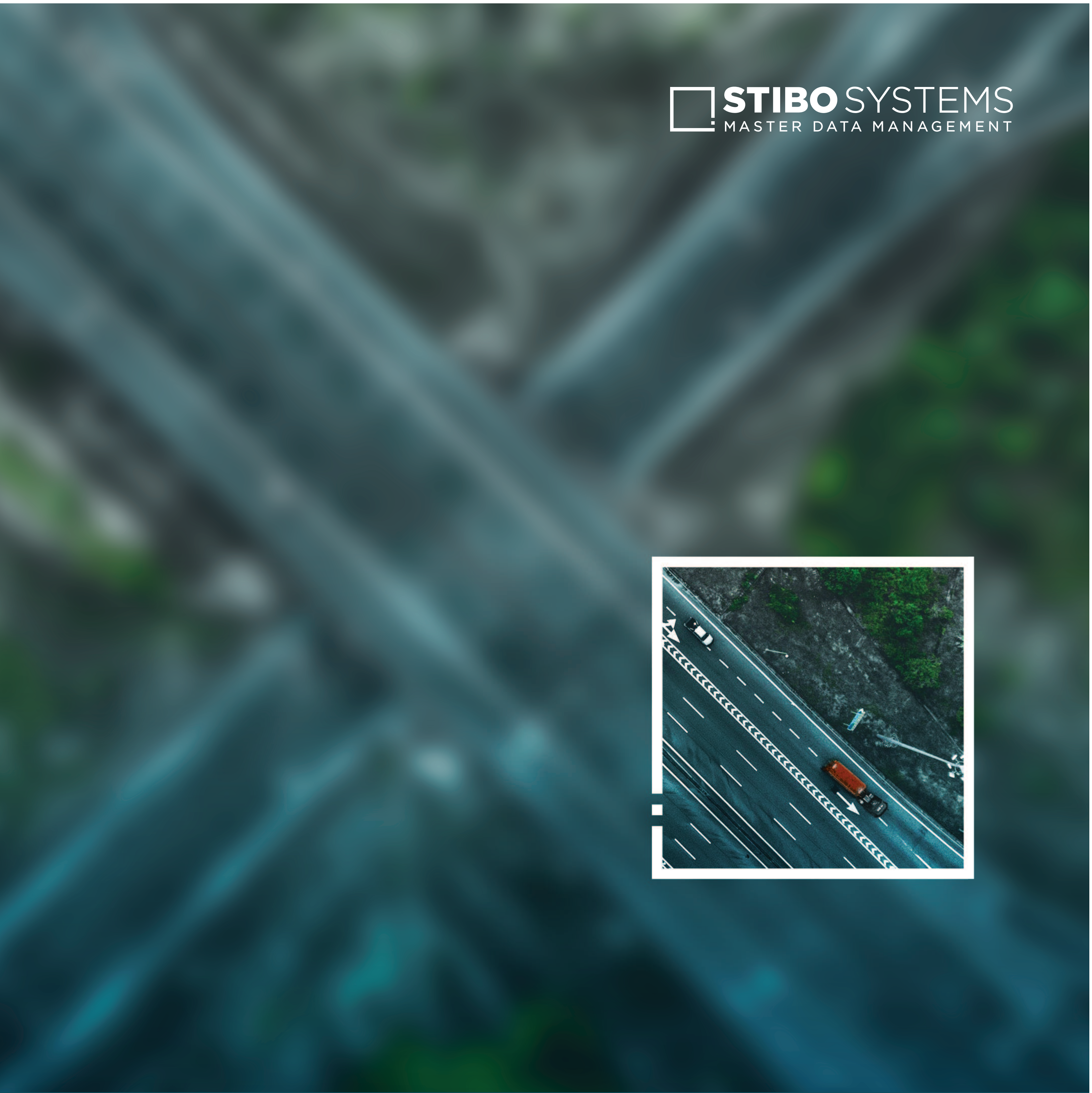

PRODUCT LIFECYCLE MANAGEMENT

PLM for Users

Rel. 10.3-MP4 (March 29, 2022)

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PLM for Users

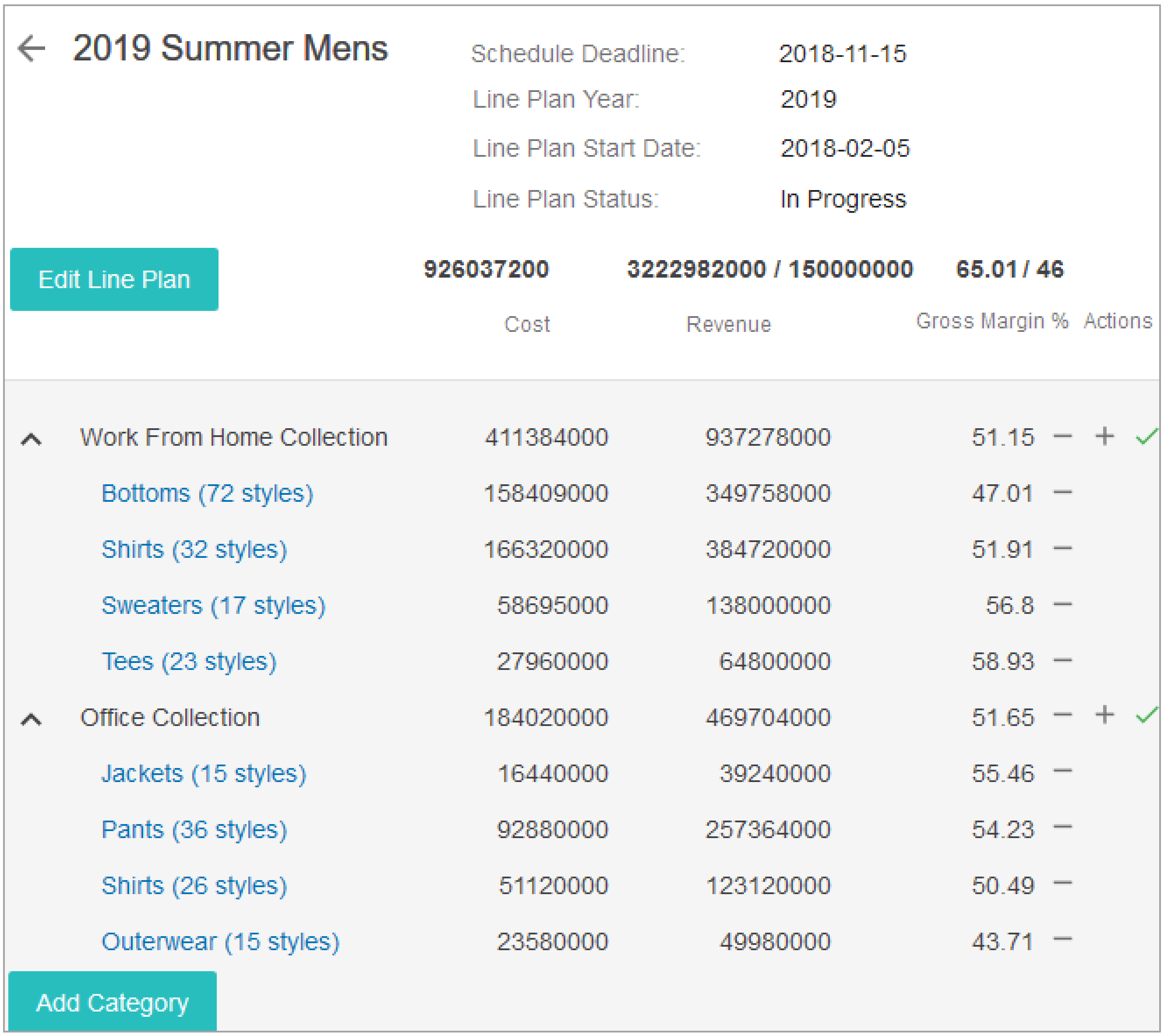
Welcome to PLM where concepts can be captured, designed, created, and managed all the way to the product's retirement. This product lifecycle management solution allows for efficient management throughout the entire process, with all needed design documents accessible throughout the schedule development process. PLM allows for quick adaptability to any changes that should arise during the production process, ensuring that timely responses can be made. For more information on PLM, see the following documentation.

Line Plans and Schedules Introduction

Line Planning is a discipline for the development of product offerings. Line plan managers must closely manage the development of line plans to ensure that they focus on the right products, meet key deadlines, and achieve goals set for cost and profit margins. Schedules are a way to manage the deadlines and goals set in the line plan by planing and tracking the progress of products that are in development.

Line Plans

A few of the processes that line plans undergoes when being created are:



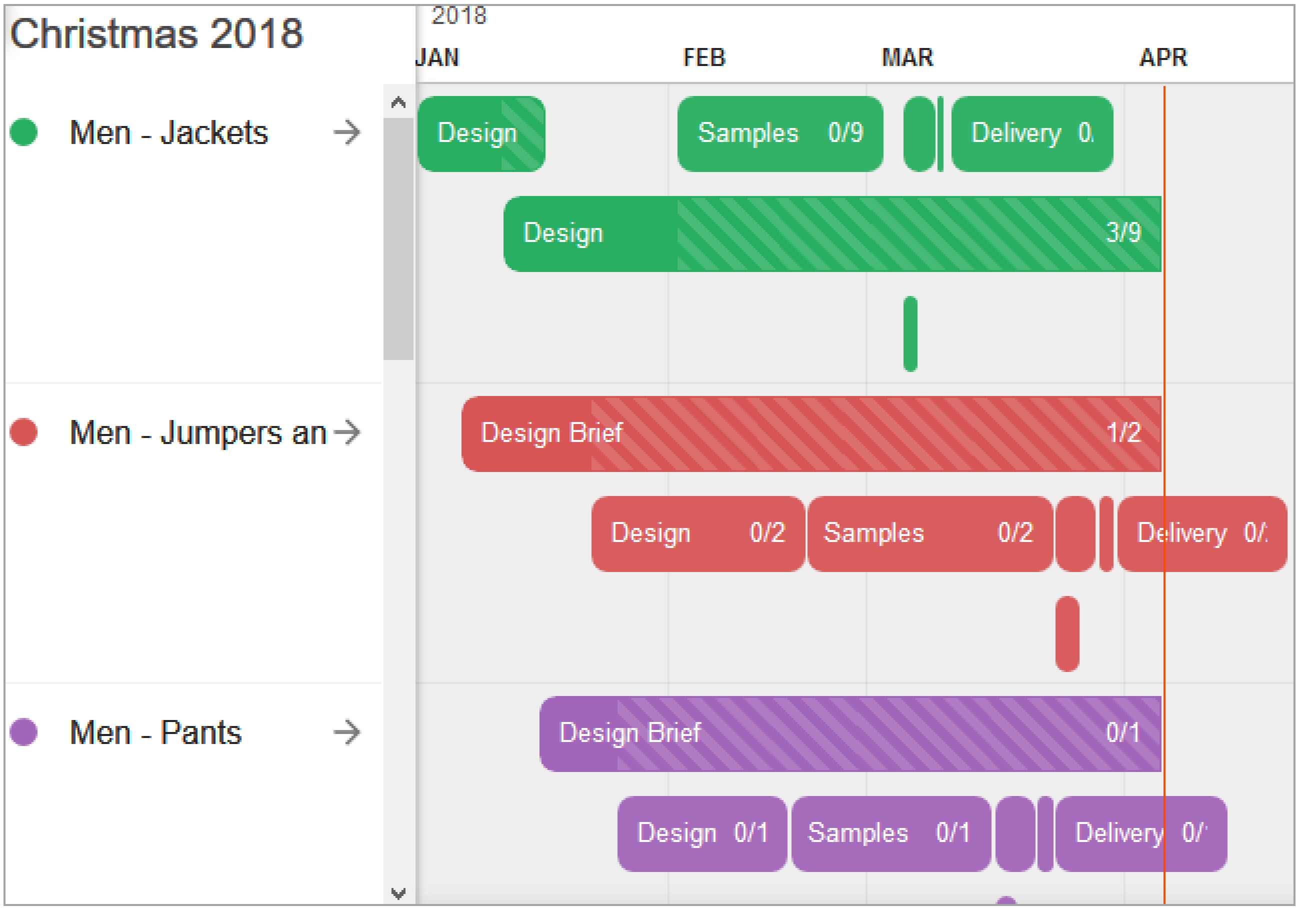
- Gathering information from various sources, such as performance reports, product managers, or designers.
- Adding categories to the plan

- Refining the line plan, such as changes to or removals of items, groups, financial, or quantity information

Once a line plan is set and it is determined that the item should be produced, the line plan manager can easily approve the line plan for production.

Schedules

A few of the processes that schedules undergoes when being created are:



- Defining the start from or need by date
- Selecting the schedule template
- Defining task durations
- Recording actual start and end dates

The following topics in this documentation explain how to use PLM line plans and schedules.

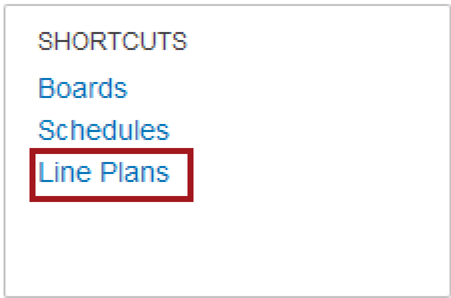
- Creating Line Plans
- Creating Schedules

Creating Line Plans

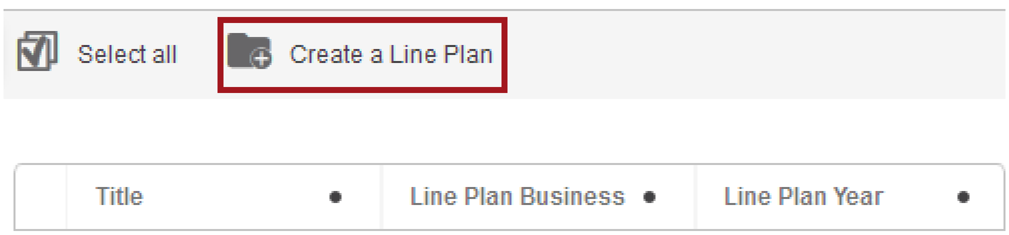
Line plans help in determining if product cost and profit margin goals can be achieved, and what key deadlines need to be met to achieve these goals.

