Oracle® Agile Product Lifecycle Management for Process

Computer Aided Compliance Screening User Guide

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Preface

The *Agile Product Lifecycle Management for Process Computer Aided Compliance Screening User Guide* explains how to use the Computer Aided Compliance Screening (CACS) application to inspect specifications for compliance against any number of user-defined screens.

This preface contains these topics:

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

Audience

This guide is intended for end users who are responsible for creating and managing information in Agile PLM for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

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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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 Getting Started Guide*
- *Agile Product Lifecycle Management for Process Administrator User Guide*
- *Agile Product Lifecycle Management for Process User Group Management User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User 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 CACS

This chapter presents an overview of the Computer Aided Compliance Screening application and describes a few basic features. Topics in this chapter include:

- Overview
- Touch Points with Other Applications
- Getting Started with Computer Aided Compliance Screening

Overview

Computer Aided Compliance Screening (CACS) is a configurable solution in which you can inspect specifications for compliance against any number of user-defined screens. These screens can include several types of constraints and can be nested to enable more complex screening scenarios. You design constraints around compliance standards, usage approval, nutritional attributes, and user-defined data that is captured using extended attributes.

CACS screens are applied at three levels: raw materials, intermediate materials, and top-level materials. The screens are available during the product development lifecycle. This availability helps you achieve early detection of compliance issues.

When running a compliance screen, you obtain feedback on compliance issues through a red/green color code. You can then examine the results to search for the root causes of compliance deviations.

Touch Points with Other Applications

CACS is integrated with several types of specifications in Global Specification Management (GSM).

Global Specification Management

You can run compliance screens against the following specification types in Global Specification Management (GSM):

- Trade specifications
- Menu item specifications
- Product specifications
- Material specifications
- Formulation specifications

- Packaging material specifications
- Printed packaging specifications

For more information, refer to "Running Screens Against Specifications" on page 2-7, or refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Getting Started with Computer Aided Compliance Screening

Accessing CACS

To access the CACS application, select **CACS** from the left navigation panel, or select **CACS** from the Applications top menu bar.

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

2

Using Computer Aided Compliance Screening

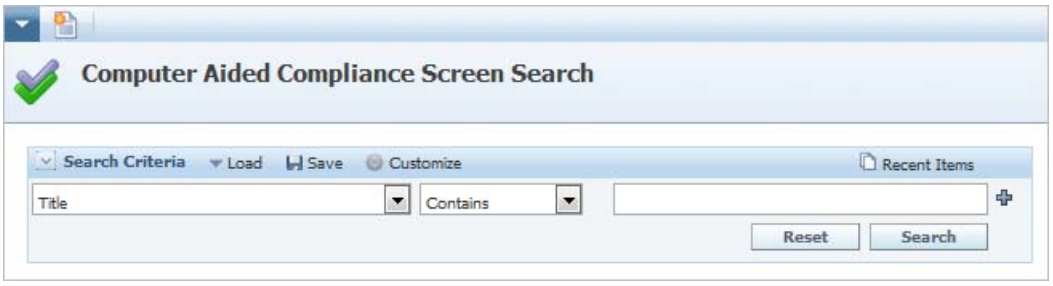
This chapter describes the capabilities and applied uses of the Computer Aided Compliance Screening product. It includes the following topics:

- Creating a New Compliance Screen
- Copying a Compliance Screen
- Running Screens Against Specifications

Creating a New Compliance Screen

Use the Computer Aided Compliance Screening (CACS) application to create and manage compliance screens. To create a new screen, click **Create New** on the Computer Aided Compliance Search page.

