for more information.

Figure 2–14 Category Tabs list

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

Key Fields

Table 2–2 Custom Data, CategoryTabs key fields

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

Editing Rules

For instructions on editing the Category Tab list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Custom Section Column Tags

Use the Custom Section Column Tags list in ADMN to maintain custom section columns tags, as Figure 2–15 shows.

Figure 2–15 Custom Section Column Tags list

Name	Behavior ID	Status
Column Tags	1005	Active
Do Not Publish To Supplier	1	System
Hide Header	9	System
Supplier eQ - Create	8	System
Suppress Printing	1	System

Key Fields

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

Name	Description
Name	The custom section column tag name
Behavior ID	The system-assigned column tag ID
Status	The assigned status for the custom section column tag. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Custom Section Column Tags list, see "Maintaining Simple Lists" on page 2-4.

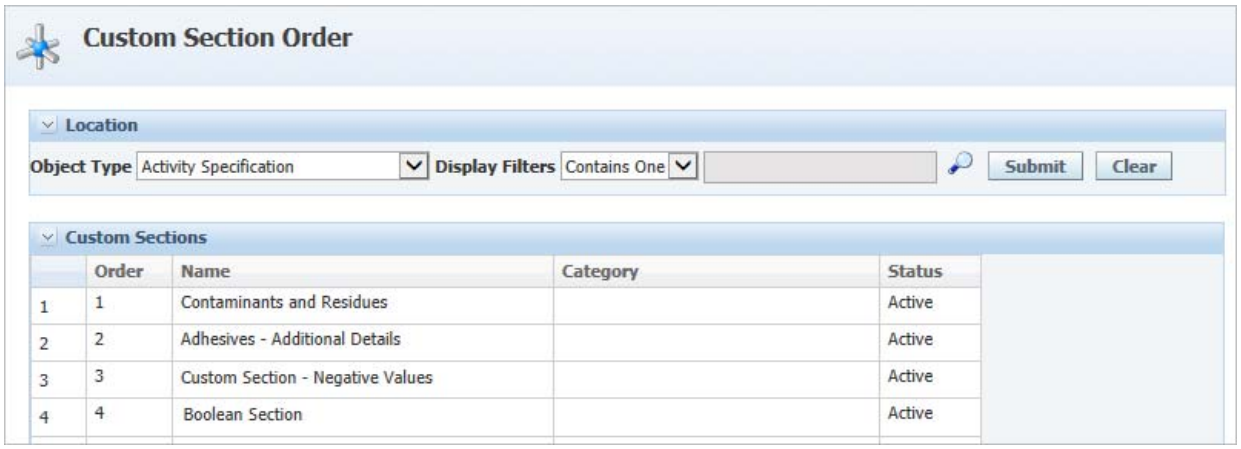
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Custom Section Order

Use the Custom Section Order list in ADMN to maintain the order of custom sections, as Figure 2–16 shows. For instructions on setting order, see "Setting Custom Section Order" on page 3-58.

Figure 2–16 Custom Section Order list



Key Fields

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

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

Display Filters

For instructions, see "Searching Simple Lists" on page 2-6.

Editing Rules

For instructions on editing the Custom Section Order list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Custom Section Row Tags

Use the Custom Section Row Tags list in ADMN to maintain custom section row tags, as Figure 2–17 shows.

Figure 2–17 Custom Section Row Tags list

Name	Behavior ID	Status
Do Not Publish To Supplier	1	System
Hide Header	6	System
Repeatable	7	System
Row Tags - Active	1006	Active
Row Tags - Archive	1007	New
Row Tags - Inactive	1008	Active
Row Tags - New	1009	New
Supplier eQ - Create	9	System
Suppress Printing	1	System

Key Fields

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

Name	Description
Name	The custom section row tag name
Behavior ID	The system-assigned custom section row tag ID
Status	The assigned status for the custom section row tag. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Custom Section Row Tags list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Custom Section Tab Order

Use the Custom Section Tab Order list in ADMN to maintain custom section tab order, as Figure 2–22 shows. You can have a different tab order by object type. If no order is specified, tabs display in alphabetical order.

Figure 2–18 Custom Section Tab Order list



Key Fields

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

Name	Description
Order	Order of custom section tab
Name	The custom section tab name
Status	The assigned status for the custom section tab. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Custom Section Tab Order list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Custom Section Tags

Use the Custom Section Tags list in ADMN to maintain custom section tags, as Figure 2–19 shows.

Figure 2–19 Custom Section Tags list

Name	Behavior ID	Status
Do Not Publish To Supplier	1	System
Insert Page Break - Above	4	System
Insert Page Break - Below	5	System
Landscape Printing	1	System
Suppress Printing	1	System

Key Fields

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

Name	Description
Name	The custom section tag name
Behavior ID	The system-assigned custom section tag ID
Status	The assigned status for the custom section tag. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Custom Section Tag list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Extended Attribute Groups

Use the Extended Attribute Groups list in ADMN to maintain extended attribute groups, as Figure 2–20 shows.

Figure 2–20 Extended Attribute Groups list



Name	Status
Chemical	Active
Compliance Screening	Active
Cost	Active
Dairy	Active
Equipment	Active
Equipment (all)	Active
Equipment (Cooler)	Active
Equipment (Dispenser)	Active
Equipment (Vendor)	Active

Key Fields

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

Name	Description
Name	The extended attribute group name
Status	The assigned status for the extended attribute group. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Extended Attribute Group list, see "Maintaining Simple Lists" on page 2-4.

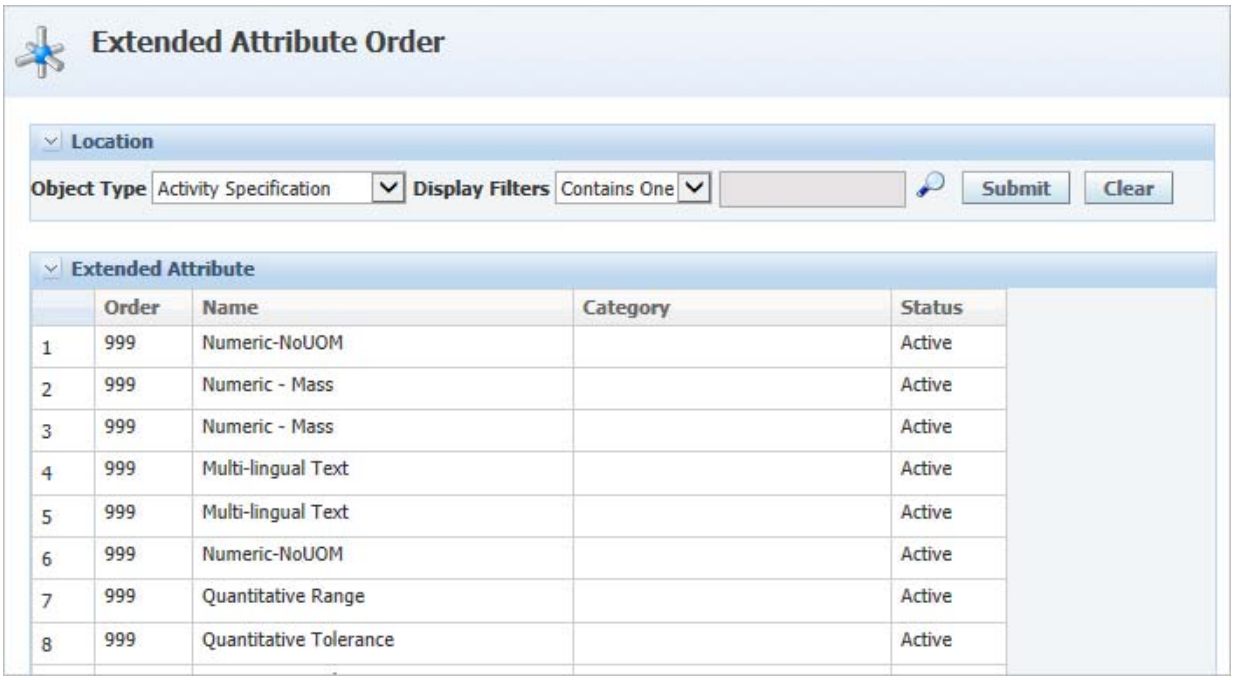
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Extended Attribute Order

Use the Extended Attribute Order list in ADMN to maintain the order of extended attributes, as Figure 2–21 shows. For instructions on setting order, see "Setting Extended Attribute Order" on page 3-30.

Figure 2–21 Extended Attribute Order list



Key Fields

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

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

Display Filters

For instructions, see "Searching Simple Lists" on page 2-6.

Editing Rules

For instructions on editing the Extended Attribute Order list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Extended Attribute Tab Order

Use the Extended Attribute Tab Order list in ADMN to maintain extended attribute tab order, as Figure 2–22 shows. You can have a different tab order by object type. If no order is specified, tabs display in alphabetical order.

Figure 2–22 Extended Attribute Tab Order list



Key Fields

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

Name	Description
Order	Order of extended attribute tab
Name	The extended attribute tab name
Status	The assigned status for the extended attribute tab. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Extended Attribute Tab Order list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Extended Attribute Tags

Use the Extended Attribute Tags list in ADMN to maintain extended attribute tags, as Figure 2–23 shows.

Figure 2–23 Extended Attribute Tags list

Name	Behavior ID	Status
Bold	1	System
Do Not Publish To Supplier	0	System
ERP_Owner		System
ERP_Owning_Org		System
Is Design Attribute	2	System
Is Distinct	-1	System
IS_ERP_ENGINEERING_ITEM		System
Italic	6	System
Packaging_Height		System
Packaging_Length		System
Packaging_Volume		System
Packaging_Width		System
SECONDARY_UOM		System
Suppress Printing	-2	System

Key Fields

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

Name	Description
Name	The extended attribute tag name
Behavior ID	The system-assigned extended attribute tag ID
Status	The assigned status for the extended attribute tag. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Extended Attribute Tag list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

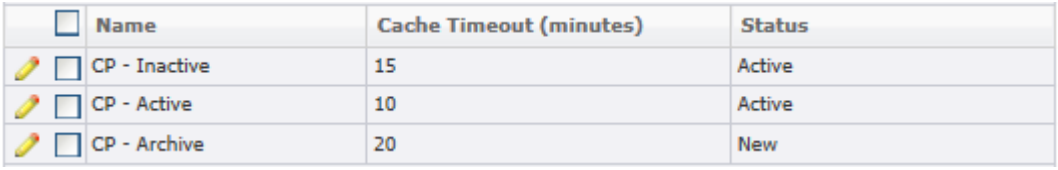
Custom Portal

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

Custom Portals

Use the Custom Portals list in ADMN to maintain custom portals, as Figure 2–24 shows.

Figure 2–24 Custom Portals list



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

Key Fields

Table 2–12 Custom Portal, Custom Portals key fields

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

Editing Rules

For instructions on editing the Custom Portals list, see "Maintaining Simple Lists" on page 2-4.

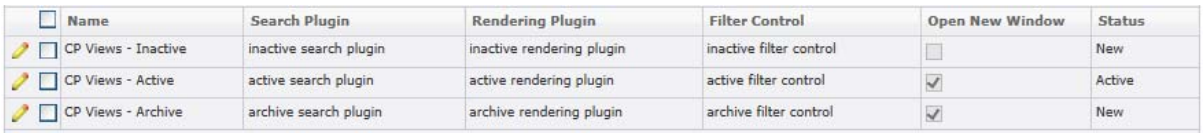
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Custom Portal Views

Use the Custom Portal Views list in ADMN to maintain custom portal views, as Figure 2–25 shows.

Figure 2–25 Custom Portal Views list



Name	Search Plugin	Rendering Plugin	Filter Control	Open New Window	Status
CP Views - Inactive	inactive search plugin	inactive rendering plugin	inactive filter control	☐	New
CP Views - Active	active search plugin	active rendering plugin	active filter control	☑	Active
CP Views - Archive	archive search plugin	archive rendering plugin	archive filter control	☑	New

Key Fields

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

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

Editing Rules

For instructions on editing the Custom Portal Views list, see "Maintaining Simple Lists" on page 2-4.

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

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Reference Library Data

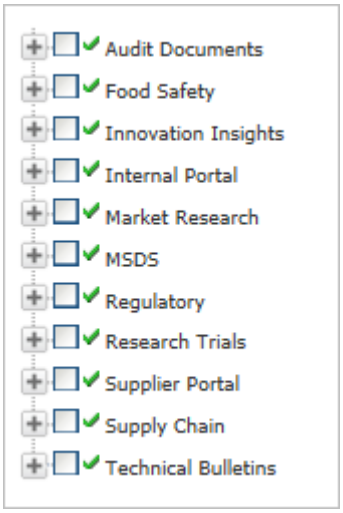
The Document Reference Library (DRL) is a repository for business documents. As an administrator, you can control the catalog and classification lists using the ADMN application. For more information about DRL, see the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

Catalogs

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

Documents are associated with catalogs on the DRL document object. Use the Catalogs tree list in ADMN to maintain the data, as Figure 2–26 shows.

Figure 2–26 Catalogs tree list



Editing Rules

For instructions on editing the Catalogs tree list, see "Maintaining Tree Lists" on page 2-11.

List Filtering

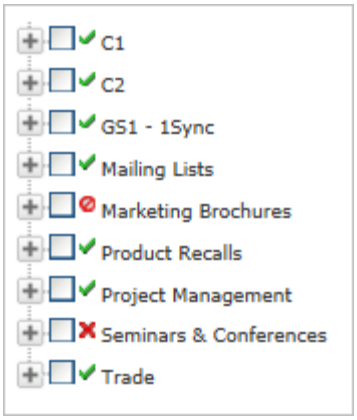
For more information about List Filtering, see "List Filtering" on page 2-9.

Classifications

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

Classifications are assigned on the DRL document object. Use the Classification list in ADMN to maintain the data, as Figure 2–27 shows.

Figure 2–27 Classifications tree list



Editing Rules

For instructions on editing the Classification tree list, see "Maintaining Tree Lists" on page 2-11.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

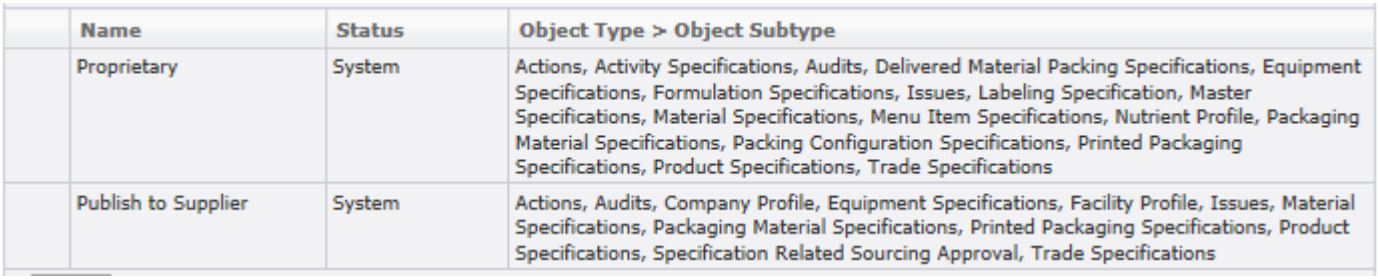
Global Data

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

Attachment Tags

Use the Attachment Tags list in ADMN to maintain the data, as Figure 2–28 shows.

Figure 2–28 Attachment Tags list



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

Key Fields

Table 2–14 Global, Attachment Tags key fields

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

Editing Rules

For instructions on editing the Attachment Tags list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Countries

Use the Countries list in ADMN to maintain the data, as Figure 2–29 shows.

Figure 2–29 Countries list



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

Key Fields

Table 2–15 Global, Countries key fields

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

Editing Rules

For instructions on editing the Countries list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Cross Reference Statuses

The Cross Reference Status section lists statuses of systems that can be cross referenced, as Figure 2–30 shows.

Figure 2–30 Cross Reference Status list



Key Fields

Table 2–16 Global, Cross Reference Status key fields

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

Editing Rules

For instructions on editing the Cross Reference list, see "Maintaining Simple Lists" on page 2-4.

Reordering Cross Reference Statuses

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

Cross References

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

Administrators maintain the cross-references and can set whether the cross reference is managed by an external system, as Figure 2–31 shows. When the Managed Externally Default box is checked, the corresponding system name is read only on the specifications.

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

Figure 2–31 Cross References list



System Name	System Code	Managed Externally Default	Status
BPCS System	USBPCS	☐	Active
JDE System	USJDE	☐	Active
Oracle System	USORACLE	☐	Active
SAP System	USSAP	☐	Active

Key Fields

Table 2–17 Global, Cross References key fields

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

Editing Rules

For instructions on editing the Cross Reference list, see "Maintaining Simple Lists" on page 2-4 (simple list display) or "Maintaining Tree Lists" on page 2-11 (tree list display). For more information on user roles, refer to Appendix A, "System-Based Roles" of the *Agile Product Lifecycle Management for Process User Group Management User Guide.*

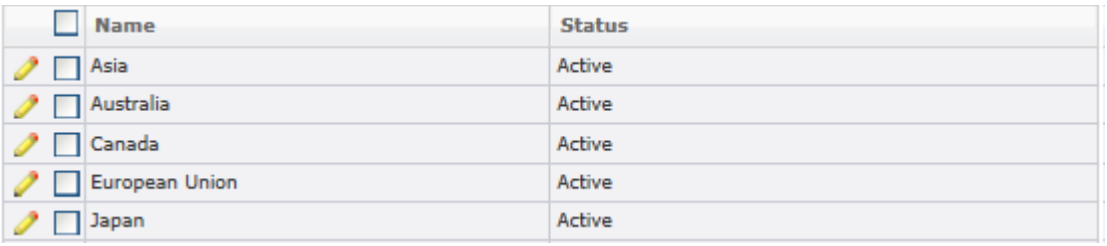
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Data Groups

Data groups are used to organize and filter select data lists in consumption. Use the Data Group list in ADMN to maintain the data, as Figure 2–32 shows.

Figure 2–32 Data Groups list



Key Field

Table 2–18 GSM Common, Data Groups key field

Name	Description
Name	Name of the data group
Status	The assigned status for the data group. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Data Groups list, see "Maintaining Simple Lists" on page 2-4.

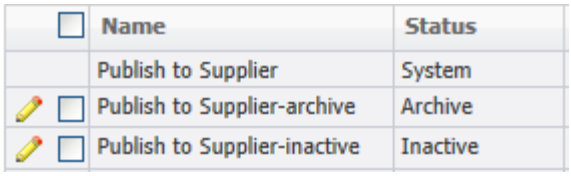
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Tags

Use the Document Tags list in ADMN to maintain the data, as Figure 2–33 shows.

Figure 2–33 Document Tags list



Key Fields

Table 2–19 Global, Document Tags key fields

Name	Description
Name	The document tag name.
Status	The assigned status for the document tag. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Document Tags list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Restrictions

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

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

Use the Restrictions tree list in ADMN to maintain the data, as Figure 2–34 shows.

Figure 2–34 Restrictions tree list



Editing Rules

For instructions on editing the Restrictions tree list, see "Maintaining Tree Lists" on page 2-11.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Segments

Use the Segments tree list in ADMN to maintain the data, as Figure 2–35 shows.

Figure 2–35 Segments tree list



Editing Rules

For instructions on editing the Segments tree list, see "Maintaining Tree Lists" on page 2-11.

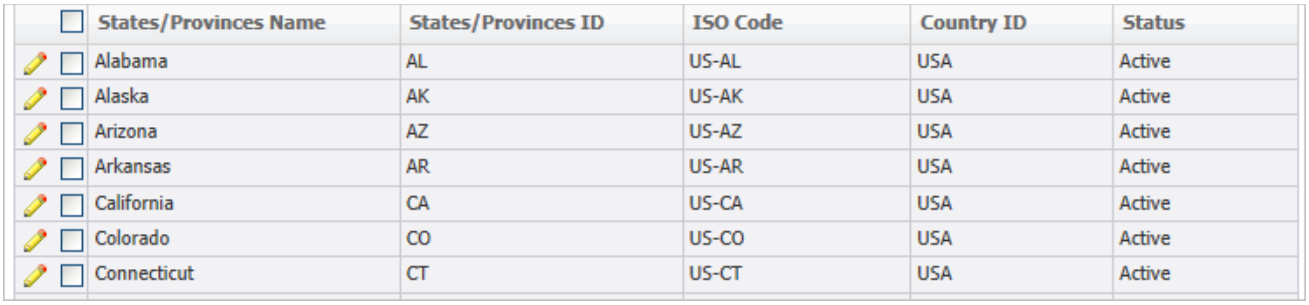
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

States/Provinces

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

Figure 2–36 States/Provinces list



States/Provinces Name	States/Provinces ID	ISO Code	Country ID	Status
Alabama	AL	US-AL	USA	Active
Alaska	AK	US-AK	USA	Active
Arizona	AZ	US-AZ	USA	Active
Arkansas	AR	US-AR	USA	Active
California	CA	US-CA	USA	Active
Colorado	CO	US-CO	USA	Active
Connecticut	CT	US-CT	USA	Active

Key Fields

Table 2–20 Global, States/Provinces key fields

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

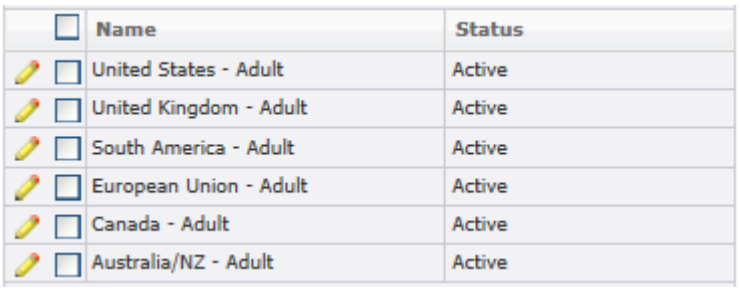
Editing Rules

For instructions on editing the Substitute Restrictions list, see "Maintaining Simple Lists" on page 2-4.

Substitute Restrictions

Use the Substitute Restrictions list in ADMN to maintain substitute restrictions, as Figure 2–37 shows.

Figure 2–37 Substitute Restrictions list



Name	Status
United States - Adult	Active
United Kingdom - Adult	Active
South America - Adult	Active
European Union - Adult	Active
Canada - Adult	Active
Australia/NZ - Adult	Active

Key Fields

Table 2–21 Global, Substitute Restrictions key fields

Name	Description
Name	Name of the substitute restriction
Status	The assigned status for the substitute restriction. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Substitute Restrictions list, see "Maintaining Simple Lists" on page 2-4.

Reordering Substitute Restrictions

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

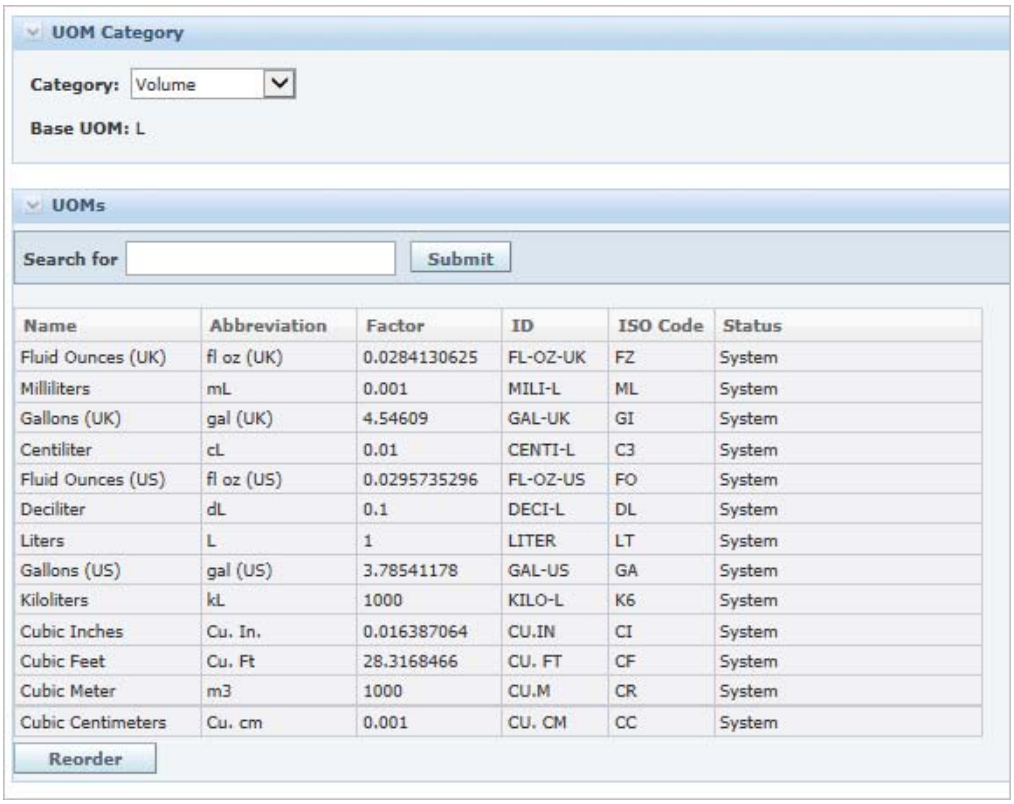
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

UOM

Use the UOM (Units of Measure) list in ADMN to maintain your own units of measures and categories that can be consumed in PLM for Process specifications and integrated with ERP systems, as Figure 2–38 shows.

Figure 2–38 UOM list



Key Fields

Table 2–22 Global, UOM key fields

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

Editing Rules

To add a unit of measure:

1. Click **Add**. Agile PLM for Process displays the UOM Summary page, shown in Figure 2–39.

Figure 2–39 UOM Summary page



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

Reordering UOMs

Only users with the role of [SUPER_DATA_ADMIN] can reorder UOMs. See "To reorder data in a simple list:" on page 2-6 for instructions on setting the order of UOM data.

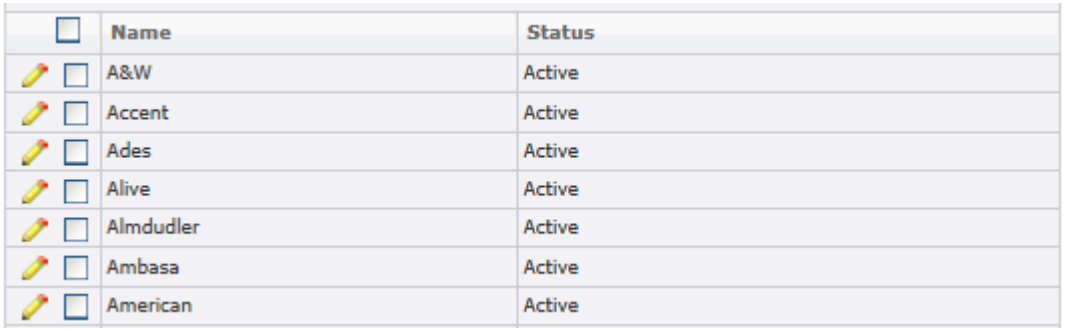
Global Specification Management Common Data

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

Brands - (GSM Legacy Free Text)

Use the Brands - (GSM Legacy Free Text) list in ADMN to maintain the data, as Figure 2–41 shows. This list is deprecated and will be removed in a future release.

Figure 2–40 Brands - (GSM) Legacy Free Text list



Key Fields

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

Name	Description
Name	Name of the brand in GSM. This is used for legacy free text entry.
Status	The assigned status for the brand. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Brands - (GSM Legacy Free Text) list, see "Maintaining Simple Lists" on page 2-4.

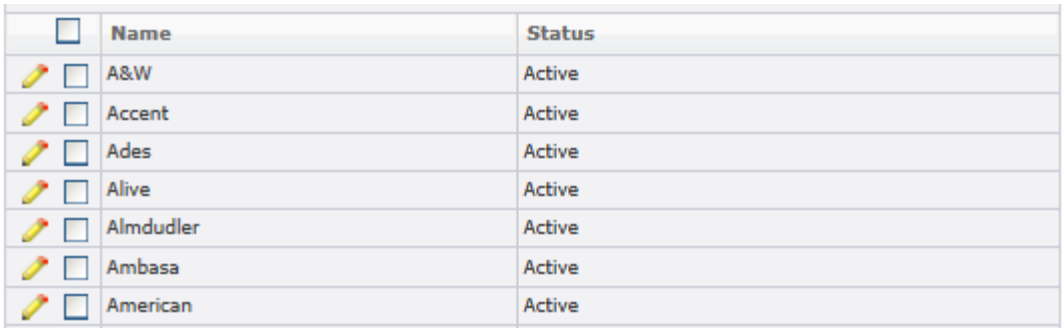
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Brands - (GSM)

Use the Brands - (GSM) list in ADMN to maintain the data, as Figure 2–41 shows.

Figure 2–41 Brands - (GSM) list



Key Fields

Table 2–24 GSM Common, Brands - (GSM) key fields

Name	Description
Name	Name of the brand in GSM
Status	The assigned status for the brand. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Brands - (GSM) list, see "Maintaining Simple Lists" on page 2-4.

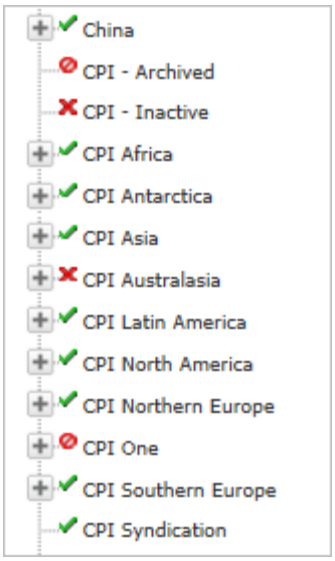
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Business Units - (GSM)

Use the Business Units - (GSM) tree list in ADMN to maintain the data, as Figure 2–42 shows.

Figure 2–42 Business Units - (GSM) tree list



Editing Rules

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

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Classification

Use the Classification list in ADMN to maintain the data, as Figure 2–43 shows.

Figure 2–43 Classification list



Key Fields

Table 2–25 GSM Common, Classification key fields

Name	Description
Name	Name of the classification
Status	The assigned status for the classification. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Classification list, see "Maintaining Simple Lists" on page 2-4.

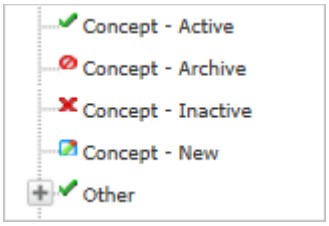
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Concepts

Use the Concepts tree list in ADMN to maintain the data, as Figure 2–44 shows.

Figure 2–44 Concepts tree list



Editing Rules

For instructions on editing the Concepts tree list, see "Maintaining Tree Lists" on page 2-11.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Status

Use the Document Status list in ADMN to maintain the GSM supporting document status list, as Figure 2–45 shows.

Figure 2–45 Document Status list



Key Fields

Table 2–26 GSM, Document Status key fields

Name	Description
Name	Name of the document status.
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Document Status list, see "Maintaining Simple Lists" on page 2-4.

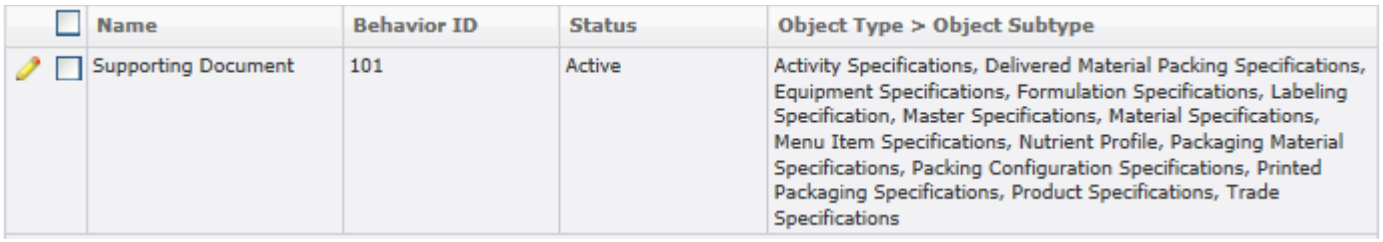
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Type

Use the Document Type list in ADMN to maintain document type options for GSM supporting documents, as Figure 2–89 shows.

Figure 2–46 Document Type list



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

Key Fields

Table 2–27 GSM, Document Type key fields

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

Editing Rules

For instructions on editing the Document Type list, see "Maintaining Simple Lists" on page 2-4.

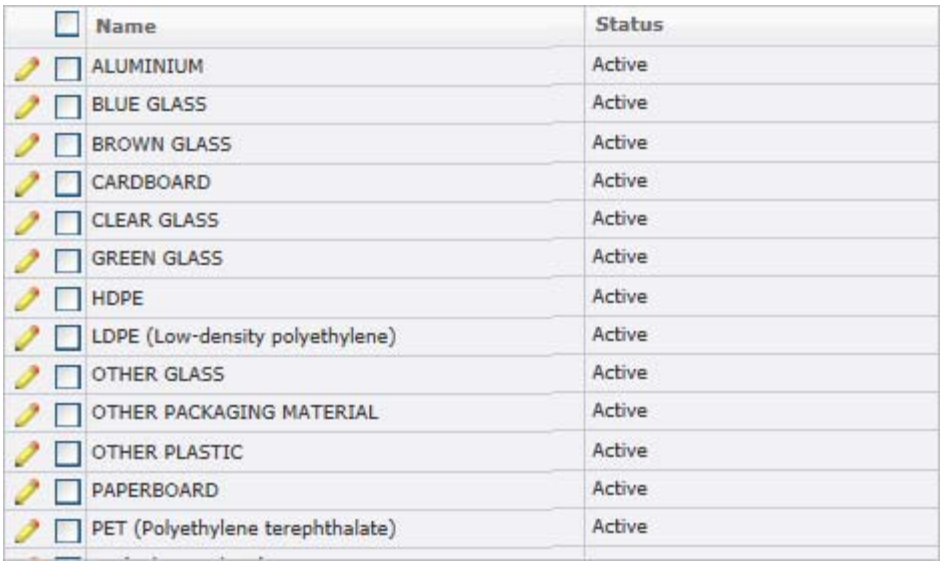
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Environmental Waste

Use the Environmental Waste list in ADMN to maintain the data, as Figure 2–47 shows.

Figure 2–47 Environmental Waste list



Name	Status
ALUMINIUM	Active
BLUE GLASS	Active
BROWN GLASS	Active
CARDBOARD	Active
CLEAR GLASS	Active
GREEN GLASS	Active
HDPE	Active
LDPE (Low-density polyethylene)	Active
OTHER GLASS	Active
OTHER PACKAGING MATERIAL	Active
OTHER PLASTIC	Active
PAPERBOARD	Active
PET (Polyethylene terephthalate)	Active

Key Fields

Table 2–28 GSM Common, Environmental Waste key fields

Name	Description
Name	Name of the environmental waste
Status	The assigned status for the environmental waste. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Environmental Waste list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Formulation Classification

Formula classifications are used to secure % breakdowns on material, product, and trade specifications. Use the Formula Classification list in ADMN to maintain the data, as Figure 2–48 shows.

Figure 2–48 Formula Classifications list



	Name	Group(s)	Status
	All GSM Users	Testing Protocol Admin, GSM	New
	Restricted To Specs & Labeling	All Roles, Specs&Labeling	Active

Key Fields

Table 2–29 GSM Common, Formula Classification key fields

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

Editing Rules

For instructions on editing the Formula Classification list, see "Maintaining Simple Lists" on page 2-4.

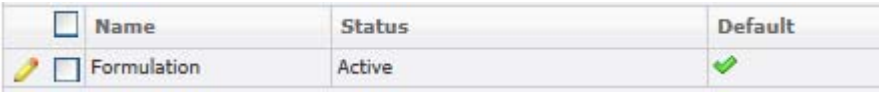
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Formulation Item Type

Use the Formulation Item Type list in ADMN to maintain the data, as Figure 2–47 shows.

Figure 2–49 Formulation Item Type list



Key Fields

Table 2–30 GSM Common, Formulation Item Type key fields

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

Editing Rules

For instructions on editing the Formulation Item Type list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Formulation Tags

Use the Formulation Tags list in ADMN to maintain the data, as Figure 2–50 shows.

Figure 2–50 Formulation Tags list



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

Key Fields

Table 2–31 Formulation Tags key fields

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

Editing Rules

For instructions on editing the Formulation Tags list, see "Maintaining Simple Lists" on page 2-4.

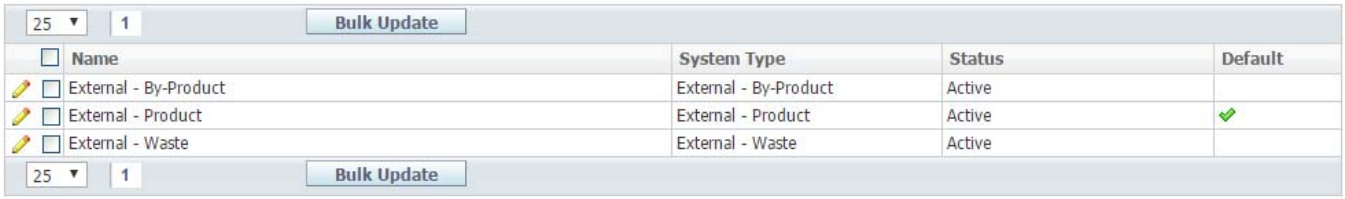
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Formula Output Types - External

Use the Formula Output Type - External list in ADMN to maintain the data, as Figure 2–51 shows.

Figure 2–51 Formula Output Type - External list



Key Fields

Table 2–32 Formula output type - external key fields

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

Editing Rules

For instructions on editing the formula output types - external list, see "Maintaining Simple Lists" on page 2-4.

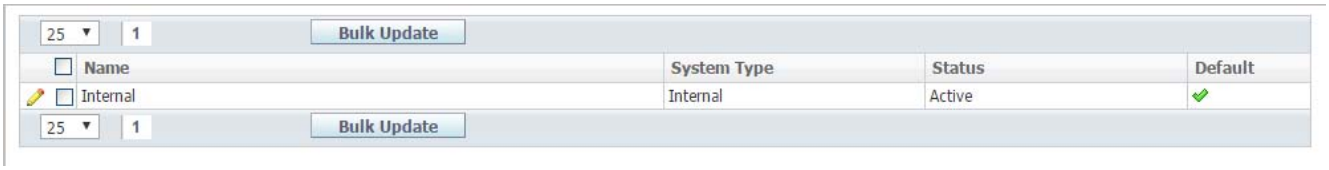
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Formula Output Types - Internal

Use the Formula Output Type - Internal list in ADMN to maintain the data, as Figure 2–51 shows.

Figure 2–52 Formula Output Type - Internal list



Key Fields

Table 2–33 Formula output type - internal key fields

Name	Description
Name	Name of the formula output type.
System Type	System type of the formula output type. There is only one internal type: ' Internal'. Refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide* for output type descriptions.
Status	The assigned status for the formula output type. Refer to "Statuses" on page 2-3 for status descriptions.
Default	A check indicates the default output type.

Editing Rules

For instructions on editing the formula output types - internal list, see "Maintaining Simple Lists" on page 2-4.

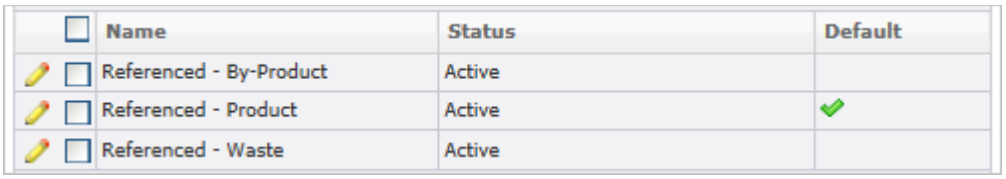
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Formula Output Types - Referenced

Use the Formula Output Type - Internal list in ADMN to maintain the data, as Figure 2–51 shows.

Figure 2–53 Formula Output Type - Referenced list



Key Fields

Table 2–34 Formula output type - referenced key fields

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

Editing Rules

For instructions on editing the formula output types - referenced list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Label Claims

Use the Label Claims list in ADMN to maintain the data, as Figure 2–54 shows.