To create a line plan, follow the steps below:

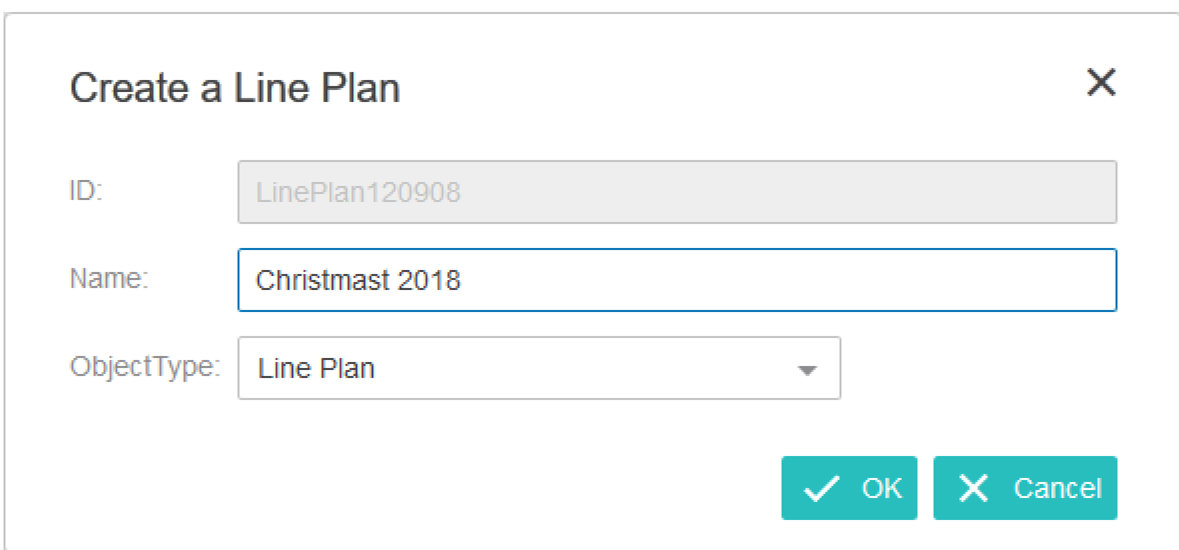
1. After logging in to Web UI, click on the Line Plans link in the Links Widget.



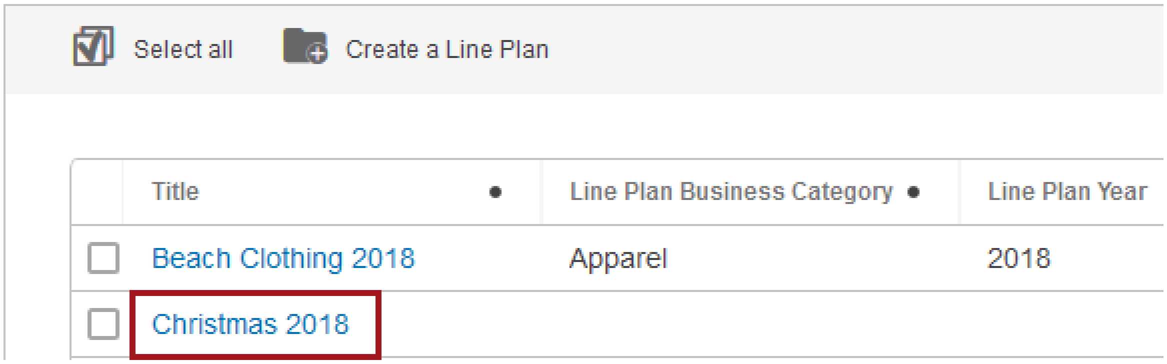
2. Next, select the **Create a Line Plan** toolbar action.



3. Enter in the name of the line plan and press **OK**.



4. Find your newly created line plan in the line plan table, and click on the hyperlink.

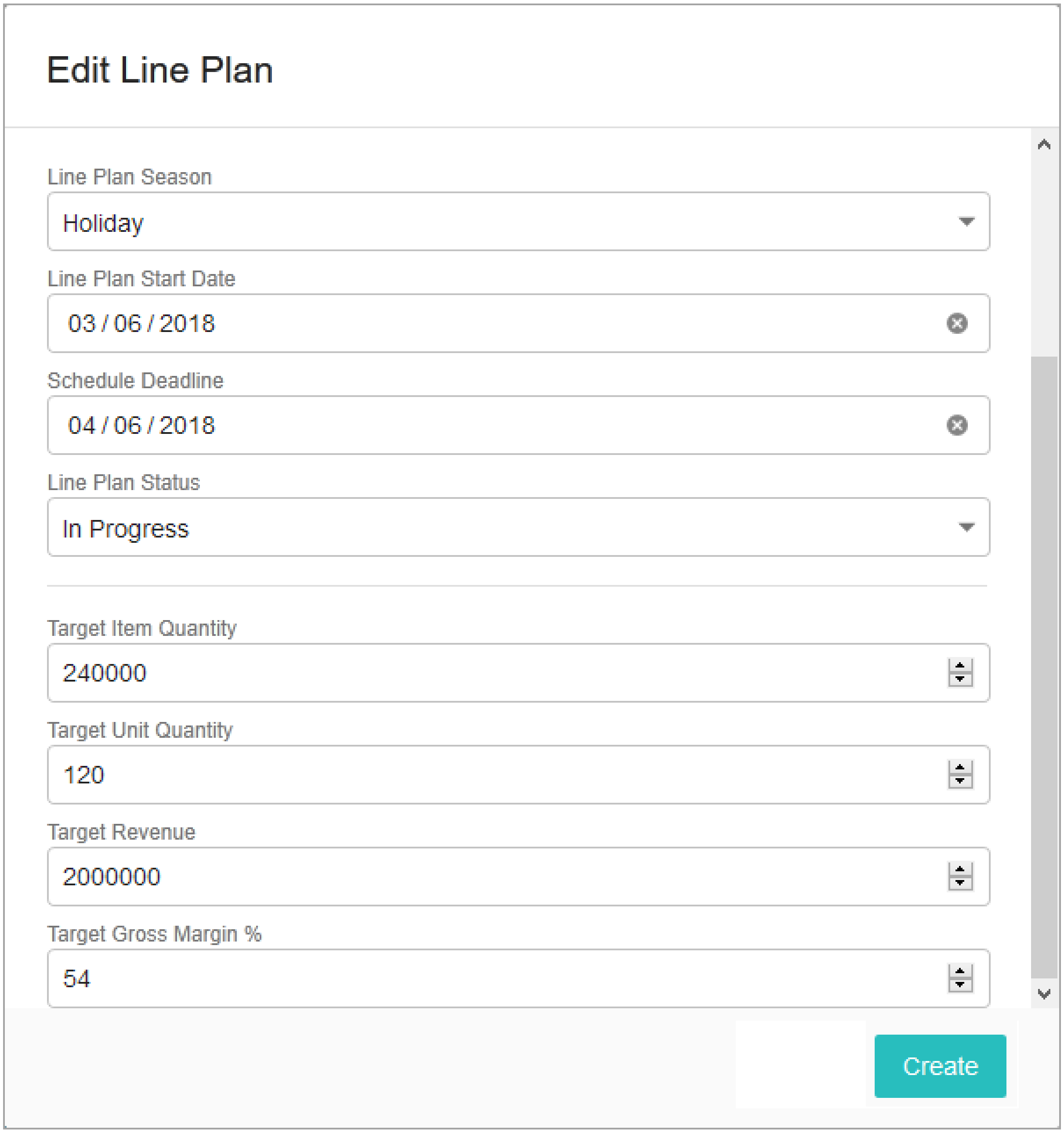


5. An Edit Line Plan dialog displays. The user can fill out any of the attributes or attribute groups that are configured to display, though the values for Target Item Quantity, Target Unit Quantity, Target Revenue, and Target Gross Margin % must be filled out for line plans to work.

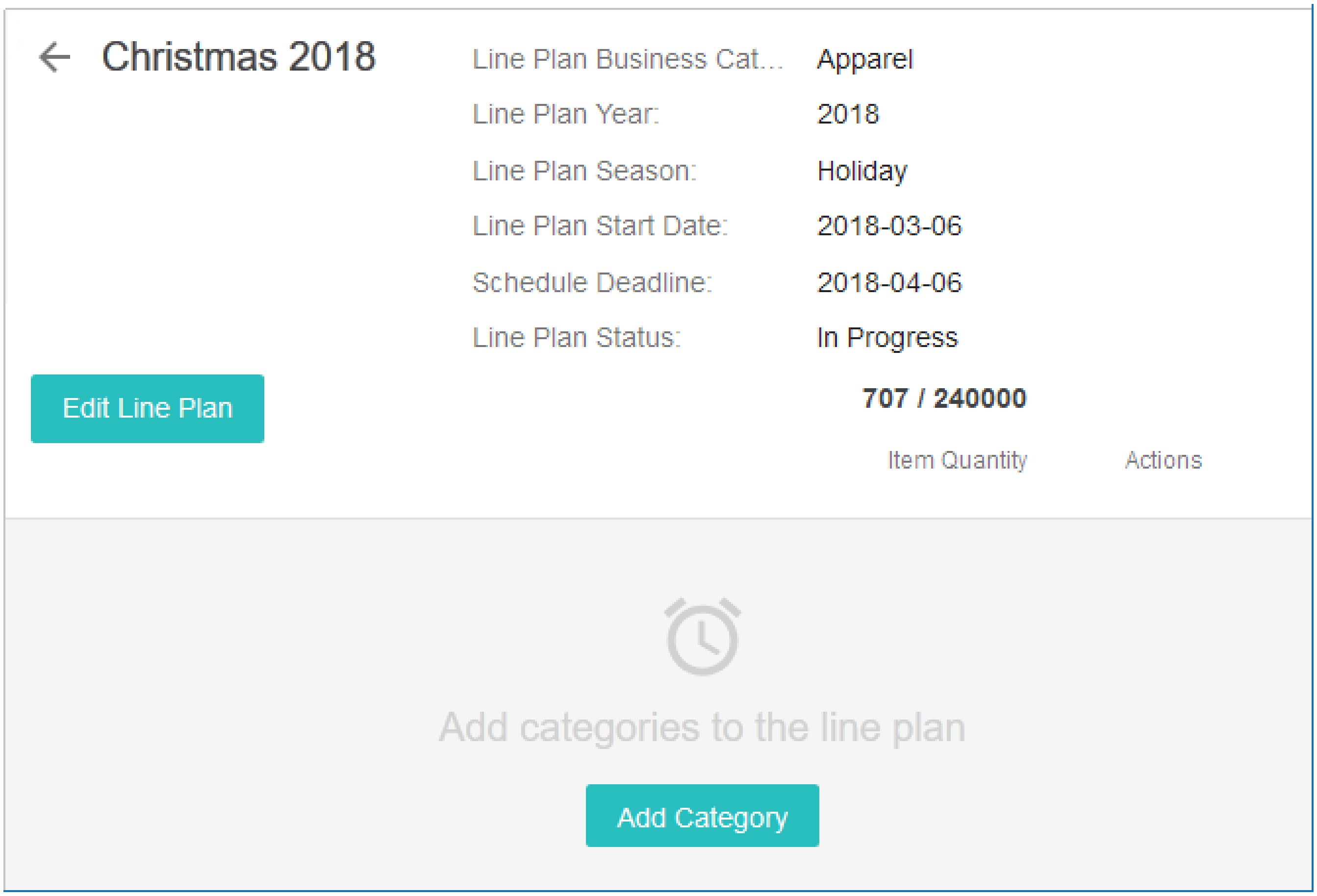
Note: It is impossible to create a line plan without filling in at least one value on this dialog.

6. When finished, click **Create**.

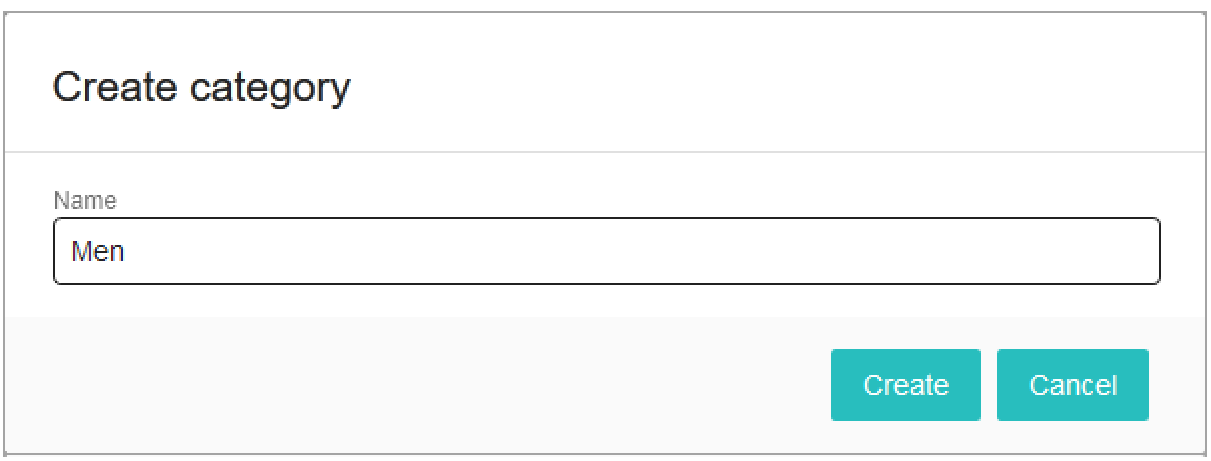
Note: Talk to your administrator if anything shown in the Edit Line Plan dialog needs to be edited.