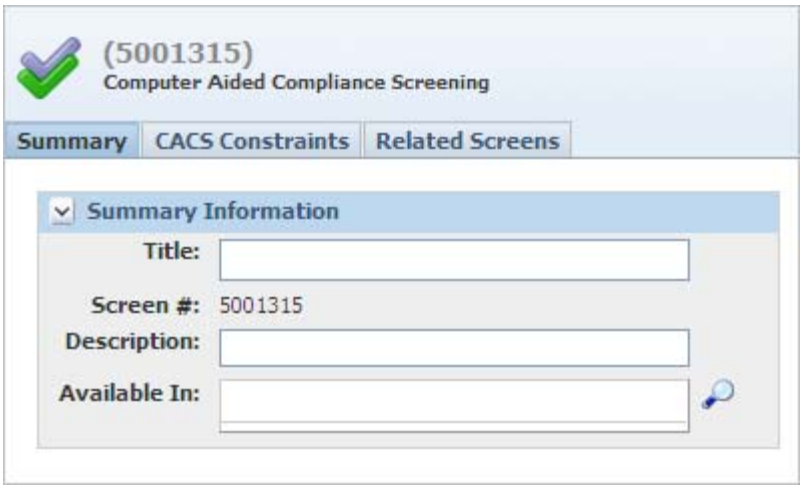
Figure 2–1 Computer Aided Compliance Screening Search page



Computer Aided Compliance Screening Page

Screens contain three tabs: Summary, CACS Constraints, and Related Screens, shown in Figure 2–2.

Figure 2–2 New page



Summary Tab

The Summary tab of a CACS screen provides additional information that helps to uniquely identify the screen when you are searching using the search form. The tab also identifies where the screen is available to be used for compliance checking in other applications.

Summary Information Section

The Summary Information section consists of the following fields:

Title—The user-defined title of the screen

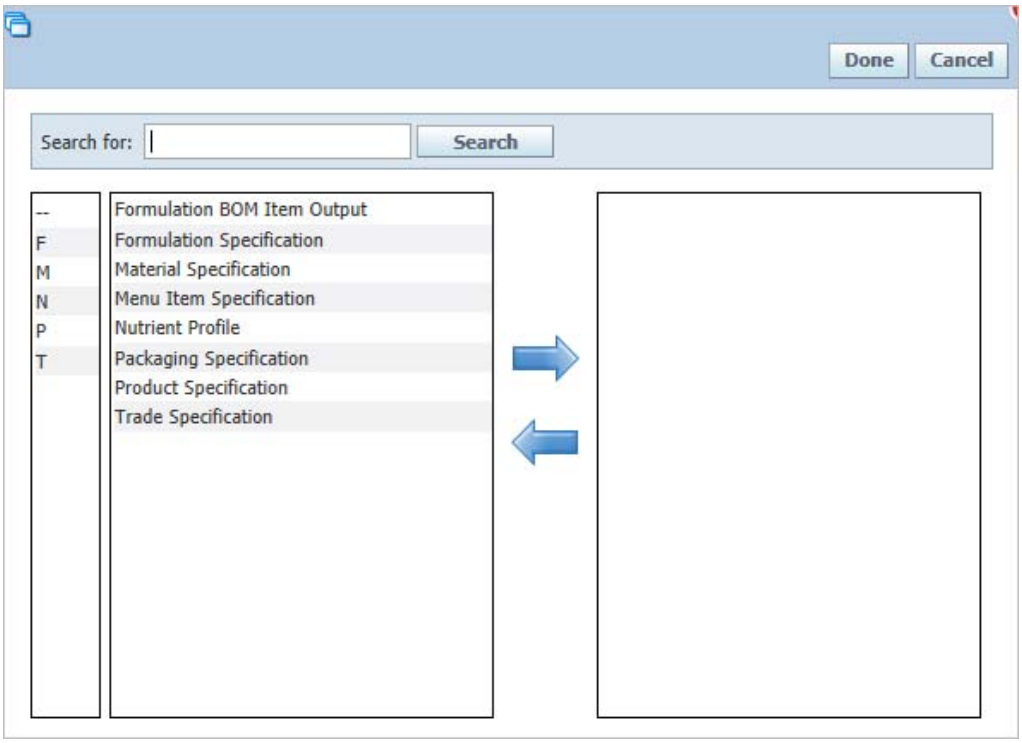
Screen #—A system-defined number associated with this screen

Description—The user-defined description of the screen

Available In—The types of objects that are able to use the screen

When you create a new screen, **Title** is the only field required to save the screen. When you click the search icon for the **Available In** field, a dialog box displays specifications and nutrient profiles that are able to use the screen, as shown in Figure 2–3.