Figure 2–54 Label Claims list



Name	Is Calculatable	Status
100% Fat Free	☐	Active
Calorie Free	☐	Active
Calories (Free)	☑	Inactive
Calories (Reduced/Fewer)	☑	Inactive
Cholesterol (Free)	☑	Active
Cholesterol (Low)	☑	Active
Cholesterol (Reduced/Less)	☑	Active
Cholesterol Free	☐	Active
Fat Free	☐	Active
Light in Sodium	☐	Active
Lite or Light	☑	Active
Lite or Light (w/ Calories disclosure)	☑	Active
Lite or Light (w/ Total Fat disclosure)	☑	Active
Low Calories	☐	Active

Key Fields

Table 2–35 GSM Common, Label Claims key fields

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

Editing Rules

For instructions on editing the Label Claims list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Label Claims Classifications

Use the Label Claims Classifications list in ADMN to maintain label claims classifications, as Figure 2–55 shows.

Figure 2–55 Label Claims Classifications list

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

Key Fields

Table 2–36 GSM Common, Label Claims Classifications key fields

Name	Description
Name	Name of the label claim classification
Status	The assigned status for the label claim classification. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Label Claims Classifications list, see "Maintaining Simple Lists" on page 2-4.

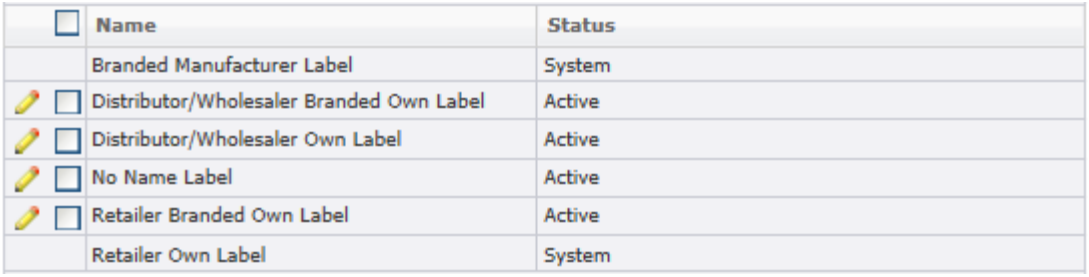
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Label Owner

Use the Label Owner list in ADMN to maintain the label owner data, as Figure 2–56 shows.

Figure 2–56 Label Owner list



Name	Status
Branded Manufacturer Label	System
Distributor/Wholesaler Branded Own Label	Active
Distributor/Wholesaler Own Label	Active
No Name Label	Active
Retailer Branded Own Label	Active
Retailer Own Label	System

Key Fields

Table 2–37 GSM Common, Label Owner key fields

Name	Description
Name	Name of the label owner
Status	The assigned status for the label owner. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Label Owner list, see "Maintaining Simple Lists" on page 2-4.

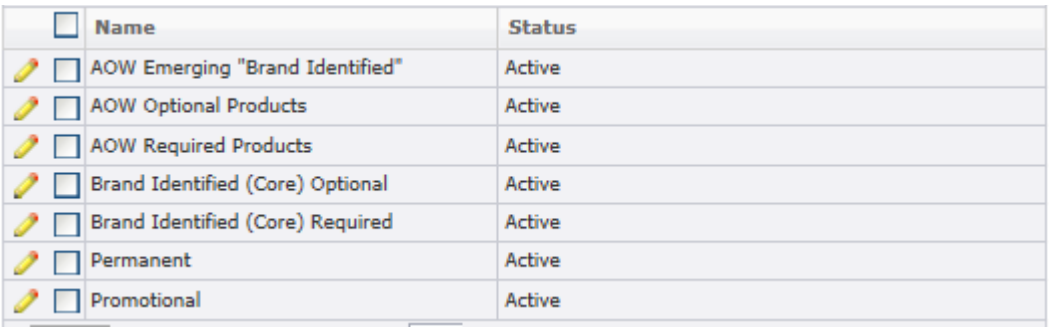
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Menu Item Class

Use the Menu Item Class list in ADMN to maintain the menu item classifications, as Figure 2–57 shows.

Figure 2–57 Menu Item Class list



Key Field

Table 2–38 GSM Common, Menu Item Class key field

Name	Description
Name	Name of the menu item class
Status	The assigned status for the menu item class. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Menu Item Class list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Menu Item Standard

Use the Menu Item Standard list in ADMN to maintain the menu item standards, as Figure 2–58 shows.

Figure 2–58 Menu Item Standard list

Locality	Compliance	Name	Status
Global	Target	Global - Target "Gold" Standard	Active
Local	Target	Local - Reference Standard	Active
Local	Meets	Local - Meets Regional Standard	Active
Local	Alternative	Local - Acceptable Alternative	Active
Local	Non	Local - Not Standard	Active
Regional	Target	Regional - Target Standard	Active
Regional	Non	Regional - Not Standard	Active
Regional	Alternative	Regional - Acceptable Alternative	Active
Regional	Meets	Regional - Meets Global Standard	Active

Key Fields

Table 2–39 GSM Common, Menu Item Standard key fields

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

Editing Rules

For instructions on editing the Menu Item Standard list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Nutp Special Attributes

Use the Nutrient Profile Special Attributes list in ADMN to maintain the data, as Figure 2–59 shows.

Figure 2–59 Nutrient Profile Special Attributes list

Name	Status
Five a Day Portion - 1 per Can	Active
Five a Day Portion - 2 per Can	Active
Five a Day Symbol- 2 Petal	Active
Five a Day Symbol - 1 Petal	Active
Five a Day Symbol - 3 Petal	Active
Five a Day Symbol - 4 Petal	Active
Five a Day Symbol - 5 Petal	Active

Key Fields

Table 2–40 GSM Common, Nutrient Profile Special Attributes key fields

Name	Description
Name	Name of the nutrient profile special attribute
Status	The assigned status for the nutrient profile special attribute. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Nutrient Profile Special Attributes list, see "Maintaining Simple Lists" on page 2-4.

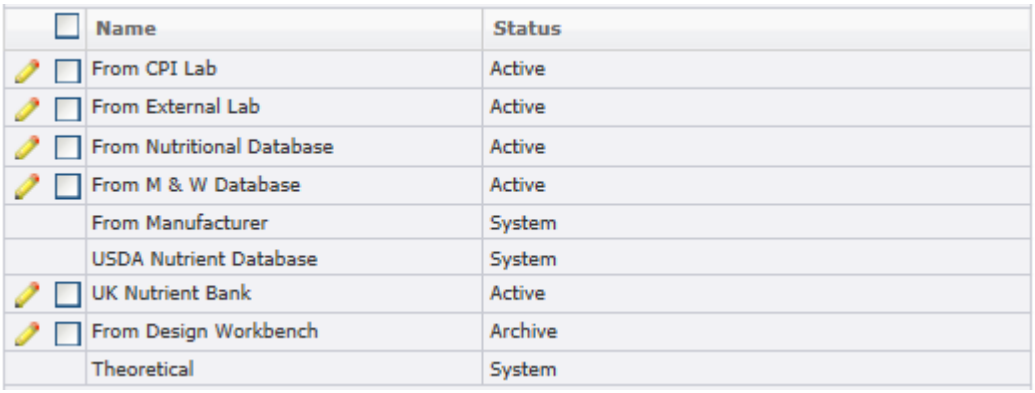
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Nutrient Source

Use the Nutrient Source list in ADMN to maintain the data, as Figure 2–60 shows.

Figure 2–60 Nutrient Source list



Name	Status
From CPI Lab	Active
From External Lab	Active
From Nutritional Database	Active
From M & W Database	Active
From Manufacturer	System
USDA Nutrient Database	System
UK Nutrient Bank	Active
From Design Workbench	Archive
Theoretical	System

Key Fields

Table 2–41 GSM Common, Nutrient Source key fields

Name	Description
Name	Name of the nutrient source
Status	The assigned status for the nutrient source. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Nutrient Source list, see "Maintaining Simple Lists" on page 2-4.

Reordering Nutrient Sources

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

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Packaging Type

Use the Packaging Type list in ADMN to maintain the data, as Figure 2–61 shows.

Figure 2–61 Packaging Type list



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

Key Fields

Table 2–42 GSM Common, Packaging Type key fields

Name	Description
Name	Name of the packaging type
ISO Code	Name of the related ISO code. For more information, see "ISO Codes" on page A-4.
Status	The assigned status for the packaging type. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Packaging Type list, see "Maintaining Simple Lists" on page 2-4.

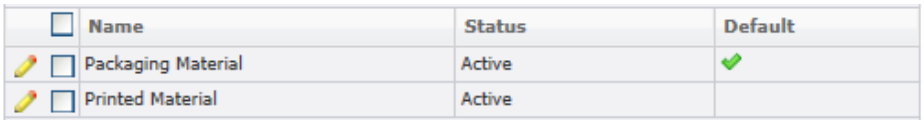
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Packaging Item Type

Use the Packaging Item Type list in ADMN to maintain the data, as Figure 2–62 shows.

Figure 2–62 Packaging Item Type list



Key Fields

Table 2–43 GSM Common, Packaging Item Type key fields

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

Editing Rules

For instructions on editing the Packaging Item Type list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Printed Packaging Languages

Use the Printed Packaging Languages list in ADMN to maintain the data, as Figure 2–63 shows.

Figure 2–63 Printed Packaging Languages list

Name	Status
(Afan)Oromo	Active
Abkhazian	Active
Afar	Active
Afrikaans	Active
Albanian	Active
Amharic	Active
Arabic	Active
Armenian	Active
Assamese	Active
Aymara	Active
Azerbaijani	Active
Bangla	Active
Bashkir	Active
Basque	Active

Key Fields

Table 2–44 GSM Common, Printed Packaging Languages key fields

Name	Description
Name	Name of the printed packaging language
Status	The assigned status for the printed packaging language. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Printed Packaging Languages list, see "Maintaining Simple Lists" on page 2-4.

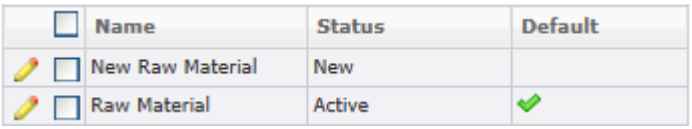
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Raw Material Types

Use the Raw Material Types list in ADMN to maintain the data, as Figure 2–64 shows.

Figure 2–64 Raw Materials list



Key Fields

Table 2–45 GSM Common, Raw Materials key fields

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

Editing Rules

For instructions on editing the Raw Materials list, see "Maintaining Simple Lists" on page 2-4.

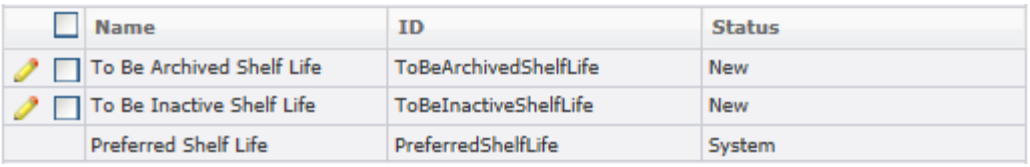
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Shelf Life Type

Use the Shelf Life Type list in ADMN to maintain the data, as Figure 2–65 shows.

Figure 2–65 Shelf Life Type list



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

Key Fields

Table 2–46 GSM Common, Shelf Life Type key fields

Name	Description
Name	Name of the shelf life type
ID	Unique identifier for the shelf life type
Status	The assigned status for the shelf life type. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Shelf Life Type list, see "Maintaining Simple Lists" on page 2-4.

Reordering Shelf Life Types

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

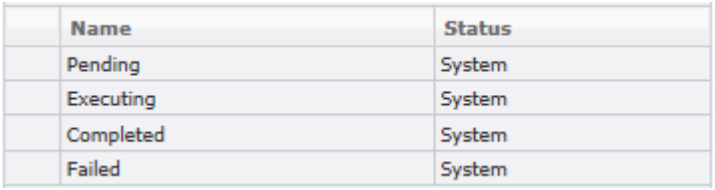
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Smart Issue Status

Use the Smart Issue Status list in ADMN to maintain the data, as Figure 2–66 shows.

Figure 2–66 Smart Issue Status list



	Name	Status
	Pending	System
	Executing	System
	Completed	System
	Failed	System

Key Fields

Table 2–47 GSM Common, Smart Issue Status key fields

Name	Description
Name	Name of the smart issue status
Status	The assigned status for the smart issue status. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Smart Issue Status list, see "Maintaining Simple Lists" on page 2-4.

Reordering Smart Issue Status

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

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Storage and Shipping Requirements

Use the Storage and Shipping Requirements list in ADMN to maintain the data, as Figure 2–67 shows.

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

Figure 2–67 Storage and Shipping Requirements list

Name	Status
Ambient	Active
Away from Strong Odors	Active
Chilled	Active
Cool	Active
Dark	Active
Dry	Active
Frozen	Active
Not Exposed to Sunlight	Active
Refrigerated	Active
Sanitary Conditions	Active
Unopened	Active
Ventilated	Active

Key Fields

Table 2–48 GSM Common, Storage and Shipping Requirements key fields

Name	Description
Name	Name of the storage and shipping requirement
Status	The assigned status for the storage and shipping requirement. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Storage and Shipping Requirements list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

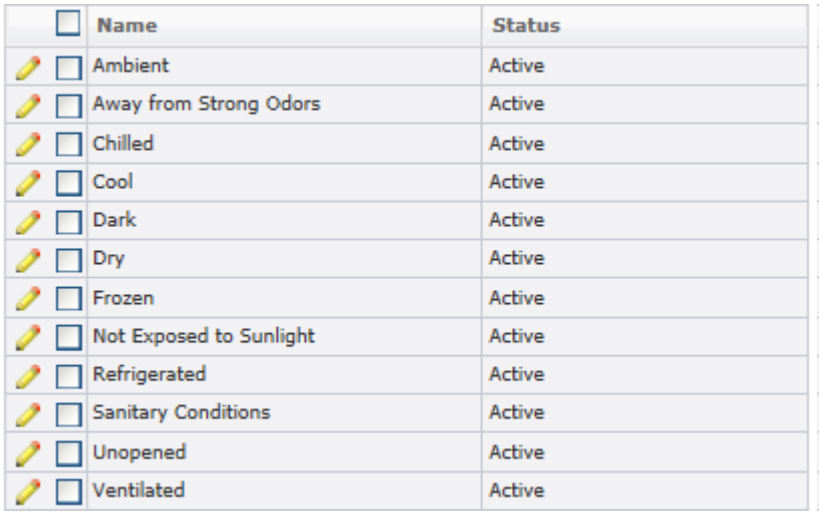
For more information about List Filtering, see "List Filtering" on page 2-9.

Storage Requirements (Trade Specs)

Use the Storage Requirements (Trade Specs) list in ADMN to maintain the data, as Figure 2–68 shows.

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

Figure 2–68 Storage Requirements (Trade Specs) list



Name	Status
Ambient	Active
Away from Strong Odors	Active
Chilled	Active
Cool	Active
Dark	Active
Dry	Active
Frozen	Active
Not Exposed to Sunlight	Active
Refrigerated	Active
Sanitary Conditions	Active
Unopened	Active
Ventilated	Active

Key Fields

Table 2–49 GSM Common, Storage Requirements (Trade Specs) key fields

Name	Description
Name	Name of the trade specification storage requirement
Status	The assigned status for the trade specification storage requirement. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Storage Requirements (Trade Spec) list, see "Maintaining Simple Lists" on page 2-4.

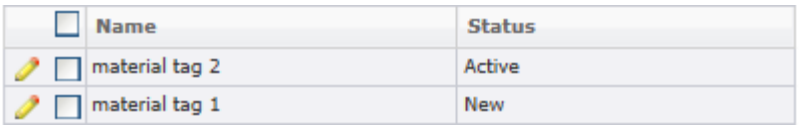
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Substitute Material Tags

Use the Substitute Material Tags list in ADMN to maintain the data, as Figure 2–69 shows.

Figure 2–69 Substitute Material Tags list



Key Fields

Table 2–50 Substitute Material Tags key fields

Name	Description
Name	Name of the substitute material tag
Status	The assigned status for the substitute material tag. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Substitute Material Tags list, see "Maintaining Simple Lists" on page 2-4.

Reordering Substitute Material Tags

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

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Trade Item Type

Use the Trade Item Type list in ADMN to maintain the Item Type field on a GSM trade specification. This list allows you to customize the Item Type name shown and tie it to a system type. The System type controls which sections and fields are shown on the trade specification. This list is shown in Figure 2–70 below.

Figure 2–70 Trade Item Type list

Name	Is Discrete	System Type	Status	Default
Consumer Unit		Consumer Unit	Active	✔
Consumer Unit (co-pack)		Consumer Unit (co-pack)	Active	
Consumer Unit (not for resale - co-pack)		Consumer Unit (not for resale - co-pack)	Active	
Consumer Unit (not for resale)		Consumer Unit (not for resale)	Active	
Traded Unit		Traded Unit	Active	
Traded Unit (co-pack)		Traded Unit (co-pack)	Active	
Traded Unit (no children - co-pack)		Traded Unit (no children - co-pack)	Active	
Traded Unit (no children)		Traded Unit (no children)	Active	

Key Fields

Table 2–51 Trade Item Type key fields

Name	Description
Name	Name of the trade item type that displays to the user.
Is Discrete	When an item type is flagged with isDiscrete, the trade specification hides the Nutrient Profile section, Related Material Specification section, and the Compliance, Allergens, Intolerances, Additives sections. Discrete always shows suppliers regardless of system type selected.
System Type	This type controls which fields are available on the trade specification when a trade item type is selected. Refer to Figure 2–71 detailing what each system type shows.
Status	The assigned status for the trade item type. Refer to "Statuses" on page 2-3 for status descriptions.
Default	The trade type that is automatically selected when a blank trade specification is created.

Figure 2–71 shows which sections and fields are displayed based on the system type selected. CU = Consumer Unit and TU = Traded Unit

Figure 2–71 System Types

System Types	CU Packaging Attributes	TU Packaging Attributes	Trade Children	% Breakdown	Suppliers	GTIN/UPC/EAN	
CU	Shown	Hidden	Shown	Hidden	Hidden	Shown	
CU (not for resale)	Shown	Hidden	Shown	Hidden	Hidden	Hidden	
TU	Hidden	Shown	Shown	Hidden	Hidden	Shown	
TU (no children)	Shown	Shown	Hidden	Hidden	Hidden	Shown	
CU (co-pack)	Shown	Hidden	Shown	Shown	Shown	Shown	
CU (co-pack) (not for resale)	Shown	Hidden	Shown	Shown	Shown	Shown	
TU (co-pack)	Hidden	Shown	Shown	Shown	Shown	Shown	
TU (co-pack) (no children)	Shown	Shown	Hidden	Shown	Shown	Shown	
System Types	**PLU Description**	**POS Description**	**Brand Description**	**Product Name**	**UNSPSC Code**	**Tax Type**	**Stacking Height**
CU	Shown	Shown	Shown	Shown	Shown	Shown	Hidden
CU (not for resale)	Hidden	Hidden	Shown	Shown	Hidden	Hidden	Hidden
TU	Shown	Shown	Hidden	Hidden	Shown	Shown	Shown
TU (no children)	Shown	Shown	Shown	Shown	Hidden	Shown	Shown
CU (co-pack)	Shown	Shown	Shown	Shown	Hidden	Shown	Hidden
CU (co-pack) (not for resale)	Shown	Shown	Shown	Shown	Hidden	Hidden	Hidden
TU (co-pack)	Shown	Shown	Hidden	Hidden	Shown	Shown	Shown
TU (co-pack) (no children)	Shown	Shown	Shown	Shown	Hidden	Shown	Shown
* Coding and Variable Weight fields are always on all Trade Types. If the Packaging Attributes TU section exists they appear within this section, else they appear in the Packaging Attributes CU section.							

Editing Rules

For instructions on editing the Trade Item Type list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Trade Tax Type/Rate

Use the Trade Tax Type/Rate list in ADMN to maintain the trade tax type/rate, as Figure 2–72 shows.

Figure 2–72 Trade Tax Type/Rate list



Key Fields

Table 2–52 GSM Common, Trade Tax Type/Rate key fields

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

Editing Rules

For instructions on editing the Trade Tax Type/Rate list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Trade UNSPSC Code

Use the Trade United Nations Standard Products and Services Code (UNSPSC (UNSPSC) Code list in ADMN to maintain the list, as Figure 2–73 shows.

Figure 2–73 Trade UNSPSC Code list



Editing Rules

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

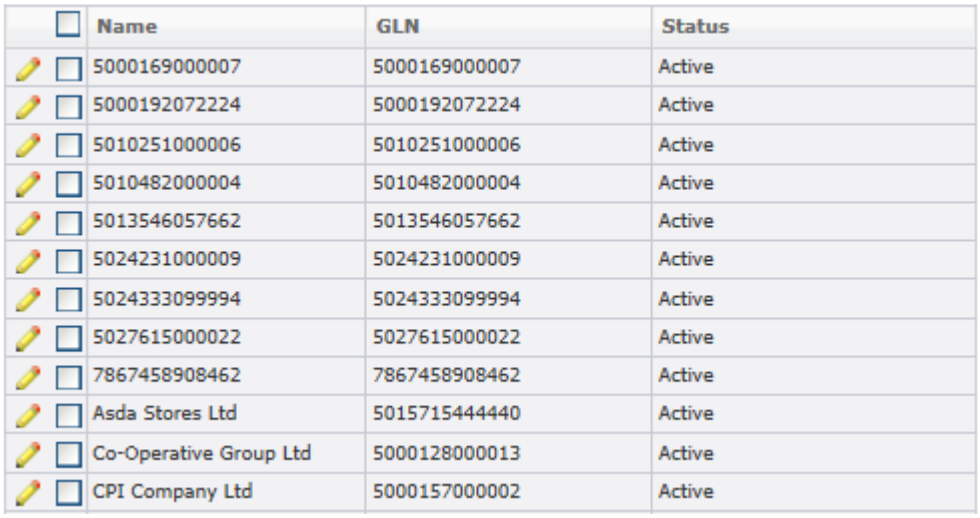
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Trading Company

Use the Trading Company list in ADMN to maintain the fields, as Figure 2–74 shows.

Figure 2–74 Trading Company list



Name	GLN	Status
5000169000007	5000169000007	Active
5000192072224	5000192072224	Active
5010251000006	5010251000006	Active
5010482000004	5010482000004	Active
5013546057662	5013546057662	Active
5024231000009	5024231000009	Active
5024333099994	5024333099994	Active
5027615000022	5027615000022	Active
7867458908462	7867458908462	Active
Asda Stores Ltd	5015715444440	Active
Co-Operative Group Ltd	5000128000013	Active
CPI Company Ltd	5000157000002	Active

Key Fields

Table 2–53 GSM Common, Trading Company key fields

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

Editing Rules

For instructions on editing the Trading Company list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

UDEX Classifications

Use the UDEX Classifications list in ADMN to maintain the data, as Figure 2–75 shows.

Figure 2–75 GSM Common, UDEX Classifications tree list



Editing Rules

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

List Filtering

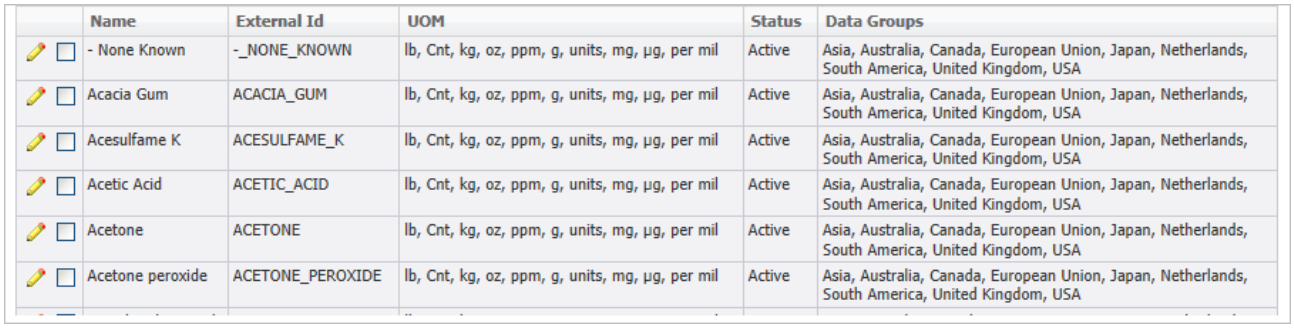
For more information about List Filtering, see "List Filtering" on page 2-9.

Global Specification Management Compliance Data

Additives

Use the Additives list in ADMN to maintain the data, as Figure 2–76 shows.

Figure 2–76 Additives list



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

Key Fields

Table 2–54 GSM Compliance, Additives key fields

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

Editing Rules

For instructions on editing the Additives list, see "Maintaining Simple Lists" on page 2-4.

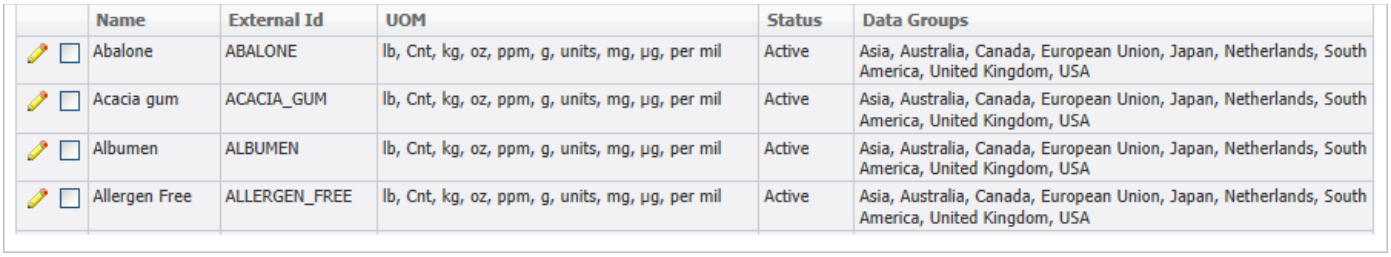
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Allergens

Use the Allergens list in ADMN to maintain the data, as Figure 2–77 shows.

Figure 2–77 Allergens list



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

Key Fields

Table 2–55 GSM Compliance, Allergens key fields

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

Editing Rules

For instructions on editing the Allergens list, see "Maintaining Simple Lists" on page 2-4.

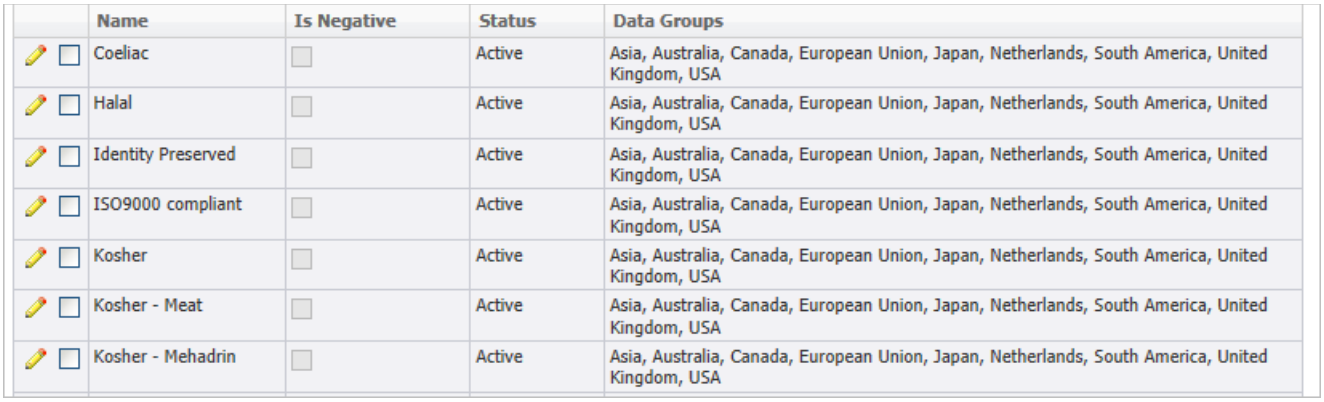
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Complies With

Use the Complies With list in ADMN to maintain the data, as Figure 2–78 shows.

Figure 2–78 Complies With list



Name	Is Negative	Status	Data Groups
Coeliac		Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
Halal		Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
Identity Preserved		Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
ISO9000 compliant		Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
Kosher		Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
Kosher - Meat		Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA
Kosher - Mehadrin		Active	Asia, Australia, Canada, European Union, Japan, Netherlands, South America, United Kingdom, USA

Key Fields

Table 2–56 GSM Compliance, Complies With key fields

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

Editing Rules

For instructions on editing the Complies With list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Intolerances

Use the Intolerances list in ADMN to maintain the data, as Figure 2–79 shows.

Figure 2–79 Intolerances list

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

Key Fields

Table 2–57 GSM Compliance, Intolerances key fields

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

Editing Rules

For instructions on editing the Intolerances list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

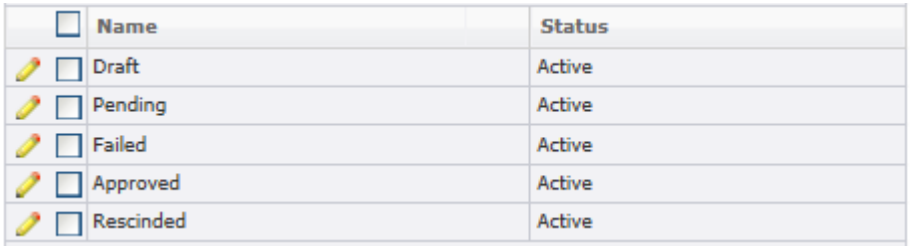
For more information about List Filtering, see "List Filtering" on page 2-9.

Global Specification Management FSIS Data

Application Status

Use the Application Status list in ADMN to maintain the data, as Figure 2–80 shows.

Figure 2–80 Application Status list



Key Fields

Table 2–58 GSM FSIS, Application Status key fields

Name	Description
Name	Name of the FSIS application status
Status	The assigned status for the FSIS application status. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Application Status list, see "Maintaining Simple Lists" on page 2-4.

Reordering Application Statuses

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

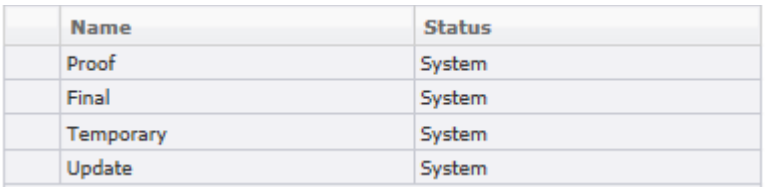
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

CFIA Approval Type

Use the CFIA Approval Types list in ADMN to maintain approval types, as Figure 2–81 shows.

Figure 2–81 CFIA Approval Types list



	Name	Status
	Proof	System
	Final	System
	Temporary	System
	Update	System

Key Fields

Table 2–59 GSM FSIS, CFIA Approval Type key fields

Name	Description
Name	Name of the FSIS CFIA approval type
Status	The assigned status for the FSIS CFIA approval type. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the CFIA Approval Type list, see "Maintaining Simple Lists" on page 2-4.

Reordering CFIA Approval Types

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

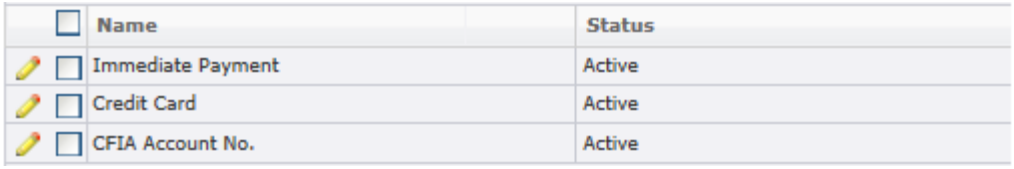
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

CFIA Payment Method

Use the CFIA Payment Method list in ADMN to maintain payment methods, as Figure 2–82 shows.

Figure 2–82 CFIA Payment Method list



Key Fields

Table 2–60 GSM FSIS, CFIA Payment Method key fields

Name	Description
Name	Name of the FSIS CFIA payment method
Status	The assigned status for the FSIS CFIA payment method. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the CFIA Payment Method list, see "Maintaining Simple Lists" on page 2-4.

Reordering CFIA Payment Methods

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

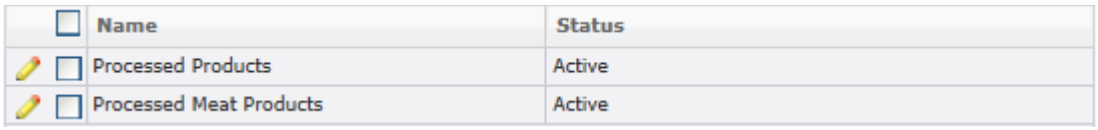
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

CFIA Product Type

Use the CFIA Product Type list in ADMN to maintain the product type data, as Figure 2–83 shows.

Figure 2–83 CFIA Product Type list



Key Fields

Table 2–61 GSM FSIS, CFIA Product Type key fields

Name	Description
Name	Name of the FSIS CFIA product type
Status	The assigned status for the FSIS CFIA product type. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the CFIA Product Type list, see "Maintaining Simple Lists" on page 2-4.

Reordering CFIA Product Types

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

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

USDA HACCP Category

Use the USDA HACCP Category list in ADMN to maintain the data, as Figure 2–84 shows.

Figure 2–84 USDA HACCP Category list

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

Key Fields

Table 2–62 GSM FSIS, USDA HACCP Category key fields

Name	Description
Name	Name of the USDA HACCP category
Status	The assigned status for the USDA HACCP category. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the USDA HACCP list, see "Maintaining Simple Lists" on page 2-4.

Reordering USDA HACCP Categories

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

List Filtering

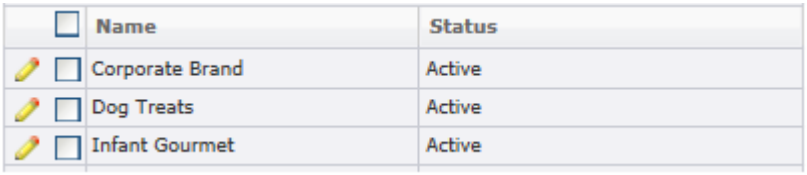
For more information about List Filtering, see "List Filtering" on page 2-9.

New Product Development Data

Brands - (NPD)

Use the Brands - (NPD) list in ADMN to maintain the data, as Figure 2–85 shows.

Figure 2–85 Brands - (NPD) list



Key Fields

Table 2–63 NPD, Brands - (NPD) key fields

Name	Description
Name	Name of the brand in NPD
Status	The assigned status for the brand. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Brands - (NPD) list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Business Units - (NPD)

Use the Business Units - (NPD) tree list in ADMN to maintain the data, as Figure 2–86 shows.

Figure 2–86 Business Units - (NPD) tree list



Editing Rules

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

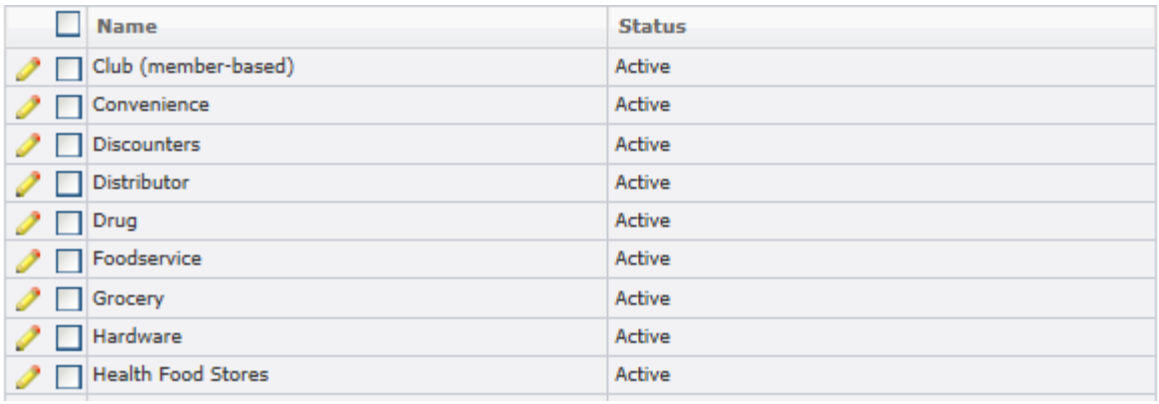
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Channels

Channels are used to define distribution strategies in projects and strategic briefs. Use the Channels list in ADMN to maintain the data, as Figure 2–87 shows.

Figure 2–87 Channels list



Key Fields

Table 2–64 NPD, Channels key fields

Name	Description
Name	Name of the channel
Status	The assigned status for the channel. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Channels list, see "Maintaining Simple Lists" on page 2-4.

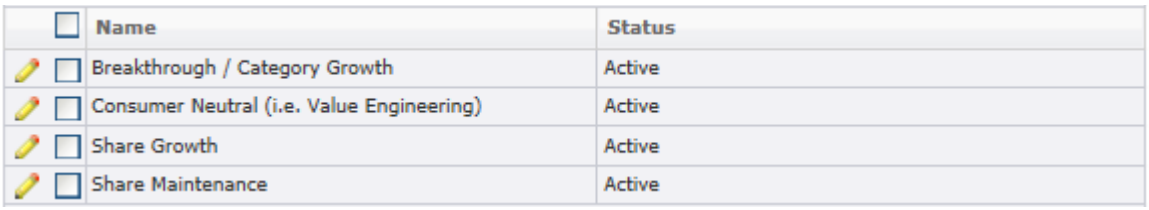
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Consumer Value Perception

Use the Consumer Value Perception list in ADMN to maintain the data, as Figure 2–88 shows.

Figure 2–88 Consumer Value Perception list



Key Fields

Table 2–65 NPD, Consumer Value Perception key fields

Name	Description
Name	Name of the consumer value perception
Status	The assigned status for the consumer value perception. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Consumer Value Perception list, see "Maintaining Simple Lists" on page 2-4.

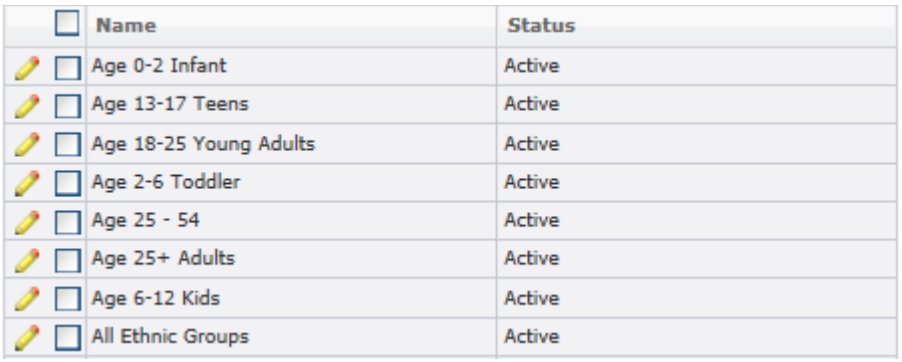
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Demographic Categories

Demographics are used when defining projects and strategic briefs. Use the Demographics list in ADMN to maintain the data, as Figure 2–89 shows.

Figure 2–89 Demographics list



Key Fields

Table 2–66 NPD, Demographics key fields

Name	Description
Name	Name of the demographic category.
Status	The assigned status for the demographic category. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Demographics list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Status

Use the Document Status list in ADMN to o maintain the NPD supporting document status list, as Figure 2–89 shows.

Figure 2–90 Document Status list



Key Fields

Table 2–67 NPD, Document Status key fields

Name	Description
Name	Name of the document status.
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Document Status list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Type

Use the Document Type list in ADMN to maintain document type options for NPD supporting documents, as Figure 2–89 shows.

Figure 2–91 Document Type list



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

Key Fields

Table 2–68 NPD, Document Type key fields

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

Editing Rules

For instructions on editing the Document Type list, see "Maintaining Simple Lists" on page 2-4.