7. On the line plan canvas, click on **Add Category** to add a line plan category.

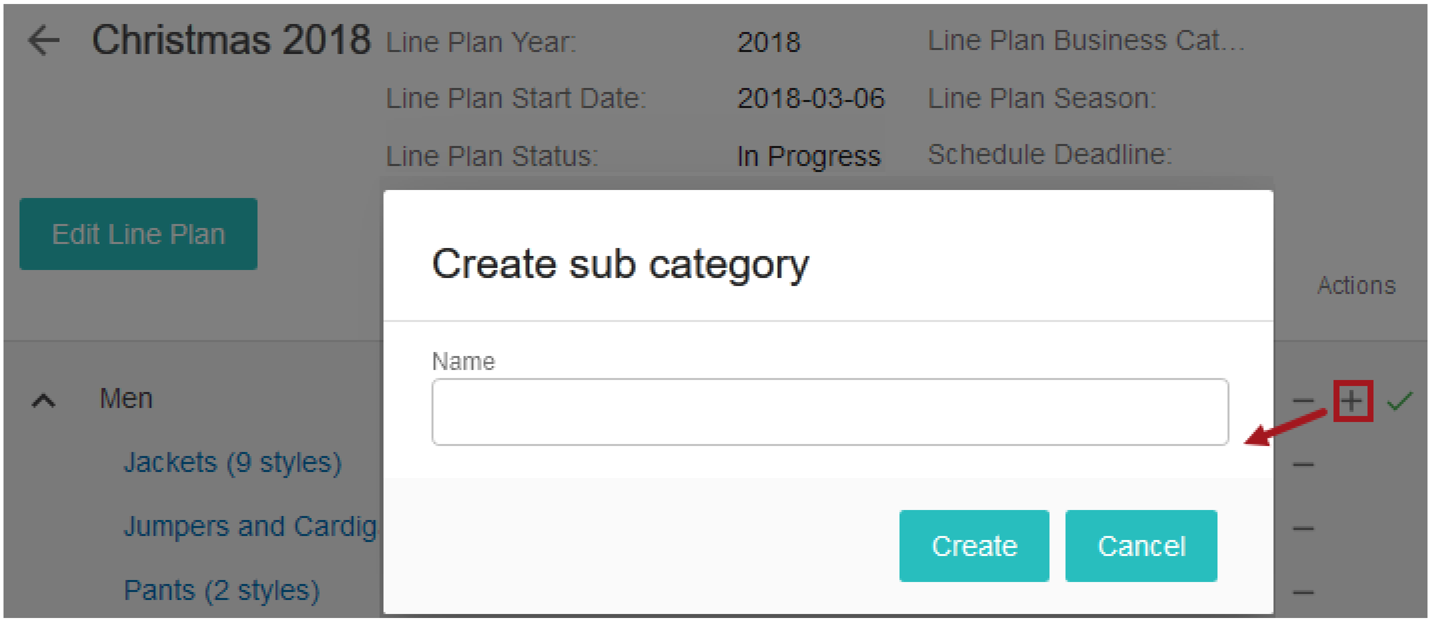


8. Enter in a product category and press **Create**. Create as many categories as needed.

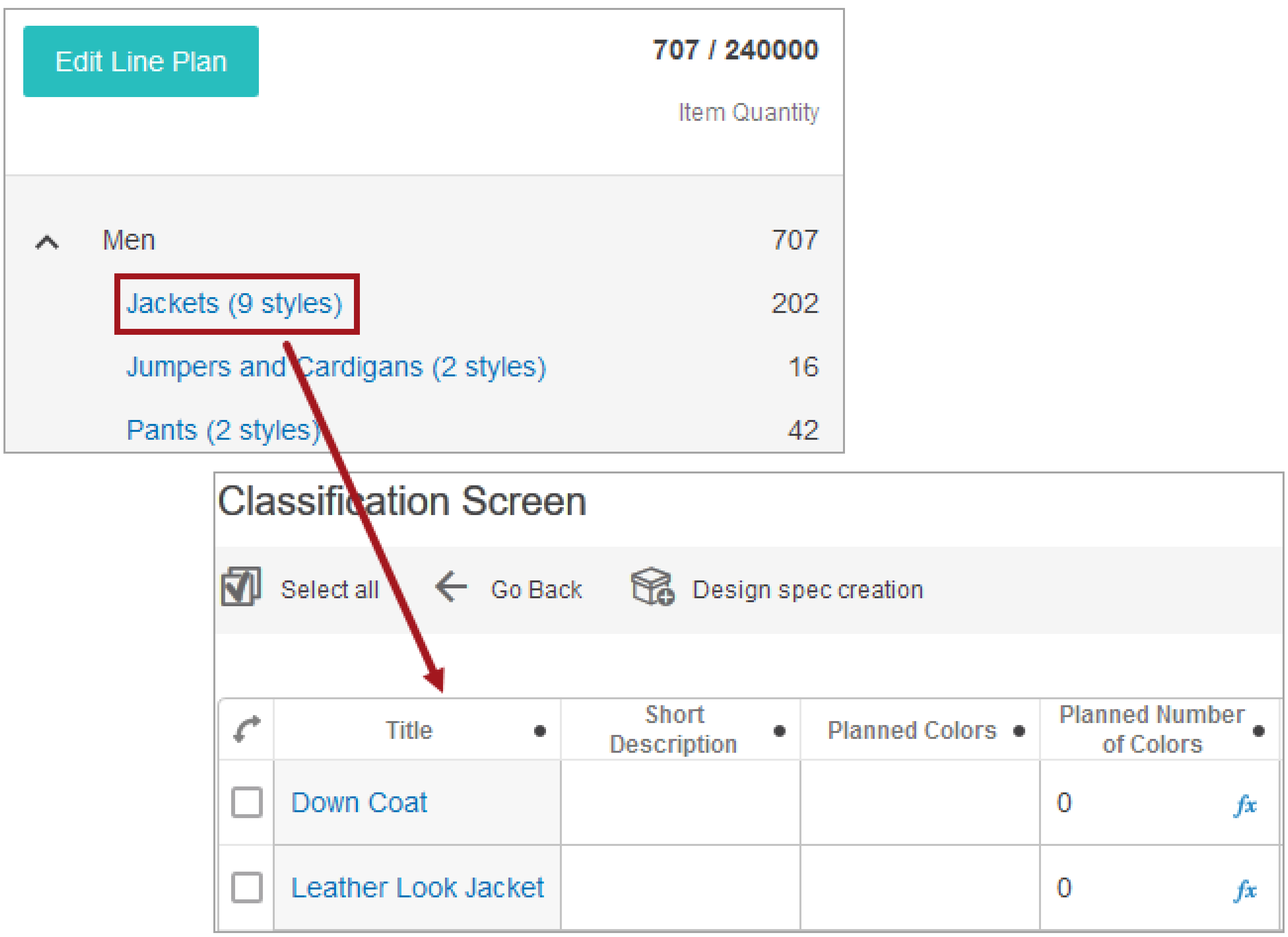


9. After all categories have been added, click on the plus sign (+) next to the category to add any needed sub categories.

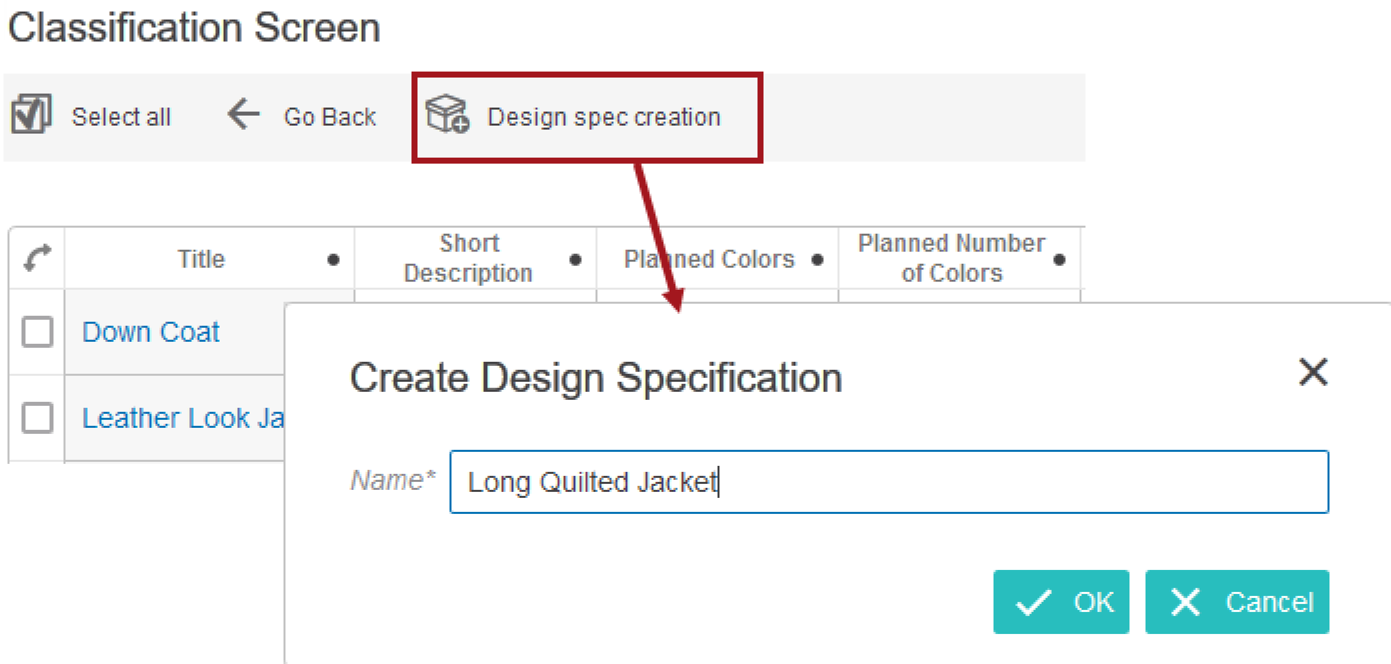
> **Note:** Clicking the negative sign (-) will delete the sub category.



10. After all sub categories are created, add design specifications to the designated sub categories. Click on the sub category link to go to the design specifications table.

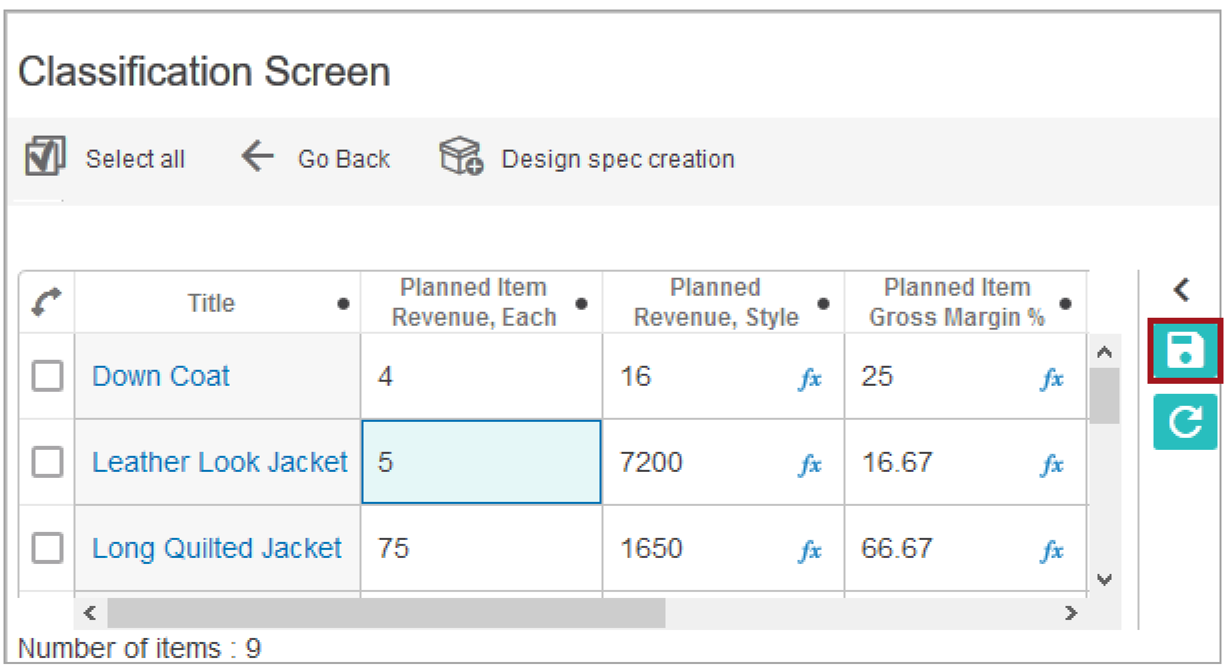


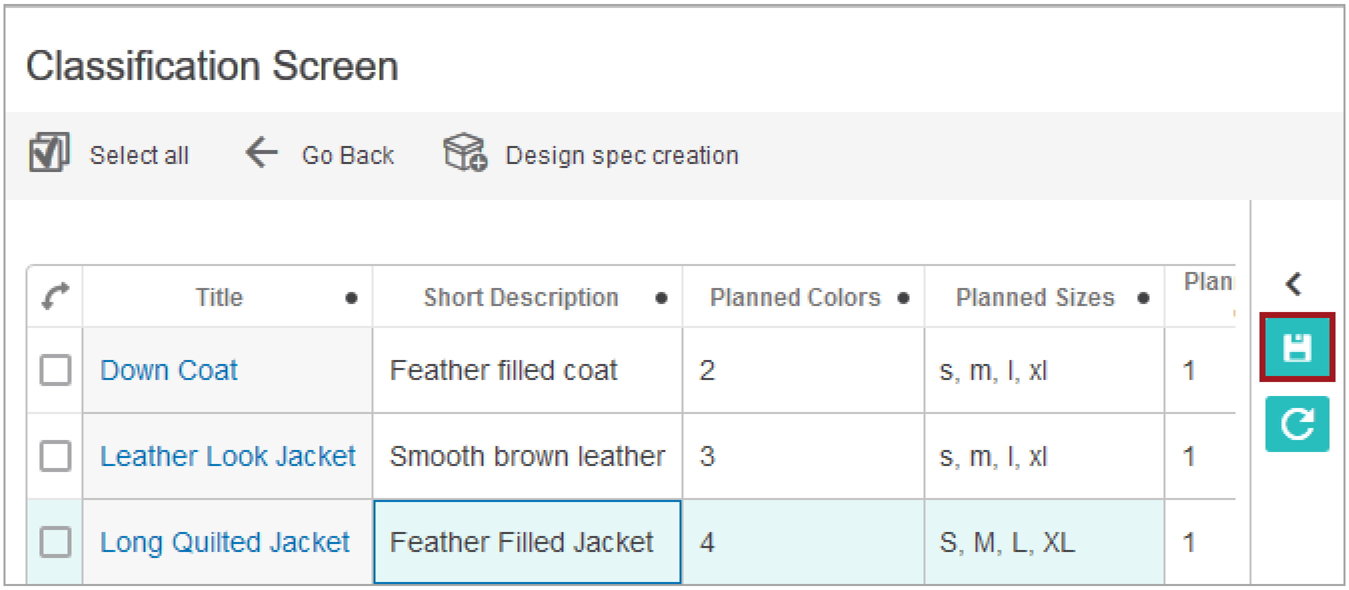
11. Click on the **Design spec creation** toolbar action to create a design specification.