Figure 2–3 Objects available for screening



Use the add and remove selected data item icons to select objects for screening, and then click **Done**. When multiple objects are added, the list of constraints available are based on the object with the fewest available constraints. For example, if you add packaging specifications, you only have Extended Attribute and Business Unit constraints to define since packaging specifications do not have nutrient or compliance constraints. See "CACS Constraints Tab" on page 2-3 for more information.

> **Note:** If the Available In data is not provided, the screen being created is not available to run against specifications in GSM.

Once you complete the Summary tab, click the **CACS Constraints** tab.

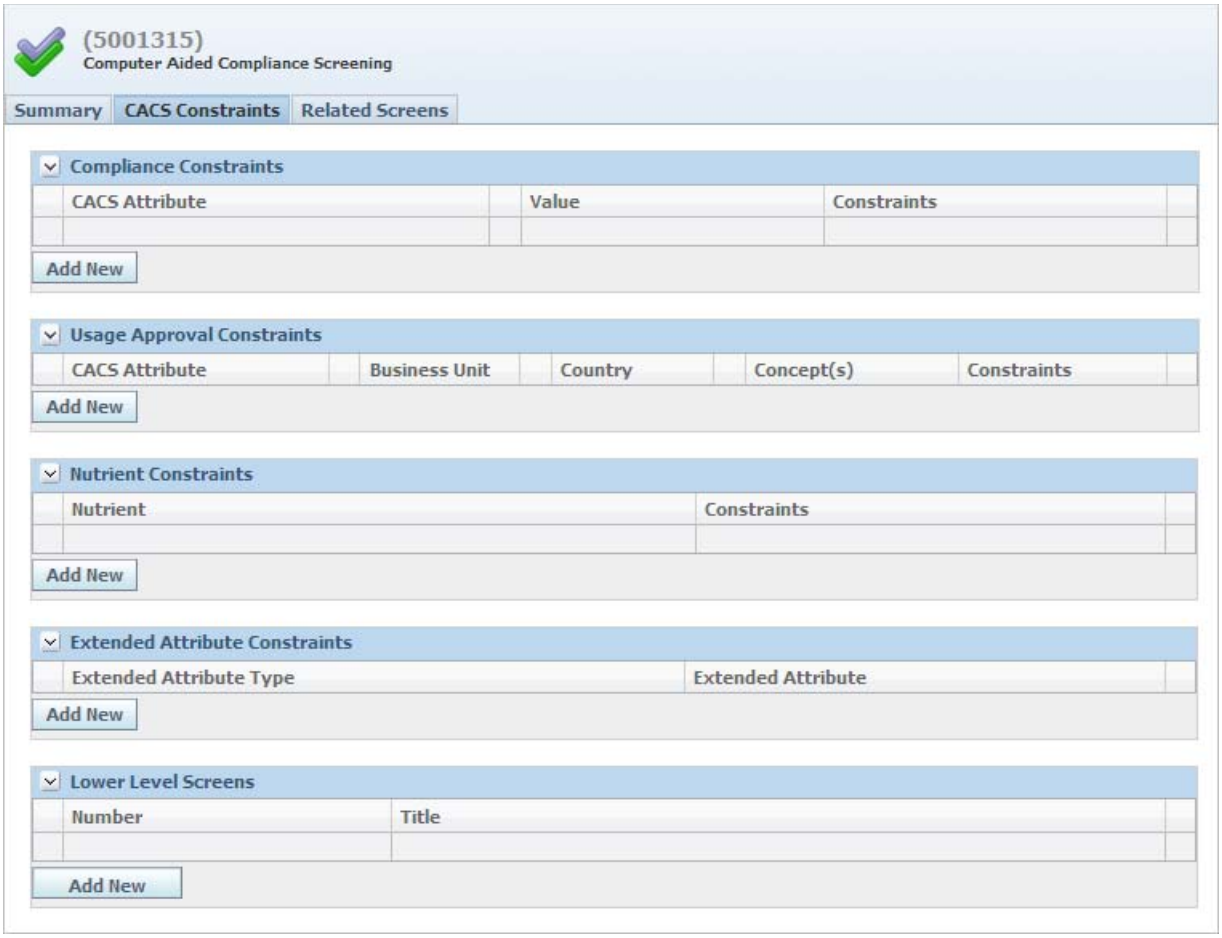
CACS Constraints Tab

Use the CACS Constraints tab, shown in Figure 2–4, to provide the parameters, or rules, that a specification must comply with in order to pass the screening process.