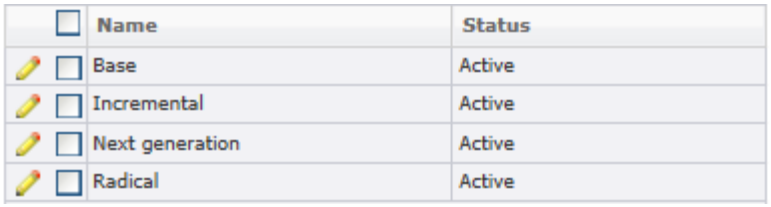
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Enabling Technology

Use the Enabling Technology list to maintain the data, as Figure 2–92 shows.

Figure 2–92 Enabling Technology list



Key Fields

Table 2–69 NPD, Enabling Technology key fields

Name	Description
Name	Name of the enabling technology
Status	The assigned status for the enabling technology. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Enabling Technology list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Functional Area - (NPD)

Use the Functional Area - (NPD) list in ADMN to maintain the data, as Figure 2–93 shows.

Figure 2–93 Functional Area - (NPD) list

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

Key Fields

Table 2–70 NPD, Functional Area - (NPD) key fields

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

Editing Rules

For instructions on editing the Functional Area - (NPD) list, see "Maintaining Simple Lists" on page 2-4.

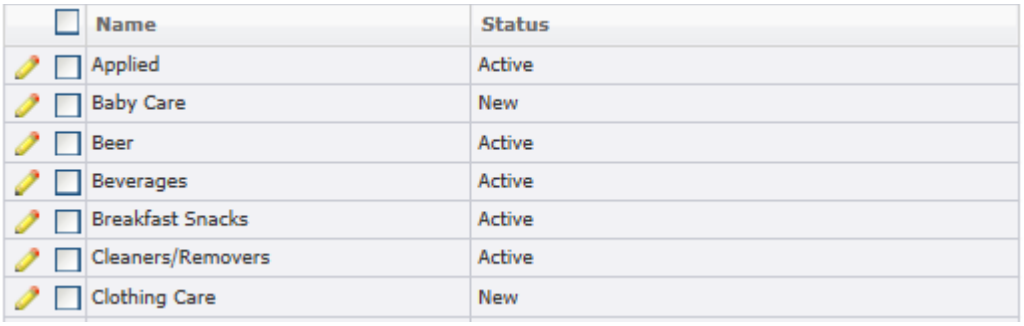
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Global Categories

Use the Global Categories list in ADMN to maintain the data, as Figure 2–94 shows.

Figure 2–94 Global Categories list



Key Fields

Table 2–71 NPD, Global Categories key fields

Name	Description
Name	Name of the global category
Status	The assigned status for the global category. Refer to"Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Global Categories list, see "Maintaining Simple Lists" on page 2-4.

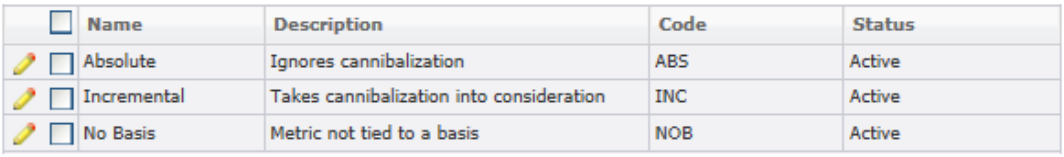
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Metrics - Basis

Use the Metrics - Basis list to maintain the data, as Figure 2–95 shows.

Figure 2–95 Metrics - Basis list



	Name	Description	Code	Status
	Absolute	Ignores cannibalization	ABS	Active
	Incremental	Takes cannibalization into consideration	INC	Active
	No Basis	Metric not tied to a basis	NOB	Active

Key Fields

Table 2–72 NPD, Metrics - Basis key fields

Name	Description
Name	Name of the metrics basis
Description	Description of the metrics basis
Code	Alphanumeric code assigned to the metrics basis
Status	The assigned status for the metrics basis. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Metrics - Basis list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Metrics - Category

Use the Metrics - Category list to maintain the data, as Figure 2–96 shows.

Figure 2–96 Metrics - Category list



Name	Status
Capital	Active
Consumer Testing	Active
Expense	Active
Other	Active
Product	Active
Resources	Active
Revenue	Active
Volume	Active

Key Fields

Table 2–73 NPD, Metrics - Category key fields

Name	Description
Name	Name of the metrics category
Status	The assigned status for the metrics category. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Metrics - Category list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Metrics - Fiscal Year

Use the Metrics - Fiscal Year list to maintain the data, as Figure 2–97 shows.

Figure 2–97 Metrics - Fiscal Year list



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

Key Fields

Table 2–74 NPD, Metrics - Fiscal Year key fields

Name	Description
Name	Name of the metrics fiscal year
Description	Description of the metrics fiscal year
Code	Alphanumeric code assigned to the metrics fiscal year
Status	The assigned status for the fiscal year. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Metrics - Fiscal Year list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Metrics - Phase

Use the Metrics - Phase list to maintain the data, as Figure 2–98 shows.

Figure 2–98 Metrics - Phase list

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

Key Fields

Table 2–75 NPD, Metrics - Phase key fields

Name	Description
Name	Name of the metrics phase
Description	Description of the metrics phase
Code	Alphanumeric code assigned to the metrics phase
Status	The assigned status for the metrics phase. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Metrics - Phase list, see "Maintaining Simple Lists" on page 2-4.

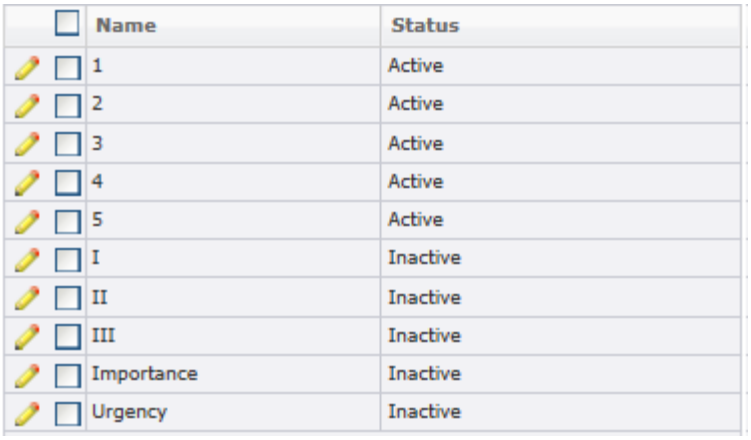
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Priorities

Use the Priorities list in ADMN to maintain the data, as Figure 2–99 shows.

Figure 2–99 Priorities list



Name	Status
1	Active
2	Active
3	Active
4	Active
5	Active
I	Inactive
II	Inactive
III	Inactive
Importance	Inactive
Urgency	Inactive

Key Fields

Table 2–76 Priorities key fields

Name	Description
Name	Name of the priority
Status	The assigned status for the priority. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Priorities list, see "Maintaining Simple Lists" on page 2-4.

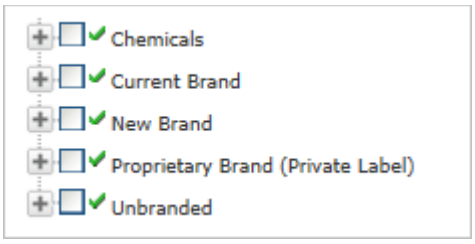
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Project Type Categories

Use the Project Type Categories tree list in ADMN to maintain the data, as Figure 2–100 shows.

Figure 2–100 NPD Project Type Categories list



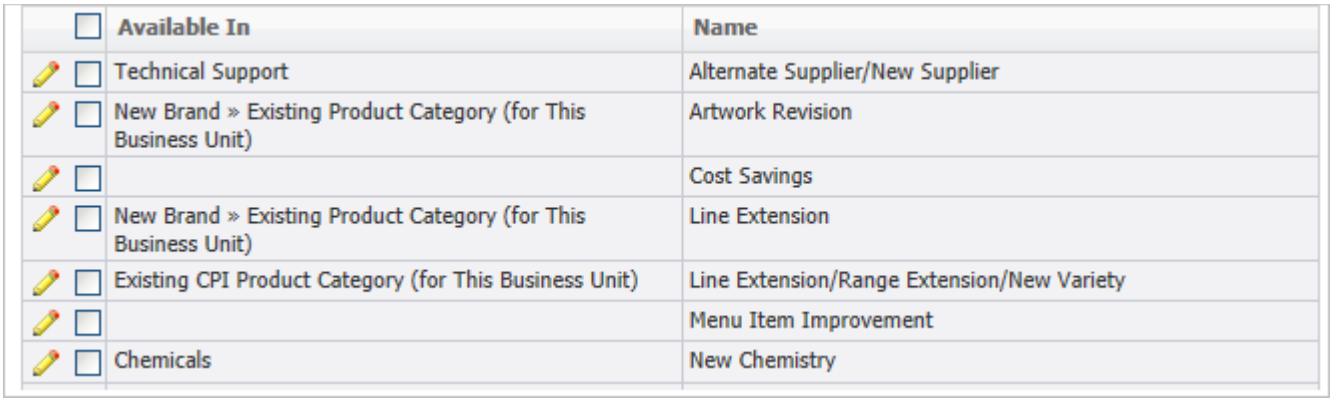
Editing Rules

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

Project Types

Use the Project Types list in ADMN to maintain the data, as Figure 2–101 shows.

Figure 2–101 Project Types list



Available In	Name
Technical Support	Alternate Supplier/New Supplier
New Brand » Existing Product Category (for This Business Unit)	Artwork Revision
	Cost Savings
New Brand » Existing Product Category (for This Business Unit)	Line Extension
Existing CPI Product Category (for This Business Unit)	Line Extension/Range Extension/New Variety
	Menu Item Improvement
Chemicals	New Chemistry

Key Fields

Table 2–77 NPD, Project Types key fields

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

Editing Rules

For instructions on editing the Project Types list, see "Maintaining Simple Lists" on page 2-4.

Project Visibilities

Use the Project Visibility list in ADMN to maintain the data, as Figure 2–102 shows.

Figure 2–102 Project Visibility list



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

Key Fields

Table 2–78 NPD, Project Visibility key fields

Name	Description
Name	Name of the project visibility
Status	The assigned status for the project visibility. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Project Visibility list, see "Maintaining Simple Lists" on page 2-4.

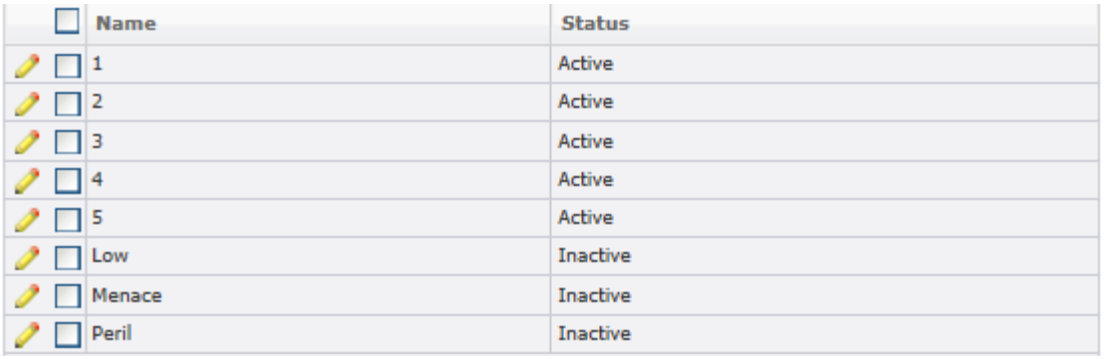
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Risk

Use the Risk list in ADMN to maintain the data, as Figure 2–103 shows.

Figure 2–103 Risk list



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

Key Fields

Table 2–79 Risk key fields

Name	Description
Name	Name of the risk
Status	The assigned status for the risk. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Risk list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Product Quality Management Data

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

Action Type

Use the Action Type list in ADMN to maintain action types for PQM, as Figure 2–104 shows.

Figure 2–104 Action Type list

Name	Abbreviation	System Code	Status
Corrective and Preventative Action	CAPA	Corrective and Preventative Action	Active
Illness/Injury CAPA	ILLINJCAPA	Corrective and Preventative Action	Active
Labeling CAPA	LBLCAPA	Corrective and Preventative Action	Active
Packaging CAPA	PKGCAPA	Corrective and Preventative Action	Active
Product CAPA	PRDCAPA	Corrective and Preventative Action	Active
Product Recall	PRDRCLL	Corrective and Preventative Action	Active
Supplier Corrective Action Request	SCAR	Corrective and Preventative Action	Active

Key Fields

Table 2–80 PQM, Action Type key fields

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

Editing Rules

For instructions on editing the Action Type list, see "Maintaining Simple Lists" on page 2-4.

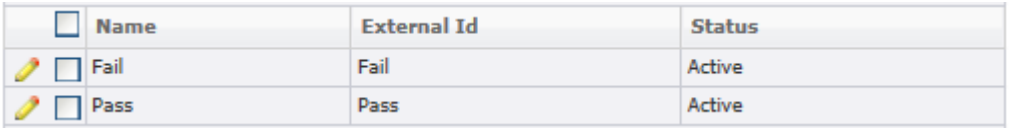
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Audit Result

Use the Audit Result list in ADMN to maintain audit results for PQM, as Figure 2–105 shows.

Figure 2–105 Audit Result list



Key Fields

Table 2–81 PQM, Audit Result key fields

Name	Description
Name	Name of the audit result
External Id	Unique identification for the audit result
Status	The assigned status for the audit result. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Audit Result list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Audit Type

Use the Audit Type list in ADMN to maintain audit types for PQM, as Figure 2–106 shows.

Figure 2–106 Audit Type list

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

Key Fields

Table 2–82 PQM, Audit Type key fields

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

Editing Rules

For instructions on editing the Audit Type list, see "Maintaining Simple Lists" on page 2-4.

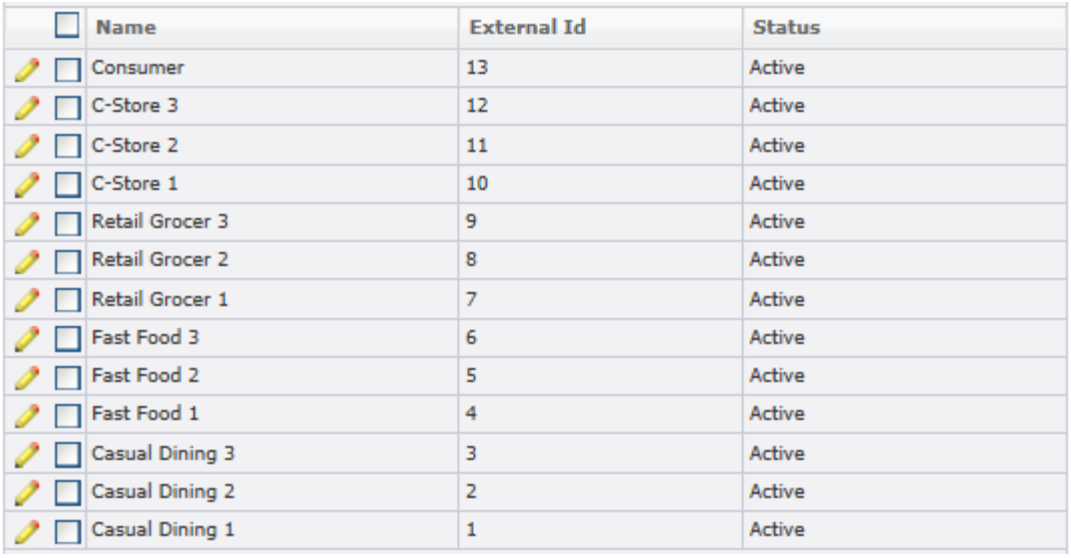
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Customers

Use the Customers list in ADMN to maintain customers for PQM, as Figure 2–107 shows.

Figure 2–107 Customers list



Name	External Id	Status
Consumer	13	Active
C-Store 3	12	Active
C-Store 2	11	Active
C-Store 1	10	Active
Retail Grocer 3	9	Active
Retail Grocer 2	8	Active
Retail Grocer 1	7	Active
Fast Food 3	6	Active
Fast Food 2	5	Active
Fast Food 1	4	Active
Casual Dining 3	3	Active
Casual Dining 2	2	Active
Casual Dining 1	1	Active

Key Fields

Table 2–83 PQM, Customers key fields

Name	Description
Name	Name of the customer
External Id	Unique identification for the customer
Status	The assigned status for the customer. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Customers list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Status

Use the Document Status list in ADMN to maintain the PQM supporting document status list, as Figure 2–107 shows.

Figure 2–108 Document Status list



	Name	Behavior ID	Default	Status
	Approved	103		Active
	Draft	101	☑	Active
	Review	102		Active

Key Fields

Table 2–84 PQM, Document Status key fields

Name	Description
Name	Name of the document status.
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Document Status list, see "Maintaining Simple Lists" on page 2-4.

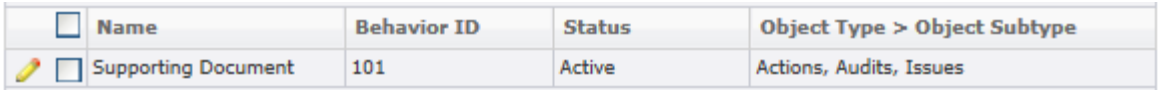
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Type

Use the Document Type list in ADMN to maintain document type options for PQM supporting documents, as Figure 2–109 shows.

Figure 2–109 Document Type list



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

Key Fields

Table 2–85 PQM, Document Type key fields

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

Editing Rules

For instructions on editing the Document Type list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Failure Type

Use the Failure Type list in ADMN to maintain failure types for PQM, as Figure 2–110 shows. Failure types are associated to an affected item on an issue, action or audit.

Figure 2–110 Failure Type list

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

Key Fields

Table 2–86 PQM, Failure Type key fields

Name	Description
Name	Name of the failure type
External Id	Unique identification for the failure type
Status	The assigned status for the failure type. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Failure Type list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Issue Types

Use the Issue Type list in ADMN to maintain issue types for PQM, as Figure 2–111 shows.

Figure 2–111 Issue Type list

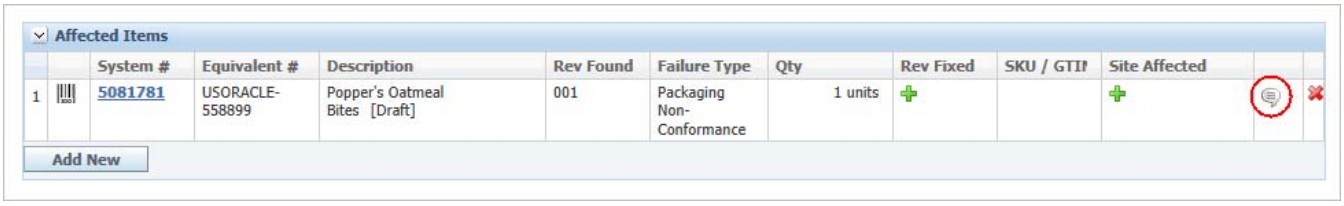
Name	Abbreviation	System Code	Status
Consumer Complaint	Consumer Complaint	Non Conformance Report	Active
Customer Complaint	Customer Complaint	Non Conformance Report	Active
Incoming Goods Inspection Failure	Incoming Goods Failure	Non Conformance Report	Active
Injury Report	Injury Report	Problem Report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

Key Fields

Table 2–87 PQM, Issue Type key fields

Name	Description
Name	Name of the issue type
Abbreviation	Abbreviation for the issue type
System Code	The system type assigned to the issue type. This system type controls which core fields are displayed to the user when this type is selected. Only two system types of Issues are available: Problem Report and Non Conformance Report. Non Conformance Reports contain extra fields. These fields are shown by selecting the non conformance icon ( ) in the Affected Items grid. See Figure 2–112 below.
Status	The assigned status for the issue type. Refer to "Statuses" on page 2-3 for status descriptions.

Figure 2–112 Affected Items grid



Editing Rules

For instructions on editing the Issue Type list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Product Line

Use the Product Line list in ADMN to maintain product lines for PQM, as Figure 2–113 shows.

Figure 2–113 Product Line list

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

Key Fields

Table 2–88 PQM, Product Line key fields

Name	Description
Name	Name of the product line
External Id	Unique identification for the product line
Status	The assigned status for the product line. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Product Line list, see "Maintaining Simple Lists" on page 2-4.

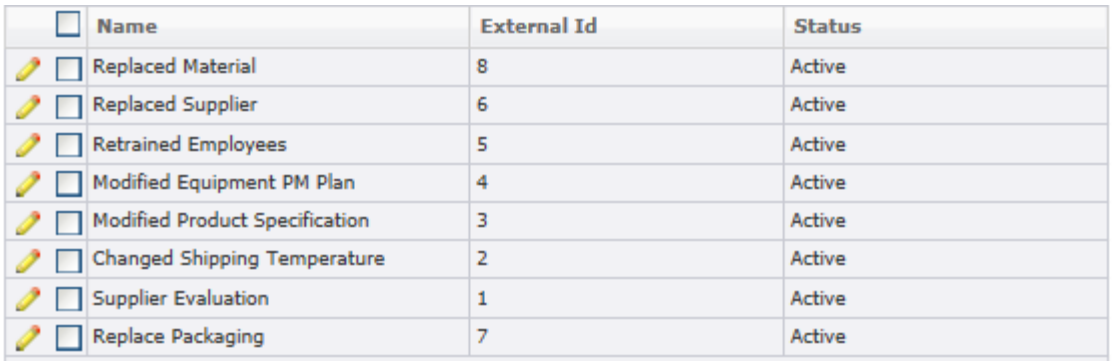
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Resolution

Use the Resolution list in ADMN to maintain resolutions for PQM, as Figure 2–114 shows. This list controls the resolution options found on a PQM issue.

Figure 2–114 Resolution list



Name	External Id	Status
Replaced Material	8	Active
Replaced Supplier	6	Active
Retrained Employees	5	Active
Modified Equipment PM Plan	4	Active
Modified Product Specification	3	Active
Changed Shipping Temperature	2	Active
Supplier Evaluation	1	Active
Replace Packaging	7	Active

Key Fields

Table 2–89 PQM, Resolution key fields

Name	Description
Name	Name of the resolution
External Id	Unique identification for the resolution
Status	The assigned status for the resolution. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Resolution list, see "Maintaining Simple Lists" on page 2-4.

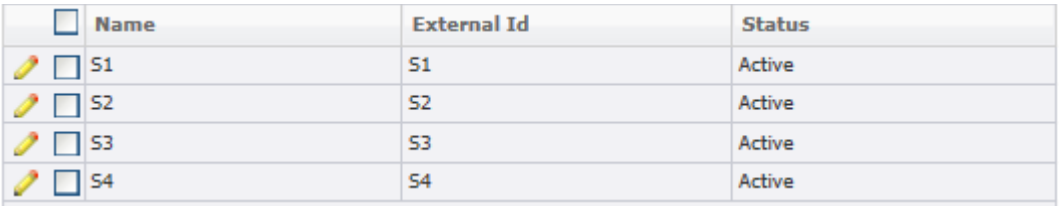
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Severity

Use the Severity list in ADMN to maintain severities for PQM, as Figure 2–115 shows.

Figure 2–115 Severity list



Key Fields

Table 2–90 PQM, Severity key fields

Name	Description
Name	Name of the severity
External Id	Unique identification for the severity
Status	The assigned status for the severity. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Severity list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Product Quality Scorecard Data

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

Lot Samples Quantity UOMs

Use the Lot Samples Quantity UOMs list in ADMN to maintain units of measure for lot sample quantities, as Figure 2–116 shows.

Figure 2–116 Lot Samples Quantity UOMs list



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

Key Fields

Table 2–91 PQS, Lot Samples Quantity UOMs key fields

Name	Description
Name	Name of the lot sample quantity unit of measure
Status	The assigned status for the lot sample quantity unit of measure. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Lot Samples Quantity UOMs list, see "Maintaining Simple Lists" on page 2-4.

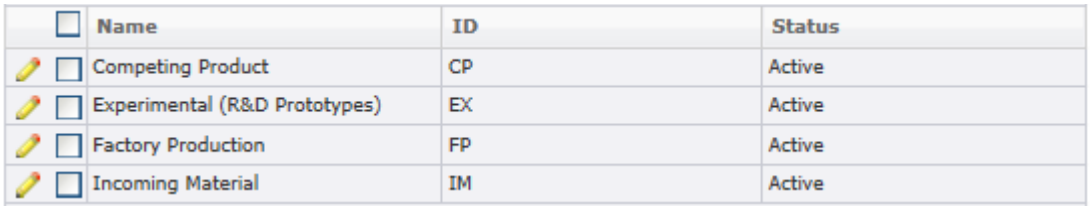
Reordering Lot Samples Quantity UOMs

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

Sample Types

Use the Sample Type list in ADMN to maintain sample types, as Figure 2–117 shows.

Figure 2–117 Sample Type list



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

Key Fields

Table 2–92 PQS, Sample Type key fields

Name	Description
Name	Name of the sample type
ID	Unique identification assigned to the sample type
Status	The assigned status for the sample type. Refer to "Statuses" on page 2-3 for status descriptions.

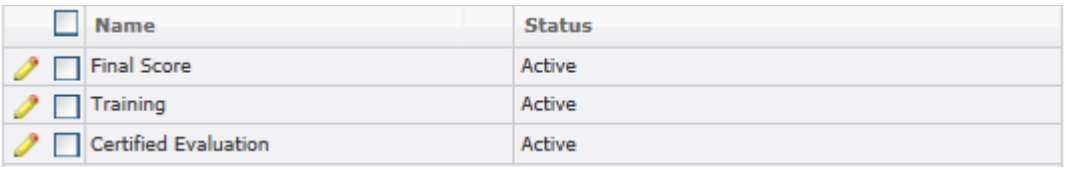
Editing Rules

For instructions on editing the Sample Type list, see "Maintaining Simple Lists" on page 2-4.

Scorecard Qualifications

Use the Scorecard Qualifications list in ADMN to maintain scorecard qualifications, as Figure 2–118 shows.

Figure 2–118 Scorecard Qualifications list



Key Fields

Table 2–93 PQS, Scorecard Qualifications key fields

Name	Description
Name	Name of the scorecard qualification
Status	The assigned status for the scorecard qualification. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Scorecard Qualifications list, see "Maintaining Simple Lists" on page 2-4.

Reordering Scorecard Qualifications

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

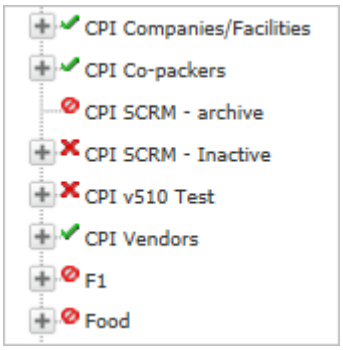
Supply Chain Relationship Management Data

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

Business Units - (SCRM)

Use the Business Units - (SCRM) tree list in ADMN to maintain the data, as Figure 2–119 shows.

Figure 2–119 Business Units - (SCRM) tree list



Editing Rules

Use the instructions provided for editing tree lists provided in "Maintaining Tree Lists" on page 2-11.

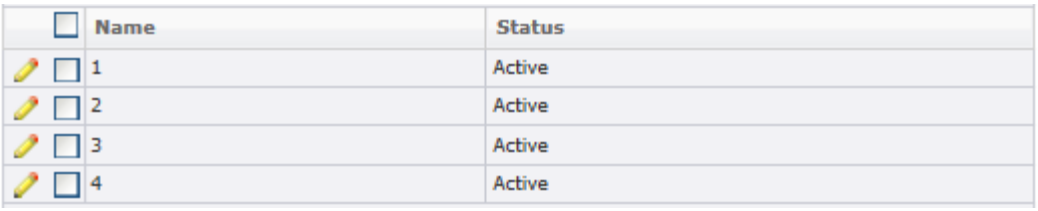
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Class

Use the Class list in ADMN to maintain the data, as Figure 2–120 shows.

Figure 2–120 Class list



Key Field

Table 2–94 SCRM, Class key field

Name	Description
Name	Name of the class
Status	The assigned status for the class. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Class list, refer to "Maintaining Simple Lists" on page 2-4.

Reordering Classes

Only users with the role of [SUPER_DATA_ADMIN] can reorder classes. For instructions on setting the order, see "To reorder data in a simple list:" on page 2-6.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Company Special Attributes

Use the Company Special Attributes list in ADMN to maintain the data, as Figure 2–121 shows.

Figure 2–121 Company Special Attributes list

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

Key Field

Table 2–95 SCRM, Company Special Attributes key field

Name	Description
Name	Name of the special attribute for companies
Status	The assigned status for the special attribute for companies. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Company Special Attributes list, see "Maintaining Simple Lists" on page 2-4.

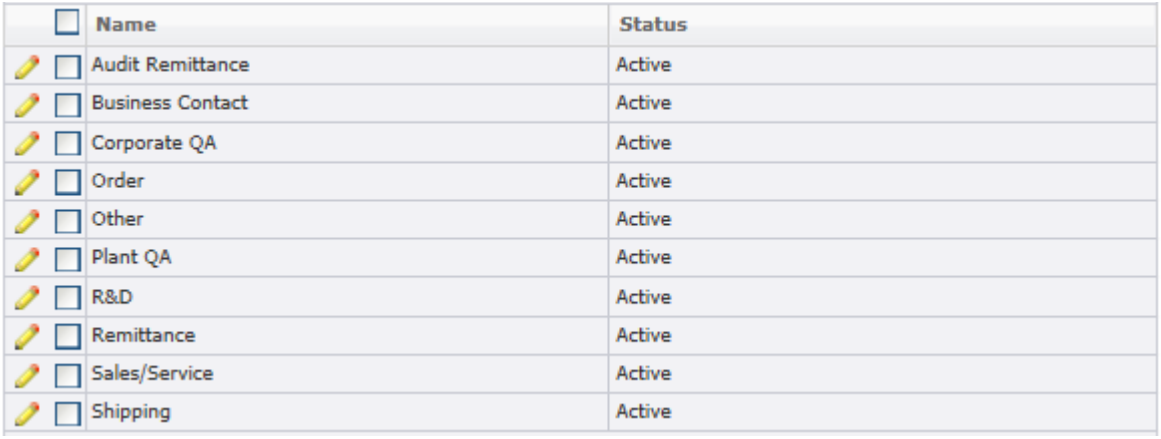
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Contact Category

Contact categories for company and facility profiles are maintained in the ADMN Contact Category list, as Figure 2–122 shows.

Figure 2–122 Contact Category list



Name	Status
Audit Remittance	Active
Business Contact	Active
Corporate QA	Active
Order	Active
Other	Active
Plant QA	Active
R&D	Active
Remittance	Active
Sales/Service	Active
Shipping	Active

Key Field

Table 2–96 SCRM, Contact Category key field

Name	Description
Name	Name of the contact category
Status	The assigned status for the contact category. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Contact Category list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Contact Profile Tags

Use the Contact Profile Tags list in ADMN to maintain contact profile tags, as Figure 2–14 shows.

Figure 2–123 Contact Profile Tags list

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

Key Fields

Table 2–97 SCRM Data, Contact Profile Tags key fields

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

Editing Rules

For instructions on editing the Contact Profile Tag list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Status

Use the Document Status list in ADMN to maintain the SCRM supporting document status list, as Figure 2–124 shows.

Figure 2–124 Document Status list



Key Fields

Table 2–98 SCRM, Document Status key fields

Name	Description
Name	Name of the document status.
Behavior ID	The document status ID
Default	Indicates the default document status
Status	The assigned status for the document status. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Document Status list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Document Type

Use the Document Type list in ADMN to maintain document type options for SCRM supporting documents, as Figure 2–125 shows.

Figure 2–125 Document Type list



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

Key Fields

Table 2–99 SCRM, Document Type key fields

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

Editing Rules

For instructions on editing the Document Type list, see "Maintaining Simple Lists" on page 2-4.

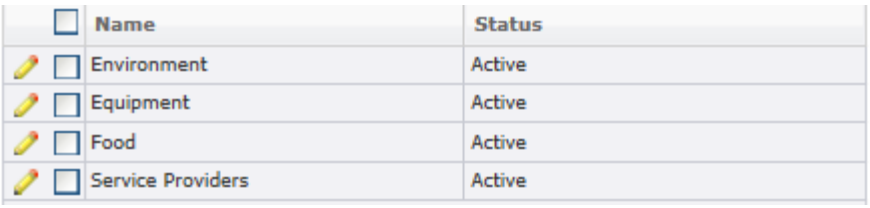
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Facility Special Attributes

Use the Facility Special Attributes list in ADMN to maintain the data, as Figure 2–126 shows:

Figure 2–126 Facility Special Attributes list



Key Fields

Table 2–100 SCRM, Facility Special Attributes key fields

Name	Description
Name	Name of the facility special attribute
Status	The assigned status for the facility special attribute. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Facility Special Attributes list, see "Maintaining Simple Lists" on page 2-4.

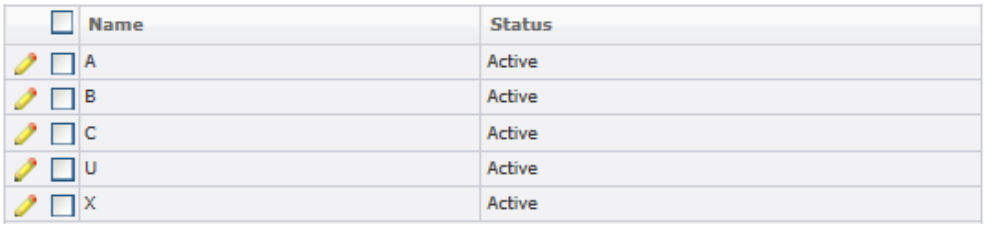
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Protocol

Use the Protocol list in ADMN to maintain the data, as Figure 2–127 shows.

Figure 2–127 Protocol list



Key Field

Table 2–101 SCRM, Protocol key fields

Name	Description
Name	Name of the protocol
Status	The assigned status for the protocol. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Protocol list, see "Maintaining Simple Lists" on page 2-4.

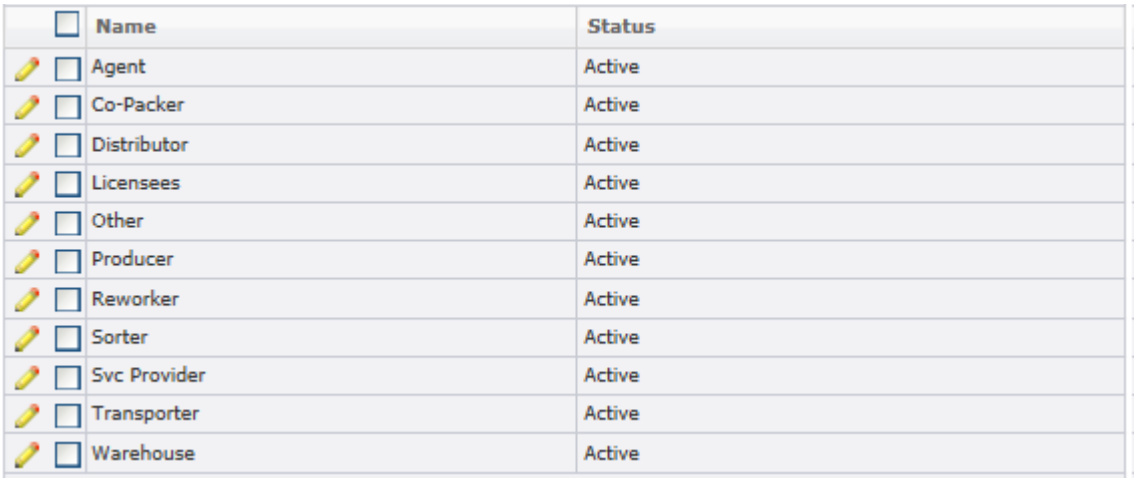
List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Sourcing Type

Use the Sourcing Type list in ADMN to maintain the data, as Figure 2–128 shows.

Figure 2–128 Sourcing Type list



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

Key Field

Table 2–102 SCRM, Sourcing Type key field

Name	Description
Name	Name of the sourcing type
Status	The assigned status for the sourcing type. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Sourcing Type list, see "Maintaining Simple Lists" on page 2-4.

List Filtering

For more information about List Filtering, see "List Filtering" on page 2-9.

Workflow Administration Data

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

Functional Area - (WFA)

The Functional Area - (WFA) list is used when evaluating workflow participants in WFA. Global Specification Management (GSM), Supply Chain Relationship Management (SCRM), and Product Quality Management (PQM) organize workflow participant selection by functional area. Functional areas are defined according to the needs of each customer. Functional areas may be divided according to company departments (Human Resources, Marketing, Sales, and so on). Use the Functional Area list in ADMN to maintain the data, as Figure 2–129 shows.

Figure 2–129 Functional Area - (WFA) list

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

Key Field

Table 2–103 WFA, Functional Area - (WFA) key fields

Name	Description
Name	Name of the functional area in WFA
Status	The assigned status for the functional area. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

For instructions on editing the Functional Area - WFA list, see "Maintaining Simple Lists" on page 2-4.

Tags

Global Specification Management (GSM), Supply Chain Relationship Management (SCRM), and Product Quality Management (PQM) workflow templates use tags as part of defining steps in workflows. Use the Tags list in ADMN to maintain the data, as Figure 2–130 shows.

Figure 2–130 Tags list

Name	Type	Behavior ID	Is Distinct	Available In	Status
All Users	Visibility	101	☐		System
Cancelled	Workflow Action	206	☑	PQM	System
Complete	Workflow Action	205	☑	PQM	System
Custom Tag	Workflow Action	1006	☑	GSM	Inactive
Designable	Feature	102	☐	GSM	System
Hide SAs	Workflow Action	11	☐	SCRM	System
Hide Specs	Workflow Action	1	☐	GSM	System
Initial Load	Workflow Action	10	☑	GSM, SCRM, PQM	System
Is Approved	Workflow Action	4	☐	GSM, SCRM, PQM	System
Is Developmental	Workflow Action	3	☐	GSM	System

Key Fields

Table 2–104 WFA, Tags key fields

Name	Description
Name	Name of the tag
Type	Type of tags are as follows: **Workflow Action**—Tags in this group apply to general actions that should happen when the specification reaches a certain status. For example, Hide Specs flags the specification as hidden, so the specification does not appear in search results for all users. Other workflow actions include tags that are used by outside systems. For example, IsApproved is used signify that the specification must be in an "Approved" status to kick off integration processes. **Feature** —Tags in this group apply to specific feature behavior. For example, when the designable tag is present in a formulation specification's workflow, certain design tools appear within the UI. **Supplier Action**—Tags in this group apply to specific supplier related actions that should happen when the specification reaches a certain status. For example, Publish to Supplier Portal is used when the specification should be available to suppliers. **Visibility**—Tags in this group are used to specify visibility rules. Visibility tags are used to filter specifications from search results in GSM. See the WFA chapters of the *Agile Product Lifecycle Management for Process Workflow Administration User Guide* to learn more about visibility tags. Additional information can be found in the *Agile Product Lifecycle Management for Process Security Configuration Guide*.
Behavior ID	The unique behavior ID that is defined by the system.

Table 2–104 WFA, Tags key fields

Name	Description
IsDistinct	If a tag is flagged as Is Distinct, the tag can only be applied to one Active workflow step per WFA workflow template.
Available In	Select which WFA templates these tags should be available in. Options are GSM WFA templates and/or SCRM WFA templates and/or PQM WFA templates. **Note**: Visibility tags are not supported in SCRM.
Status	The assigned status for the tag. Refer to "Statuses" on page 2-3 for status descriptions.

Editing Rules

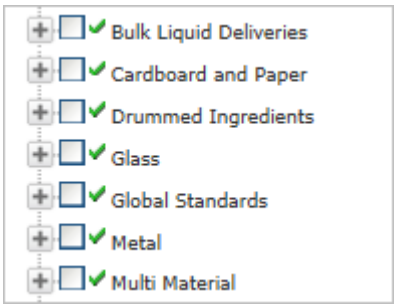
For instructions on editing the Tags list, see "Maintaining Simple Lists" on page 2-4.