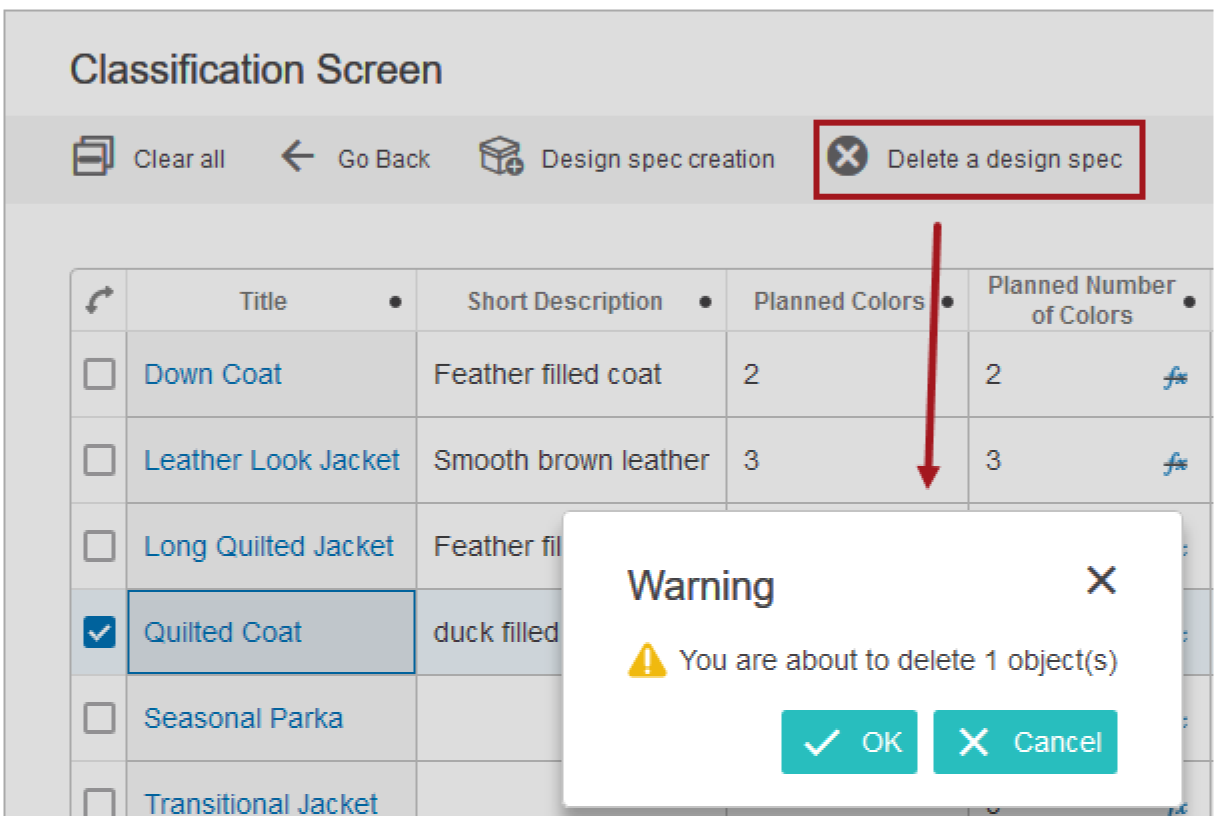
12. Fill in the attributes in the table to complete the design specification, and click the **Save** button (to the right of the table). Clicking on the **Refresh** button before saving will reset all fields to what they were before changes were made.

Important: All attribute information for the design specification must have a value in order for necessary calculations to take place for line plans.



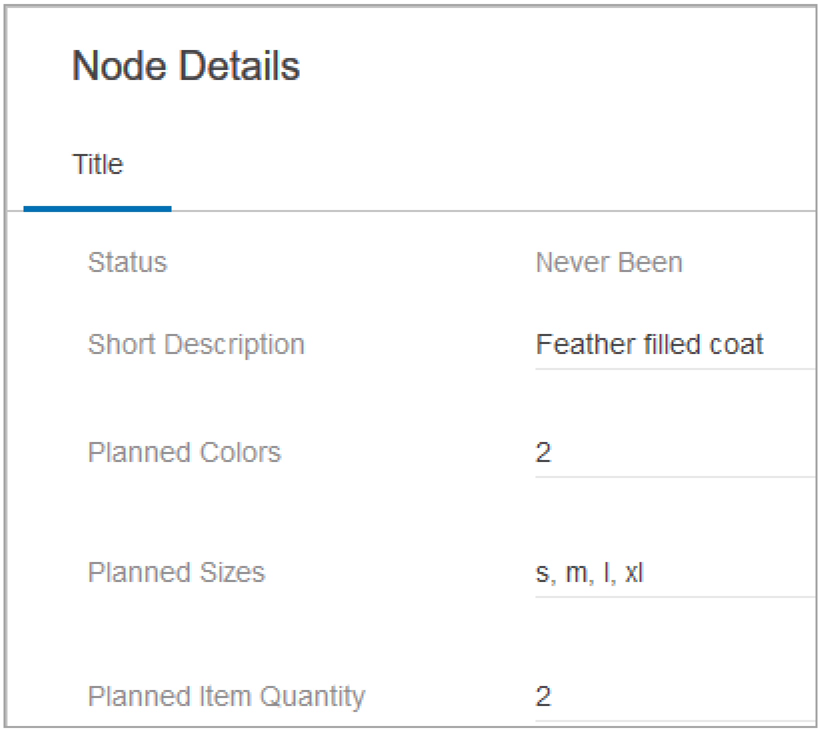


13. Clicking on a checkbox next to a design specification folder enables the **Delete a design spec** toolbar action. Click on the action to delete the selected design specification(s). To help prevent unintended deletions, an actionable warning dialog will appear requiring confirmation that this is the action that you want to take. Click OK or Cancel.

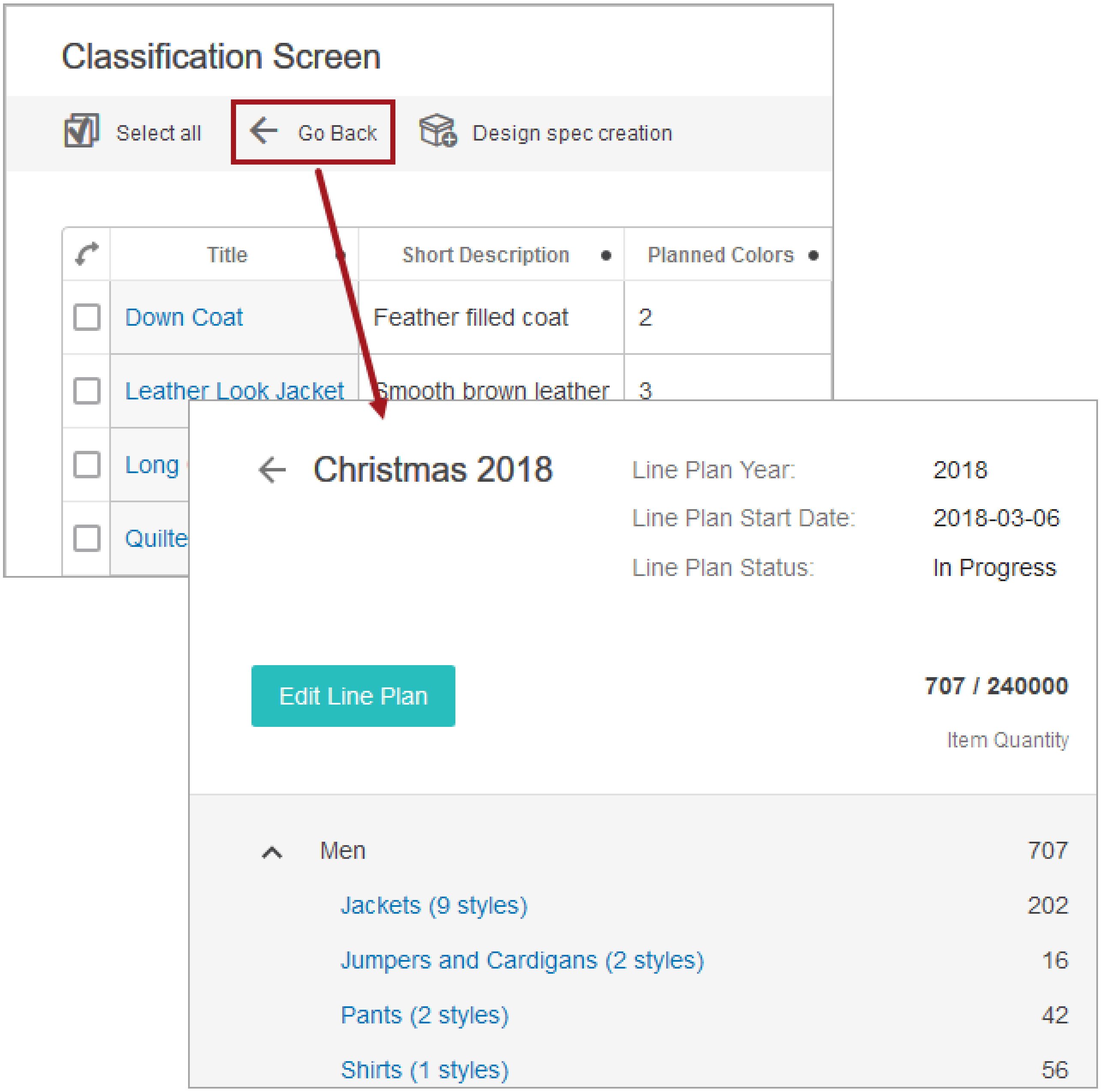


To see only the design specification for a particular object, click on the created design specification hyperlink.

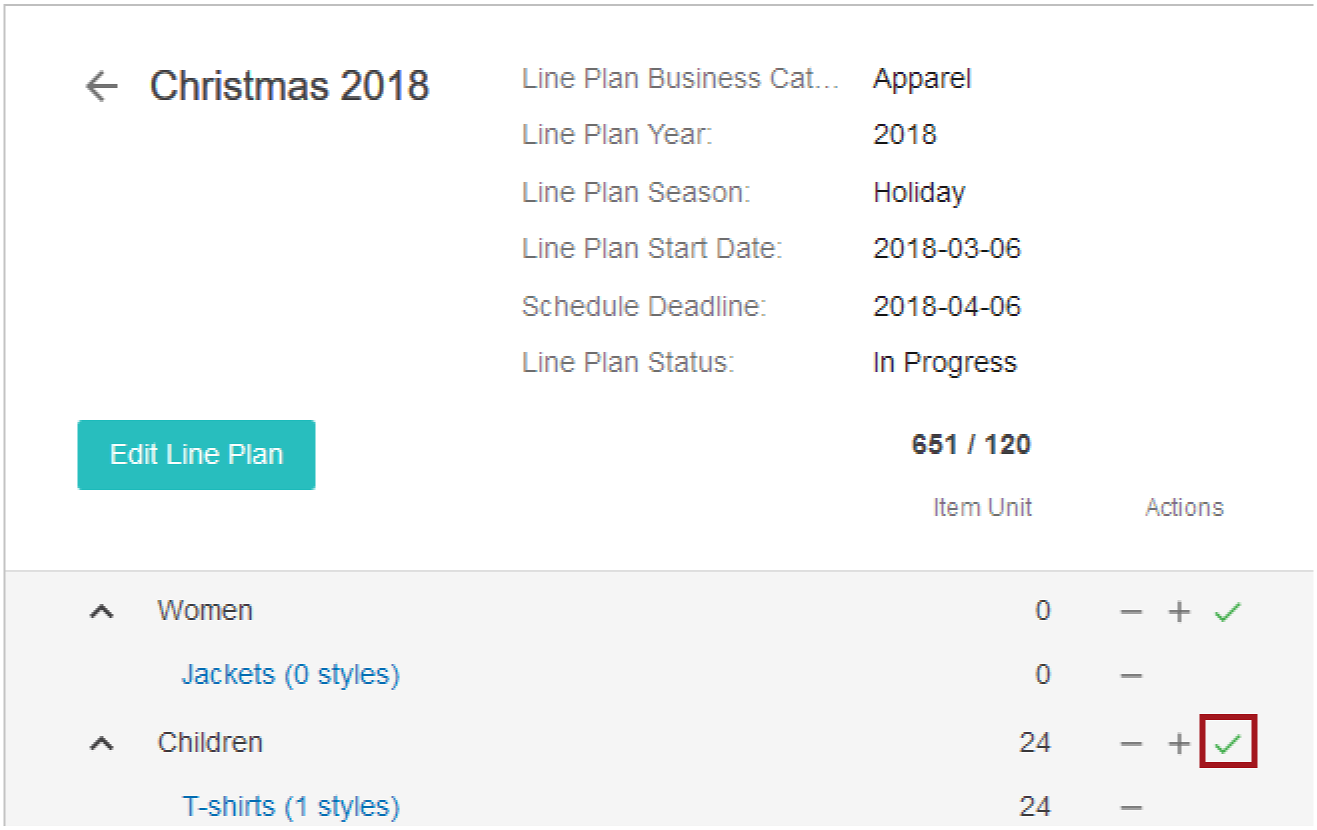
> **Note:** No changes can be made to the design specification from this view. To exit this view, click the browser's back button.



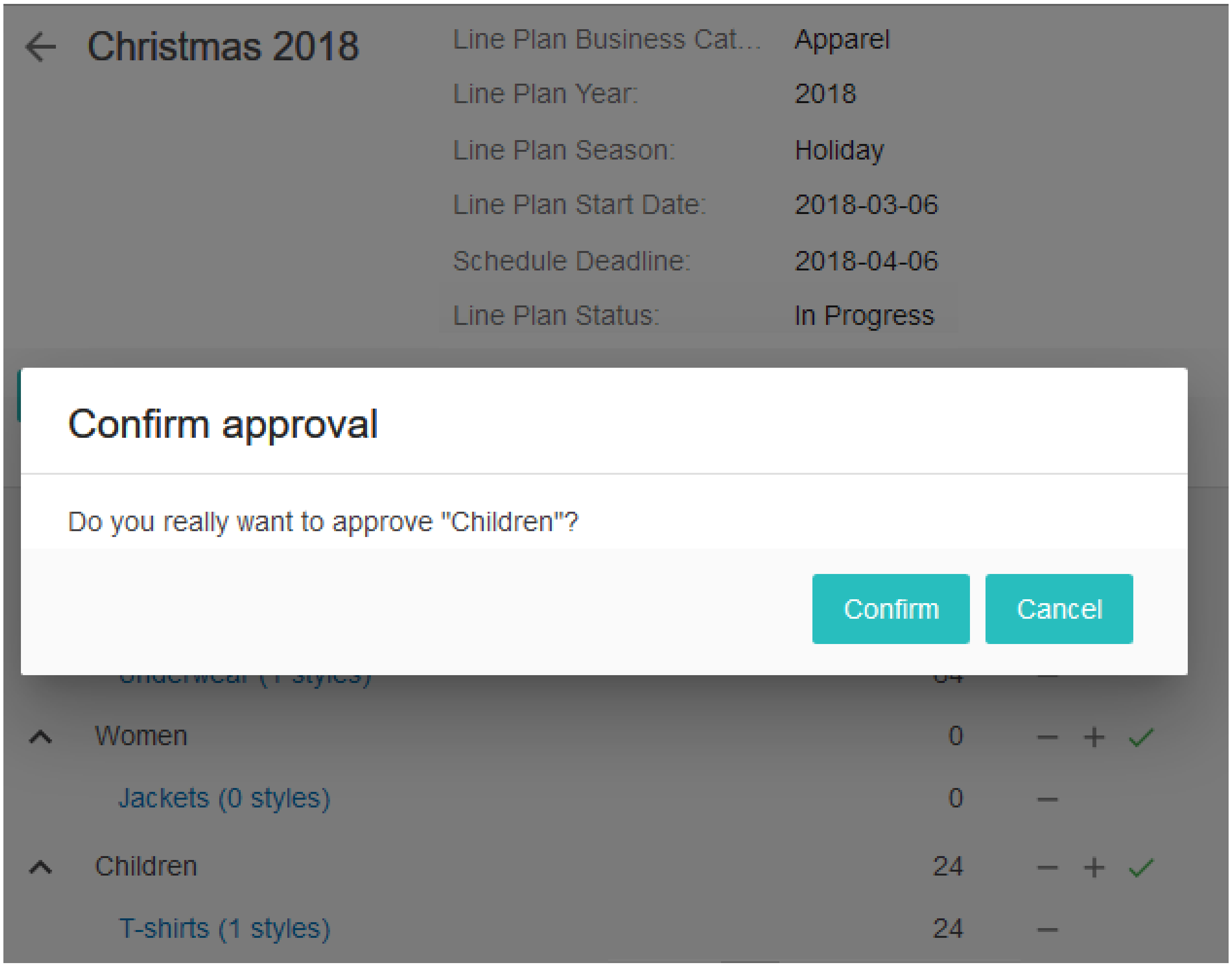
14. Back on the design specifications table, when all additions, changes, and deletions to the design specifications have been made and saved, you can navigate back to the main line plan by clicking on the **Go Back** button.