Build constraints around the following parameters:

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

Figure 2–4 CACS Constraints tab



To add a new constraint, identify which type of constraint needs to be added and then click **Add New** under the desired section. Each constraint category has a unique configuration.

Compliance Constraints Section

For each compliance constraint, do the following:

1. Select a compliance attribute from the CACS Attributes dropdown list.
2. Click the add data icon to add the value for the attribute in the **Value** field.
3. Set the constraint on the value in the **Constraints** field.
4. Once you complete the setup for the constraint, click the apply changes icon to save the new constraint.

For example, you might want to ensure there is no peanut or peanut oil in your specification. To set up a constraint verifying this, create a screen and add the following constraint:

- CACS Attribute—KTC Allergen (Known to Contain Allergen)
- Value—Peanut / Peanut Oil
- Constraint = 0

When a specification is investigated with this screen, if there is any value defined on the specification for Peanut / Peanut Oil other than 0, the constraint will fail.

Usage Approval Constraints Section

For usage approval constraints, you will add a compliance attribute, define some combination of business unit, country, and concept and finally, set the constraint on the value. Once you have completed the setup for the constraint, click the apply changes icon to save the new constraint.

For example, you might want to make sure that all the specifications in a formulation are approved for use in Canada. To make sure that is the case, create a screen and add the following constraint:

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

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

Nutrient Constraints Section

For nutrient constraints, add a nutrient item and set the constraint on the nutrient. Once you have completed the setup for the constraint, select the apply changes icon to save the new constraint.

For example, you might want to make sure there is equal or less than 10g of Vitamin C in a formula. To make sure that is the case, create a screen and add the following constraint:

- Nutrient—Vitamin C
- Constraint <=10g

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

Extended Attribute Constraints Section

For extended attribute constraints, add an extended attribute type and set the value on the extended attribute. Once you have completed the setup for the constraint, click the apply changes icon to save the new constraint. The constraint varies based on the type of attribute you are using, but the results are returned similarly to all other constraints.

You can add multiple constraints to any given screen.

> **Note:** The extended attributes that are available for screens are those that are marked as distinct and any of the following type: Boolean, Qualitative, Qualitative Lookup, Date, Numeric, Calculated Boolean, Calculated Numeric, Calculated Text, Quantitative Range, and Quantitative Tolerance. For more information, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Lower Level Screens Section

CACS screens are nested within a given screen to enable you to create complex screening scenarios in a modular way. To link a screen to the screen that you are creating, click **Add New** and use the search page to select the screens that you want to nest.

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

Figure 2–5 represents what the CACS Constraints tab would look like given the scenarios above.

Figure 2–5 Constraints tab



Related Screens Tab

The Related Screens tab shows parent screens based on the relationship established in the Lower Level Screens section. When a screen is added as a lower level screen, it displays the specification that it was added to as a parent screen.

Copying a Compliance Screen

Click **Create Copy** from the action menu to create a copy of the compliance screen. A new screen number is assigned and displayed in the Screen # field. All other fields are copied from the original screen.

Note: The role [SCREEN_CREATOR] is required to use the copy feature.

Running Screens Against Specifications

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

CACS Review Parameters

CACS review parameters define the rules of investigation for the system. You must select the scope of the investigation and the screens to use. Figure 2–6 shows the CACS Review Parameters section.

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

- **Top Level**—Interrogates the specification that you are currently on.
- **Intermediate Processes**—Interrogates any specifications that are used within the current specification. Available for formulation and menu item specifications only.
- **Raw Materials**—Interrogates the raw materials level of the hierarchy. Available for formulation and menu item specifications only.