Spec Category

A specification category is a hierarchy used to group Global Specification Management (GSM) specifications. To edit a specification category in ADMN, select the specification category by clicking **ADMN > Spec Category > {name of specification}** from the left navigation panel. Specification categories exist for the following specification types:

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

Figure 2–131 Selected specification category (Delivered Material Packing Specifications)



Using the ADMN application, you can modify these specification categories, as explained in the following sections. The procedure is the same for all specification categories.

Note: When the specification category is consumed in other applications, the displayed specification category is limited to 200 characters for all three levels combined.

Node Statuses

Like other tree lists, specification category nodes contain an icon indicating their status:

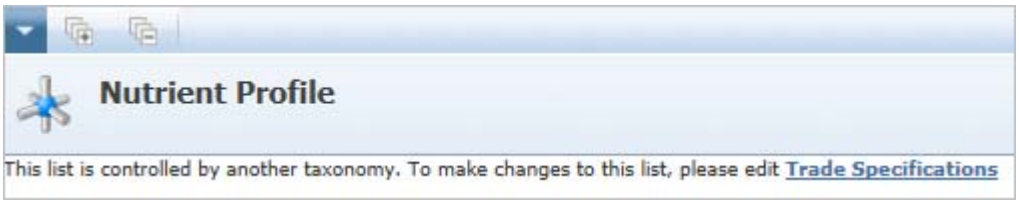
- ( )—Active item
- ( )—New item
- ( )—Inactive item
- ( )—Archived item

Editing Specification Categories

For information on adding and editing specification categories, see "Editing Actions" on page 2-12. Depending on your configuration, some lists may be controlled by another specification category. These lists are called referenced lists. If you select a referenced list, Agile PLM for Process displays an information message, shown in

Figure 2–132.

Figure 2–132 Referenced list redirect message

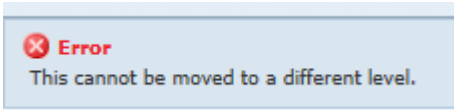


Parent-Child Relationship Guidelines

Use the following guidelines when working with specification categories:

- Relationship rules between the states of parents and children within a specification category must be respected. Once a node as been activated it must remain in the same level of the hierarchy. For example, if the node is a third level position, it can only be dragged to another third level position. If you attempt to drag an item to a location that disrupts the hierarchy, an error message displays, as Figure 2–133 shows:

Figure 2–133 Drag and drop warning



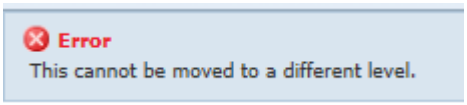
As an administrator, you have the ability to reorganize categories and add items to categories. Users with the role [SUPER_DATA_ADMIN] can drag and drop items regardless of the item's status. Users with the role [DATA_ADMIN] can drag and drop new items only.

A parent node in an "Inactive" or "Archived" state must have all child nodes in an "Inactive" or "Archived" state. When you inactivate or archive a node, it's child nodes are automatically inactivated or archived as well.

Warning: All specification categories must have three active levels as indicated by the active node symbol (✔).

- You can move an active node only to another node with a status of "Active." If you attempt to move an active node to an inactive or archived node, the error message shown in Figure 2–134 displays.

Figure 2–134 Active node movement to non-active node warning



Note: The environment names and position in the process are set in the configuration files.

Activities

The import/export activities include "tokens" as a synchronization tool that allows you to import/export multiple types of data between the staging and target environments. The process is reliant on a "staging/target" relationship. There is one staging environment where data is created or changed, and one to many target environments (Production, Testing, QA).

Generate Token

"Token Section" on page 2-137 explains how tokens are used for exporting data.

To generate a token:

1. Log in to the target environment.
2. Access the **ADMN** application in the left navigation panel.
3. Click **Activities > Generate Token** on the left navigation panel. ADMN displays the Generate Token page, as Figure 2–135 shows.

Figure 2–135 Generate Token page



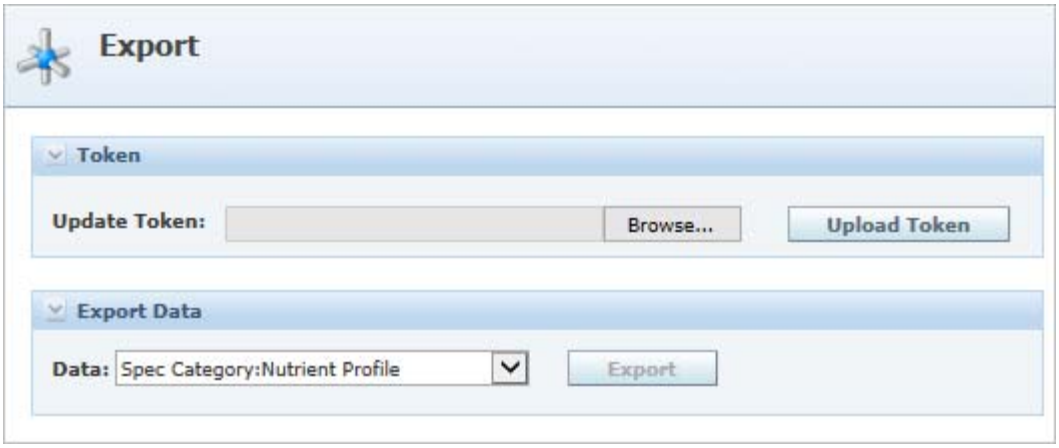
4. Click **Generate**. A File Download dialog box displays the token file name.
5. In the File Download dialog box, click **Save**.
6. Navigate to the local folder to store the token.
7. In the Save As dialog box, click **Save**.

Warning: The file extension for the token must be.tok

Export

You can export data from a centralized export page in the staging environment. A user can access the page by selecting **ADMN > Activities > Export** from the left navigation panel or by clicking Export at the top of each individual data type page. The Export page, shown in Figure 2–136, contains fields for uploading a token from a target environment and a drop-down list to select data types.

Figure 2–136 Export page



Token Section

Tokens are generated from a target environment. If there are multiple target environments, each one must generate its own token for import. Tokens help the system decide which data to include in the export package.

Update Token—Tokens must be uploaded into the staging environment before a data type can be packaged for export. Use this field to select a token.

> **Note:** A new token should be generated when the data in your target environment has changed.

To upload a token:

1. Click **Browse**. A dialog box displays.
2. Select the token to upload.

> **Note:** The file extension for the token must be .tok

3. Click **Open**. The file you selected displays in the Update Token field.
4. Click **Upload Token** to upload the token. The token, once uploaded, displays the target environment name and the date that the token was generated.

Export Data Section

Select the data to package and export using this section.

Data—This drop-down list contains each export data type. Each selected data type creates an export package. The package is an encrypted file that contains the exported data.

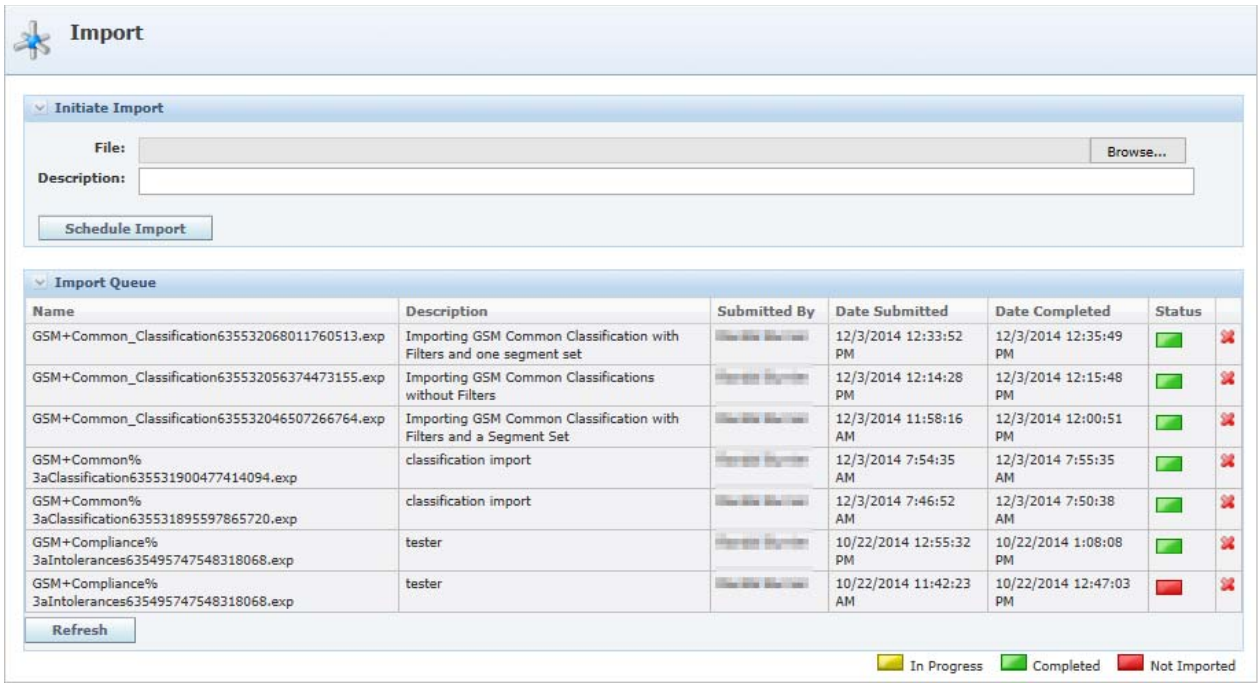
To export data from a staging environment into the target environment:

1. Log in to the staging environment and generate a token as explained in "To generate a token:" on page 2-136.
2. Log in to the staging environment.
3. Access the **ADMN** application in the left navigation panel.
4. Click **Activities > Export** in the ADMN left navigation panel. The Export page displays.
5. Click **Browse** to locate the folder that contains the token.
6. Navigate to the folder that contains the token.
7. Click **Open** and then click **Upload Token**.
8. Select the data types from the **Data** drop-down list.
9. Click **Export**. A dialog box displays with the file name of the export package.
10. Click **Save**.
11. Navigate to a local folder to store the export packages.
12. Click **Save** again.
13. Repeat steps 5 through 12 for as many data types as needed.

Import

You import data from a centralized import page in a target environment. You can access the import page from selecting **ADMN > Activities > Import** from the left navigation panel. Figure 2–137 shows the Import page.

Figure 2–137 Import page



Initiate Import Section

Select and name a file to import using this section.

File—Click the **Browse** button to locate your export package.

Description—Provide a description in this text field.

Click **Schedule Import** to schedule the import. The file you selected displays in the table in the Import Queue section.

Import Queue Section

This section contains a table showing imports that are queued. The table contains the following fields:

- **Name**—The package name
- **Description**—The package description
- **Submitted By**—The name of the user who submitted the package
- **Date Submitted**—The date that the package was submitted
- **Date Completed**—The date that the import was completed
- **Status**—A green, amber or red status icon. The green icon indicates "Completed." The amber icon indicates "In Progress." The red icon indicates "Not Imported." "Not Imported" indicates that there was an error during import. The red status icon links to the error. Once a package is imported, the system emails the person who scheduled the import and flushes the associated cache group.

Click the delete icon to delete an import package's reference in the queue. This action does not cancel the import; it only removes the record in the queue.

To import data into your target environment:

1. Log in to your production environment.

2. Access the **ADMN** application in the left navigation panel.
3. Click **Activities > Import** in the left navigation panel.
4. Click **Browse** to locate the export package that you exported from the staging environment and select the file.
5. Click **Open**.
6. Enter a description for the export package.
7. Click **Schedule Import**. The package is added to the import queue.
8. Repeat Steps 4-7 to add more export packages to your queue.

3

Using ADMN to Manage Custom Data

This chapter explains how to maintain custom data using the Manage Core Data (ADMN) application. Topics in this chapter include:

- Introducing Custom Data
- Extended Attribute Groups
- Creating or Editing Extended Attribute Groups
- Extended Attributes
- Creating an Extended Attribute
- Setting Extended Attribute Order
- Custom Sections
- Creating a Custom Section
- Creating a Table
- Previewing a Custom Section
- Copying a Custom Section
- Setting Custom Section Order

Introducing Custom Data

Agile Product Lifecycle Management (PLM) for Process administrators use the ADMN (Manage Core Data) application to maintain data lists and extended attributes that are used across Agile PLM for Process applications. In addition to maintaining core data, you can define custom data (customer-specific data). This chapter explains how to create and maintain custom data. Chapter 2, "Using ADMN to Manage Core Data", explains how to create and maintain core data within Agile PLM for Process.

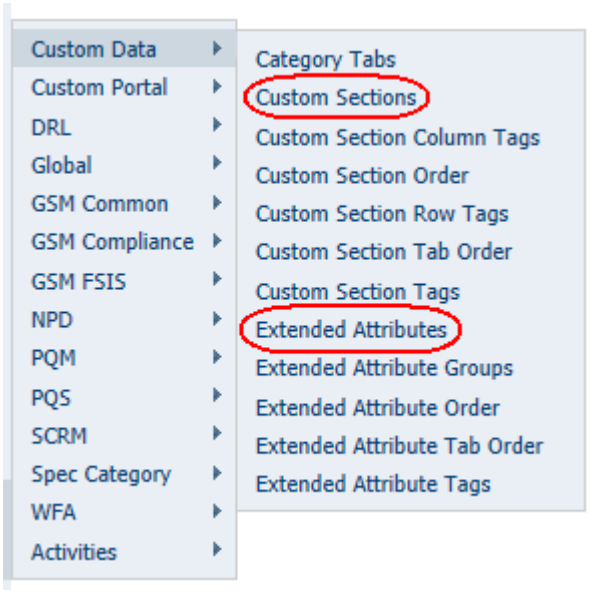
Custom Data Types

There are two types of custom data that administrators create:

- **Extended attributes**—Customer-defined and maintained fields that are available on some business objects. Customers use extended attributes to capture custom information and elements that are unique to their business. Extended attributes can capture textual, numeric, boolean, calculated, date, and range data.
- **Custom sections**—Custom sections are configurable sets of extended attributes. Custom sections allow you to organize a group of extended attributes in table format.

The **ADMN > Custom Data** submenu lists available custom data types, as Figure 3–1 shows, along with other options:

Figure 3–1 Custom Data menu



Statuses

Custom data contain statuses that are defined as follows:

- **New**—The data is not yet ready to become available to Agile PLM for Process applications. When an item has a status of "New," its values remain editable.
- **Active**—The data is available (searchable and available for assignment) for use in Agile PLM for Process applications.
- **Inactive**—The data should no longer be used. All existing references to this item remain. The item is no longer available for assignment but is still searchable.
- **Archive**—The item is no longer available for searching or assignment. All existing references to this item remain.

Administrative Roles

There are several user roles associated with ADMN:

[DATA_ADMIN]—Can add and edit new items, but edit rights are limited.

[SUPER_DATA_ADMIN]—Can edit most items regardless of the item's status.

[EA_SECTION_CREATOR]—Can see the Create New and Edit buttons on custom sections.

[CUSTOM_SECTION_DENORM_ENABLER]—The user must have this role to include a custom section in the de-normalization process.

[DENORMALIZED_CUSTOM_SECTION_EDITOR]—Once a custom section has been activated (status of active, inactive, archived) and is flagged as **Include in De-normalization** a user needs this role to make any edits to the custom section.

If the user doesn't have this role they will not see the Edit action button and instead sees the following information panel message. "This section has been marked for

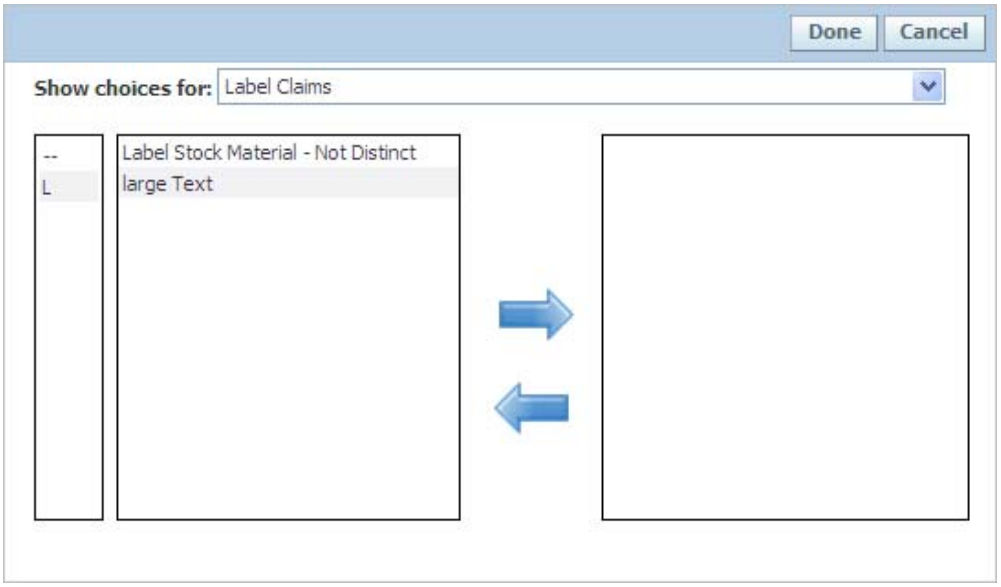
inclusion in the de-normalization process. You do not have the proper privileges to edit this Custom Section."

These roles are explained more later in this chapter.

Extended Attribute Groups

Extended attribute groups are used to organize attributes. These groups can be used to filter available extended attributes during consumption. For example, when users are adding attributes in GSM they can filter the extended attributes list by group name. See Figure 3–2 showing the extended attributes dialog box in GSM filtered by the group "Label Claims."

Figure 3–2 Extended attributes filtered by "Label Claims" group



An extended attribute cannot be saved unless its been assigned to a group. If you do not have any extended attribute groups defined in Agile PLM for Process, you must create these prior to creating extended attributes.

Creating or Editing Extended Attribute Groups

To create extended attribute groups:

1. Click **ADMN > Custom Data > Extended Attribute Groups**. Extended attribute groups display in the Extended Attribute Groups list, as Figure 3–3 shows:

Figure 3–3 Custom Data, Extended Attribute Groups list

Name	Status
Chemical	Active
Compliance Screening	Active
Cost	Active
Dairy	Active
Equipment	Active
Equipment (all)	Active
Equipment (Cooler)	Active
Equipment (Dispenser)	Active
Equipment (Vendor)	Active

2. Optionally, choose one of the following:
   - **Add a new extended attribute group**—Click **Add** in the action menu. A new row displays at the top of the Extended Attribute Groups list. Enter the new extended attribute group name in the empty text field. Click the apply changes icon to apply your change.

     Note: Only a user with the role [ADD_EXT_ATT] can add an extended attribute group. For more information on roles, see the *Agile Product Lifecycle Management for Process User Group Management User Guide*.

   - **Edit an existing extended attribute group**—Click the edit icon to the left of the group name and edit the extended attribute group name in the provided text field. Click the apply changes icon to apply your change.

     Note: Only a user with the role [SUPER_DATA_ADMIN] can edit an existing extended attribute group. For more information on roles, see the *Agile Product Lifecycle Management for Process User Group Management User Guide*.

3. Click **Save**.
4. Flush the administrator data cache, as described in "Using the Cache Application" on page 4-3.

Extended Attributes

You can create new extended attributes using the ADMN application. Extended attributes are found in the following objects:

GSM

- Activities
- Equipment specifications
- Formulation specifications
- Master specifications
- Material specifications
- Menu item specifications
- Nutrient profiles
- Output items
- Packing configuration specifications
- Packaging material specifications
- Printed packaging specifications
- Product specifications
- Smart Issue requests
- Testing protocols
- Trade specifications

NPD—Projects, innovations/sales pipelines, activities, and strategic briefs

PQM—Issues, actions, and audits

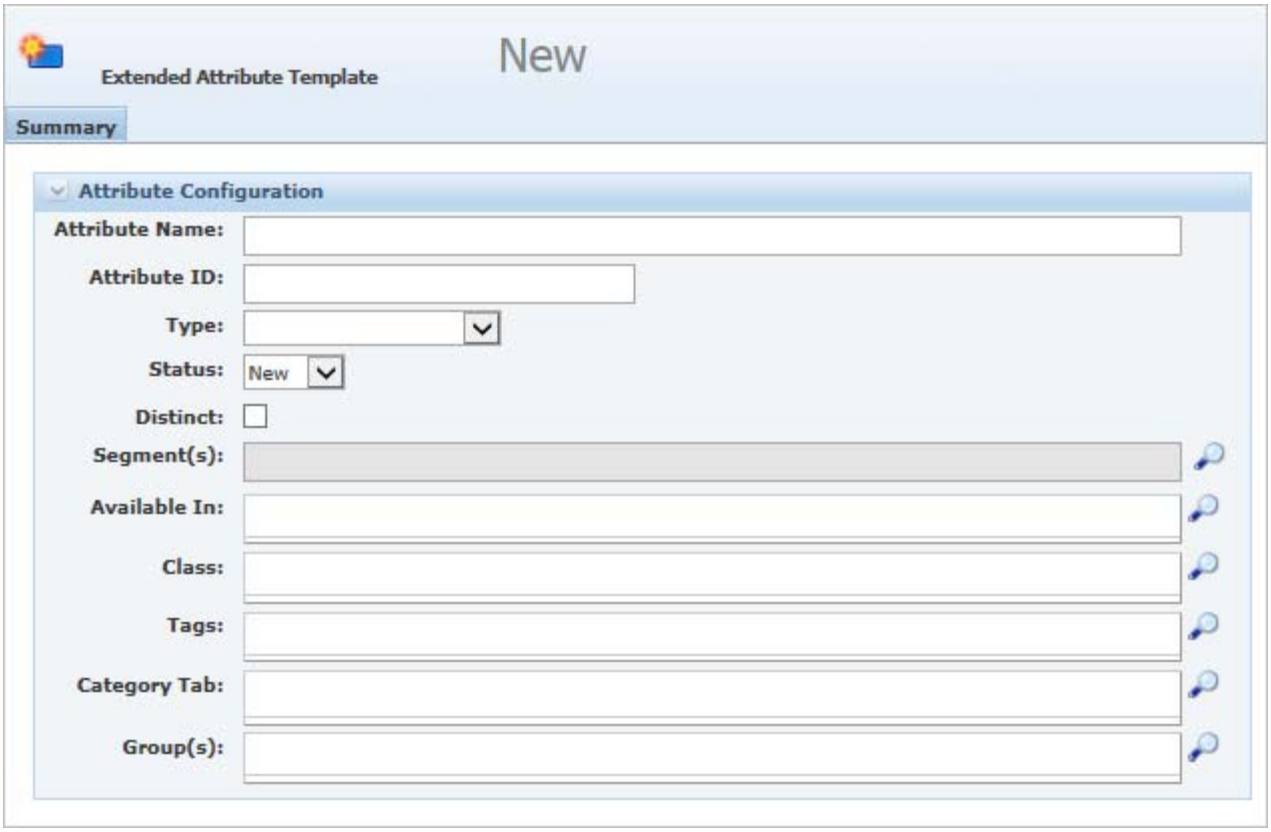
SCRM—Companies, facilities, and sourcing approvals

eQ—Material, packaging, printed packaging, product questionnaires, and trade questionnaires

CSS—Publications

Figure 3–4 shows the Extended Attribute Template page.

Figure 3–4 Extended Attribute Template page



Summary Tab

Attribute Configuration Section

Enter the following information in the Attribute Configuration section.

Attribute Name—Name for the extended attribute. This field is required. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved. This is the name displayed when the attribute is added to the extended attributes section and can also be used when searching for extended attributes and custom sections.

Attribute ID—A unique identifier. This is a required field. This ID is used to reference the extended attribute during calculations and integrations.

Type—The type of extended attribute. Choices are: Boolean, Calculated Boolean, Calculated Numeric, Calculated Text, Date, Free Text, Long Free Text, Long Multi-lingual Text, Multi-lingual Text, Numeric, Qualitative, Qualitative Lookup, Qualitative Range, and Qualitative Tolerance. These are defined in detail beginning on on page 3-8. This is a required field.

Distinct—Select to indicate that this extended attribute is intended to occur only once (a single cell instance) within a specification or profile. An attribute must be distinct to be rolled up during formulation. This flag cannot be edited once the attribute has been activated. If the attribute will be accessed during reporting or integration, it is ***strongly recommended*** you make the attribute distinct. This flag keeps the attribute unique per specification and increases performance when accessing it.

Segment(s)—Assign a segment to the extended attribute. This field may not display based on configuration settings.

Available In—Click the link to display a selection dialog box containing a list of areas where you can make the attribute available. This field is required.

> **Note:** eQuestionnaire extended attribute availability is based on the related GSM specification type. For example, when creating a material questionnaire you are only allowed to add attributes that are available in material specifications.

Class—Class indicates if you plan on using the attribute in a custom section and/or the simple extended attribute list. An attribute can be made available to both. This field is required. Click the link to display a selection dialog box containing the following options:

- **Custom Sections**—Makes the attribute available for assignment to a custom section. For more information, see "Custom Sections" on page 3-33.
- **Simple**—Makes the attribute available to the extended attribute lists.

Tags—Tags allow you to apply special behaviors to your attribute. Multiple tags can be attached to an attribute. Click the link to display a selection dialog box containing the following options:

- **Bold**—Extended attribute is bolded anywhere it appears in consumption.
- **Do Not Publish to Supplier**—Extended attribute is not published to Supplier Portal and is unavailable in eQuestionnaire.
- **ERP_Owner**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **ERP_Owning_Org**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **Is Design Attribute**—Extended attribute is automatically added to a formulation output item. This happens when the attribute is marked as distinct and present on one of the formulation inputs. This is a usability helper only, keeping the user from having to manually add attributes to the formulation output item. This tag does not control roll ups.
- **Is Distinct**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **IS_ERP_ENGINEERING_ITEM**—This tag is legacy data from AIA and is used to publish values from PLM for Process to EBS system via PIP.
- **Italic**—Extended attribute is italicized anywhere it appears in consumption.
- **Suppress Printing**—Extended attribute is not included in the specification print out.

Category Tabs—Click the link to display a selection dialog box containing a list of extended attribute category tabs.

Groups—Click the link to display a selection dialog box containing a list of extended attribute groups, as defined in "Extended Attribute Groups" on page 3-3. Attributes can be added to multiple groups. This is a required field.

Status—Click the drop-down list to assign a status to the extended attribute with one of the following:

- **New**—The extended attribute is not yet ready to become available to Agile PLM for Process applications. When an extended attribute has a status of "new", its values remain editable.
- **Active**—The extended attribute is ready to become available for use in Agile PLM for Process applications.
- **Inactive**—The extended attribute should no longer be used. Inactive extended attributes are no longer available for assignment, however, they are not removed from existing objects that reference them. Inactive extended attributes are still available for searching.
- **Archived**—The extended attribute is not available for searching or assignment. Archived extended attributes are not removed from existing objects that reference them.

Security Classification—This field is only available if Object Level Security is enabled. A classification can be used to limit access to the extended attribute in Agile PLM for Process applications. Refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide* for more information.

Type

Use the Type field to assign a type to the extended attribute. This is a required field. The type of extended attribute decides what interface is displayed to users. For example, the "Free Text" type displays a text area to the user. The choice you make in the type field determines which additional options display under it. The type cannot be changed once the attribute is activated.

Select one of the following choices for the Type field. These are defined further on the following pages.

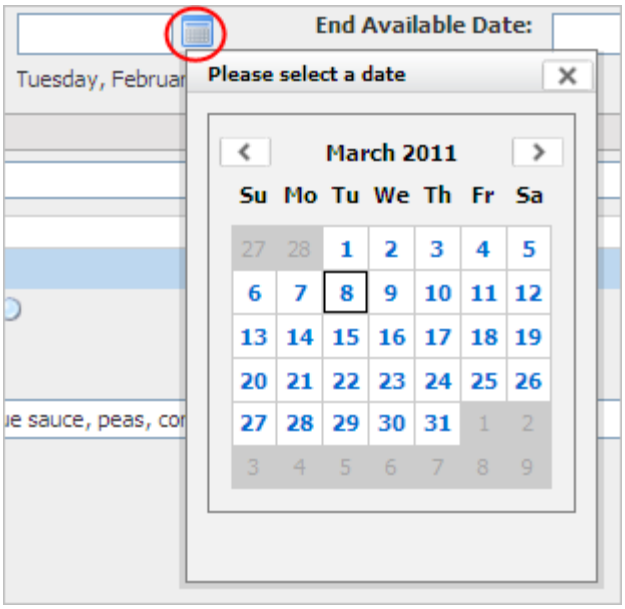
- Boolean
- Calculated Boolean
- Calculated Numeric
- Calculated Text
- Date
- Free Text
- Long Free Text
- Long Multi-lingual Text
- Multi-lingual Text
- Numeric
- Qualitative
- Qualitative Lookup
- Quantitative Range
- Quantitative Tolerance

Date This type allows the user to enter a date, as Figure 3–5 shows. The user will be provided a calendar control to help select the appropriate date, as Figure 3–6 shows.

Figure 3–5 Type field, Date



Figure 3–6 Date extended attribute



Free Text This type allows the user to enter free text, as Figure 3–7 shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. Figure 3–8 shows an example of what the user might see.

Figure 3–7 Type field, Free Text

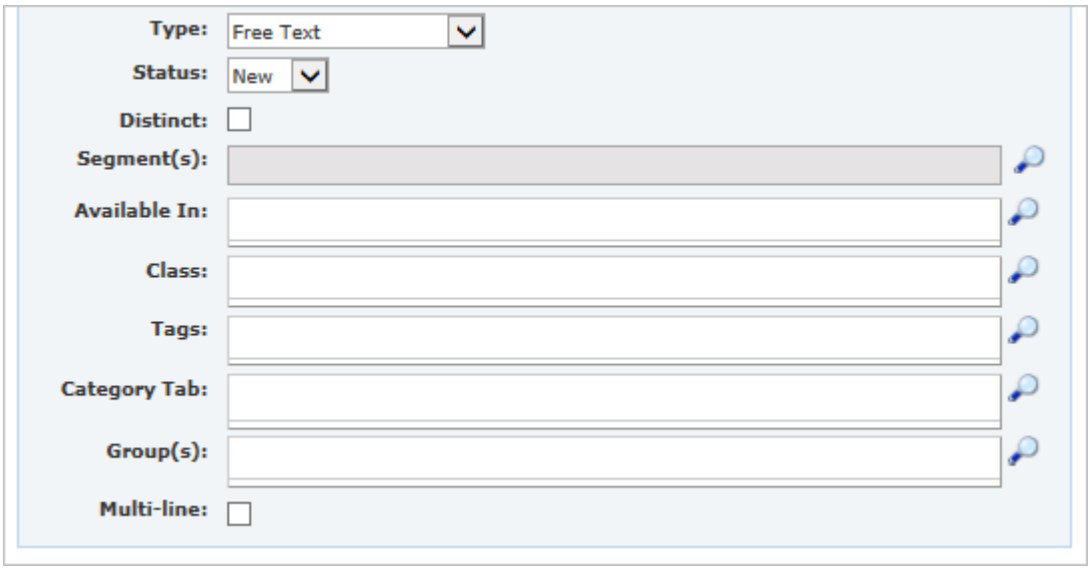
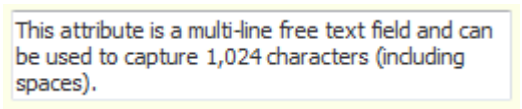


Figure 3–8 Free text extended attribute (multi-line)



Long Free Text This type allows the user to enter long free text, as Figure 3–9 shows. By default this style appears as a text field. Check the Multi-line box to make it a

multi-line text area. Figure 3–10 shows an example of what the user might see.

Figure 3–9 Type field, Long Free Text

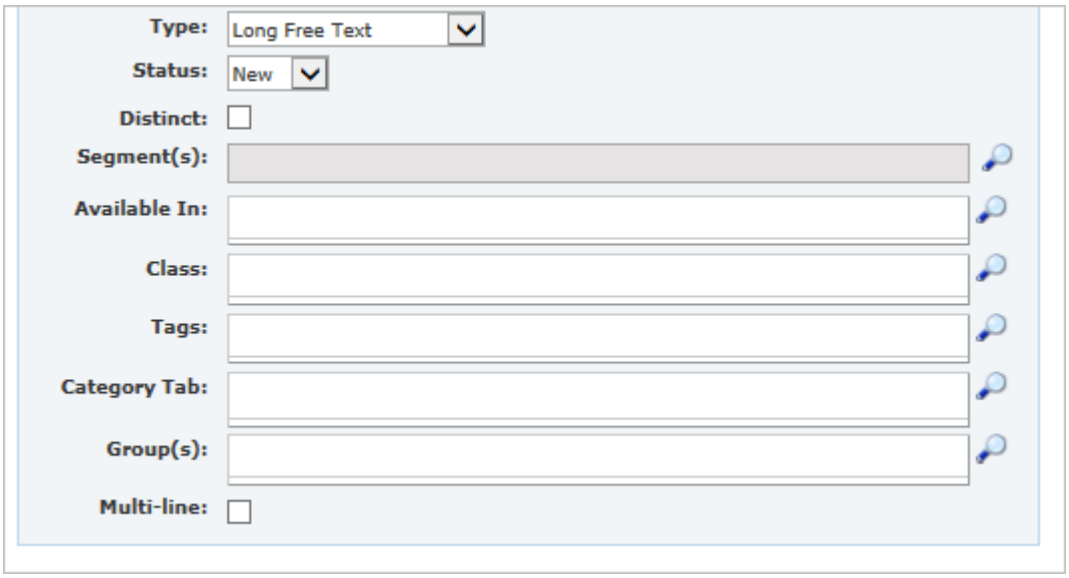


Figure 3–10 Long free text extended attribute



Long Multi-lingual Text This type allows the user to enter long multi-lingual text, as Figure 3–11 shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. Figure 3–12 shows an example of what the user might see.

Figure 3–11 Type field, Long Multi-lingual Text

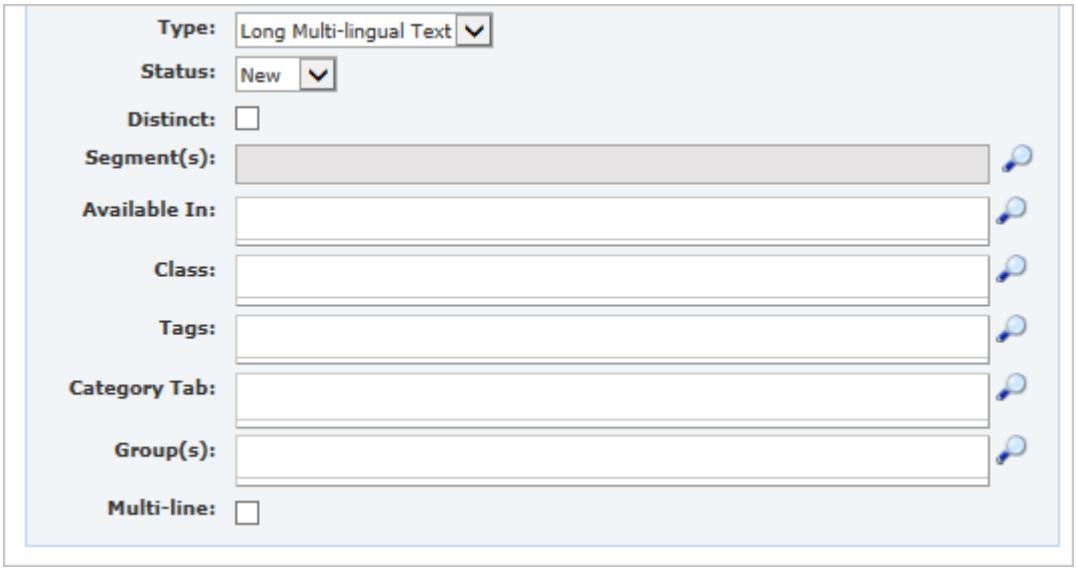


Figure 3–12 Long multi-lingual text extended attribute



Multi-lingual Text This type allows the user to enter multi-lingual text, as Figure 3–13 shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. Figure 3–14 shows an example of what the user might see.

Figure 3–13 Type field, Multi-lingual Text

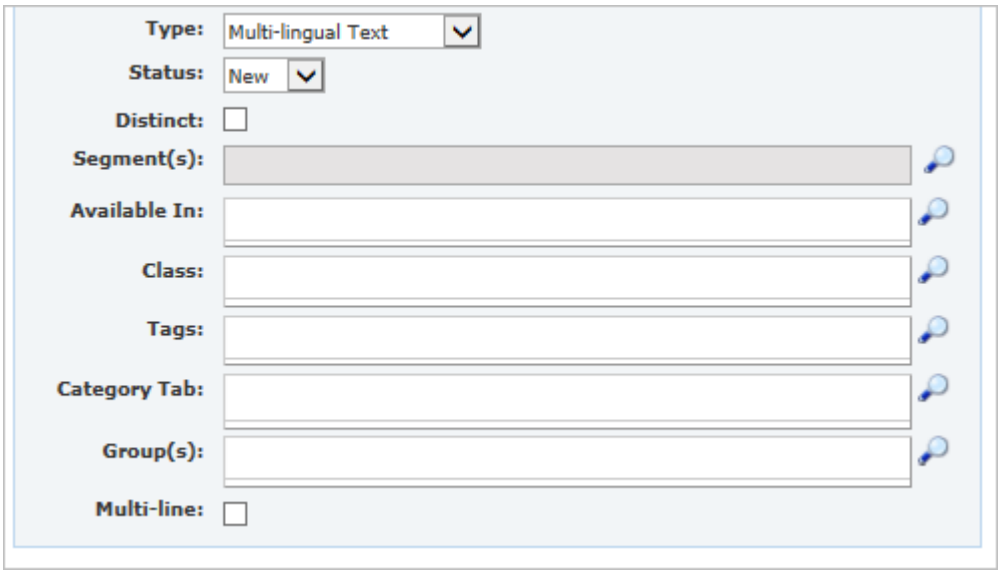


Figure 3–14 Multi-lingual text extended attribute



Numeric Provide a numeric field for the extended attribute, as Figure 3–15 shows.

Figure 3–15 Type field, Numeric

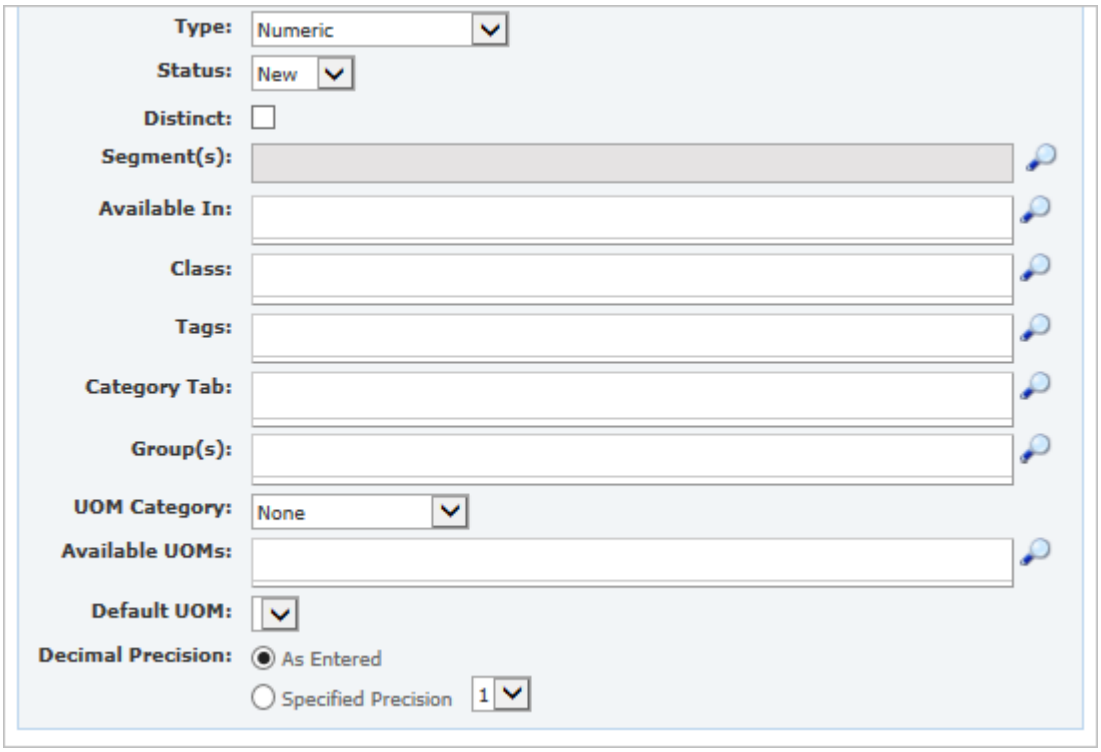
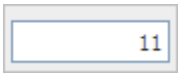


Figure 3–16 shows what this type looks like when assigned.