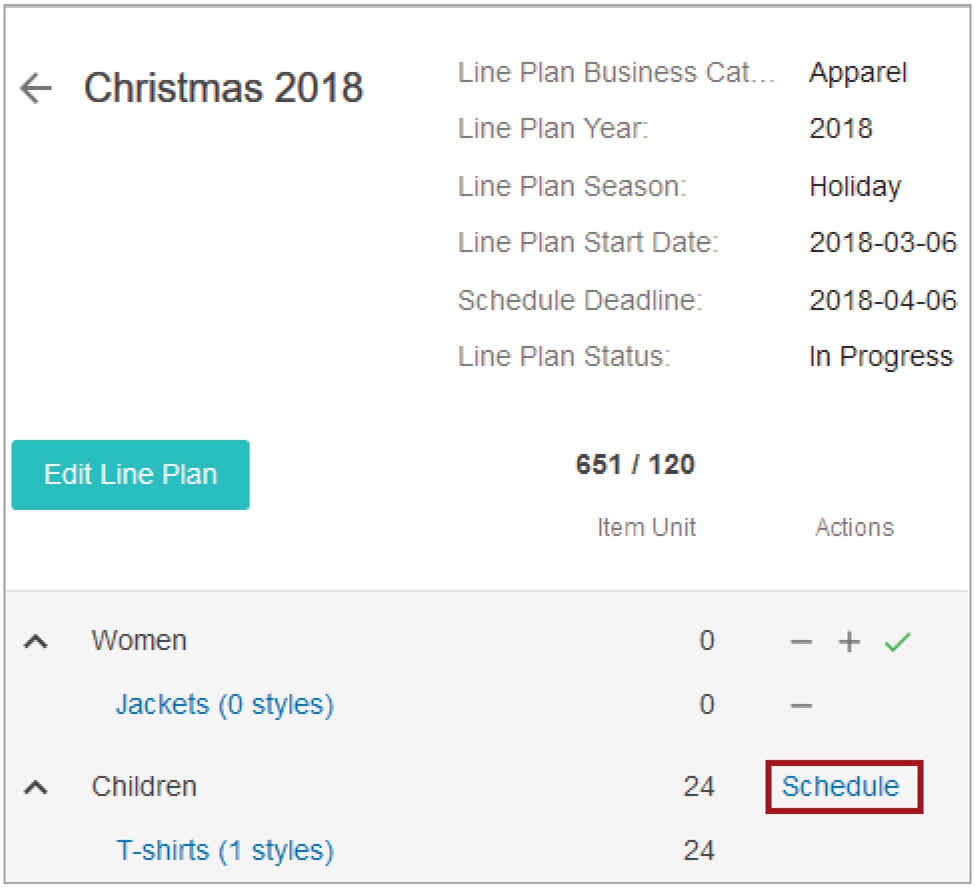
15. On the main line plan screen, if a category in the line plan is considered complete, click the checkmark under the Actions column to approve the category.



A 'Confirm approval' dialog will appear, requiring action. This is to ensure that you intended to confirm the line plan category.

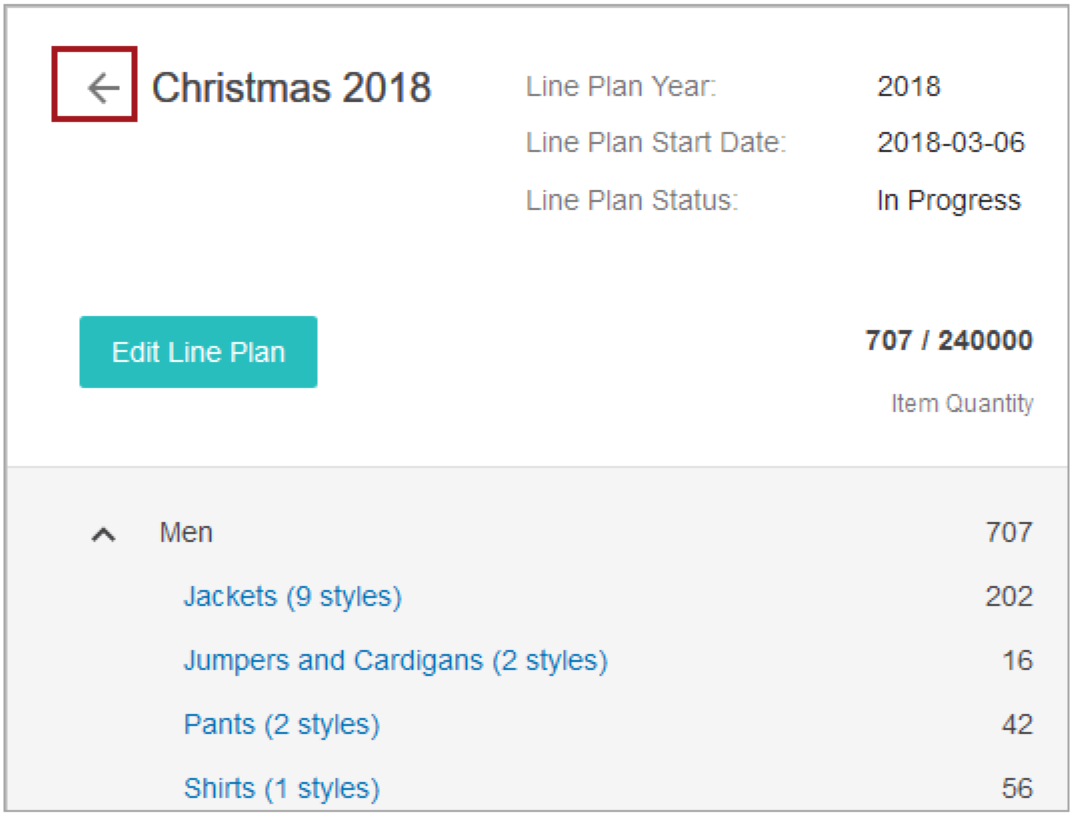


If confirmed, a hyperlink to the schedules in Web UI will appear.



For more on PLM Schedules, see the **Creating Schedules** topic in this documentation.

16. To navigate back to the complete list of all created line plans, click on the back arrow by the line plan name.

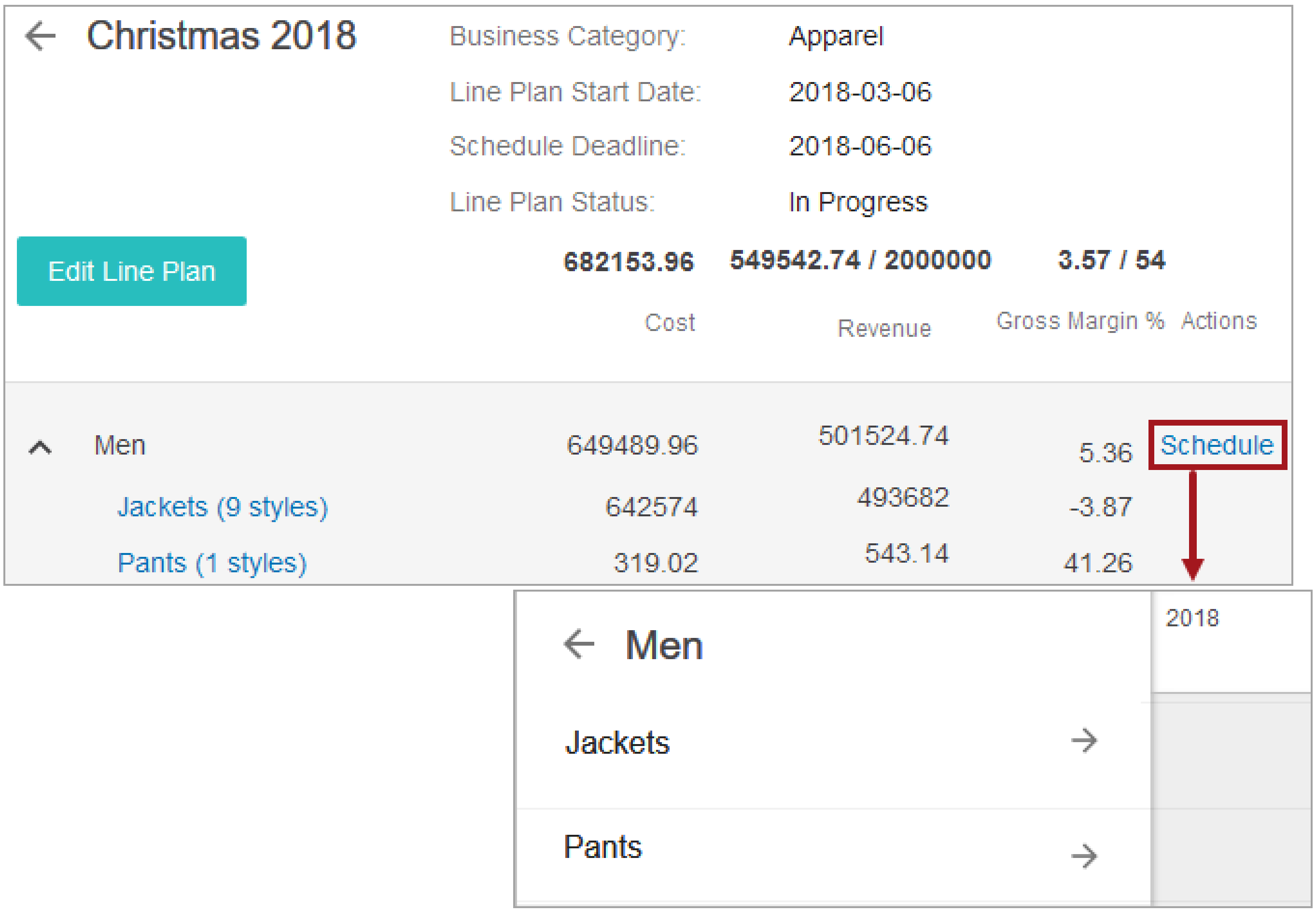

Christmas 2018
Line Plan Year: 2018
Line Plan Start Date: 2018-03-06
Line Plan Status: In Progress
Edit Line Plan
707 / 240000
Item Quantity
Men 707
Jackets (9 styles) 202
Jumpers and Cardigans (2 styles) 16
Pants (2 styles) 42
Shirts (1 styles) 56

Creating Schedules

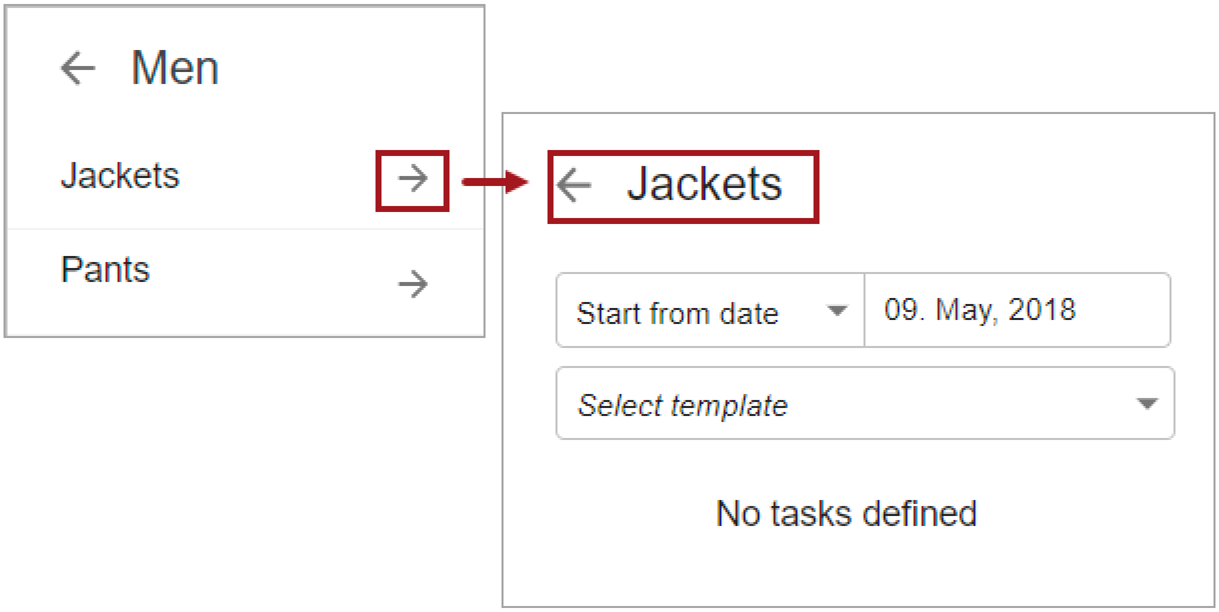
PLM Schedules assist managers with the planning, tracking, and progress of products that are in development. You can access schedules by clicking on an approved line plan.