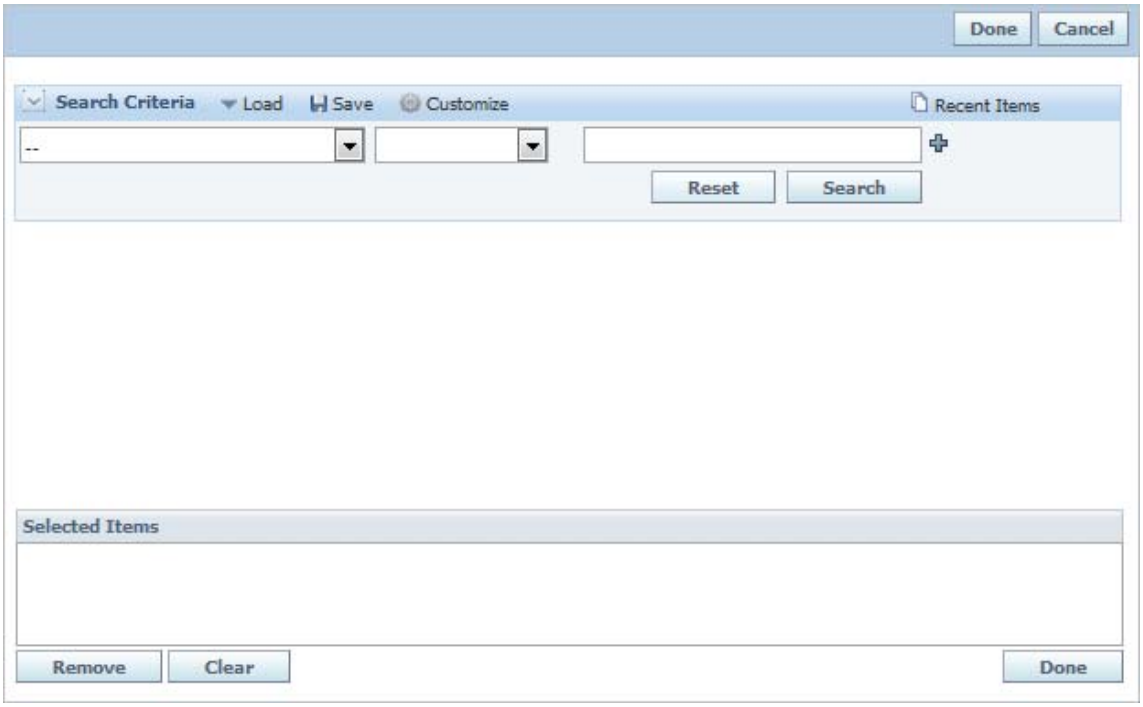
Figure 2–6 CACS Review Parameters section



Note: When running nutritional screens on specifications, CACS will only screen the nutrient information on the nutrient profile attached to the top-level specification. It is not possible to screen nutritional information on a specification below the top level.

The screens are the previously defined rules that you want to use to determine whether the specifications are in line with the compliance rules. You can add screens to this list by clicking the search icon in the **CACS Screens** field. The search page is displayed, shown in Figure 2–7.