Figure 3–16 Numeric extended attribute



Additional options associated with this type are:

UOM Category—Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs in the category of "Other" can be extended by editing the UOM list discussed on page 2-41. Select "None" to not display a UOM option next to the numeric field.

Available UOMs—Choose the unit of measure options that you want to be available to the user.

Default UOM—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, '---' is selected as the default. A blank selection is allowed.

Decimal Precision—Set the decimal precision as follows:

- **As Entered**—The user entered value is not altered.
- **Specified Precision**—The user entered value is altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros are appended to the value. If the user exceeds the number of decimals, the value is rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value is altered to "1.6."

Quantitative Range Provide a quantitative range of fields for the extended attribute, as Figure 3–17 shows.

Figure 3–17 Type field, Quantitative Range

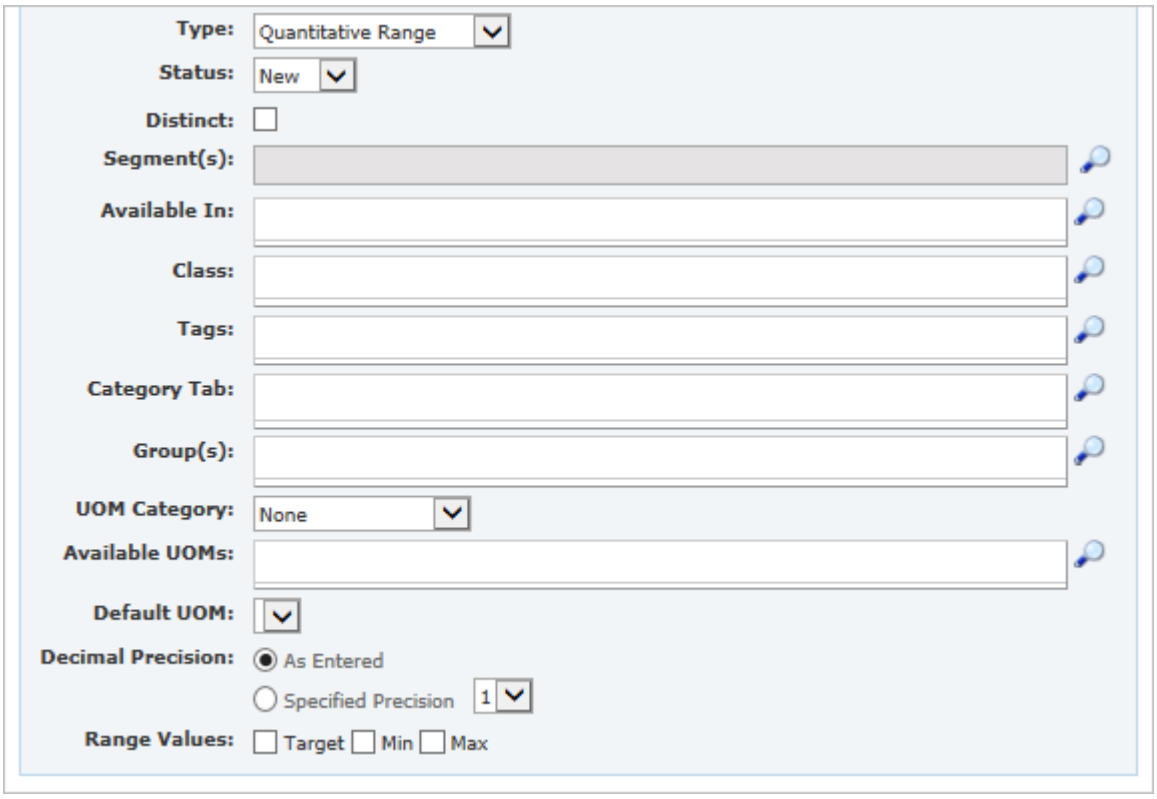


Figure 3–18 shows what this type looks like when assigned.

Figure 3–18 Quantitative range extended attribute



Additional options are:

UOM Category—Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs in the category of "Other" can be extended by editing the UOM list discussed on page 2-41. Select "None" to not display a UOM option next to the numeric field.

Available UOMs—Choose the unit of measure options that you want to be available to the user.

Default UOM—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list is selected as the default. A blank selection is allowed.

Decimal Precision—Set the decimal precision as follows:

- **As Entered**—The user entered value is not altered.
- **Specified Precision**—The user entered value is altered to match the specified number of decimal places. If the user does not include the specified number of

decimals, zeros are appended to the value. If the user exceeds the number of decimals, the value is rounded. For example, if the specified number is “1” and the user enters “1.58,” when the row is submitted the value is altered to “1.6.”

Range Values—Check the range value of Target, Min, and/or Max. This selection determines which fields the user will see.

Quantitative Tolerance Set up a quantitative tolerance extended attribute to provide tolerance fields to the user, as Figure 3–19 shows.

Figure 3–19 Type field, Quantitative Tolerance

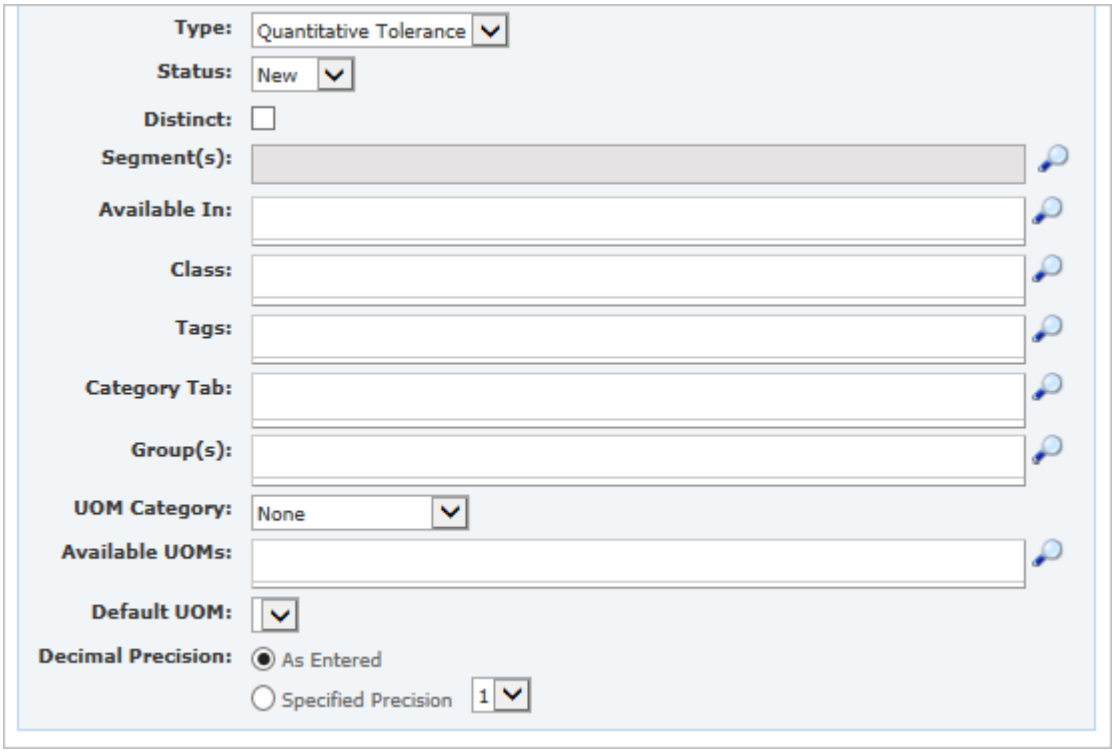


Figure 3–20 shows what this type looks like when assigned.

Figure 3–20 Quantitative tolerance extended attribute



Additional options are:

UOM Category—Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs in the category of "Other" can be extended by editing the UOM list discussed on page 2-41. Select "None" to not display a UOM option next to the numeric field.

Available UOMs—Choose the unit of measure options that you want to be available to the user.

Default UOM—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is

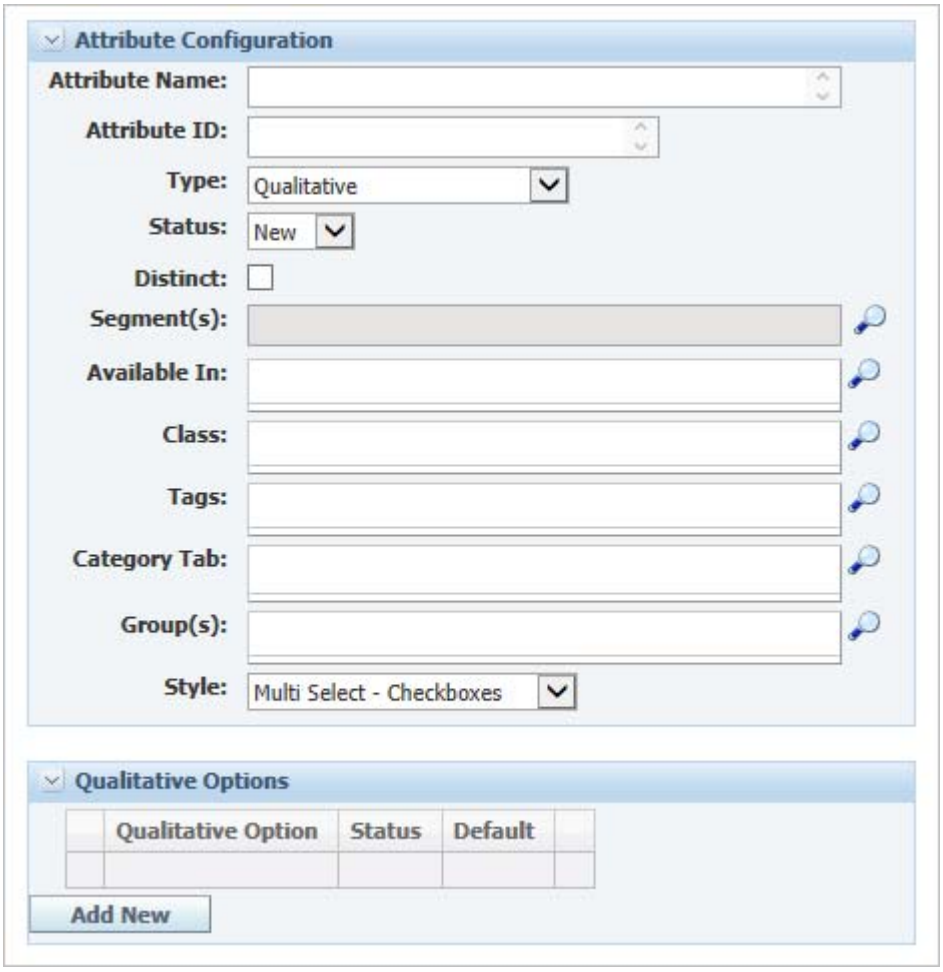
specified, the first UOM in the list is selected as the default. A blank selection is allowed.

Decimal Precision—Set the decimal precision as follows:

- **As Entered**—The user-entered value is not altered.
- **Specified Precision**—The user entered value is altered to match the specified number of decimal places. If the user does not include the specified number of decimals, zeros are appended to the value. If the user exceeds the number of decimals, the value is rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value is altered to "1.6."

Qualitative Set up a qualitative extended attribute to display selectable options to the user, as Figure 3–21 shows.

Figure 3–21 Type field, Qualitative, Checkboxes option

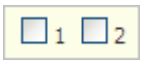


Style—Select the style you want to use to display your attribute options to the user. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved. The following styles are available:

- **Multi Select - Checkboxes**—Display attribute options to the user in the form of checkboxes. This style is recommended when you have a small amount of options (1-3 items) and you want to give the user the opportunity to select

multiple options. Figure 3–22 shows how the user will see this style.

Figure 3–22 Checkboxes style



- **Single Select - Pull down**—Display attribute options to the user in the form of a pull down list. This style is recommended when you have a medium amount of options (3-25) and you want to restrict the user to a single selection. Figure 3–23 shows how the user will see this style.

Figure 3–23 Pull-down style



- **Single Select - Radio buttons**—Display attribute options to the user in the form of radio buttons. This style is recommended when you have a small amount of options (3-20 items) and you want to restrict the user to a single selection. Figure 3–24 shows how the user will see this style.

Figure 3–24 Radio buttons style



- **Multi Select - Dialog**—Display attribute options to the user in the form of a multi-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to give the user the opportunity to select multiple options. The multi-select dialog automatically sorts your options alphabetically. Figure 3–25 and Figure 3–26 show how the user will see this style.

Figure 3–25 Multi-select dialog style

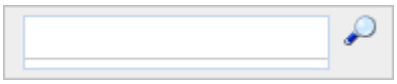
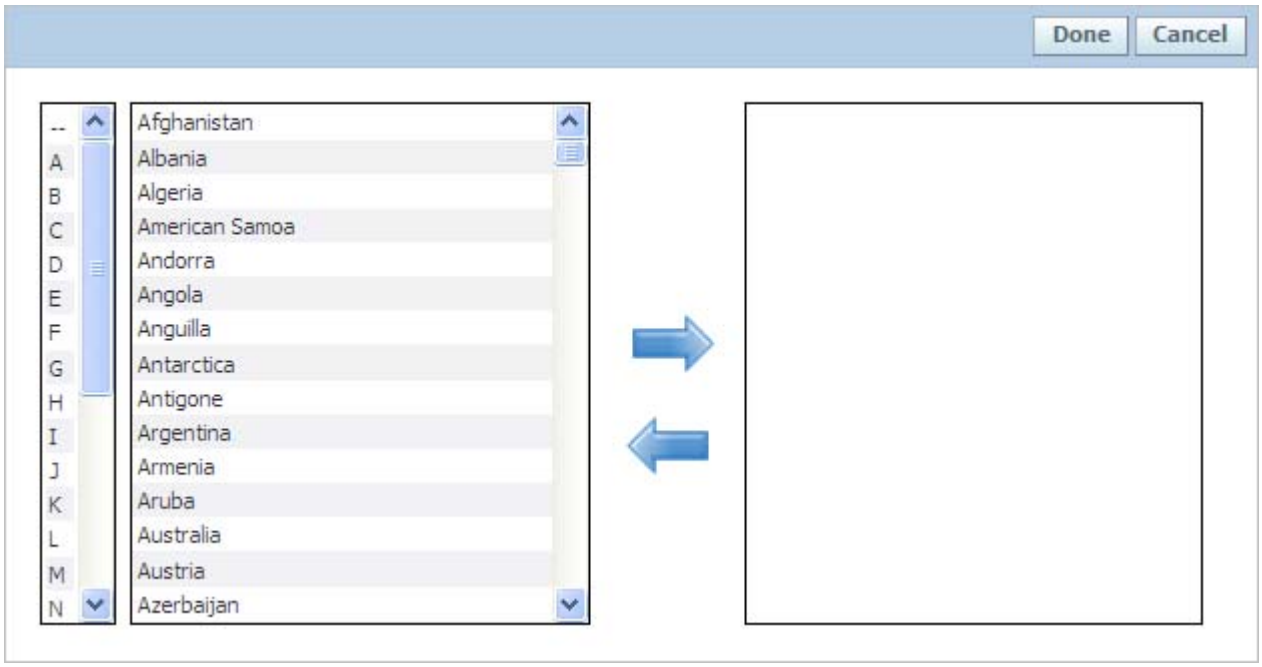


Figure 3–26 Sample multi-select dialog box



- **Single Select - Dialog**—Display attribute options to the user in the form of a single-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to restrict the user to a single selection. The single-select dialog automatically sorts your options alphabetically. Figure 3–27 and Figure 3–28 show how the user will see this style.

Figure 3–27 Single select dialog style

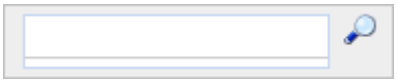


Figure 3–28 Sample single-select dialog box

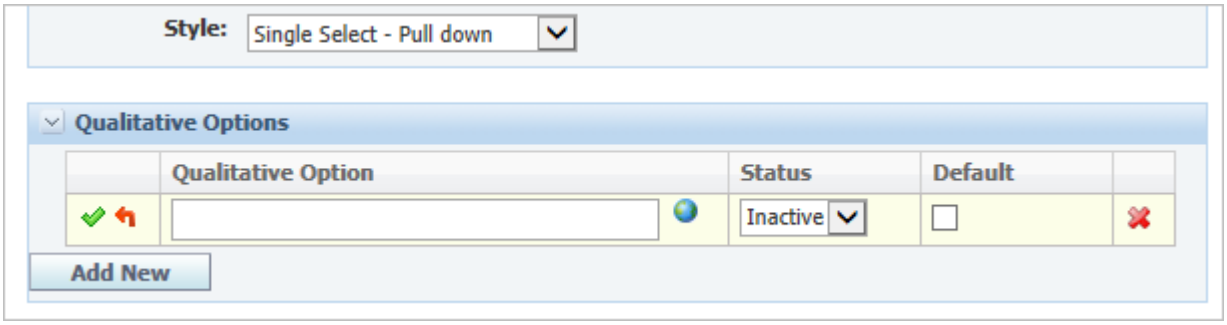


To add options for the Qualitative type:

1. Select "Qualitative" from the **Type** drop-down list.

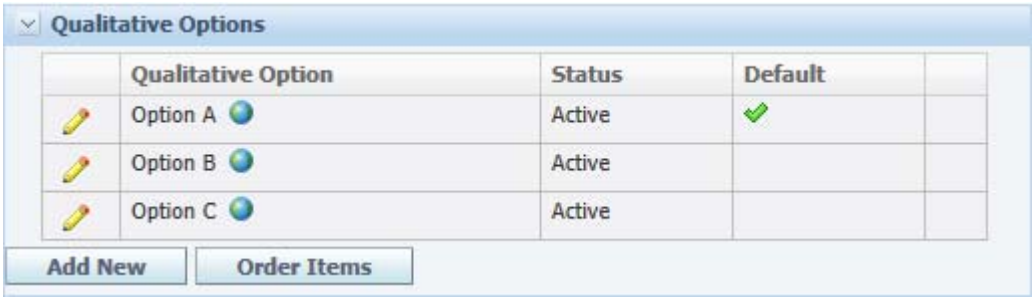
2. Select a style from the **Style** drop-down list. A table displays which you use to define the options that are available for the user upon consumption, as Figure 3–29 shows.

Figure 3–29 Checkboxes style, Add New



3. Click **Add New**. The first row opens in edit mode.
4. In the Qualitative Option field, define a value for the option.
5. In the Status field, select **Active**.
6. In the Default field, click the checkbox if you want to make this option the default.
7. Click the apply changes icon.
8. Repeat step 3 through step 7 to add additional options. Figure 3–30 shows what a completed table may look like:

Figure 3–30 Qualitative type, Checkboxes options defined

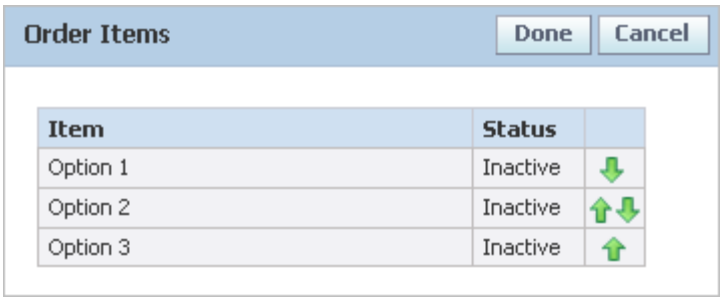


9. Optionally, click the **Order Items** button to set the order of item.

> **Note:** The Order Items button is displayed when user has role [SUPER_DATA_ADMIN].

When you click **Order Items**, ADMN displays the Order Items dialog box:

Figure 3–31 Order Items dialog box - 12/3 Getting Parser Error



a. Use the reorder rows icons to set the order of the items.

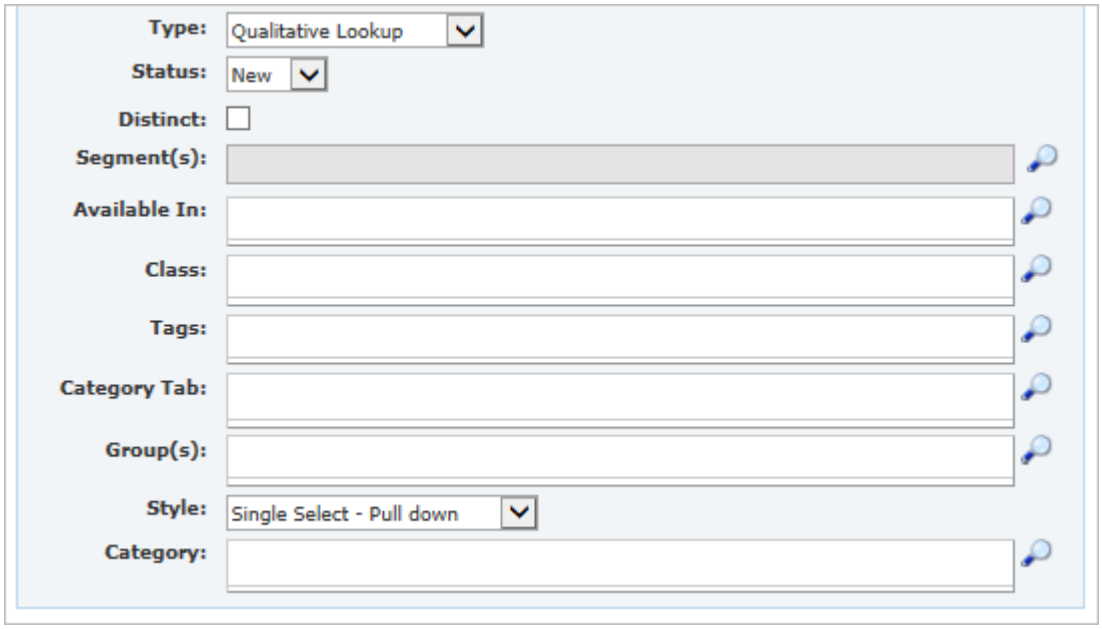
b. Click **Done**. The items reflect the chosen order.

10. Click **Save**.

> **Note:** Because of the larger number of items included in the list, the single and multi select styles list items alphabetically. This order is only respected when using checkboxes, radio buttons, and pull-downs.

Qualitative Lookup Set up a qualitative lookup extended attribute to create extended attributes that reference existing ADMN lists for core fields such as allergens, additives, or countries. Most common lookups are available. This type is also used when referencing a custom database table. Refer to *Agile Product Lifecycle Management for Process Data Administration Toolkit Guide* for instructions on creating a custom qualitative lookup. This attribute will display selectable options to the user, as Figure 3–33 through Figure 3–37 show.

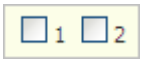
Figure 3–32 Type field, Qualitative Lookup



Style—Select the style you want to use to display your attribute options to the user. The following styles are available:

- **Multi Select - Checkboxes**—Display attribute options to the user in the form of checkboxes. This style is recommended when you have a small amount of options (1-3 items) and you want to give the user the opportunity to select multiple options. Figure 3–33 shows how the user will see this style.

Figure 3–33 Checkboxes style



- **Single Select - Pull down**—Display attribute options to the user in the form of a pull down list. This style is recommended when you have a medium amount of options (3-25) and you want to restrict the user to a single selection. Figure 3–34 shows how the user will see this style.

Figure 3–34 Pull-down style



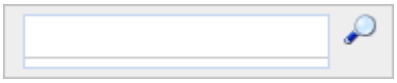
- **Single Select - Radio buttons**—Display attribute options to the user in the form of radio buttons. This style is recommended when you have a small amount of options (2-3 items) and you want to restrict the user to a single selection. Figure 3–35 shows how the user will see this style.

Figure 3–35 Radio buttons style



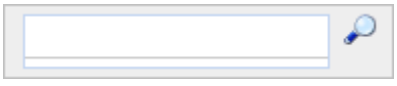
- **Multi Select - Dialog**—Display attribute options to the user in the form of a multi-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to give the user the opportunity to select multiple options. The multi-select dialog automatically sorts your options alphabetically. Figure 3–36 shows how the user will see this style.

Figure 3–36 Multi select dialog style



- **Single Select - Dialog**—Display attribute options to the user in the form of a single-select dialog box. This style is recommended when you have a large amount of options (25-100+ items) and you want to restrict the user to a single selection. The single-select dialog automatically sorts your options alphabetically. Figure 3–37 shows how the user will see this style.

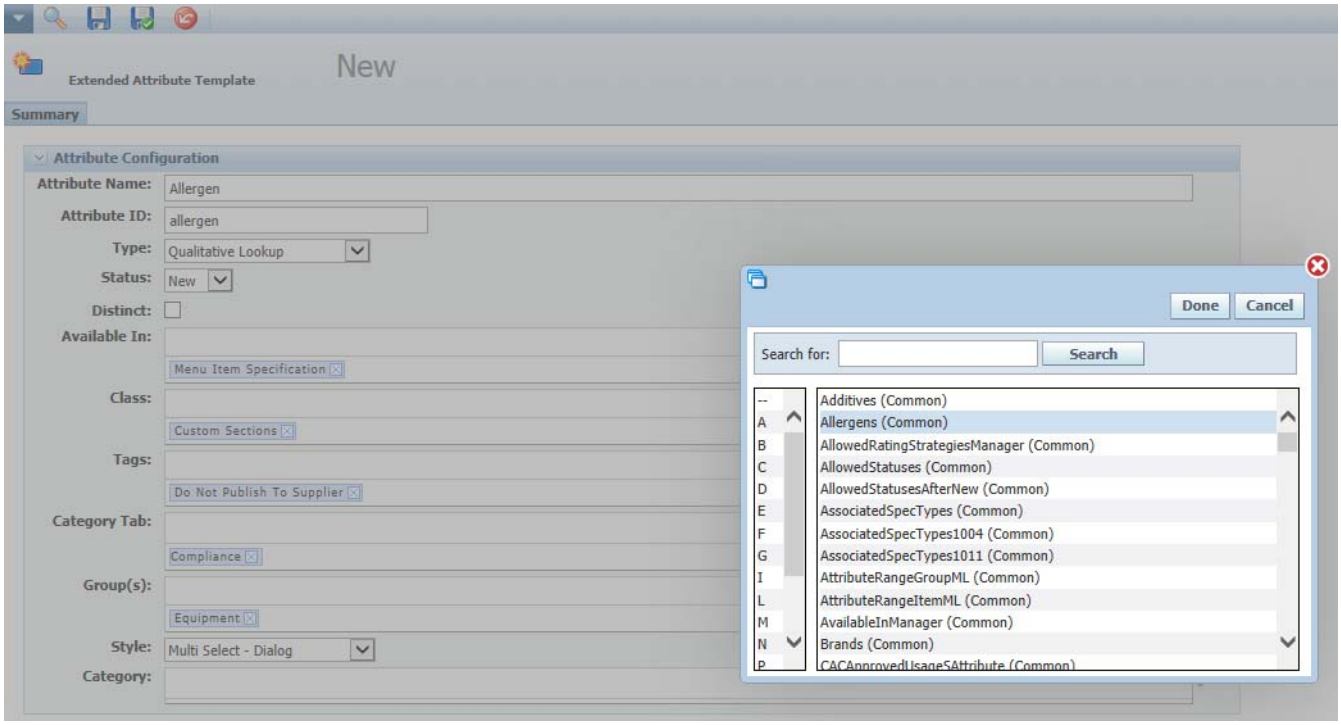
Figure 3–37 Single select dialog style



After setting the qualitative lookup style, click the search icon at the end of the **Category** field to set the category for the extended attribute. This category can be an existing common lookup category (allergens, additives, etc.) or can be a configured custom table. Refer to the *Agile Product Lifecycle Management for Process Data Administration Toolkit Guide* for more information on custom table implementation.

Figure 3–38 shows an example of adding the Lookup Category to the extended attribute. In this case you are adding "Allergens".

Figure 3–38 Example 1: Lookup category added to extended attribute



Note that the Style must be carefully thought through in order to determine the most efficient method for managing data. In this example, we do not recommend using the multi-select check boxes functionality for Allergens because the list is so large. Only single/multi select dialogs should be used.

Calculated Boolean Set up Boolean extended attributes in which users are provided a True/False drop-down.

Figure 3–39 Type field, Calculated Boolean

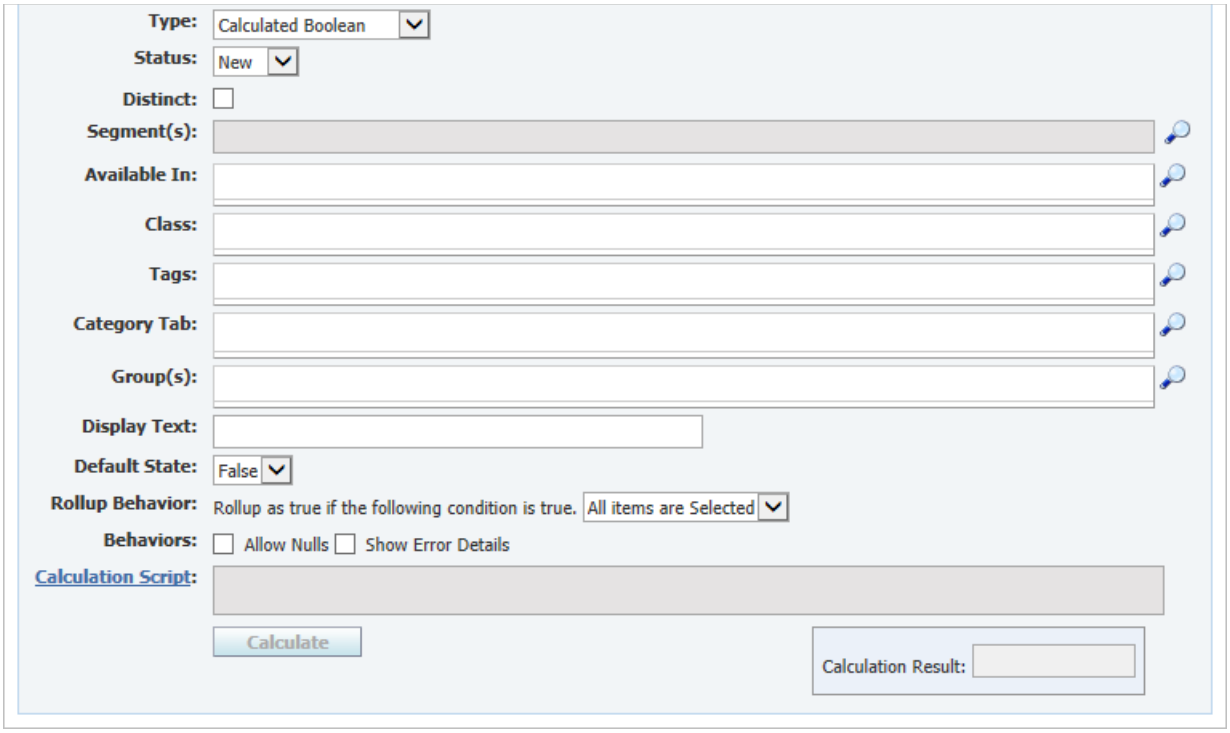


Figure 3–40 shows what this type looks like assigned.

Figure 3–40 Calculated Boolean extended attribute



Additional options associated with this type are:

Display Text—Enter text to show before the drop-down. This field is optional. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved.

Default State—Select the default state. Options are blank, 'True,' and 'False.'

Rollup Behavior—When Boolean attributes are set as distinct and included on formulation inputs, they can be rolled up. Define rollup behavior by selecting an option from the following drop-down list:

Rollup as true if the following condition is true—

- **All items are Selected**—This option sets the rolled up boolean extended attribute value to "True" if all attributes on the formulation input materials are set to "True." If any of the attributes are set to "False" the boolean rolls up as "False."
- **One item is Selected**—This option sets the rolled up boolean extended attribute value to "True" if one or more attributes on the formulation input materials are set to "True." If this condition is not "True," the boolean rolls up as "False."

Behaviors—Check the **Allow Nulls** box to calculate even when there is no user entered value for the referenced items.

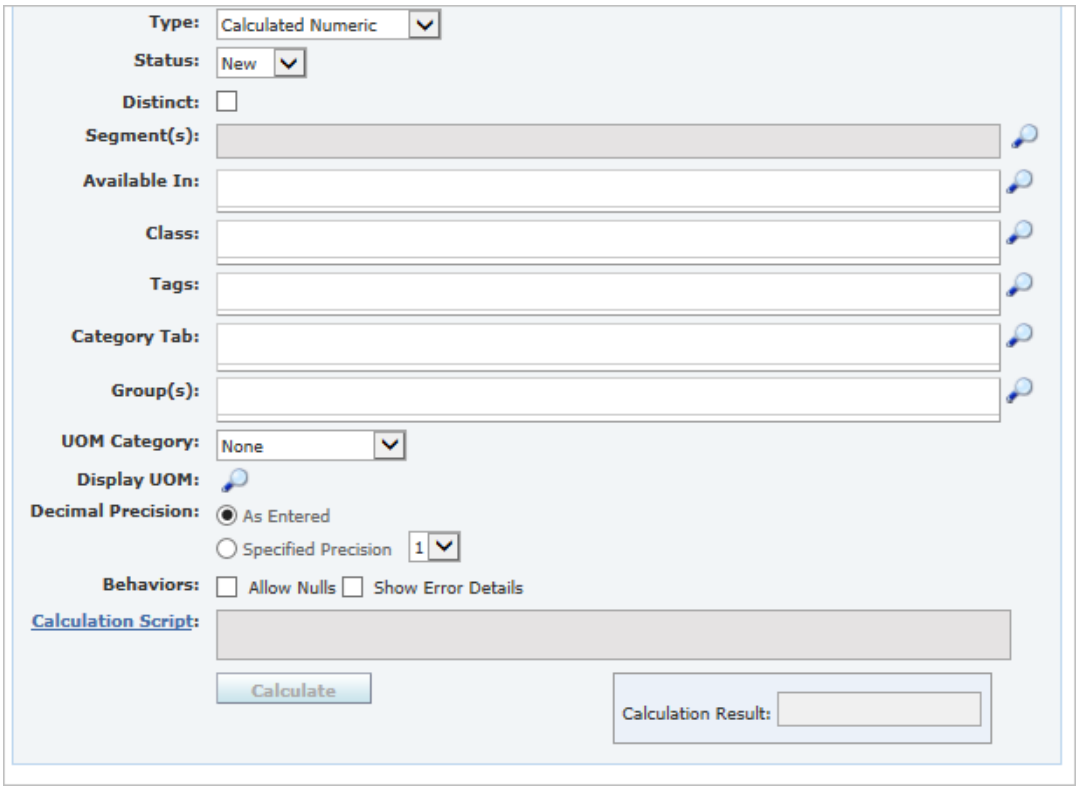
When a calculation is performed and the system cannot find a referenced item or an error occurs, the warning icon appears next to the attribute. Check the **Show Error Details** box when the calculation is not sensitive information. When **Show Error Details** is selected, the end user is able to click the warning icon and see calculation error details. These details could include formulation details, referenced variable names, etc.

Note: Warnings can be turned off using methods during your calculation. For more information, refer to the "Calculated Attributes" section of the *Agile Product Lifecycle Management for Process Extensibility Guide*.

Calculation Script—Click the **Calculation Script** link to display the calculation dialog box for entering a calculation script. See the "Calculated Attributes" section of the *Agile Product Lifecycle Management for Process Extensibility Guide* for help in writing calculation scripts. Click **Calculate** to test your calculation.

Calculated Numeric Calculated Numerics allow you to create a read-only extended attribute that displays results of a calculation to the user. Figure 3–41 shows the options available when a calculated numeric type is selected.

Figure 3–41 Type field, Calculated Numeric



When this type is assigned the user sees a read-only view showing the results of the calculation.

Additional options are:

UOM Category—Select the unit of measure category that you want to include with your numeric field (for example, "Length," "Mass," "Time," and "Volume"). The UOMs

in the category of "Other" can be extended by editing the UOM list discussed on page 2-41. Select "None" to not display a UOM option next to the numeric field.

Display UOM—Choose the unit of measure you want to display with the calculated attribute.

Default UOM—Set the unit of measure that is selected by default. Your choices are derived from your selections made in the Available UOMs field. If no default UOM is specified, the first UOM in the list is selected as the default. A blank selection is allowed.

Decimal Precision—Set the decimal precision as follows:

- **As Entered**—The calculated value is not altered.
- **Specified Precision**—The calculated value is altered to match the specified number of decimal places. If the calculated value does not include the specified number of decimals, zeros are appended to the value. If the calculated value exceeds the number of decimals the value is rounded. For example, if the specified number is "1" and the user enters "1.58," when the row is submitted the value is altered to "1.6."

Behaviors—Check the **Allow Nulls** box to calculate even when there is no user entered value for the referenced items.

When a calculation is performed and the system cannot find a referenced item or an error occurs, the warning icon appears next to the attribute. Check the **Show Error Details** box when the calculation is not sensitive information. When **Show Error Details** is selected, the end user is able to click the warning icon and see calculation error details. These details could include formulation details, referenced variable names, etc.

Note: Warnings can be turned off using methods during your calculation. For more information, refer to the “Calculated Attributes" section of the *Agile Product Lifecycle Management for Process Extensibility Guide*.

Calculation Script—Click the **Calculation Script** link to display the calculation dialog box for entering a calculation script. See the “Calculated Attributes" section of the *Agile Product Lifecycle Management for Process Extensibility Guide* for help in writing calculation scripts. Click **Calculate** to test your calculation.

Calculated Text This type allows the user to enter calculated free text, as Figure 3–42 shows. By default this style appears as a text field. Check the Multi-line box to make it a multi-line text area. Figure 3–43 shows an example of what the user might see.

Figure 3–42 Type field, Calculated Text

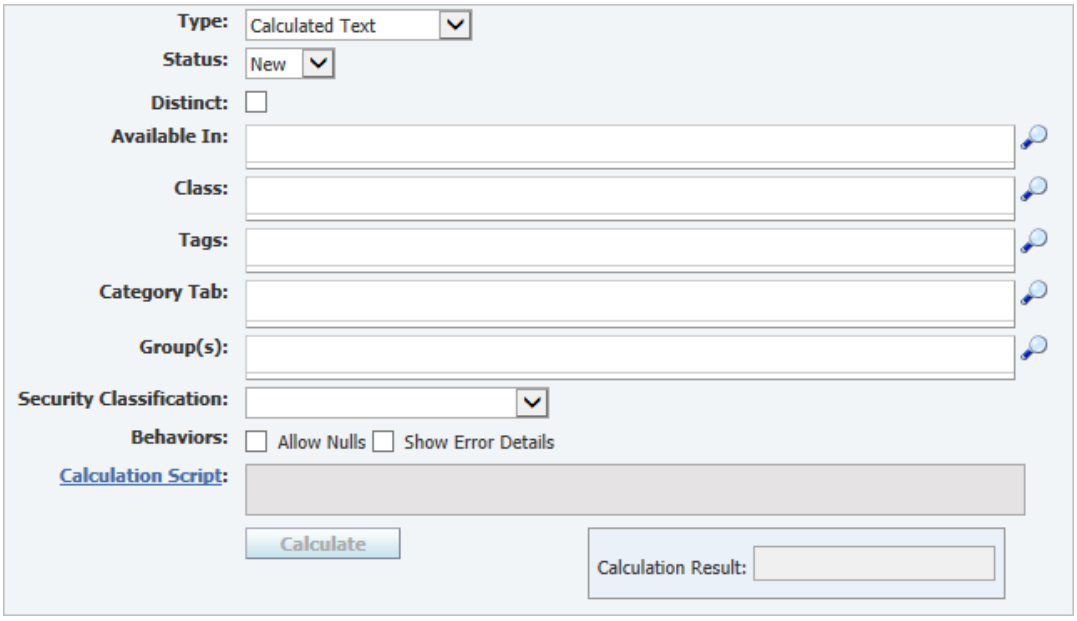


Figure 3–43 Calculated text extended attribute (multi-line)



Boolean Set up Boolean extended attributes in which users are provided a True/False drop-down.