To access a schedule from an approved line plan and start schedule configuration:

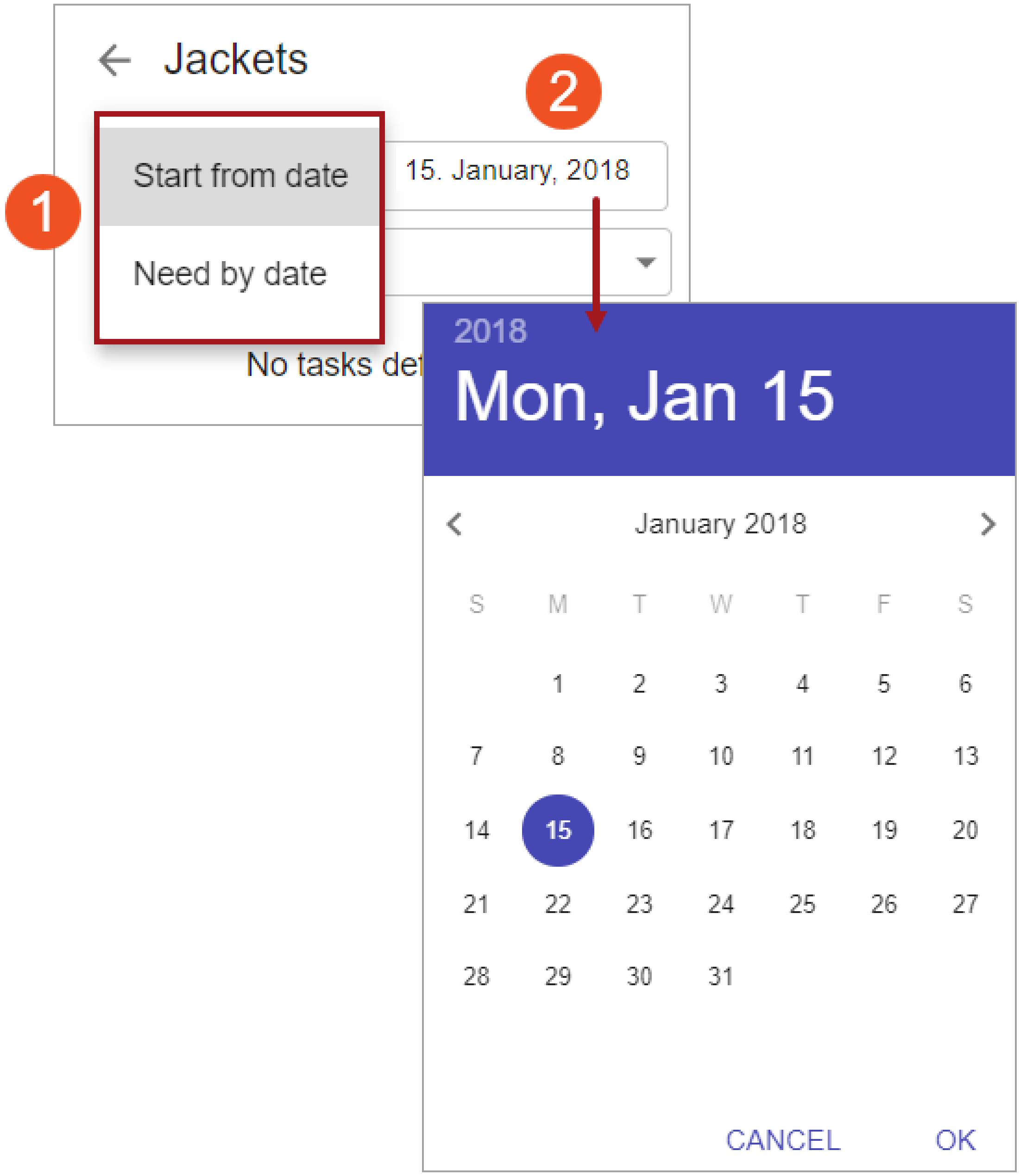
1. Click on the approved PLM Line Plan, and then click on the **Schedule** hyperlink. This directs you to the schedule associated with the approved line plan.



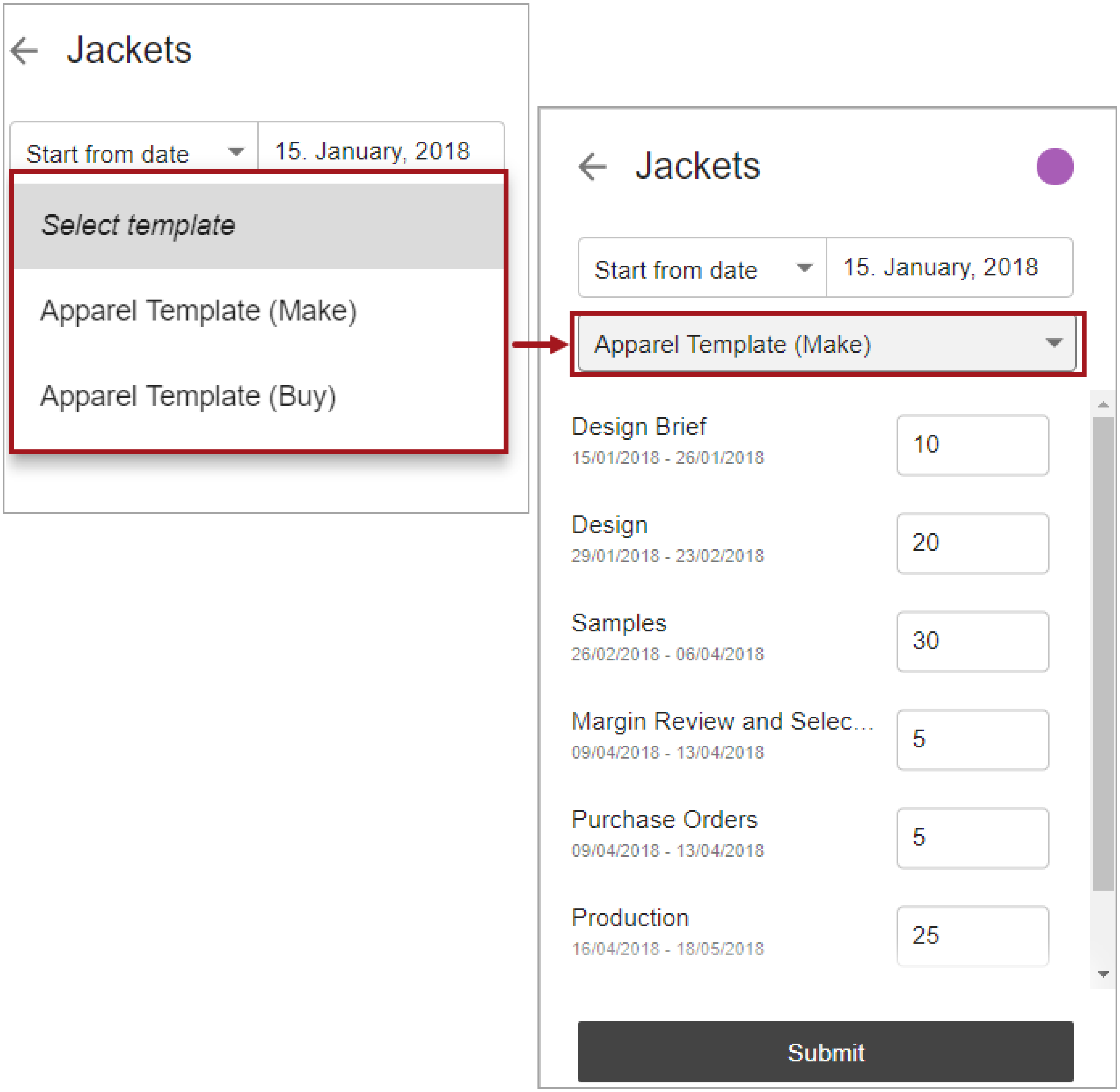
2. On the main schedule, click on the subsection to work with and begin to configure.



3. On the subsection schedule panel, choose from the dropdown if the schedule will need to be set as a 'Start from date' or as a 'Need by date.' Then in the date section, select the desired date from the node picker. Click **OK** when the date is selected.



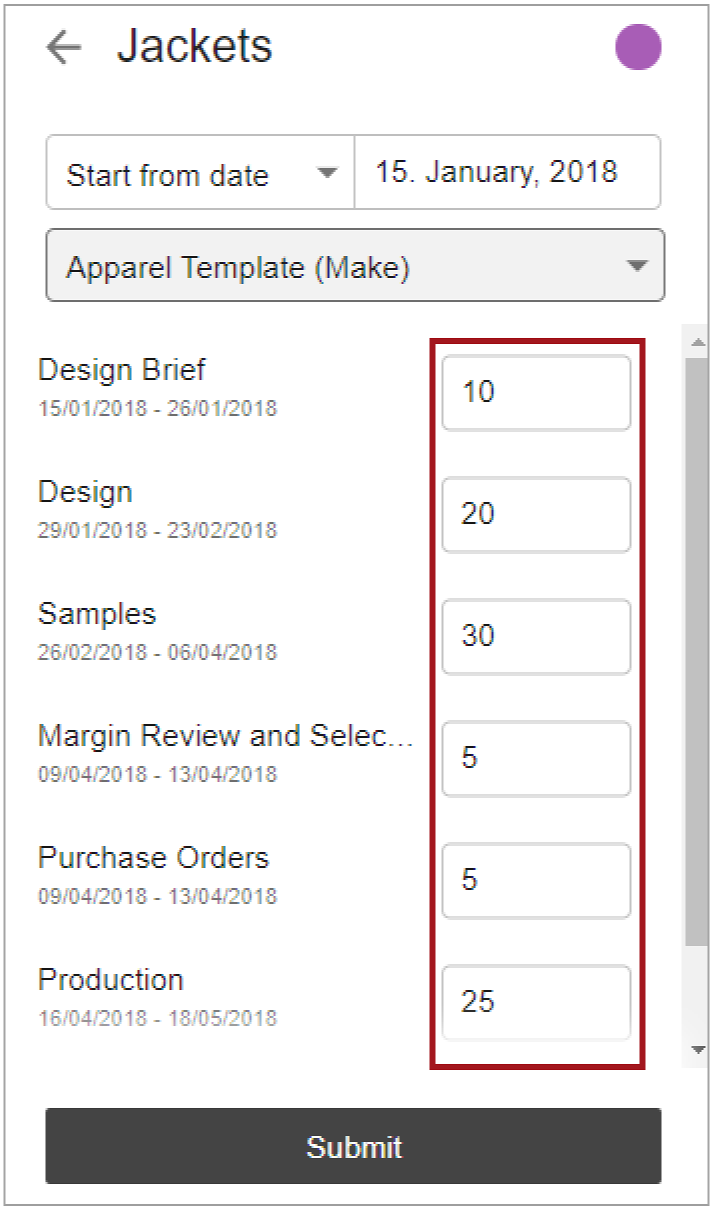
4. After the type of schedule and the date have been selected, choose the template that is to be used for the schedule. In the example below, the 'Apparel Template (Make)' was chosen.



Note: Templates will vary according to business needs. If you feel that a template has tasks that needs to be added or changed, or you are missing a template, talk to your administrator.

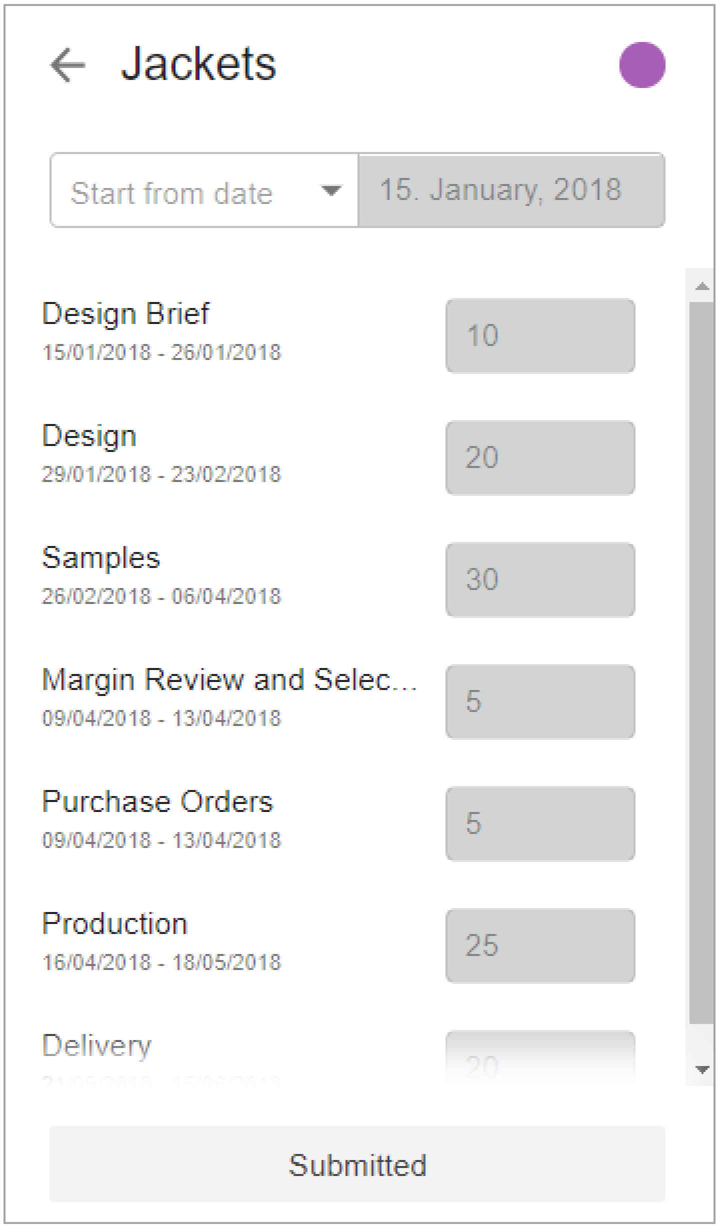
When you select a schedule template, you will notice that the tasks associated with the template, along with the planned duration of days for each task, populate. While the tasks cannot be altered, the planned duration of days can be adjusted before the schedule is submitted according to business needs.

Important: The schedule does not allocate for any business holidays, and this must be taken into account by the schedule manager when creating the schedule.

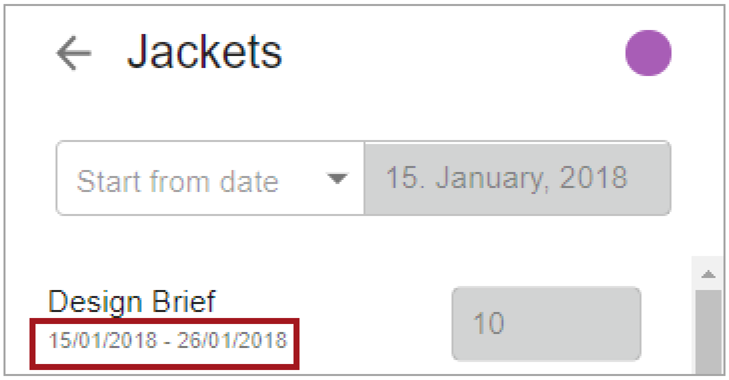


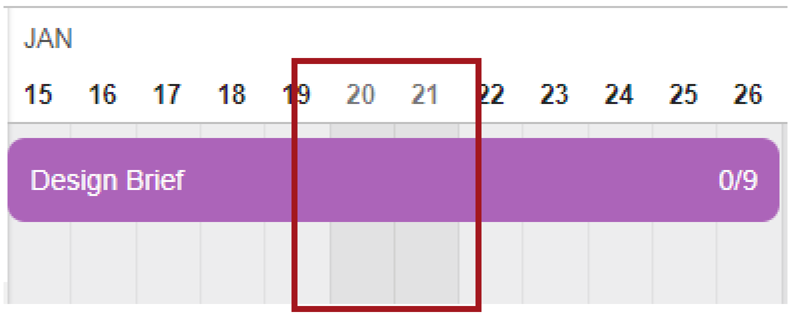
5. Click **Submit** when the schedule is set and ready to be implemented. Once submitted, no alterations to the schedule can be made.

Important: If you feel a mistake has been made after a schedule is submitted, talk to your administrator.