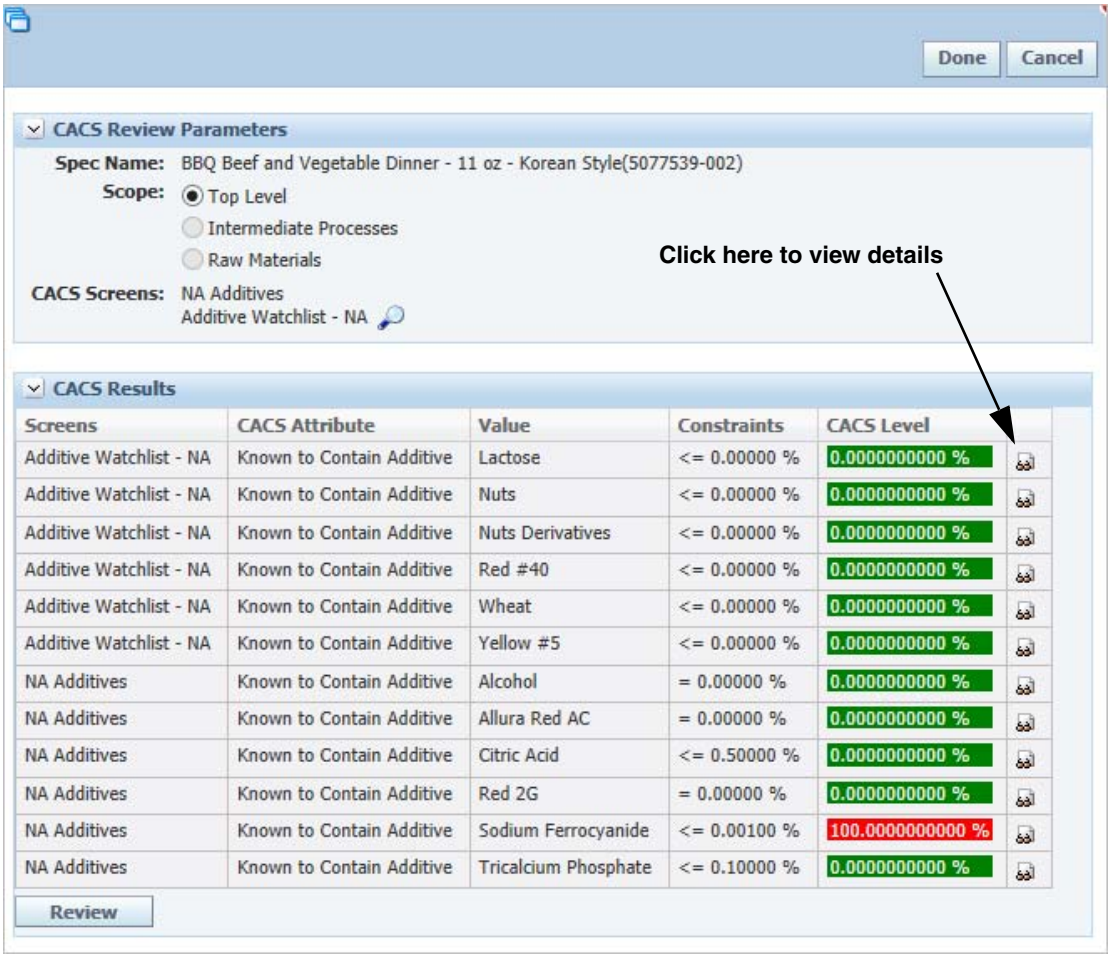
Figure 2–7 Search page



Enter search criteria, then click **Search**. The Search Results section lists screens that match the defined criteria. Click anywhere in a row to include the screen in the compliance check. Selected screens display in the Selected Items section. Once you have selected all the screens to be run, click **Done** to return to the screening page.

To begin the investigation, click **Review**. The results of the screening are displayed in the CACS Results section, as Figure 2–8 shows.

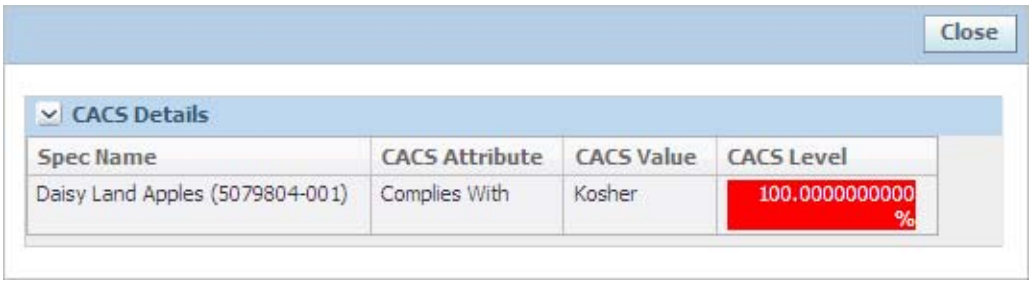
Figure 2–8 CACS Results section



Screen Results and Details

When CACS finishes its review, it returns the results with immediate feedback on compliance issues using a red/green color code. If a constraint passes, it displays in green. If the constraint fails, it displays in red. In order to see the details of the constraint results, click the view details icon. When you click the icon, a dialog box displays containing the constraint details, as Figure 2–9 shows.

Figure 2–9 CACS Details dialog box



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