Figure 3–44 Type field, Boolean

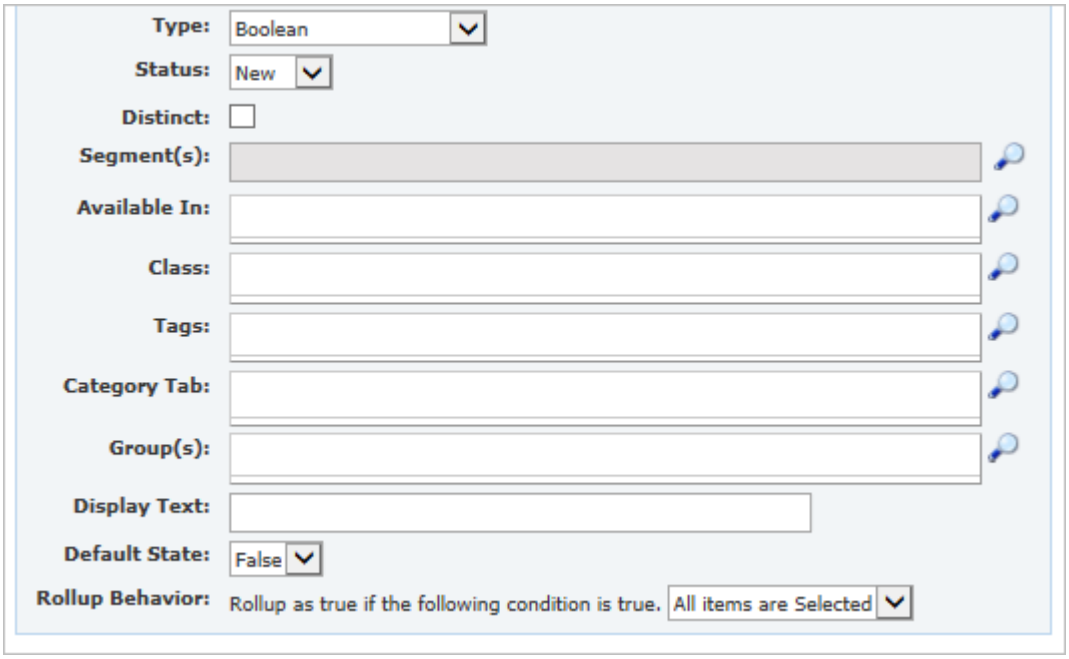


Figure 3–45 shows what this type looks like assigned.

Figure 3–45 Boolean extended attribute



Additional options associated with this type are:

Display Text—Enter text to show before the drop-down. This field is optional. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved.

Default State—Select the default state. Options are blank, 'True,' and 'False.'

Rollup Behavior—When Boolean attributes are set as distinct and included on formulation inputs, they can be rolled up. Define rollup behavior by selecting an option from the following drop-down list:

Rollup as true if the following condition is true—

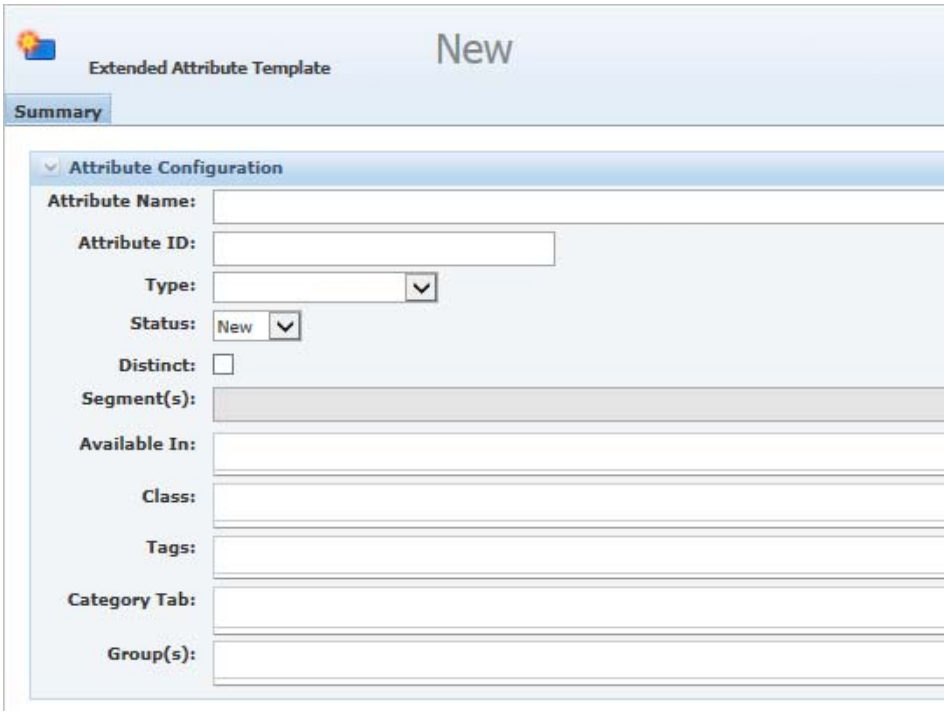
- **All items are Selected**—This option sets the rolled up boolean extended attribute value to "True" if all attributes on the formulation input materials are set to "True." If any of the attributes are set to "False" the boolean rolls up as "False."
- **One item is Selected**—This option sets the rolled up boolean extended attribute value to "True" if one or more attributes on the formulation input materials are set to "True." If this condition is not "True," the boolean rolls up as "False."

Creating an Extended Attribute

To create an extended attribute:

1. On the left navigation panel click **New > Extended Attributes**. ADMN displays the Extended Attribute Template page, as shown in Figure 3–46.

Figure 3–46 Extended Attribute Template page



2. Enter extended attribute information, as described in "Summary Tab" on page 3-6 and "Type" on page 3-8.
3. Click **Save & Close**.
4. To make the attribute available, flush the extended attributes / custom sections cache, as described in "Using the Cache Application" on page 4-3.

Displaying Extended Attributes as Bold or Italic Text

To format an extended attribute, perform the following steps:

1. Create the extended attribute following the same steps as outlined above.
2. Select the bold and/or italics tags, as shown below:

Figure 3–47 Selecting bold or italic tags

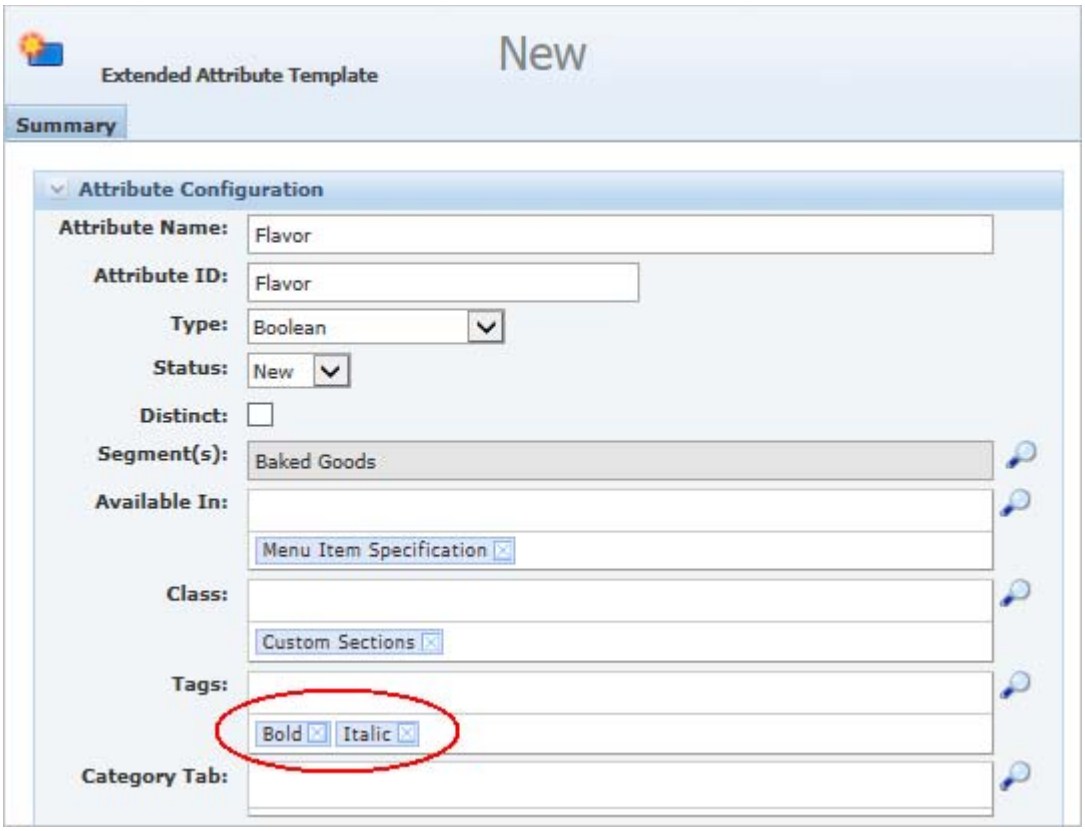
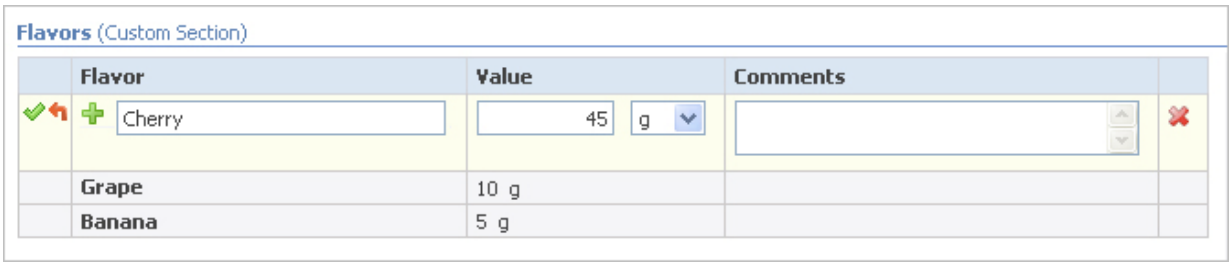


Figure 3–48 shows an extended attribute with the Bold tag applied.

Figure 3–48 Bolded extended attributes



Editing an Extended Attribute

To edit an extended attribute:

1. On the left navigation panel click **ADMN > Custom Data > Extended Attributes**. ADMN displays the Extended Attribute Template Search page.
2. Using the search feature, search for and select the extended attribute to edit. (For instructions on the search feature, see "Searching for Extended Attributes" on page 3-29.) The Extended Attributes page displays.
3. In the action menu, click **Edit**. The Extended Attributes page reloads. Depending on your role and the attribute's status, the screen displays several fields in edit mode.

4. Edit extended attribute information in the Summary tab, as described in "Summary Tab" on page 3-6 and "Type" on page 3-8.
5. Click **Save & Close**.
6. To make your edits available, flush the extended attributes / custom sections cache, as described in "Using the Cache Application" on page 4-3.

Searching for Extended Attributes

To search for extended attributes:

1. On the left navigation panel click **ADMN > Custom Data > Extended Attributes**. ADMN displays the Extended Attribute Template search page.
2. Enter search criteria for extended attributes:
   a. In the key field drop-down list, select your search criteria as follows:
      - **--** — Searches for all extended attributes
      - **Attribute ID**—Searches for extended attributes by unique identifier
      - **Attribute Name**—Searches for extended attributes by name
      - **Available In**—Searches for extended attributes according to the specification, company/facility profile, publication, testing protocol, NPD project, or sourcing approval in which it is used
      - **Category Tag**—Searches for extended attributes by category tab
      - **Class**—Searches for extended attributes by class
      - **Group**—Searches for extended attribute by extended attribute group
      - **Most Recently Used**—Searches for the most recently used extended attributes
      - **Security Classification**—Searches for extended attribute by security classification.
      - **Segment (+Children)**—Searches for extended attributes by segment, including segments that exist as a child in the hierarchy
      - **Segment (+Exact Match)**—Searches against the exact match of the segment
      - **Segment (+Hierarchical)**—Searches against the hierarchy (both up and down) that the segment exists in
      - **Status**—Searches for extended attribute by status
   b. In the operator drop-down list, your options are determined by the choice you made in the first drop-down list. Choices may include:
      - **Null {empty field}**—Searches for all extended attributes.
      - **Contains**—Used for character searches, alphabetical, or numerical (for example, "Description Contains Admin" will produce only extended attributes with descriptions that contain the word "Admin").
      - **Contains All**—Searches for extended attributes that contain all of the values you specify. This options is used for character searches, alphabetical, or numerical (for example, "Attribute Name Contains Color Coding" will produce only extended attributes with names that contain the words "Color Coding").

- **Contains One**—Used for character searches, alphabetical, or numerical (for example, "Attribute ID Contains 123456" will produce only the extended attribute containing the ID "123456").
- **Ends With**—Searches for extended attributes that ends with the character(s) you specify
- **Equals**—Used to quantify search criteria entered in the field to the right (for example, "Attribute Name Equals Allergy" will produce only extended attributes with the name of Allergy).
- **Is True**—Searches for extended attributes matching your selection. Used with Most Recently Used criterion.
- **Not Equals**—Used to quantify search criteria entered in the field to the right (for example, "Attribute Name Not Equals Allergy" will produce only extended attributes that do not contain the name of Allergy).
- **Starts With**—Searches for extended attributes that start with the character(s) you specify

c. Use the empty search criteria field to the right of the operator drop-down list to qualify the selections you made above. For example, if you are searching by "Available In - Contains All," choose the specification type, such as "Equipment Specifications." All extended attributes with an available in value of "Equipment Attribute" are provided in the search results. You can also enter the percent (%) sign to perform a wildcard search matching any one character.

3. Click **Search**. The Search Results table displays extended attributes matching the search criteria.

Note: Click any column head to sort rows by that column head. Click again to reverse the order of the sort.

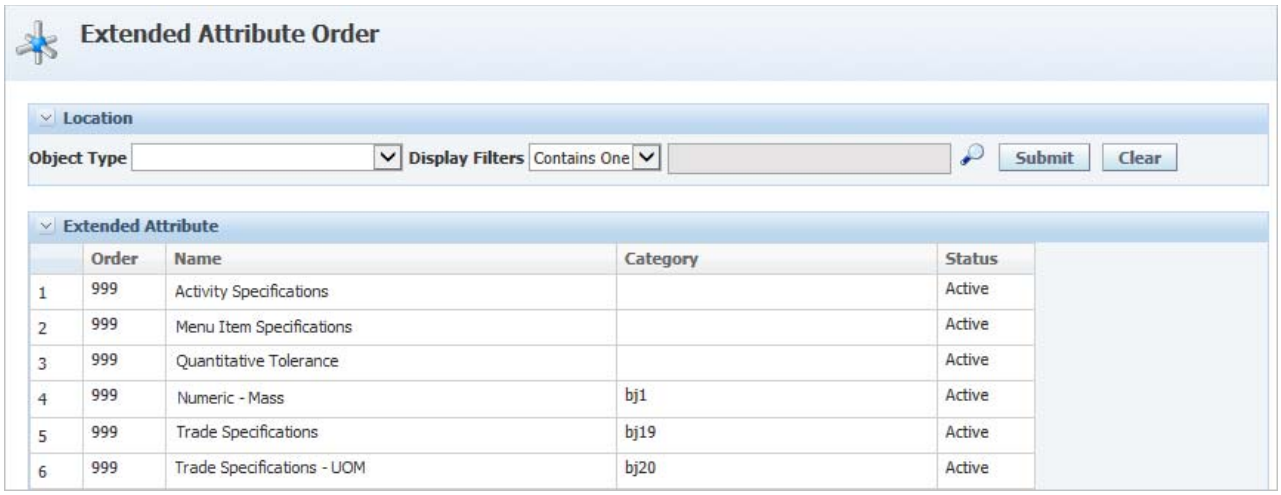
Setting Extended Attribute Order

The display order of extended attributes is defined using ADMN. You can set the display order of extended attributes by object type. The order you set also determines the print order of extended attributes. If no sort order is applied the system displays them in alphabetical order.

To change the order of extended attributes:

1. Click **ADMN > Custom Data > Extended Attribute Order**. The Extended Attribute Order page is displayed, as Figure 3–49 shows.

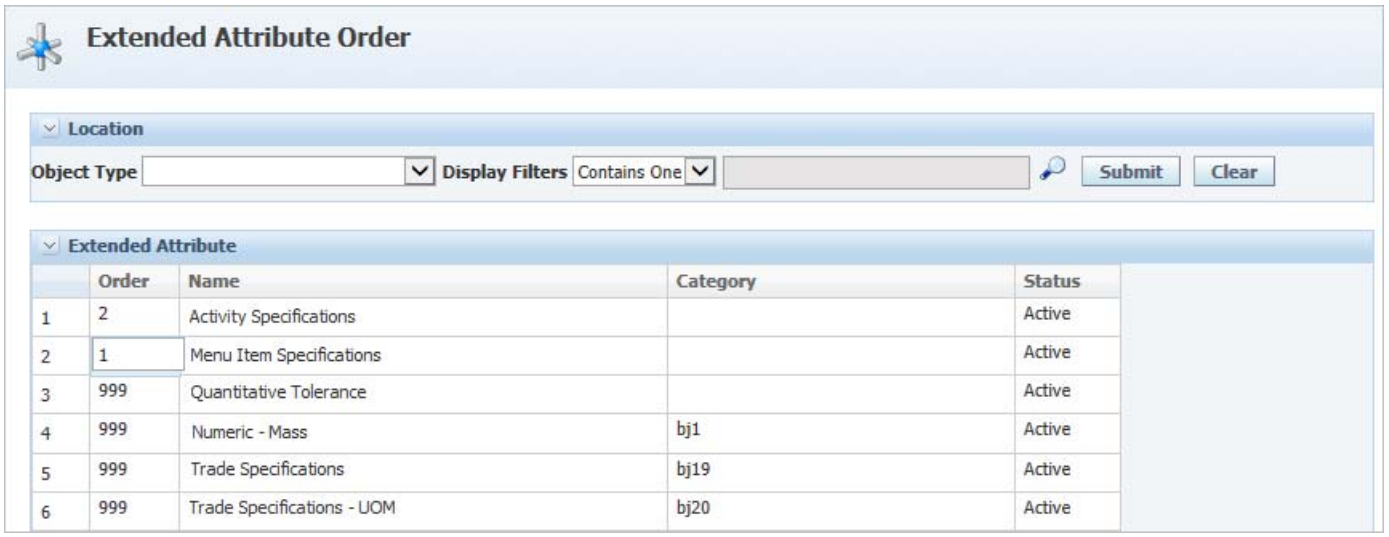
Figure 3–49 Extended Attribute Order page



2. Select an object type from the **Object Type** drop-down list.
3. Select an option from the **Display Filters** drop-down list. Options are Contains One (default) and Contains All.
4. Click the search icon at the end of the Display Filters field. A popup window displays available filters. Select desired filters, and then close the popup window. All extended attributes available in that object type are displayed in the **Name** column. The **Status** column displays the current status.

   You can change the sort order by clicking the linked column names.
5. Click **Edit**.
6. In the **Order** column, set the order of display by assigning a number to each extended attribute, as Figure 3–50 shows.

Figure 3–50 Order column in edit mode



7. Click **Save**.
8. To set the extended attribute order for another object type, repeat step 2 through step 7.

Note: When new extended attributes are added, they are displayed at the bottom of this list.

Custom Sections

Custom sections are essentially configurable sets of extended attributes. Custom sections are found in the following objects:

GSM

- Activities
- Equipment specifications
- Material specifications
- Formulation specification
- Master specifications
- Menu item specifications
- Nutrient profiles
- Output items
- Packing configuration specifications
- Packaging material specifications
- Printed packaging specifications
- Product specifications
- Smart Issue requests
- Trade specifications

NPD—Project, innovations/sales pipelines, strategic briefs, and activities

PQM—Issues, actions, and audits

SCRM—Companies, facilities, and sourcing approvals

eQ—Material, packaging, printed packaging, product, and trade questionnaires

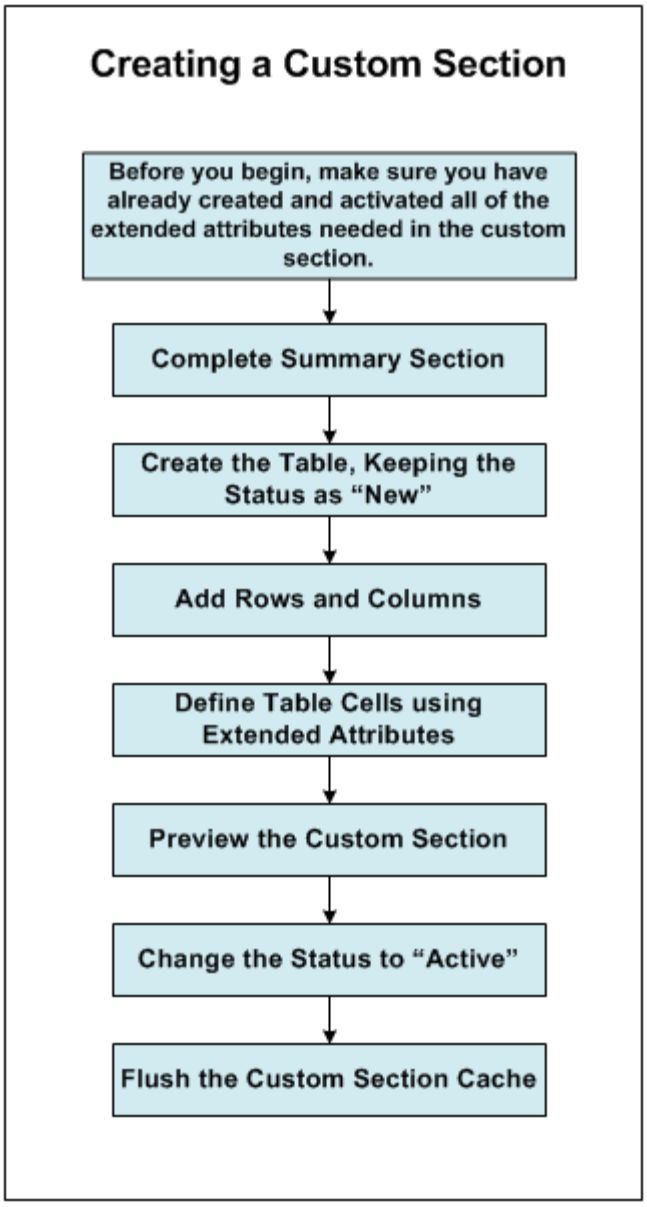
The following table is an example of the type of data that can be built as a custom section using extended attributes:

Table 3–1 Data to be built as a custom section table using extended attributes

	Amount	Soy Hydration Factor
Min Soy Protein Isolate	Numeric UOM% Extended Attribute	Numeric No UOM Extended Attribute
Min Soy Protein Concentrate	Numeric UOM% Extended Attribute	Numeric No UOM Extended Attribute

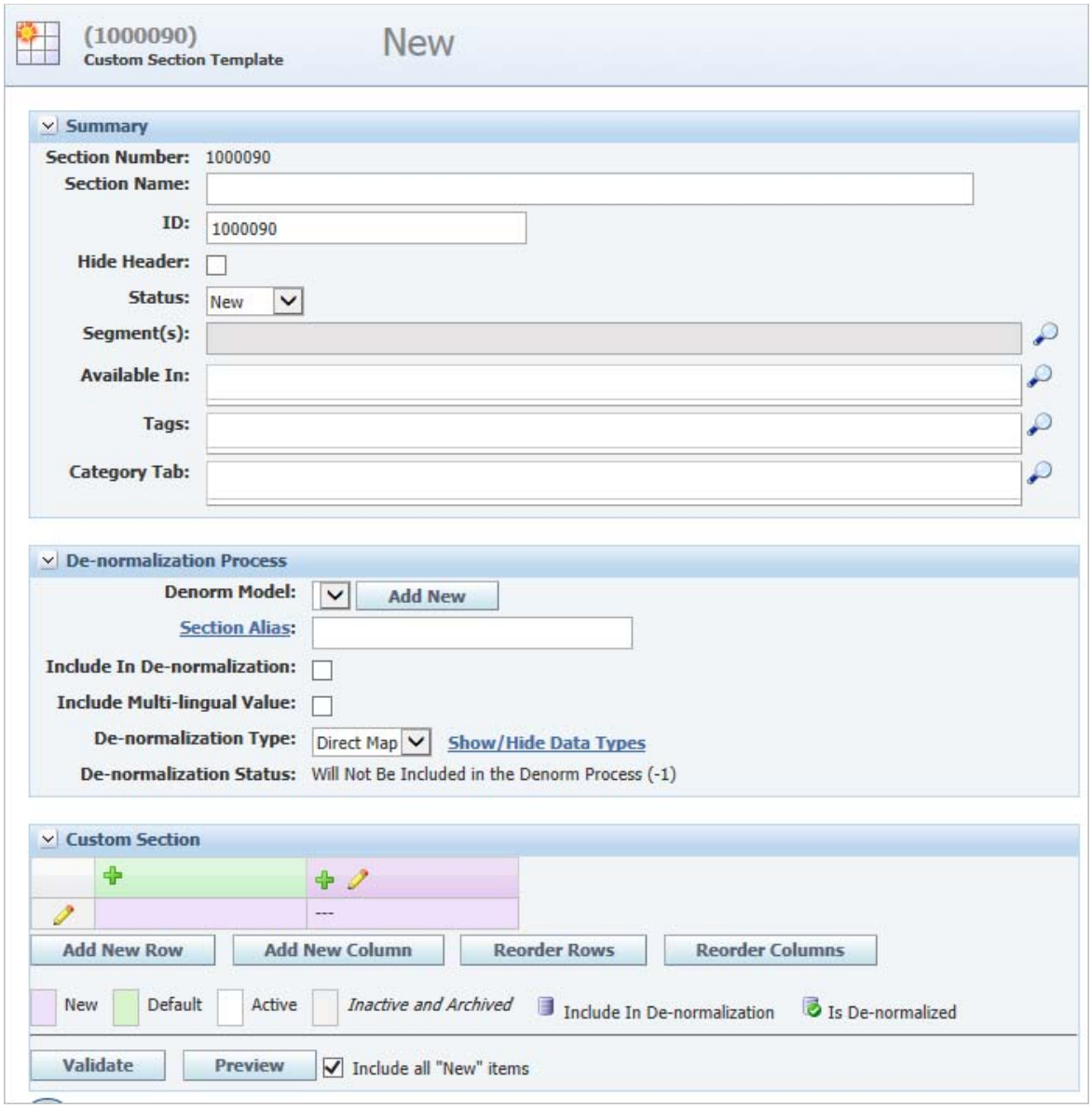
Figure 3–51 shows the steps required to build a custom section.

Figure 3–51 Steps for creating a custom section



Use the Custom Section Template page to build custom sections, as shown in Figure 3–52.

Figure 3–52 Custom Section Template page



Summary Section

The Summary section contains the following fields.

Section Number—A unique identifier. This field is defined by the system.

Section Name—The name of the custom section. This field is required. This value is a multi-lingual value. Use the set alternate language text icon to edit or add additional language values. This icon is not visible until the attribute is saved.

ID—A user-defined unique identifier. This field is required. This field is populated by the system but can be changed. This ID can be used during integration and reporting.

Hide Header—Indicates whether the header is displayed with the table. This option allows you to group two or more sections underneath one header. Use the order feature to set positions as described in "Setting Custom Section Order" on page 3-58.

Security Classification—This field is only available if Object Level Security is enabled. A classification can be used to limit access to the custom section in Agile PLM for Process applications. For more information on Object Level Security, refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

Status—Click the drop-down list to assign a status to the custom section with one of the following:

- **New**—The custom section is not yet ready to become available to Agile PLM for Process applications. When an custom section has a status of "New", its values remains editable.
- **Active**—The custom section is ready to become available for use in Agile PLM for Process applications.
- **Inactive**—The custom section should no longer be used. Inactive custom sections are no longer available for assignment, however, they are not removed from existing objects that reference them. Inactive custom sections are still available for searching.
- **Archived**—The custom section is not available for searching or assignment. Archived custom sections are not removed from existing objects that reference them.

Segment—Assign a segment to the custom section. This field may not display based on configuration settings.

Available In—Click the link to display a selection dialog box containing a list of areas where you can make the custom section available. This field is required.

Note: eQuestionnaire extended attribute availability is based on the related GSM specification type. For example, when creating a material questionnaire you are only allowed to add custom sections that are available in material specifications.

Tags—Tags allow you to apply special behaviors to your custom section. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:

- **Do Not Publish to Supplier**—Custom section is not published to Supplier Portal and is unavailable in eQuestionnaire.
- **Insert Page Break - Above**—Adds a page break above the custom section when printing.
- **Insert Page Break - Below**—Adds a page break below the custom section when printing.
- **Landscape Printing**—Sets the custom section to print in landscape mode. This tag is recommended when the custom section table is wider than portrait printing allows.
- **Suppress Printing**—The custom section is not printable.

Category Tags—Used to categorize extended attributes and custom sections in understandable groupings. The categories are presented as tab groups that hold the extended attributes and custom sections.

De-normalization Process Section

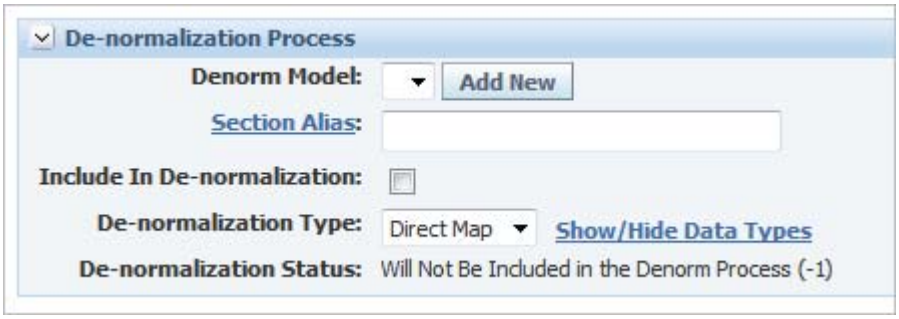
Customers wishing to use custom section data for reporting purposes can use the Custom Section Denormalization process to simplify report writing and improve SQL query performance. The Custom Section Denormalization (CS Denorm) feature provides the ability to convert the complex internal data storage of custom sections and extended attributes into simplified data structures that can be defined in the user interface.

In the Custom Section Admin user interface, users select which custom sections, rows, and columns to denormalize and indicate how the target database table(s) should be set up. The CS Denorm process then reads this information, pulls the relevant custom section data from specifications (or other business objects), and populates that data into a simplified database table(s) created solely for that custom section.

CS Denorm uses database scripts to generate the new denormalized database tables for each custom section. Therefore, it requires some database administrator assistance. The denormalization scripts are available in the Extensibility Pack release, along with detailed documentation.

The De-normalization Process section allow users to specify if the custom section should be denormalized, how it should be denormalized, and the names of the tables that will be created. A custom section can be denormalized into multiple tables. This allows for splitting up the denormalization of very large custom sections into multiple target tables, and for better handling of mixed data types within columns and/or rows.

Figure 3–53 De-normalization Process section



The section contains the following fields:

Denorm Model—A Denorm Model represent how the custom section should be denormalized. Multiple denorm models can be defined, with each model resulting in a different database table, with different columns and rows selected for denormalization. The drop-down field allows you to switch between the defined denorm models, if any. Denorm Models are named by the Section Alias field below. Once a valid denorm model has been created and validated, additional denorm models can be created by clicking the Add New button.

Section Alias—This field determines the table name that will be used for the denormalized custom section table. The value must be unique across all custom sections, and must be no longer than a configurable number of characters (default is 30). Click the calculate icon to pull the section name into the field replacing spaces with underscores. See the *Agile Product Lifecycle Management for Process Custom Section Denormalization Guide* in the Extensibility Pack for important details about field sizes.

Include in De-normalization—Check to include the custom section the in de-normalization process once the custom section becomes "Active."

Warning: If a custom section has already been de-normalized, and then this checkbox is unchecked, then the generated de-normalized custom section table will no longer be included in the data de-normalization process. Additionally, the next time the table creation process is performed this denormalized custom section table will be deleted from the database.

De-normalization Type—Determines how the custom section should be denormalized, for example, should the columns in the user interface directly map to columns in the new database table, or should the rows in the user interface be pivoted to columns (and columns to rows) in the new database table. Select one of the following:

- **Direct Map**—The custom section is created as a table structure that mimics the view of a custom section in the UI of the application, where columns in the UI are mapped as columns in the database table. Using this approach requires that the base extended attribute data types must match for all rows (marked for denorm) in a column (marked for denorm). For examples, you cannot have a numeric extended attribute in column 1, row 1, and a date extended attribute in column 1, row 2. In this scenario, the Pivot de-normalization type may be used.
- **Pivot**—This approach "pivots" a given custom section into a table structure where each row turns into a column and each column is represented by a row. Repeatable rows cannot be de-normalized using the pivot approach. Using this approach requires that the base extended attribute data types must match for all columns (marked for denorm) in a row (marked for denorm).

  Note: When direct map or pivot is selected, it is required that you select at least one column and one row to include in de-normalization before you can save your custom section. This is in place to guarantee that proper data setup rules are being followed.

- **None**—Prevents this section from ever being denormalized. Once a section has been marked with a de-normalization approach of "None," it cannot be changed. Note that this option is turned off by default, but can be enabled for all users or restricted to users in certain groups, by modifying configuration settings. This option would be used if you never want to run reports off of this custom section data.

To see the base data types of the custom section cells, click the **Show/Hide Data Types** link. This changes the custom section grid to display a color-coded base data type for each cell, to help plan the denormalization approach. Clicking the link again restores the original view.

Figure 3–54 Show/Hide Data Types selected



De-normalization Status—Depending on the status of the custom section and whether the Include in De-normalization box is checked, choices are -1, 0, 1, and 2, as described below:

Include in De-normalization checked?	Custom Section Status	De-Normalization Status	Notes
No	any	**-1**: Not for de-normalization	The custom section is not de-normalized
Yes	New	**0**: Not ready for de-normalization	De-normalization meta data (alias, etc.) is stored, but the custom section is ignored by the de-normalization scripts. Once the custom section is made Active, this status is promoted to a 1.
Yes	Active, Archived, Inactive	**1**: Ready for table generation	A de-normalized table can now be created for the custom section. Once the table generation scripts are executed, the status is moved to 2: Ready for de-normalization.
Yes	Active, Archived, Inactive	**2**: Ready for de-normalization	Custom sections in this status can now be picked up in the data de-normalization process.

For more information on the de-normalization process, see the *Agile Product Lifecycle Management for Process Custom Section Denormalization Guide*.

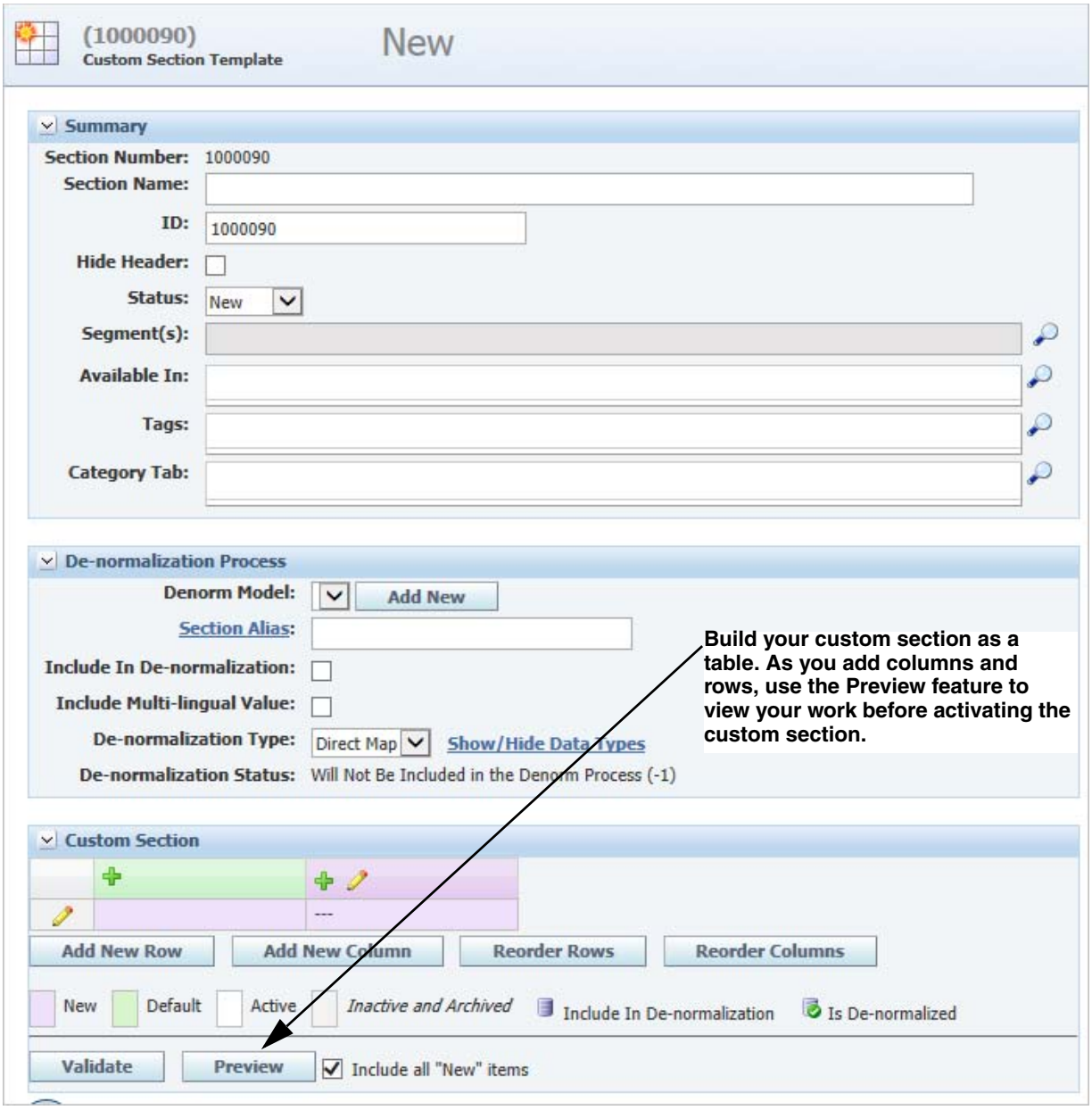
Creating a Custom Section

To create a custom section:

1. On the left navigation panel click **New > Custom Sections**. ADMN displays the Custom Section Template page, shown in Figure 3–55.

> **Note:** You can preview custom sections as you are building them by using the Preview feature. See "Previewing a Custom Section" on page 3-54 for instructions.