When calculating a schedule with the planned duration of days for each task, the schedule does not count weekends towards planned duration of days, and will reflect this in the schedule bar graph and planned task due date.





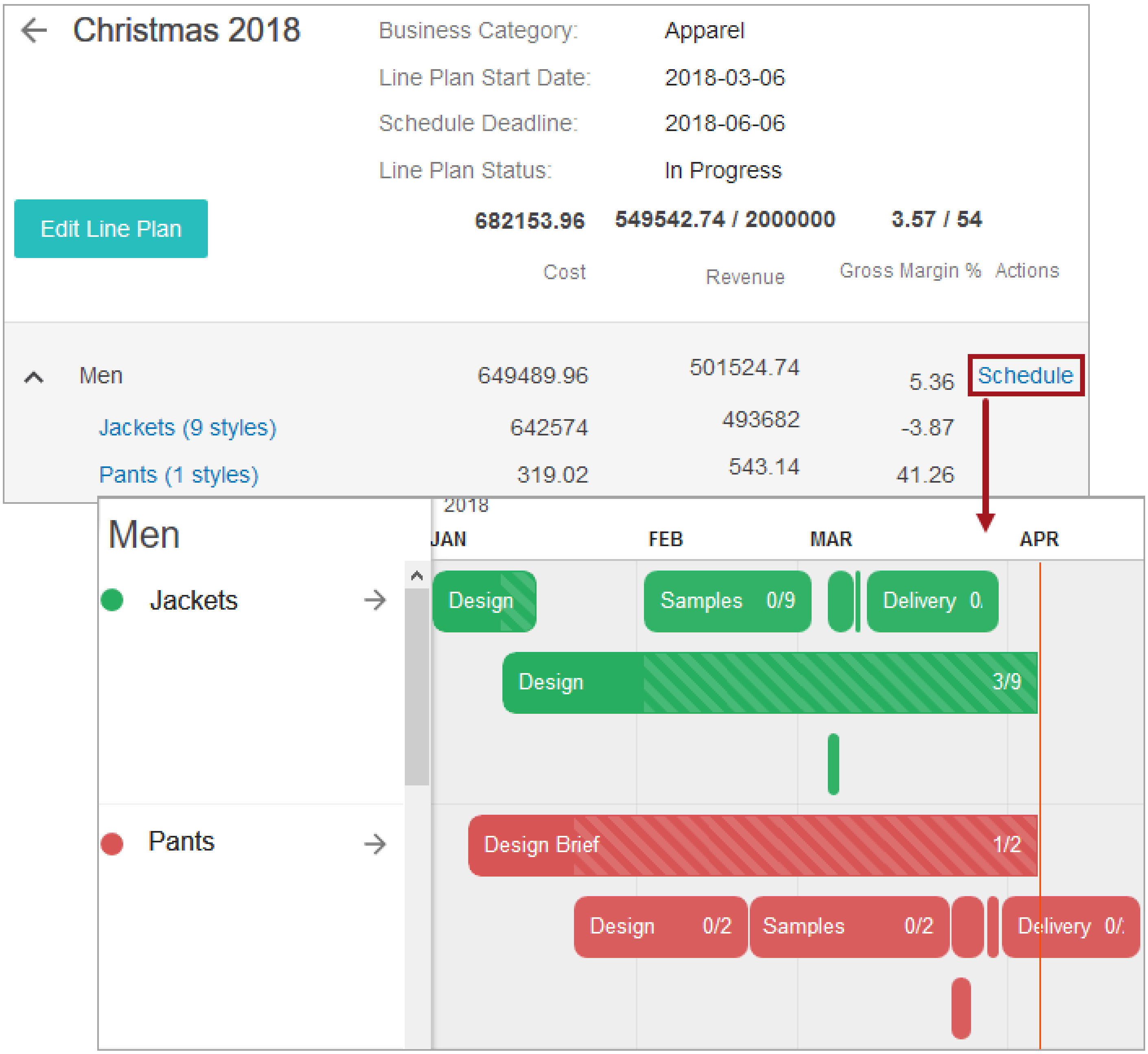
For more on how to interact with schedules, see the **Using Schedules** topic in this documentation.

Using Schedules

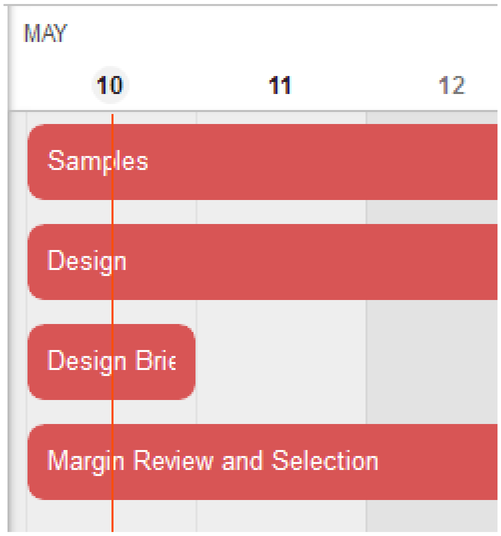
Understanding how to use and read schedules once they are created can provide valuable information on the progress of projects. Detailed below are the ways that you can interact with schedules.

Main schedule screen

You can view the main schedule screen by clicking an approved line plan's 'Schedule' hyperlink. On the main screen, you can see all subsections that are part of the approved line plan. Each subsection has its own schedule.

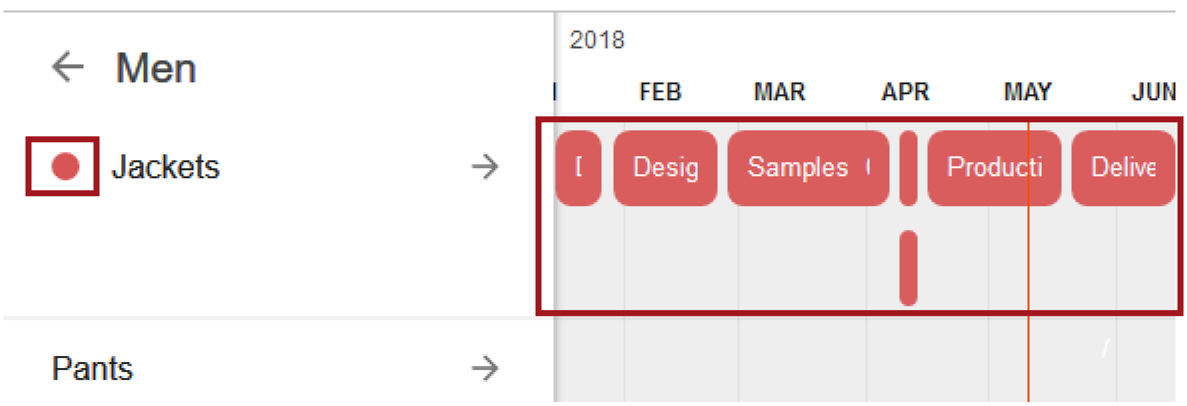


The solid red line on the calendar that passes through all schedules depicts the current date that the schedule is being viewed. In the example below, the current date is May 10th.



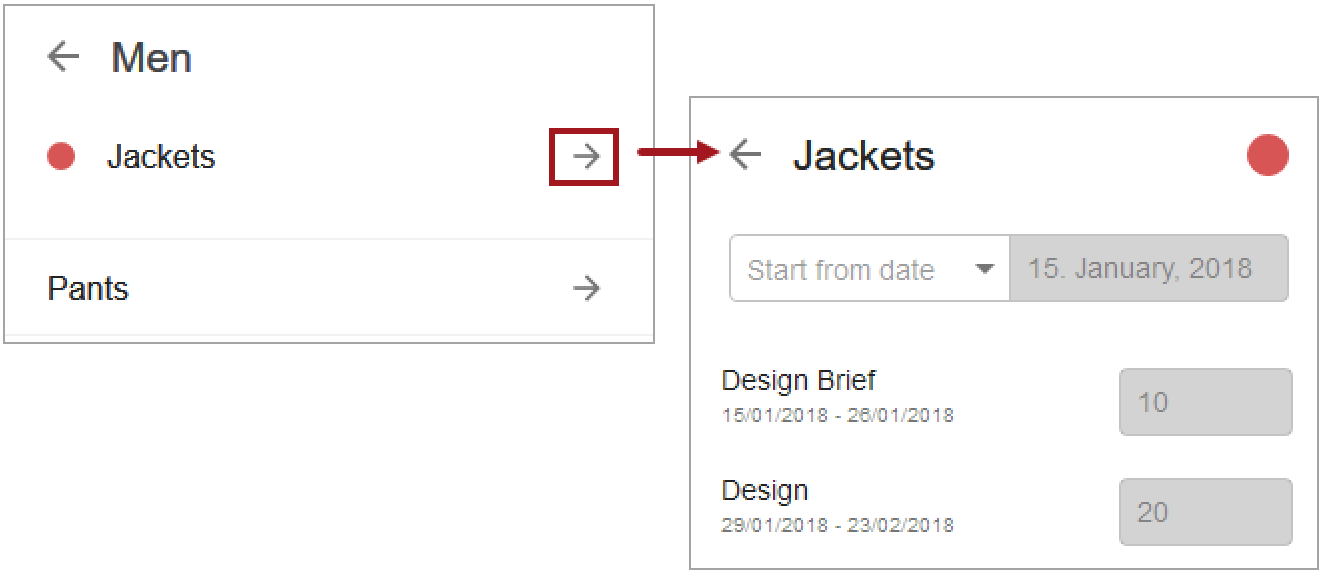
Viewing the subsection schedule panel

On the main schedule screen, you can see if a subsection has had a schedule created by viewing if there is a colored dot next to the subsection's name, and a task bar graph is generated in the calendar to the right.

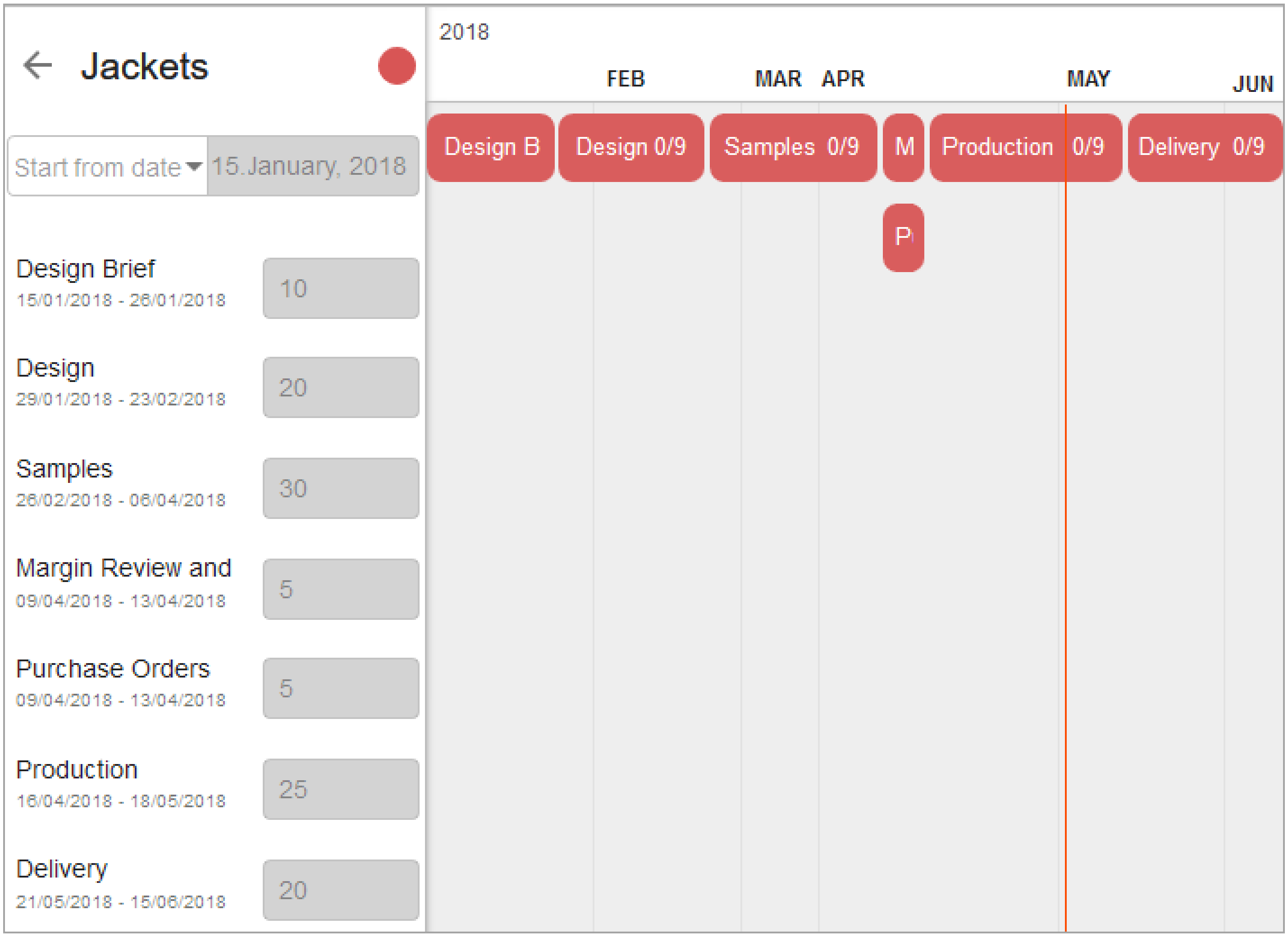


Note: Schedule task bar graph colors may rotate in color. For example, if it was red when initially created, it may be green the next time the schedule is opened. Note that no data will be altered in the schedule.

Clicking on the arrow next to the subsection will bring you to the subsection schedule panel.



While the information cannot be altered if the schedule has already been submitted, you can view the type of schedule selected, the name of the selected template, the tasks in the selected template, and the planned start and end dates for each task in the schedule. Additionally, you can see all of this information in relation to the task bar graph calendar on the right side of the subsection schedule panel.



It is possible to click and drag the calender to see different parts of the task bar graph.