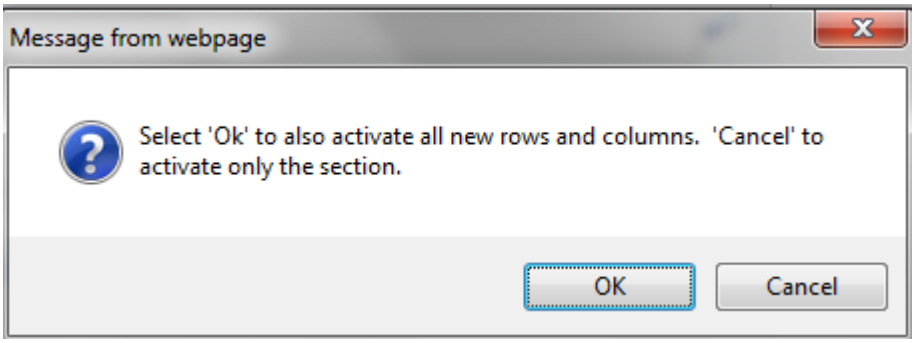
Figure 3–55 New custom section



2. Define the **Section Name**, **ID**, **Security Classification**, **Segment**, **Available In**, and **Tags** fields in the Summary Section, as described beginning on page 3-35.
3. Define whether the custom section is included in the de-normalization process, as described beginning on page 3-37.
4. Create the custom section table as described beginning in "Creating a Table" on page 3-41. Keep all table items (rows and columns) in the status of "New" while creating your table. All items can be activated at once when you activate the entire custom section.
5. Preview your table to make sure it is built correctly as described in "Previewing a Custom Section" on page 3-54.

6. In the Summary area, select "Active" in the **Status** field drop-down list. ADMN displays the following dialog box asking if you want to activate all items (rows and columns.)

Figure 3–56 Activate all new rows and columns dialog box



7. Click **OK**.
8. Click **Save & Close**.
9. Flush the extended attributes/custom sections cache, as described in "Using the Cache Application" on page 4-3.

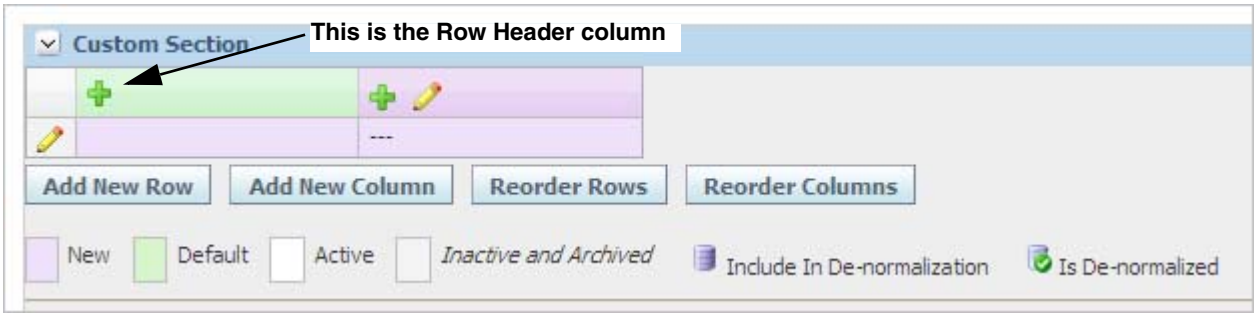
Creating a Table

As you create a table for your custom section, be sure to keep items in "New" status until you are ready to activate the entire section. Use the Preview feature as described on page 3-54 to check that all headings, columns, and rows are arranged as you would like. Activate the section only when the table is ready for use in Agile PLM for Process applications.

To create a table:

1. Define the column row header and add additional columns as described in "Creating Columns" on page 3-41.

Figure 3–57 Custom section table



2. Add additional rows as needed as described in "Creating Rows" on page 3-45.
3. Click **Save**.

Creating Columns

You can add as many columns as you need in a custom section table by clicking **Add New Column** and defining the column values. Two columns are provided by default.

The first (left-most) column is the Row Header column, as shown in Figure 3–57 above.

Defining the Row Header Column

To define the first (left most) row header column:

1. Click the lifetimes add data icon, shown in Figure 3–58, to display a Column Header Information dialog box, shown in Figure 3–59.

Figure 3–58 Row header

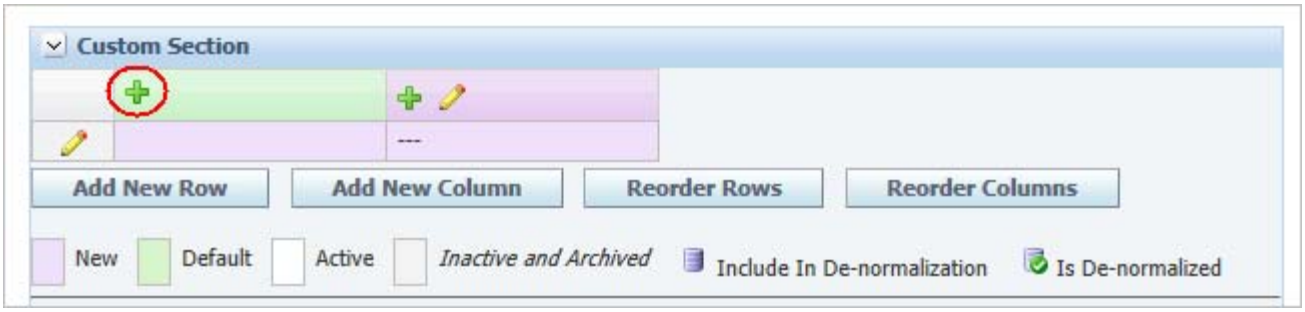
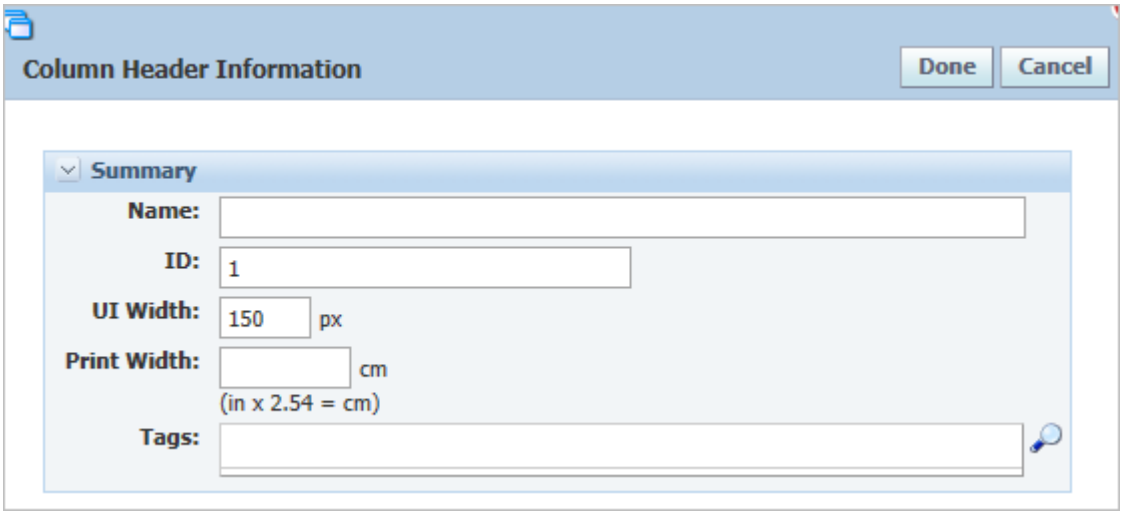


Figure 3–59 Column Header Information dialog box



2. Enter the **Name** of the column. The first column in a custom section can remain un-named.
3. Enter the unique **ID** of the column.
4. Enter the display width of the column in the **UI Width** field. This is the width of the column in the user interface.

Note: Certain UI elements require a minimum space to display properly. If you are referencing a single or multi-select style extended attribute, the UI width must be as wide as your longest selectable item.

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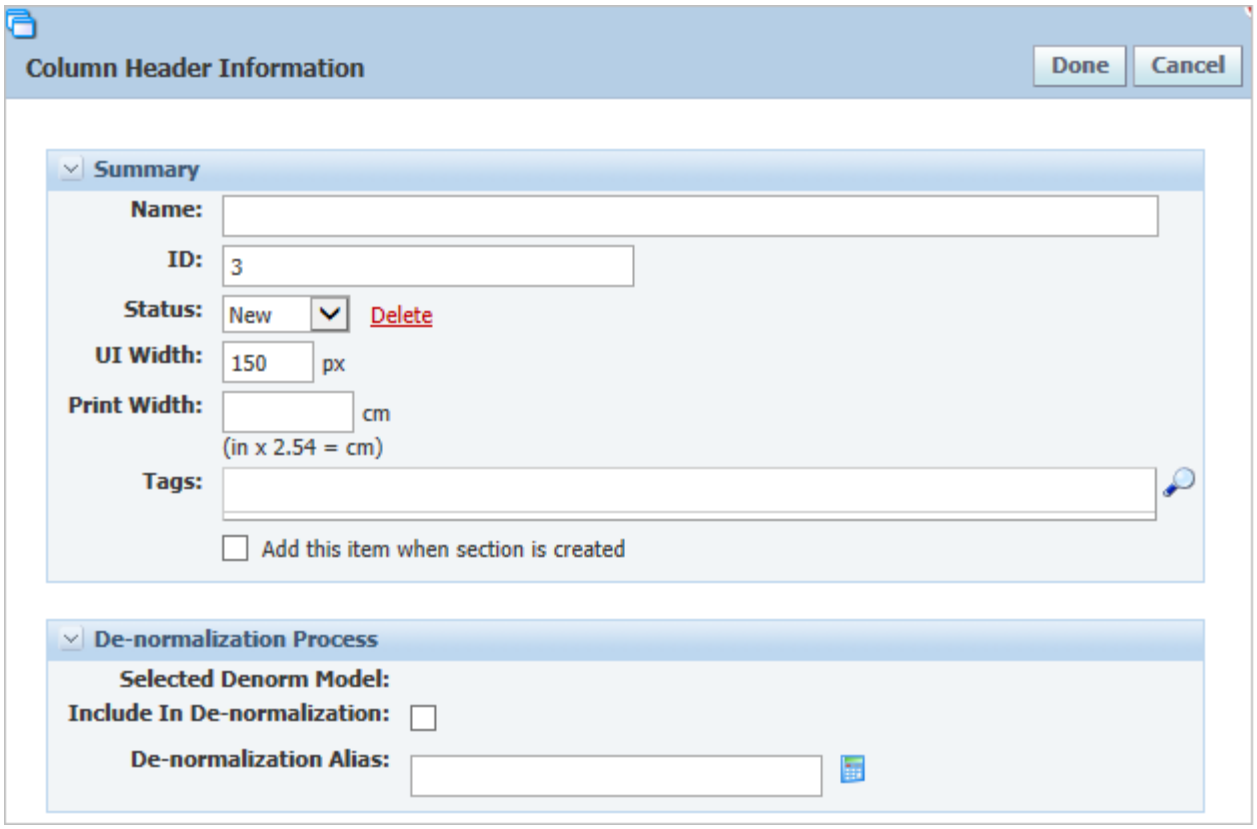
5. Enter the print width of the column in the **Print Width** field. This is the width of the column when the custom section is printed. If a print width is not provided, the printed custom section will be unreadable.
6. Click the search icon at the end of the **Tags** field to select the tags (if any) to assign to this column. Tags allow you to apply special behaviors to your column. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:
   - **Do Not Publish to Supplier**—This column will not be published to Supplier Portal and will be unavailable in eQuestionnaire.
   - **Suppress Printing**—This column will not be included when printing the custom section.
   - **Supplier eQ - Create**—Allows the supplier to add or remove these columns in a questionnaire.
7. Click **Done** to confirm your choices.

Defining Additional Columns

To define additional columns:

1. Click **Add New Column** to add an additional column to the table. The Column Header Information dialog box is displayed, as Figure 3–60 shows. If you are defining a column that already exists, click the add data icon to display the Column Header Information dialog box.

Figure 3–60 Column Header Information dialog box



2. Enter the **Name** of the column.

3. Enter the unique **ID** of the column. This field is automatically numbered by the system but can be modified. This field has to be unique within the custom section set of columns. This ID can be used when using cell location awareness in calculated extended attributes.
4. Set the column **Status** by selecting a status from the drop-down list. Keep the status of the column set to "New" until your entire section and/or column is ready to be activated.
5. Enter the display width of the column in the **UI Width** field. This is the width of the column in the user interface.

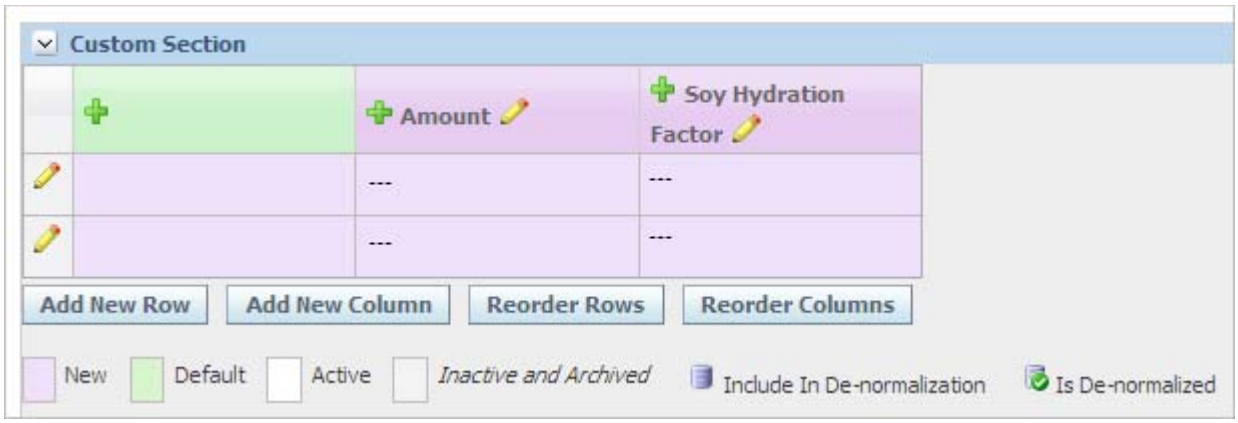
   Note: Certain UI elements require a minimum space to display properly. If you are referencing a single or multi-select style extended attribute, the UI width must be as wide as the longest selectable item.

6. Enter the print width of the column in the **Print Width** field. This is the width of the column when the custom section is printed. If a print width is not provided, the printed custom section will be unreadable.
7. Click the search icon at the end of the **Tags** field to select the tags (if any) to assign to this column. Tags allow you to apply special behaviors to your column. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:
   - **Do Not Publish to Supplier**—This column is not published to Supplier Portal and is unavailable in eQuestionnaire.
   - **Supplier eQ - Create**—Allows the supplier to add or remove these columns in a questionnaire.
   - **Suppress Printing**—This column is not included when printing the custom section.
8. Check the **Add this item when section is created** box to automatically add this column to the table when the section is created by the user.
9. To include the column in the de-normalization process for the given denorm model, select the **Include in De-normalization** checkbox.
10. Enter a unique name in the **De-normalization Alias** field, or click the calculate action icon to auto-generate one.

    Note: When columns are in a "New" status they can be deleted. To delete a column, select the red **Delete** link.

11. Click **Done** to confirm your choices. Figure 3–62 shows the defined columns.

Figure 3–61 Defined columns



Creating Rows

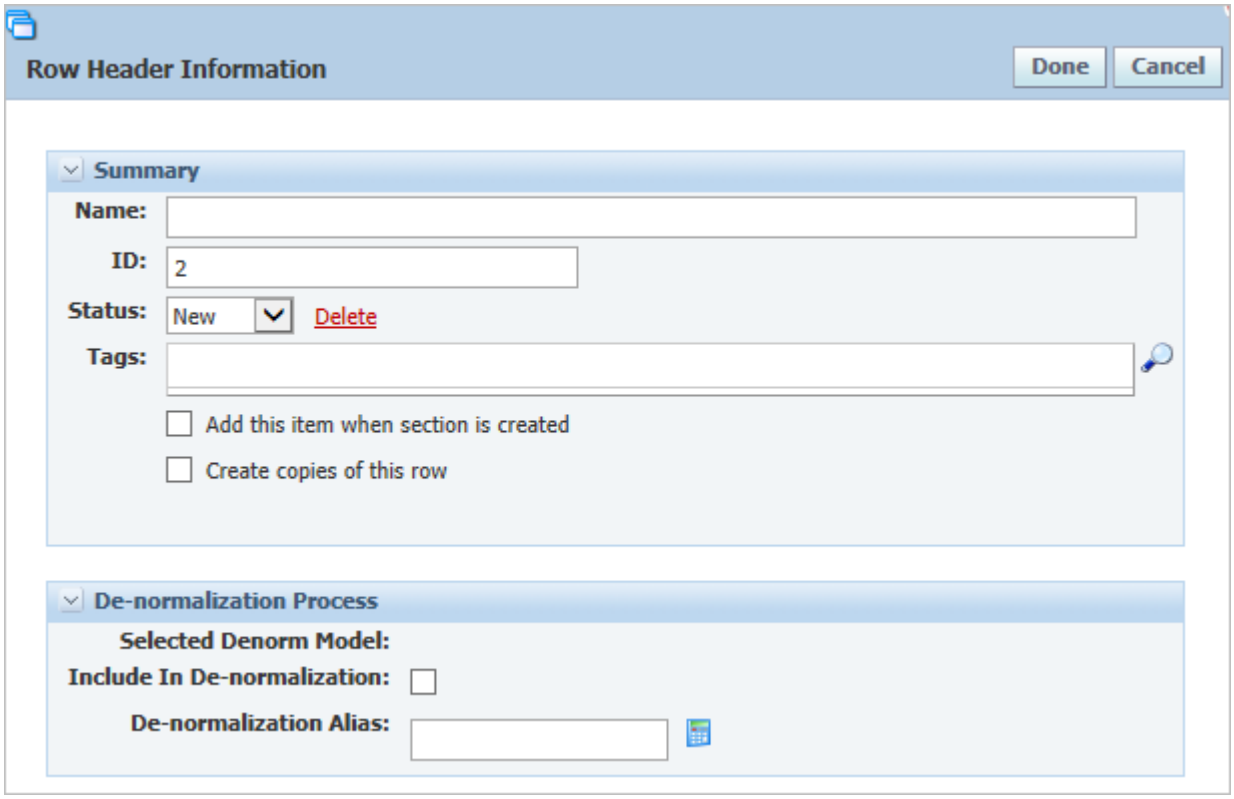
You can add as many rows as you need in a custom section table.

Defining Additional Rows

To add a new row:

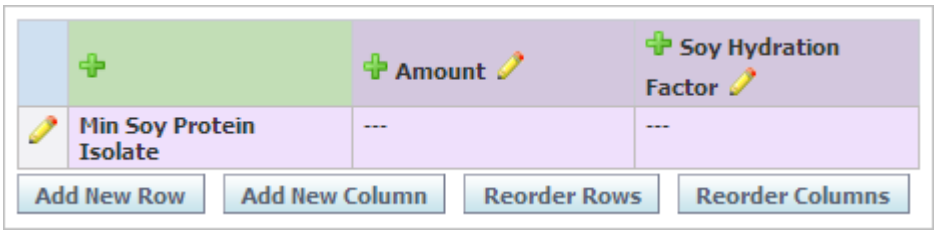
1. Click **Add New Row** to add an additional row to the table. The Row Header Information dialog box is displayed, as Figure 3–62 shows. If you are defining a row that already exists, click the edit icon to make the row editable. Click the add data icon to display the Row Header Information dialog box.

Figure 3–62 Adding a new row



2. Enter a name for the row in the **Name** field.
3. Enter a unique identifier in the **ID** field. This field is automatically numbered by the system but can be modified. This field has to be unique within the custom section set of rows. This ID can be used when using cell location awareness in calculated extended attributes.
4. Set the row **Status** by selecting a status from the drop-down list. Keep the status of the row set to "New" until your entire section and/or row is ready to be activated.
5. Click the search icon at the end of the **Tags** field to select the tags (if any) to assign to this row. Tags allow you to apply special behaviors to your row. Multiple tags can be attached. Click the link to display a selection dialog box containing the following options:
   - **Do Not Publish to Supplier**—This row is not published to Supplier Portal and is unavailable in eQuestionnaire.
   - **Hide Header**—The header for this row is not displayed in consumption or printing. When all visible rows in a custom section include the hide header tag, the entire header column does not appear. This tag is beneficial when using repeatable rows. See "Formatting Custom Sections" on page 3-50 for an example of what a custom section looks like leveraging this tag.
   - **Repeatable**—This row template can be re-used during consumption. This tag should only be used when the use case is absolutely necessary. It is recommended to use distinct rows containing distinct attributes. For more information, see "Re-using a Custom Section Row Template" on page 3-52.
   - **Supplier eQ - Create**—Allows the supplier to add or remove these rows in a questionnaire.
   - **Suppress Printing**—This row is not included when printing the custom section.
6. Check the **Add this item when section is created** box to automatically add this row to the table when the section is created by the user.
7. Check the **Create copies of this row** box to add one or more copies of this row to the table; enter the number of rows to create in the # of Copies text field. This feature is better used when all cells have already been defined. Refer to "Copying Rows" on page 3-47.
8. To include the column in the de-normalization process for the given denorm model, select the **Include in De-normalization** checkbox.
9. Enter a unique name in the **De-normalization Alias** field, or click the calculate action icon to auto-generate one.
10. Click **Done** to confirm your choices. Figure 3–63 shows the newly created row in edit mode. You can now define the cells.

Figure 3–63 Added row



Defining Cells

Custom section cells contain extended attributes.

To define a cell in a table:

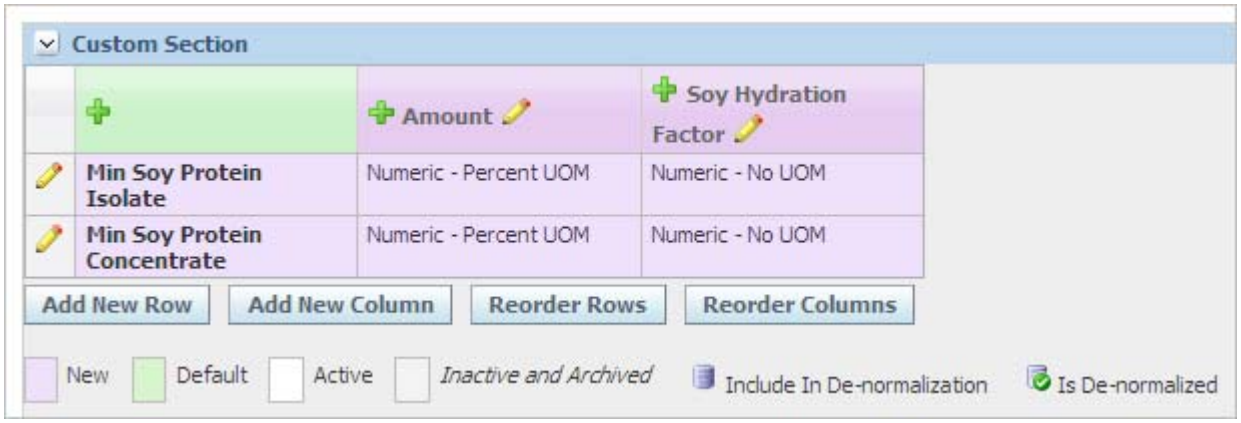
1. Click the edit icon to make the row or column editable.
2. In the cell that you are adding an attribute to, click the add data icon to display the Extended Attribute dialog box. This list contains extended attributes that have been marked with a class of "Custom Sections" and have an "Active" status.
3. Select an extended attribute from the list. For more information on creating extended attributes, refer to "Creating an Extended Attribute" on page 3-27.

> **Note:** When you add an extended attribute to the cell, a clear field icon is displayed to the right of the selection. You can click this icon to delete the extended attribute from the table, as long as the statuses of the associated row/column are "New."

4. Click **Done** to confirm your choice.
5. Continue this process until all cells in the row contain an extended attribute.
6. Click the apply changes icon to apply your changes.

> **Warning: Cells cannot be edited once the row or column has been activated.**

Figure 3–64 Defined cells



> **Note:** The extended attribute's Attribute ID value is displayed in brackets after the extended attribute name.
>
> Clicking a cell with an extended attribute launches a read-only popup displaying the extended attribute information.

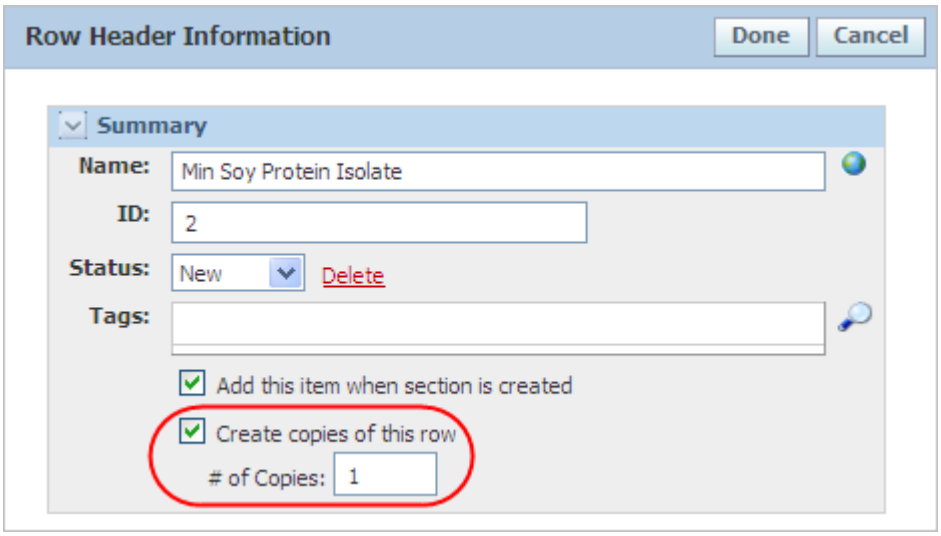
Copying Rows

To copy an existing row:

1. Click the edit icon of the row you would like to copy. This makes the row editable.

2. In the Row Header column, click the add data icon to display the Row Header Information dialog box.
3. Check the **Create copies of this row** box to add one or more copies of this row to the table. The # of Copies field appears.
4. Enter the number of rows to create in the # of Copies field. Figure 3–65 shows these entries.

Figure 3–65 Copying row fields



5. Click **Done**. The table displays the copied rows. A dialog box displays asking if you want to proceed with the copy.
6. Click **OK**. The new row(s) display under the copied row.
7. Define each row following the procedure above.

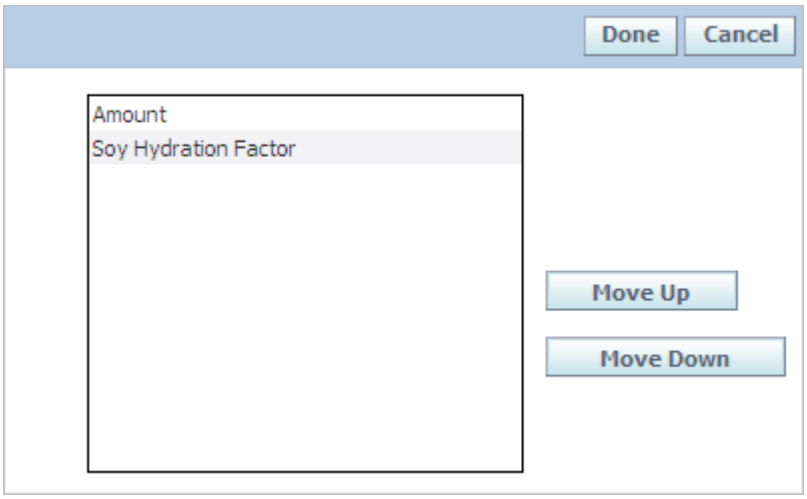
Reordering Columns

The order the columns appear in during consumption is set through the custom section template.

To reorder the columns in your table:

1. With the page in edit mode, click **Reorder Columns**. A dialog box is displayed, as Figure 3–66 shows.

Figure 3–66 Reorder columns dialog box



2. Click a column value in the list, and then click **Move Up** or **Move Down** to set the desired position.
3. Repeat step 2 as needed to move other columns to the desired position.
4. Click **Done**.

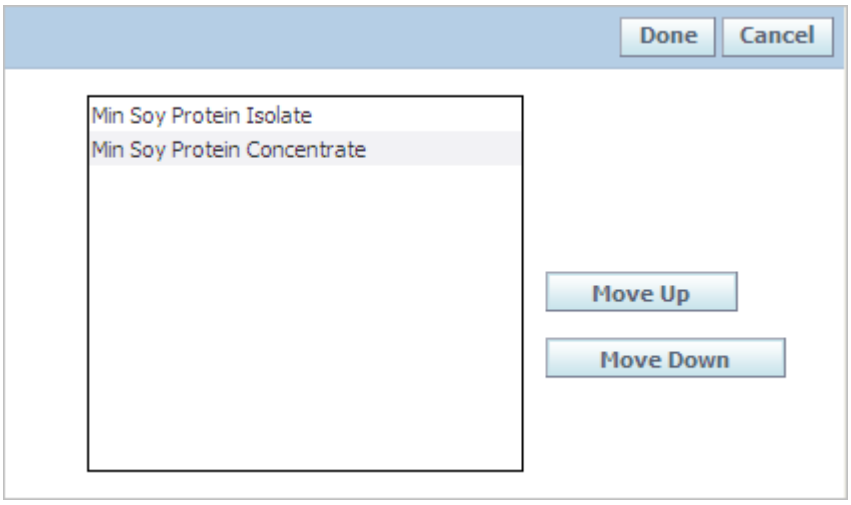
Reordering Rows

The order the rows appear in during consumption is set through the custom section template.

To reorder the rows in your table:

1. With the page in edit mode, click **Reorder Rows**. A dialog box is displayed, as Figure 3–67 shows.

Figure 3–67 Reorder rows dialog box



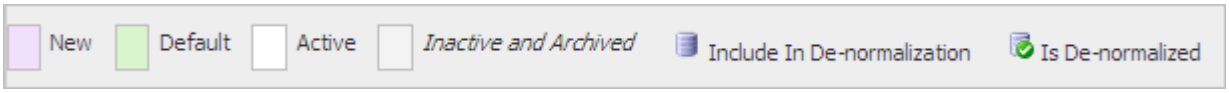
2. Click a row value in the list, and then click **Move Up** or **Move Down** to set the desired position.
3. Repeat step 2 as needed to move other rows to the desired position.

4. Click **Done**.

Legend

Rows and columns are colored to represent status and whether an item is default. The following legend is provided.

Figure 3–68 Custom Section statuses



See "Status" on page 3-36 for more information on statuses. De-normalization icons are defined below:

 —The Include in De-normalization icon is displayed if both the column and row for that cell are marked as Include In De-normalization, but their statuses are not Ready For Denormalization (meaning those columns and rows have not been created in the new de-normalization table.)

 —The De-normalized icon displays when both the column and row have been created in the denormalized table.

Formatting Custom Sections

You now have some formatting options when working with custom data.

Hide Row Header Depending on your use case and searching needs, you may not feel the need to repeat the row header over and over again throughout the section. You can add the "hide header" tag to the repeatable row's Row Header Information dialog box to accomplish this as described on page 3-46. Figure 3–69 and Figure 3–70 show what a custom section looks like before and after Hide Header tag is applied.

Figure 3–69 Custom section displaying row headers

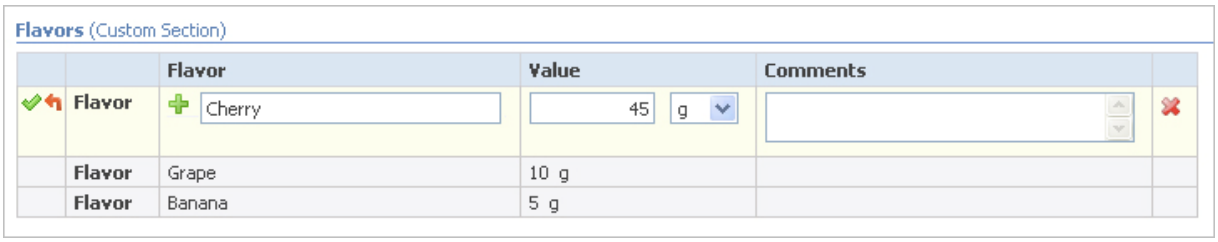
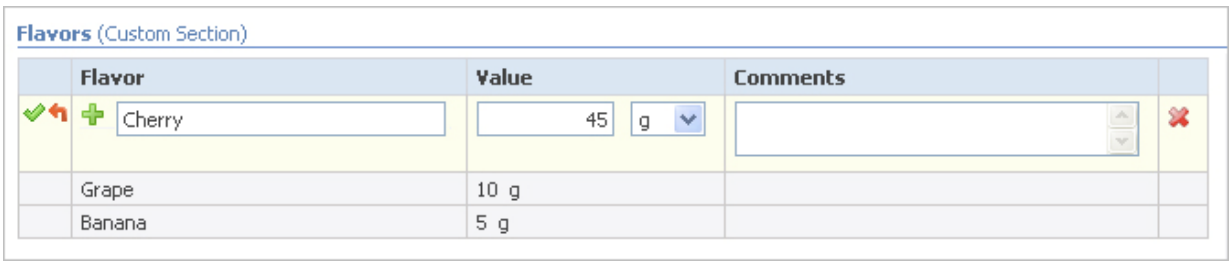


Figure 3–70 Same section leveraging the hide header tag



This tag can be used on all row types, repeatable and none repeatable. When all rows of a custom section contain the Hide Header tag the entire row header column is

hidden. If only a few rows out of the set have the Hide Header tag the bold text in the cell is hidden on those rows.

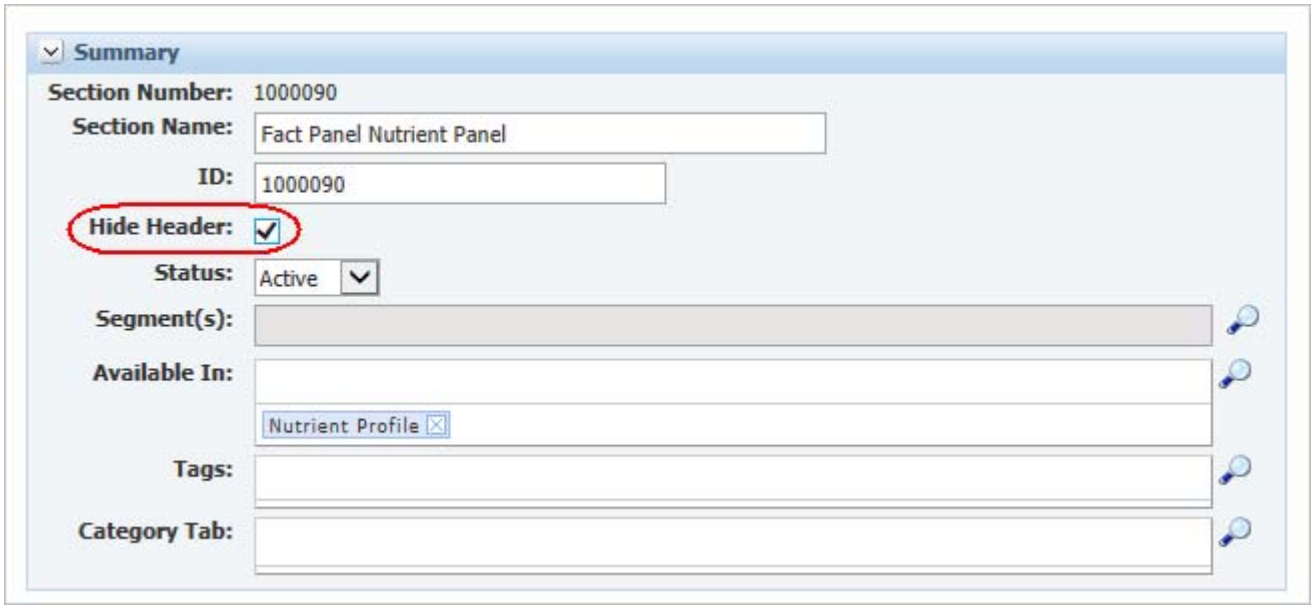
> **Note:** Error messages and advanced custom section searching still leverage the row header name.

Hide Custom Section Header Depending on your use case and searching needs, you may want to display multiple sections under one header. When a column contains this tag the header text is hidden when the custom section is being consumed in GSM, SCRM, PQM, eQ, etc. This header does not print.

To create a section with a hidden header:

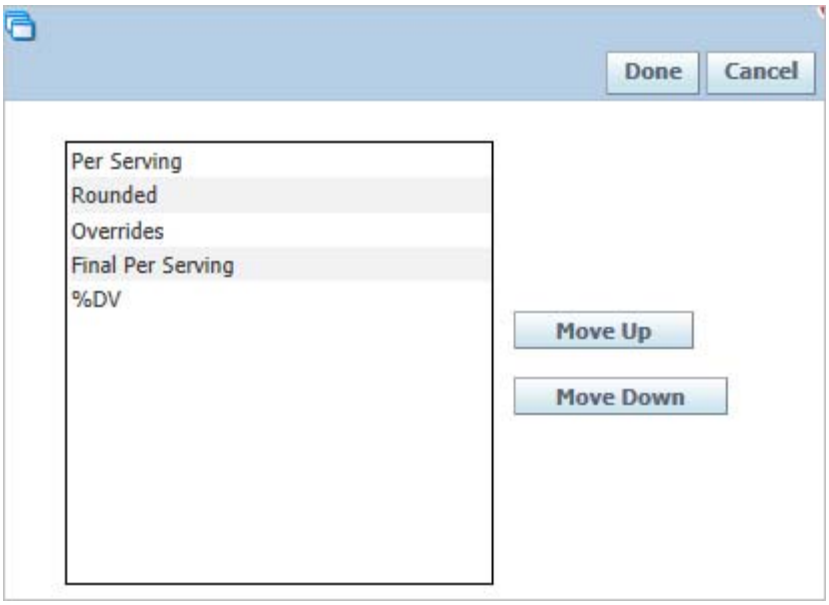
1. Create the custom sections following the same steps as outlined beginning on page 3-41.
2. Select the **Hide Header** checkbox on the Custom Section template as shown in the following figure:

Figure 3–71 Hide Header checkbox



3. Make sure to adjust the display order of the custom sections so they display appropriately using the Custom Section Order tool, as shown below.

Figure 3–72 Custom Section order tool



Note: Remember that if users are using the Advanced custom data search method they need to reference the name of the section with the hidden header. So the name of the section must be very descriptive. These values can also be searched using the quick method where the section name is not needed.

Re-using a Custom Section Row Template

You can re-use a custom section row template using the "Repeatable" tag.

Important: This feature should be used only when absolutely necessary and is not intended as a quick custom section creation tool. It is still our recommendation to use distinct custom section rows and extended attributes whenever possible. Using distinct rows and extended attributes allows for better performing reporting, integration and searching.

Use Case Example

The simplest of use cases this solution is addressing revolves around a qualitative list of 1500 possible flavors. At most a section could contain 50 flavors; previously a custom section administrator would have to create 50 row templates with ambiguous row header names: Flavor 1, Flavor 2, Flavor 3, and so on. When consumed these identifiers make it unusable when searching, because the row header has to be identified. Alternatively the administrator would be required to create 1500 row templates for the custom section; this was unreasonable and depending on the number of rows needed, unsupported.

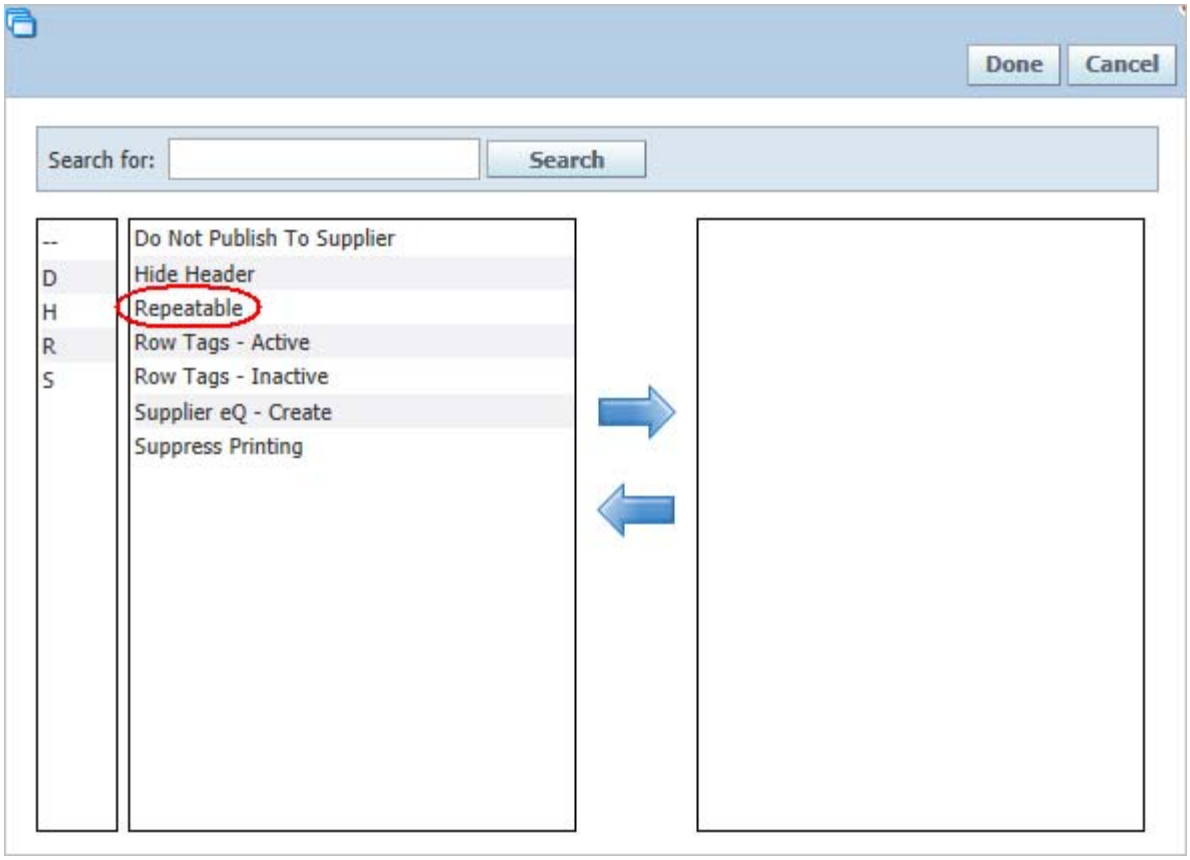
The Solution

The ability to re-use a custom section row template provides a possible solution. Now the administrator just needs to create one row called "Flavor" and include the qualitative single select extended attribute as the first cell of that row.

To create a repeatable row:

1. Create a custom section as described in "Creating a Custom Section" on page 3-39.
2. For the row you would like to be repeatable to the end user, add the tag of "Repeatable" to the row header information as shown in the following figure:

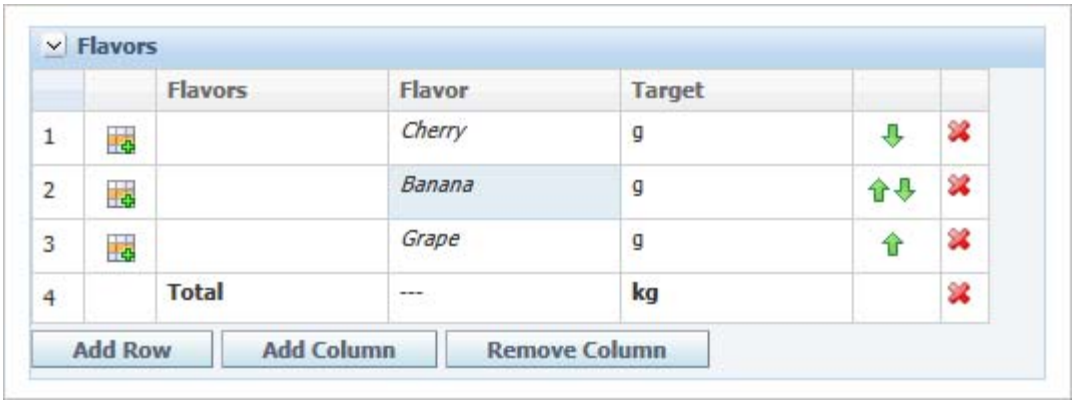
Figure 3–73 Repeatable tag



Note: Because the row is repeated on the specification, distinct extended attributes cannot be used within the row.

Figure 3–74 shows what this custom section could look like in consumption:

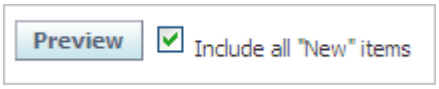
Figure 3–74 Custom section containing repeatable row



Previewing a Custom Section

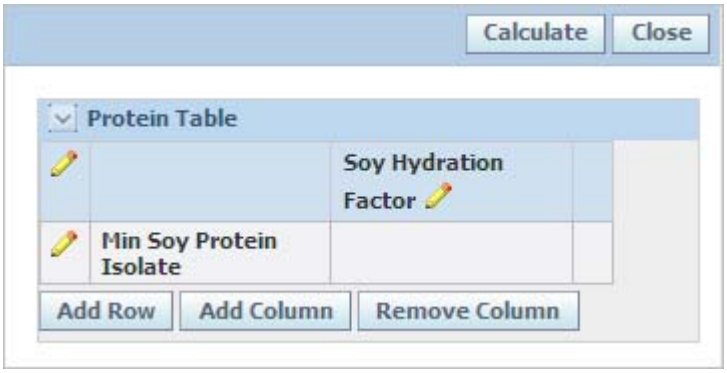
Preview custom sections by clicking **Preview** at the bottom of the page. You can use this feature to view the section as the user would see it. The preview includes all items in the status of "Active" and "New." If you don't wish to include "New" items, uncheck the Include all "New" items box. Preview mode allows you to mimic the user's experience. Preview also allows you to see UI column widths.

Figure 3–75 Custom Section page, Preview button



When you click **Preview**, the current custom section, including default values, is displayed in a dialog box, as Figure 3–76 shows.

Figure 3–76 Custom Section in preview mode



To make further changes to the custom section, click **Close**. Agile PLM for Process closes the preview dialog box closes and returns to the Custom Section page.

Calculating Extended Attributes

While in preview mode, you can click the **Calculate** button to calculate extended attribute values. This button works only with calculate attributes that are referencing attributes present in the previewed section. Depending on your calculated extended attributes, the system may pull in the mock values for items referenced by ID. Refer to

the "Calculated Attributes" section of the *Agile Product Lifecycle Management for Process Extensibility Guide* for more information.

Editing Custom Sections

To edit a custom section:

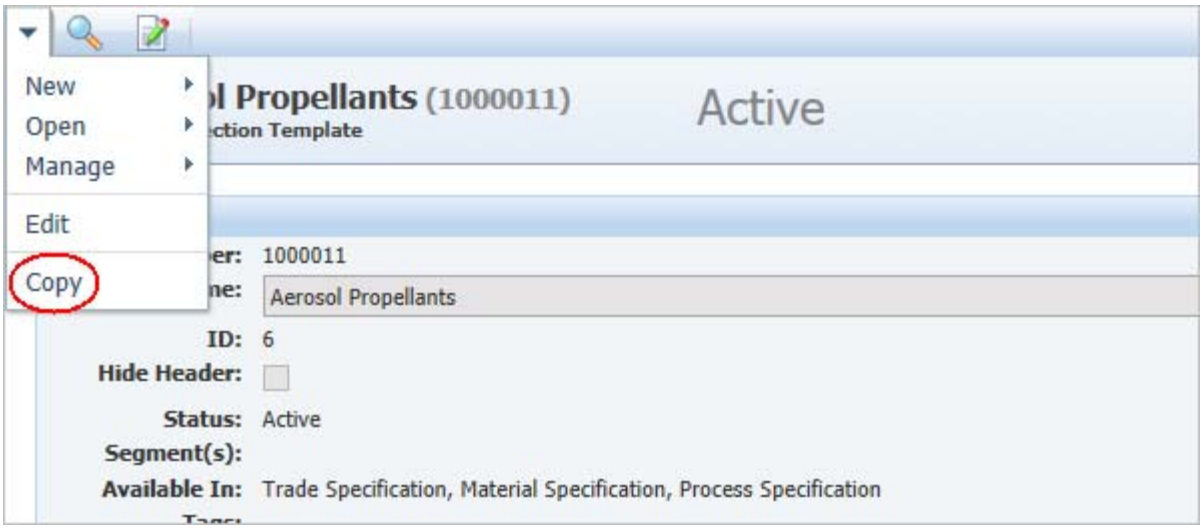
1. Click **ADMN > Custom Data > Custom Sections**.
2. Using the search feature, search for the custom section to edit. (For instructions on the search feature, see "Searching for Custom Sections" on page 3-57.)
3. Click **Edit**.
4. Edit custom section summary information, as described in "Summary Section" on page 3-35.
5. To edit the table, complete the procedures referenced below:
   - "Creating Columns" on page 3-41
   - "Defining the Row Header Column" on page 3-42
   - "Defining Additional Columns" on page 3-43
   - "Creating Rows" on page 3-45
   - "Defining Additional Rows" on page 3-45
   - "Defining Cells" on page 3-47
   - "Copying Rows" on page 3-47
   - "Reordering Columns" on page 3-48
   - "Reordering Rows" on page 3-49
6. Activate all new rows and/or columns.
7. Click **Save & Close**.
8. Flush the extended attributes / custom sections cache, as described in "Using the Cache Application" on page 4-3.

Copying a Custom Section

To copy a custom section:

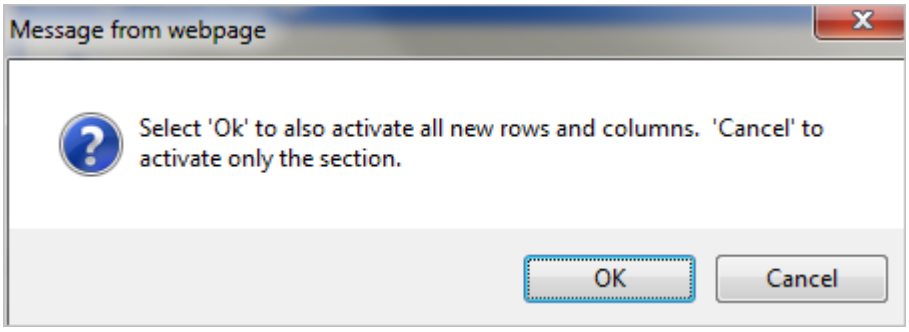
1. Click **ADMN > Custom Data > Manage Custom Sections**.
2. Use the search feature to select the custom section to copy. Figure 3–77 shows an existing custom section.

Figure 3–77 Custom section with Copy button



3. Click **Copy**. (This button does not appear if the page is in edit mode.) All items for the custom section are copied over to a new page, including rows, column, and cells.
4. Define the **Section Name**, **ID**, **Hide Header**, **Security Classification**, **Available In**, and **Tags** fields in the Summary Section, as described beginning on page 3-35.
5. Define the fields in the De-normalization Process section, as described beginning on page 3-37.
6. Edit the custom section table as described in "Editing Custom Sections" on page 3-55.
7. Preview your table to make sure it is built correctly as described in "Previewing a Custom Section" on page 3-54.
8. In the Summary area, select "Active" in the Status drop-down list. ADMN displays the following dialog box asking if you want to activate all items (rows and columns.)

Figure 3–78 Activate all new rows and columns dialog box



9. Click **OK**.
10. Click **Save & Close**.
11. Flush the extended attributes / custom sections cache, as described in See "Using the Cache Application" on page 4-3.

Searching for Custom Sections

To search for custom sections:

1. Click **ADMN > Custom Data > Custom Sections**. The Custom Section Template Search page displays.
2. Enter search criteria for custom sections using a combination of three search fields:
   a. In the key field drop-down list, select your search criteria as follows:
      - **--** —Searches for all custom sections
      - **Category Tab**—Searches by category tab
      - **Column Name**—Searches by column name
      - **Created**—Searches by creation date
      - **Last Edit**—Searches by last edit date
      - **Most Recently Used**—Searches for custom sections most recently used
      - **Row Name**—Searches by row name
      - **Segment (+Children)**—Searches for custom sections by segment, including segments that exist as a child in the hierarchy
      - **Segment (+Exact Match)**—Searches against the exact match of the segment
      - **Segment (+Hierarchical)**—Searches against the hierarchy (both up and down) that the segment exists in
      - **Section ID**—Searches by section identifier
      - **Section Name**—Searches by section name
      - **Security Classification**—Searches by security classification.
      - **Status**—Searches by status
   b. In the operator drop-down list, your options are determined by the choice you made in the key field drop-down list. Choices may include:
      - **Contains**—Used for character searches, alphabetical, or numerical (for example, "Column Name Contains Admin" will produce only custom sections containing a column name of "Admin").
      - **Equals**—Used to quantify search criteria entered in the field to the right (for example, "Section ID Equals 123456" will produce only the custom section with the section ID of "123456").
      - **Greater Than**—Searches for custom sections with a value greater than a value you specify (for example "Last Edit Greater Than 8/1/09" will produce only custom sections edited after "8/1/09").
      - **Is True**—Used only with the Most Recently Used criterion and allows you to find your most recently viewed custom sections.
      - **Less Than**—Searches for custom sections with a value less than a value you specify (for example "Created Less Than 1/1/09" will produce only custom sections created before "1/1/09").
      - **Starts With**—Searches for custom sections that start with the character(s) you specify

c. Use the empty search criteria field to the right of the operator drop-down list to qualify the selections you made above. You can also enter the percent (%) sign to perform a wildcard search matching any one character.

3. Click **Search**. The Search Results table displays custom sections matching the search criteria.

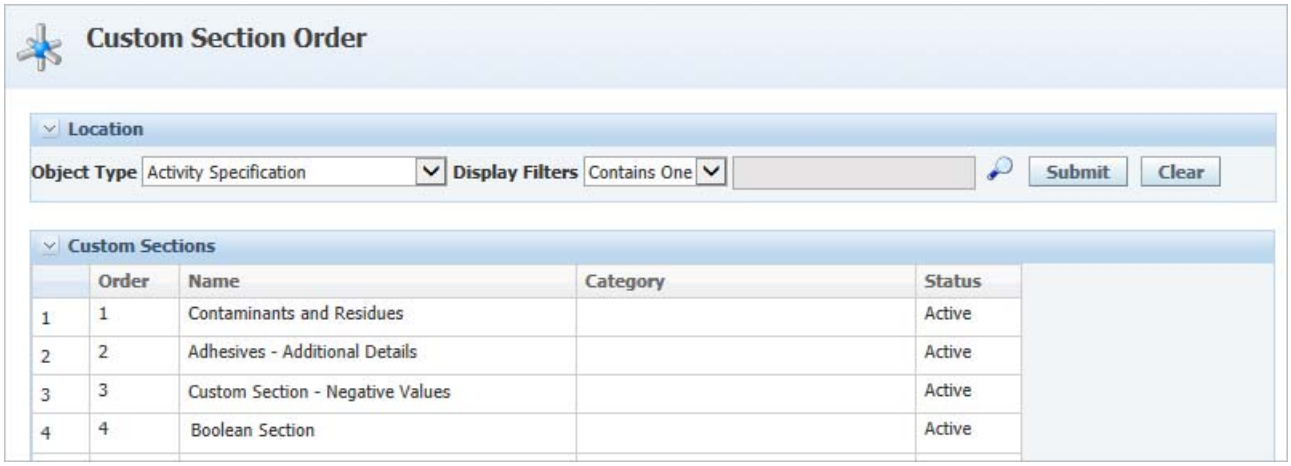
Setting Custom Section Order

The display order of custom sections is defined using ADMN. You can set the display order of custom sections by object type. The order you set also determines the print order of custom sections. If no sort order is applied, the system displays them in alphabetical order.

To change the order of custom sections:

1. Click **ADMN > Custom Data > Custom Section Order**. The Custom Section Order page is displayed, as Figure 3–79 shows.

Figure 3–79 Custom Section Order page



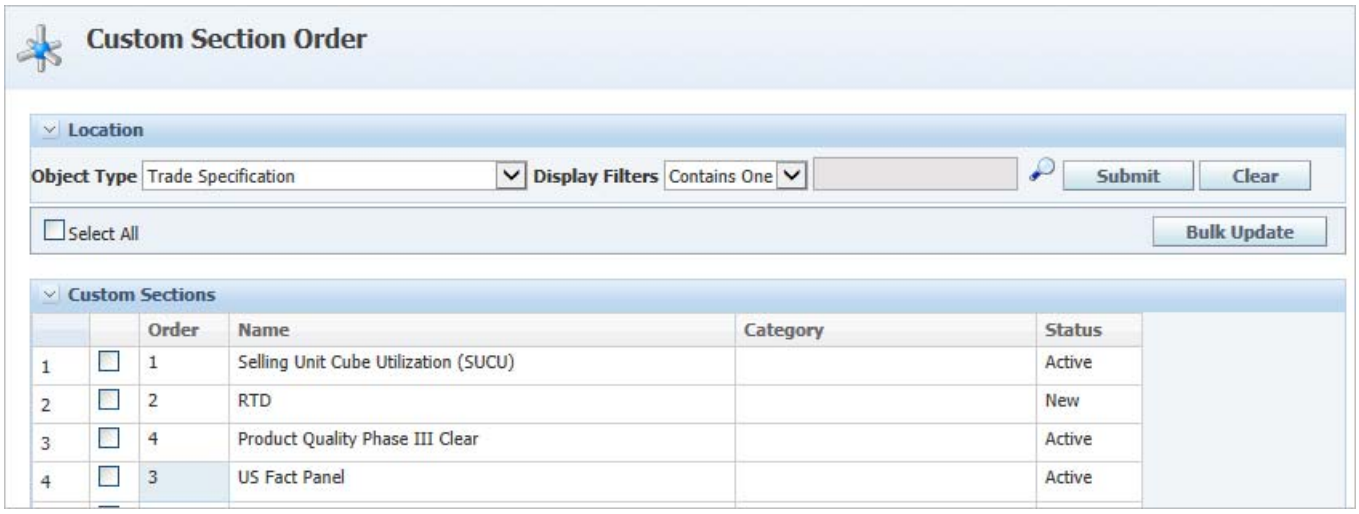
2. Select an object type from the **Object Type** drop-down list. All custom sections available in that object type are displayed in the **Name** column. The **Status** column displays the current status.

3. If needed, use the Display Filters selection to view only the new and active custom sections. You can change the sort order by clicking the linked column names.

4. Click **Edit**.

5. In the **Order** column, set the order of display by assigning a number to each custom section, as Figure 3–80 shows.

Figure 3–80 Order column in edit mode



6. Click **Save**.
7. To set the custom section order for another object type, repeat step 2 through step 7.

> **Note:** When new custom sections are added, they are displayed at the bottom of this list.

4

Using CACHE to Manage Caches

This chapter explains the cache management feature. Topics in this chapter include:

- Scheduling Data Cache Flushes
- Using the Cache Application

Scheduling Data Cache Flushes

Caches are temporary storage areas for frequently or recently accessed data. Caches must be routinely flushed. Modified data that belongs to one process must be written out of the cache to main memory so that the cache can be used by another process.

The CACHE (Manage Data Caches) application provides administrators with an application for managing data caches. You can access the CACHE application on the left navigation panel. For more information see "Using the Cache Application" on page 4-3.

You should flush caches after the following activities:

- After creating/editing/importing users using the UGM application
- After creating/editing/importing groups using the UGM application
- After creating/editing/importing workflows using the WFA application
- After creating/editing data using the ADMN application
- After creating/editing core data using the ADMN application

Workflow Groups and Workflows

When creating workflow groups and workflows, flush the cache after you have completed each of the following steps:

- After creating/editing workflow groups in UGM
- When creating workflow groups in UGM, after adding or changing assigned roles to the groups

> **Warning: When creating new workflow groups in UGM, be sure to flush the cache before adding new users to the group to avoid encountering system issues.**

- After creating workflows in WFA

- Before exporting workflows or workflow groups from the staging environment to the production environment
- After importing workflows or workflow groups into the production environment from the staging environment

Data Administration

When working in the ADMN (Manage Core Data) application, flush the cache after you have created/edited any data using the ADMN application. You must also flush the cache from the production environment after you have exported completed data changes from a staging environment to a production environment.

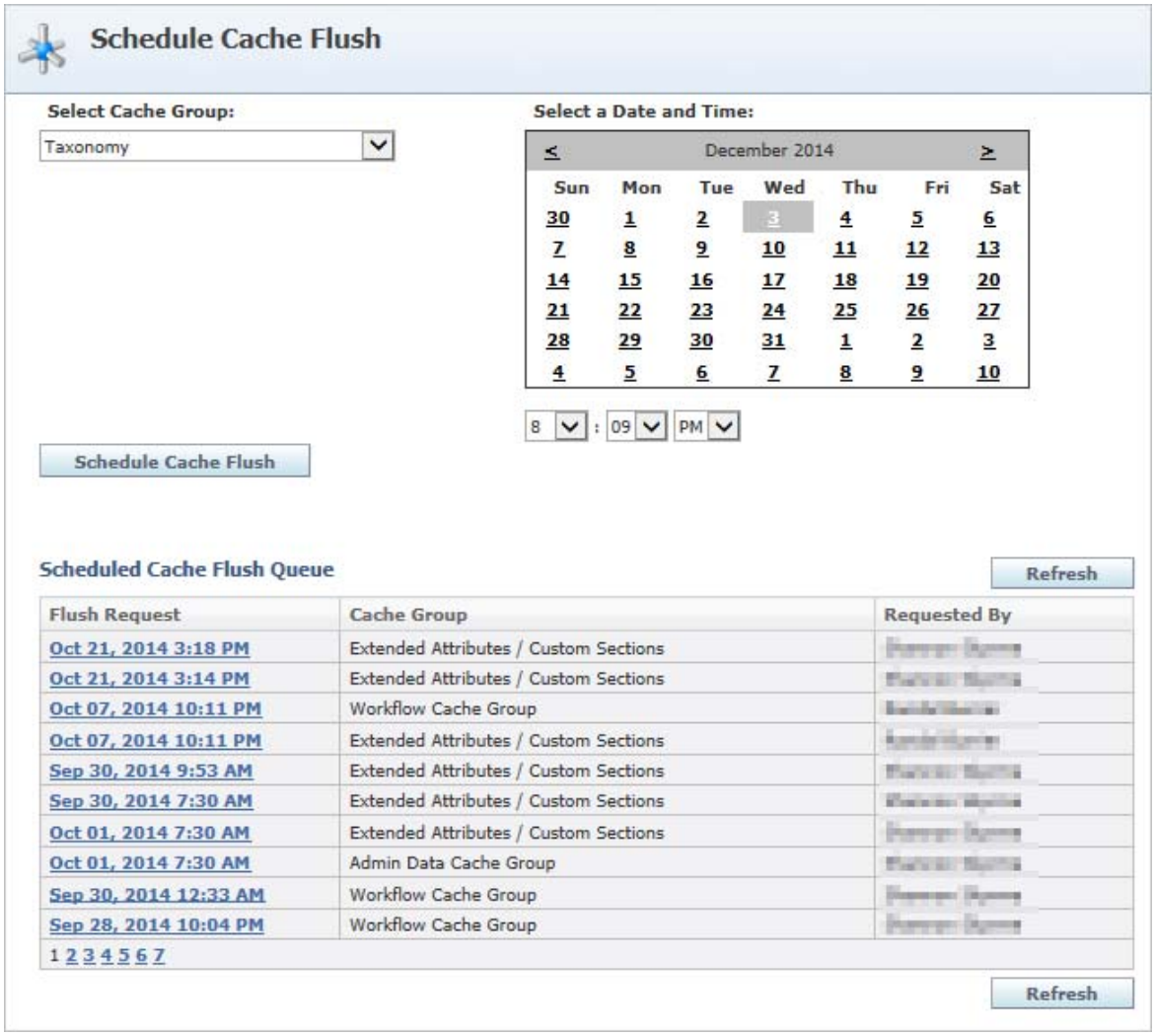
For example, flush the cache as follows:

- After creating/editing extended attribute groups
- After creating/editing extended attributes
- After creating/editing sections (customer-specific data)
- After creating/editing taxonomies
- After creating/editing any core data

Using the Cache Application

Access the CACHE application by selecting **CACHE** from the left navigation panel. By default, CACHE displays the Schedule Cache Flush page, as Figure 4–1 shows.

Figure 4–1 Schedule Cache Flush page



The Select Cache Group drop-down list contains several cache flush selections:

- **Taxonomy**—Select this option to flush the taxonomy cache after you have made changes to any tree lists/taxonomies using the ADMN (Manage Core Data) application.
- **Workflow Cache Group**—Select this option to flush the workflow cache after you have made workflow changes using the WFA (Workflow Administration) application.
- **User Cache Group**—Select this option to flush the user/group cache after you have made user/group changes using the UGM (User Group Management) application.
- **Admin Data Cache Group**—Select this option to flush the administrator data cache after you have made core data changes using the ADMN (Manage Core Data) application. This option is used for all ADMN data changes other than

taxonomies, extended attributes, and custom sections. These data types have their own cache flush groups.

- **Extended Attributes / Custom Sections**—Select this option to flush the extended attributes/ sections cache after you have made extended attribute/ section changes using the ADMN (Manage Core Data) application.

After you have selected a cache group from the drop-down list, use the **Select a Date and Time** feature to schedule your cache flush.

When you have made your selection, click **Schedule Cache Flush**.

Scheduled Cache Flush Queue

This section displays a queue showing scheduled cache flushes has been added. The queue shows which applications have been flushed, and indicates whether each execution was successful.

5

Using Performance Logging

This chapter explains the performance logging feature. Topics in this chapter include:

- Overview
- Enabling Performance Logging
- Performance Log File
- Performance Analysis

Overview

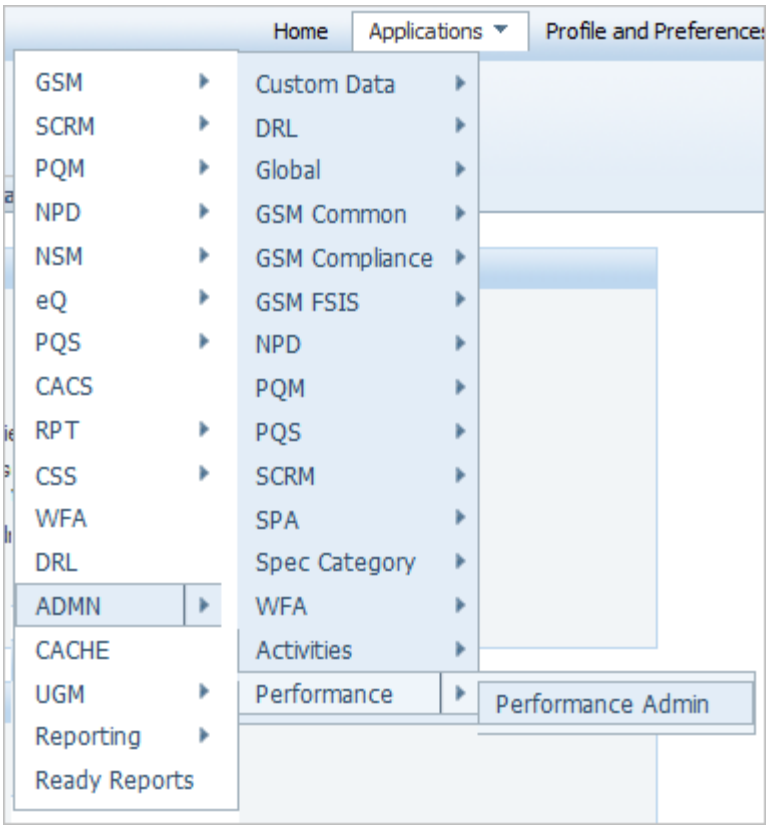
Performance Logging is a feature that helps troubleshoot performance issues. When enabled, a .csv file will be created on the server with detailed performance information about activities performed on the system. When this feature is enabled, there is little impact to the user's experience, however, we recommend only enabling it while troubleshooting.

Enabling Performance Logging

By default Performance Logging is disabled. Follow these steps to enable performance logging:

1. Assign the [PERFORMANCE_ADMIN] role to a group of users designated as performance administrators. Follow your normal UGM process for assigning the new role, including export and import, if necessary. Refer to the *Agile Product Lifecycle Management for Process User Group Management User Guide* for instructions.
2. With the admin user that has the above role, login to PLM for Process. If already logged in, then logout and re-login to have the new role respected. Open the Performance Admin UI by navigating to the Performance Admin menu item from the portal navigation, as Figure 5–1 shows below.

Figure 5–1 Menu navigation



3. In the Performance Admin dialog box, set the **Enabled Flag** to "True".

Refer to the *Agile Product Lifecycle Management for Process Configuration Guide* for more details on performance logging configurations.

Performance Log File

The location of the performance log file can be configured on the Performance Admin UI by setting the Log File Path field. The default is `"%PRODIKA_HOME%\\Logs\\"`.

The name of the performance log file is `"PLM4P_Performance_Log_0".csv`. When the file reaches a certain size or if the file is locked, preventing it from being written to, another log file is created with the "0" incremented.

Performance Analysis

Logging the Action

If an area of the application has been identified as poor performing, for example, slow response time, then Performance Logging should be used to capture the execution detail. If possible, isolate the use case to a single user performing a single UI action. For example, save a specification.

To log the action detail, follow these steps:

1. Make sure Performance Logging is turned on and test that the log file is being written to.

2. Have a user navigate to the location in the application just prior to the user action that will be analyzed.
3. Wait until the performance log file is updated. The frequency in which this file is updated is configured in the Admin UI with the **Log Frequency (in seconds):** field. The default is 30 seconds.
4. Delete the performance log file.
5. Have the user perform the action.
6. Wait until the log file is updated.
7. Create a copy of the log file. Do NOT open this file directly as this will lock the file.
8. Open the copied file with an appropriate application such as Microsoft Excel.
9. Check to see if the action the user performed was captured. This can be accomplished by looking at the first column in the file called **Root Event**. If you are uncertain, then wait another 30 seconds and copy the file once again and open it.

Interpreting the Data

Most of the data in the log file is intended to be analyzed by an Agile PLM for Process developer, though customers can use this data to determine if any SQL is executing slowly. To analyze SQL, see the "Finding SQL Performance Issues" section below.

The other area that can be used by the customer is for capturing the execution of custom code. Most extensibility points have a line in the log file that represents this custom code. There is a lot of data in the log file and the explanation is beyond the scope of this document, so to keep it simple just look at the columns titled **Event Type** and **DurationInMilliseconds**. This information tells you how long that item took, in milliseconds.

If you want Oracle to investigate the issue in more detail, please go through Oracle Support and upload the spreadsheet to a service request.

Finding SQL Performance Issues

Poor performance can often be attributed to poor performing SQL. The execution time for SQL depends on many factors such as, network traffic and bandwidth, amount of data retrieved, amount of data in the database tables and hardware specifications. Sometimes execution time of SQL can be improved by the addition of indexes. Because the need for indexes is specific to the customers' implementation, it is their responsibility to ensure the proper indexes are present. Oracle provides some out-of-the box indexes that are useful to the majority of customers but additional indexes should be created by the customer. Performance Logging is a tool that can simplify the identification of inefficient SQL.

Much of the SQL executed by the application is captured in the log file on lines that have "SQL" in the **Event Type** column. The **DurationInMilliseconds** column shows the time in milliseconds, taken to execute the SQL. The **Details** column displays the actual SQL executed. This column should be looked at to find any potential SQL issues. This assumes the network between the PLM for Process web/application server and the database server is not an issue.

First it is easiest to find any single SQL statement that exceeds an acceptable duration threshold. This threshold varies between implementations. A general rule of thumb is to investigate anything over 200ms.

Next it would be useful to look at all similar SQL statements where the combined time is large.

Once all the SQL statements are identified as a potential issue, a database administrator should do further analysis to determine if the addition of indexes might help. Note that adding indexes can drastically help performance, but adding too many unnecessary ones could hurt performance. Retesting after the indexes are added should be performed to ensure the addition produces the desired improvements.

User Interface and Field Definitions

Figure 5–2 below shows the Performance Admin user interface.

Figure 5–2 Performance Admin page



The Performance Admin page contains the following fields:

- **Enabled**—Indicates whether or not the performance logger is enabled. It only logs data when set to "True".
- **Log File Path**—The directory path to the location of the log file.
- **Log Frequency (in seconds)**—The frequency in which the logger writes to the log file.
- **Sample Rate**—If it is desired that user activity in general should be logged without targeting an identified area that needs improvements, it is likely that not every user action needs to be logged and instead a sampling can be logged. The Sample Rate determines at what interval to capture the user's actions. For example, when set to **0** or **1** every action is logged. When set to **2** every 2nd action is logged and the others are ignored. When set to **3** every 3rd action is logged, and so on. This allows for less of a performance impact and less data captured.
- **Default Rollup** —Rollup can be used to combine all events of the same name and parent, onto one line instead of multiple lines in the log file. The

Occurrences column shows the number of times the event was executed. This helps reduce the size of the log file.

This value is the default value for all event types and can be configured individually for each event in the event grid.

- **Default Duration Filter (in milliseconds)**—Duration Filter can be used to filter out events (lines in the log file, not user actions) that do not take longer than a given duration threshold. For instance if you are not interested in seeing any event that takes under 50ms, then set this field to 50. Only events with a duration of greater than 50 are shown. This help s reduce the size of the log file.

  This value is the default value for all event types and can be configured individually for each event in the event grid. A value of **-1** in the Duration Filter of the individual event indicates that the default should be used.

A

InFoods IDs and ISO Codes

Topics in this appendix include:

- "InFoods IDs"
- "ISO Codes"

InFoods IDs

The following InFoods IDs are currently available in GSM for use in calculated attributes.

Table A–1 InFoods IDs

Name	InFoods ID	UNID	Sequence ID
ALCOHOL	ALC	ALC	520
AOAC Fiber	FIBTG	FIBTG	60
ASH	ASH	ASH	210
CALCIUM	CA	CA	350
CALORIES	ENERC_KCAL	ENERC_KCAL	10
CARBOHYDRATES	CHOCDF	CHOCDF	40
CARBOHYDRATES (AVAILABLE)	CHOAVL	CHOAVL	45
CAROTENE	CARTB	CARTB	490
CASEIN (Nx6.38)	CASN	CASN	34
CHLORIDE	CLD	CLD	354
CHOLESTEROL	CHOLE	CHOLE	190
CHOLINE	CHOLN	CHOLN	435
CHOLINE CHLORIDE	CHOLNCLD	CHOLNCLD	440
CHROMIUM	CR	CR	357
COBALAMIN-B12	VITB12	VITB12	280
COPPER	CU	CU	450
d-BIOTIN	BIOT	BIOT	430
DIETARY FIBER	FIBTS	FIBTS	50
Energy kJ	ENERC_KJ	ENERC_KJ	20
FOLIC ACID	FOLAC	FOLAC	320

Table A–1 InFoods IDs

Name	InFoods ID	UNID	Sequence ID
FRUCTOSE	FRUS	FRUS	530
GLUCOSE	GLUS	GLUS	85
IODINE	ID	ID	360
IRON	FE	FE	370
LACTOSE	LACS	LACS	97
LYCOPENE	LYCPN	LYCPN	540
MAGNESIUM	MG	MG	380
MALTOSE	MALS	MALS	94
MANGANESE	MN	MN	480
MOISTURE	WATER	WATER	200
MOLYBDENUM	MO	MO	485
MONOUNSATURATED FAT	FAMS	FAMS	140
NIACIN-B3	NIA	NIA	250
POTENTIAL NIACIN	NIAEQ	NIAEQ	260
NITROGEN	NAM	NAM	500
OLIGOSACCHARIDES	OLSAC	OLSAC	65
OMEGA-3	F18D3N3	F18D3NS	160
OMEGA-6	F18D3N6	F18D3N6	170
ORGANIC ACIDS	ORGACD	ORGACD	110
PANTHOTHENIC	PANTAC	PANTAC	340
PHOSPHORUS	P	P	390
POLYOLS	POLYOLS	POLYOLS	215
POLYUNSATURATED FAT	FAPU	FAPU	150
POTASSIUM	K	K	400
PROTEIN	PROCNT	PROCNT	30
PROTEIN (Nx6.25)	PROCNT_NX625	PROCNTx625	32
Pyridoxine - B6	VITB6A	VITB6A	270
Riboflavin - B2	RIBF	RIBF	240
SATURATED FAT	FASAT	FASAT	130
SELENIUM	SE	SE	460
SODIUM	NA	NA	410
STARCH	STARCH	STARCH	510
SUCROSE	SUCS	SUCS	92
Sugars: Di	SUGARDI	SUGARDI	90
Sugars: Mono	SUGARMO	SUGARMO	80
Sugars: Other	SUGARM	SUGARM	100
TAURINE	TAU	TAU	470

Table A–1 InFoods IDs

Name	InFoods ID	UNID	Sequence ID
Thiamin - B1	THIA	THIA	230
TOTAL FAT	FAT	FAT	120
TOTAL SOLIDS	TTLSOLID	TTLSOLID	205
TOTAL SUGAR	SUGAR	SUGAR	70
TRANS FATTY ACID	FATRN	FATRN	180
Vitamin A - IU	VITA_IU	VITA_IU	223
Vitamin A - Total	VITA-	VITA-	220
VITAMIN C	VITC	VITC	290
VITAMIN D	VITD-	VITD-	300
VITAMIN E	VITE	VITE	310
VITAMIN K	VITK	VITK	330
WHEY (NX6.38)	WHEY	WHEY	37
ZINC	ZN	ZN	420

ISO Codes

The following ISO codes are currently available in GSM for use in calculated attributes.

Table A–2 ISO codes for units of measure

Name	Abbreviation	Id	ISO Code
#/SQ.FT.	#/SQ.FT	LB-SQ.FT	FP
CELSIUS	C	C	CE
CENTILITER	cL	CENT-L	C3
CENTIMETERS	cm	CENTI-M	CM
COUNT	Cnt	COUNT	1N
CUBIC CENTIMETERS	Cu. cm	CU. CM	CC
CUBIC FEET	Cu. Ft	CU. FT	CF
CUBIC INCHES	Cu. In.	CU.IN	CI
CUBIC METER	m3	CU.M	CR
DAYS	days	DAYS	DA
DECILITER	dL	DECI-L	DL
DEGREES	Degrees	DEGREES	DD
FAHRENHEIT	F	F	FA
FEET	ft	ft	FT
FLUID OUNCES (UK)	fl oz (UK)	FL-OZ-UK	FZ
FLUID OUNCES (US)	fl oz (US)	FL-OZ-US	FO
GALLONS (UK)	gal (UK)	GAL-UK	GI
GALLONS (US)	gal (US)	GAL-US	GA
GRAMS	g	G	GR
HOURS	hr	HR	HR
INCHES	in	IN	IN
INTERNATIONAL UNITS	IU	IU	F2
KILOGRAMS	kg	KILO-G	KG
KILOLITERS	kL	KILO-L	K6
KIT LEVEL	Kit Level	KITLEVEL	KT
LITERS	L	LITER	LT
METERS	m	M	MR
MICROGRAMS	ug	MICRO-G	MC
MILLIGRAMS	mg	MILI-G	ME
MILLILITERS	mL	MILI-L	ML
MILLIMETERS	mm	MILI-M	MM
MINUTES	min	MIN	MJ
MONTHS	mos	MONTHS	MO
OUNCES	oz	OZ	OZ

Table A–2 ISO codes for units of measure

Name	Abbreviation	Id	ISO Code
PARTS PER MILLION	ppm	PPM	59
PARTS PER THOUSAND	per mil	PPTH	NX
PERCENT	%	PERCENT	P1
POUNDS	lb	LB	LB
POUNDS PER SQUARE INCH	PSI	PSI	PS
SECONDS	s	SEC	3
SQUARE INCHES	Sq. In.	SQ.IN	SI
UNITS	units	UNITS	UN
WEEKS	wks	WEEKS	WK
YEARS	yrs	YEARS	YR