Task bars

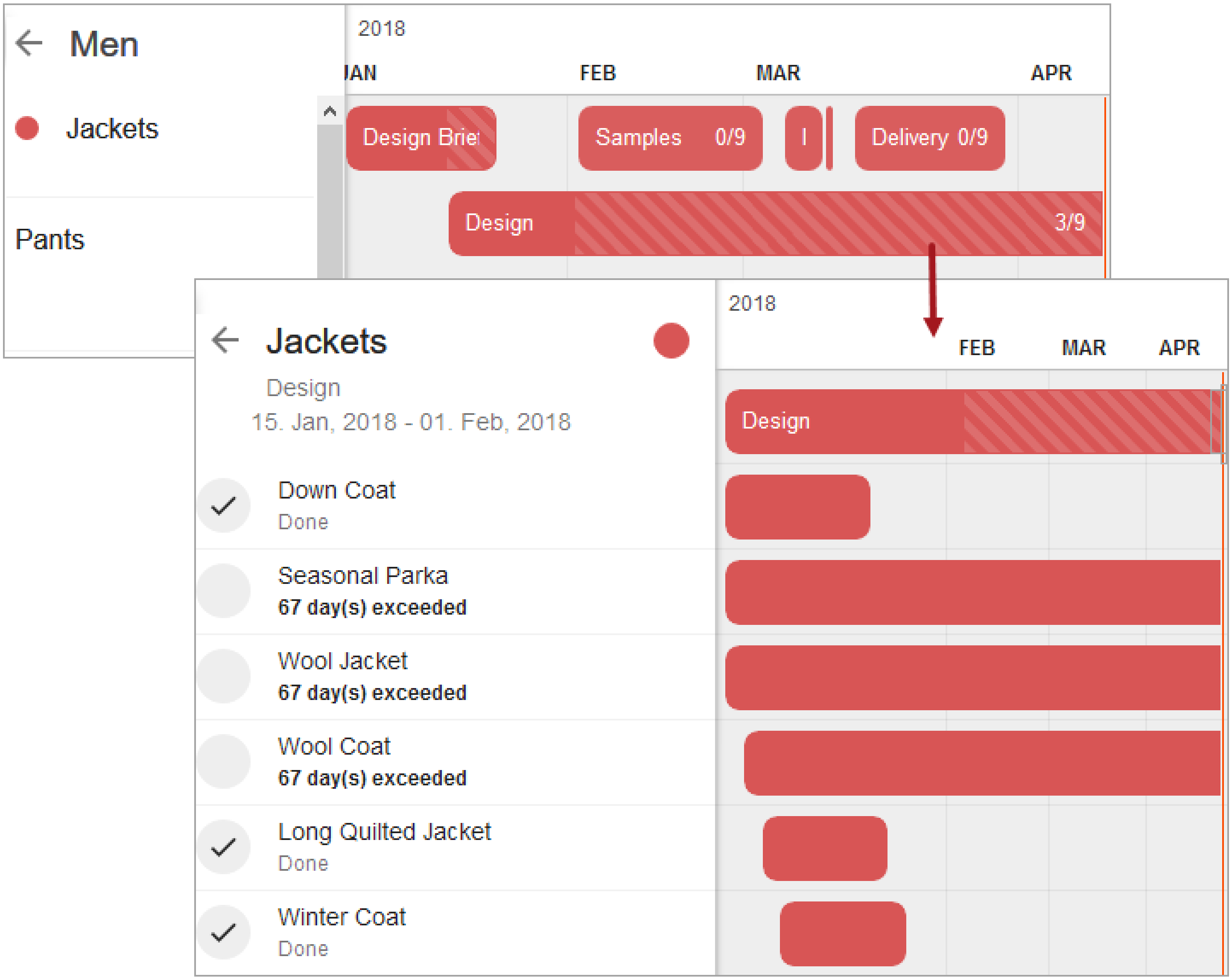
Each task bar that makes up the task bar graph calendar displays:

1. The task name
2. The number of design specifications that have completed the task
3. The total number of design specifications that need to complete the task

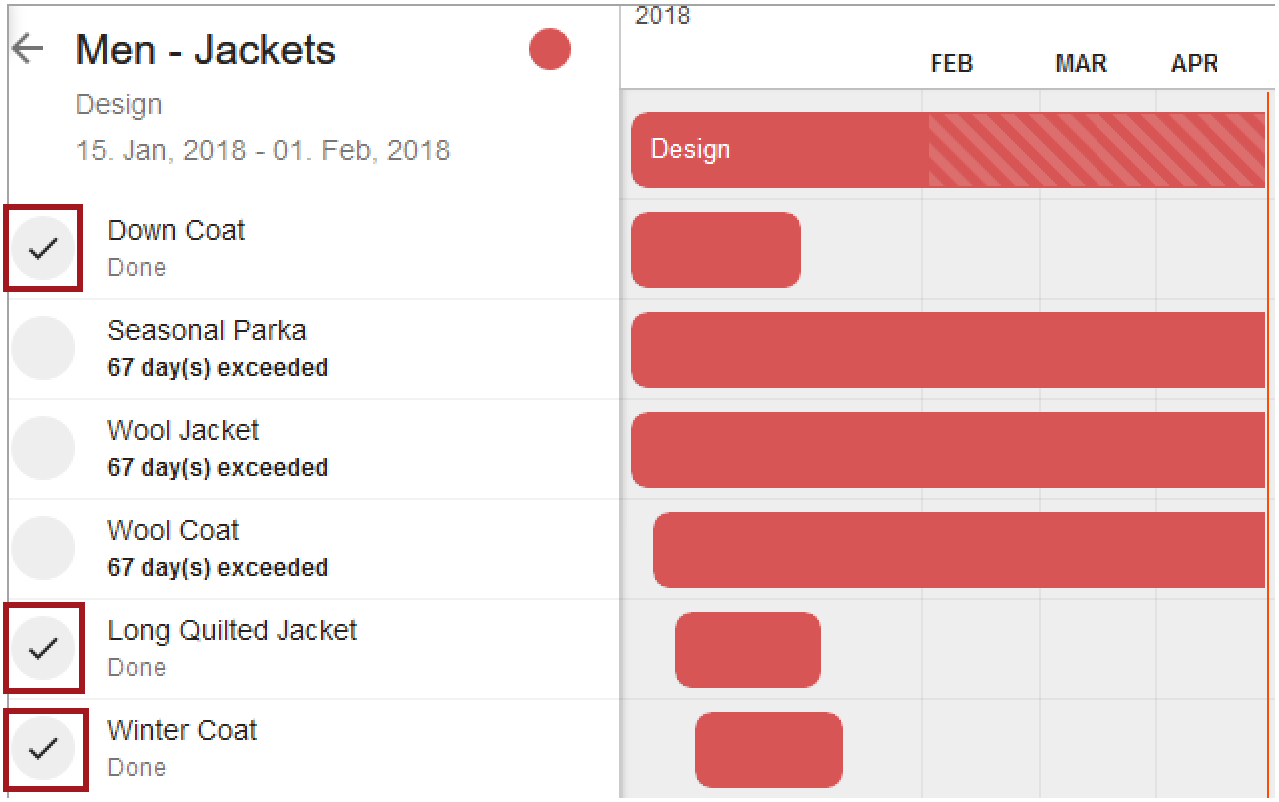
If all design specifications that need to complete a task have been completed, the task bar displays a checkmark.

Task view

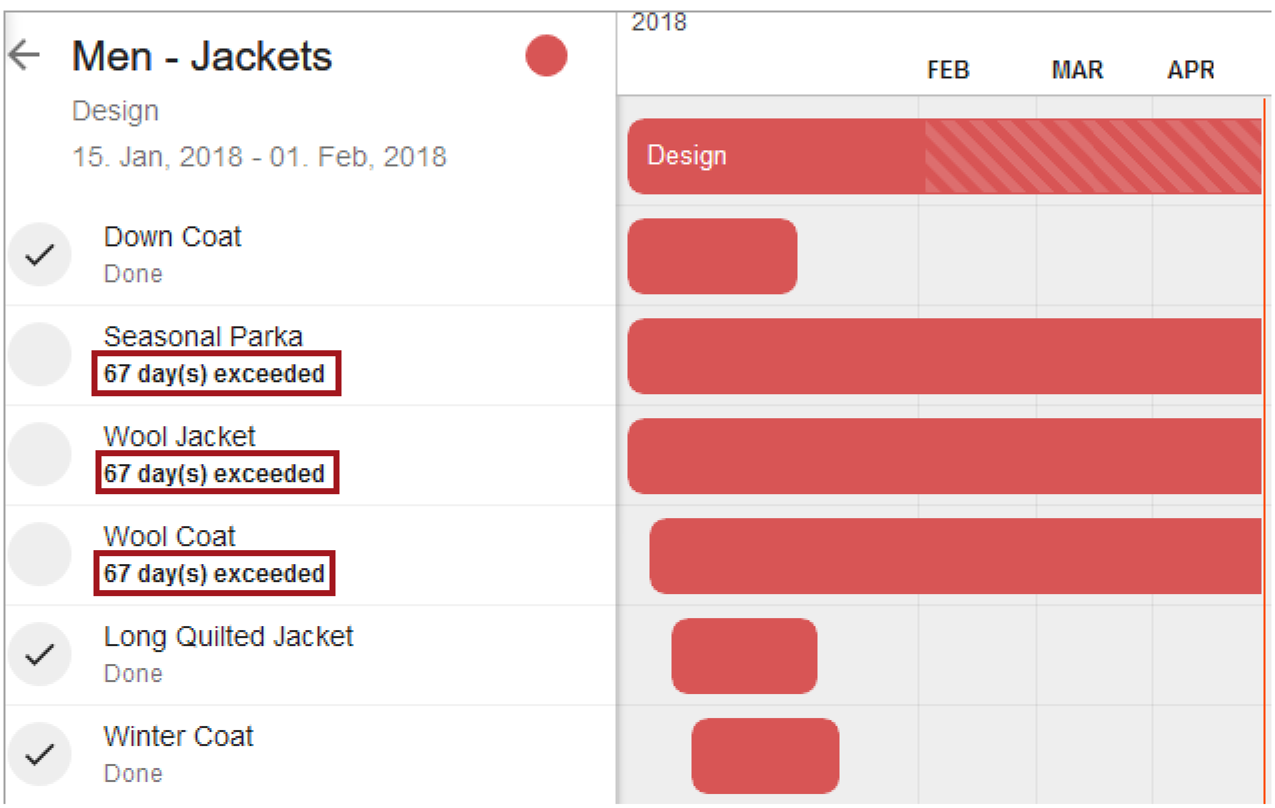
On the main schedule, you can click on a particular task bar in a schedule, and see the progress of all the design specifications in relation to that particular schedule task.



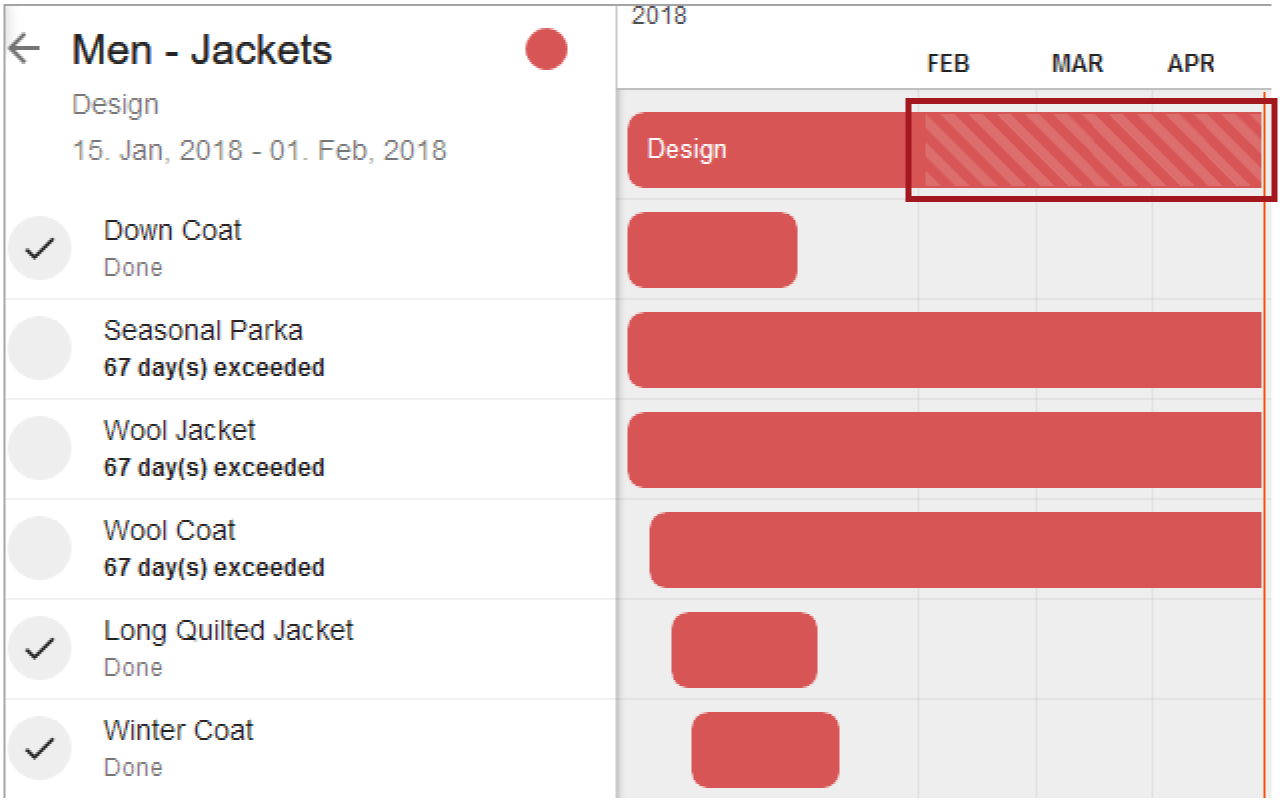
Any design specifications that are completed with the viewed task, will have a checkmark next to their name and their status will say 'Done.'



Any tasks that are overdue will state how many working days the task has exceeded the deadline.



If the task as a whole is going over the allotted planned time duration, the portion of the task that is past the deadline will be displayed with diagonal stripes.



Private Label Food Solution

The private label food solution enables you to create a product from the ground up. You are able to create a product idea, decide upon the flavors of the product, and then agree upon a recipe in collaboration with your suppliers. Additionally, you are able to create a desired packaging specification for your product, compare supplier packaging samples, and collaborate with suppliers to choose the best packaging for the product.

For recipes, there are a number of tab components in Web UI that assist with the private label food journey. Additionally, there is an action button created with private label food directly in mind. These tab components make it easier to create recipe specification for suppliers and allow suppliers to create their own version of the recipe. Suppliers can then seamlessly send their recipe versions back for evaluation, where you can select and compare different supplier samples against one another and your recipe specification. In short, it is easier to create, evaluate, and select desired recipes from suppliers.

For packaging, the Compare Requirements Tab can be used by customers to compare supplier packaging responses to one another as well as compare them to the packaging specification. If the customer wants to access the Compare Requirements Tab using the action button for private label food, they are able to do so as well.

To learn more about how to use the tabs and action button created specifically for private label food, see the following topics in this documentation:

- Specify Ingredients and Supplier Ingredients Tabs
- Selecting and Comparing Supplier Samples
- Compare Ingredients Tab
- Compare Parameters Tab
- Tabs for Comparing Requirements

Note: If accessing a Compare Ingredients Tab, Compare Parameters Tab, or Compare Requirements Tab from a Task List, it is not possible to submit the viewed object type to a different step in a workflow. If the object type in a Task List is selected and viewed individually on a Node Details screen, the options to submit that object type to a different step in a workflow are still possible.

Specify Ingredients and Supplier Ingredients Tabs

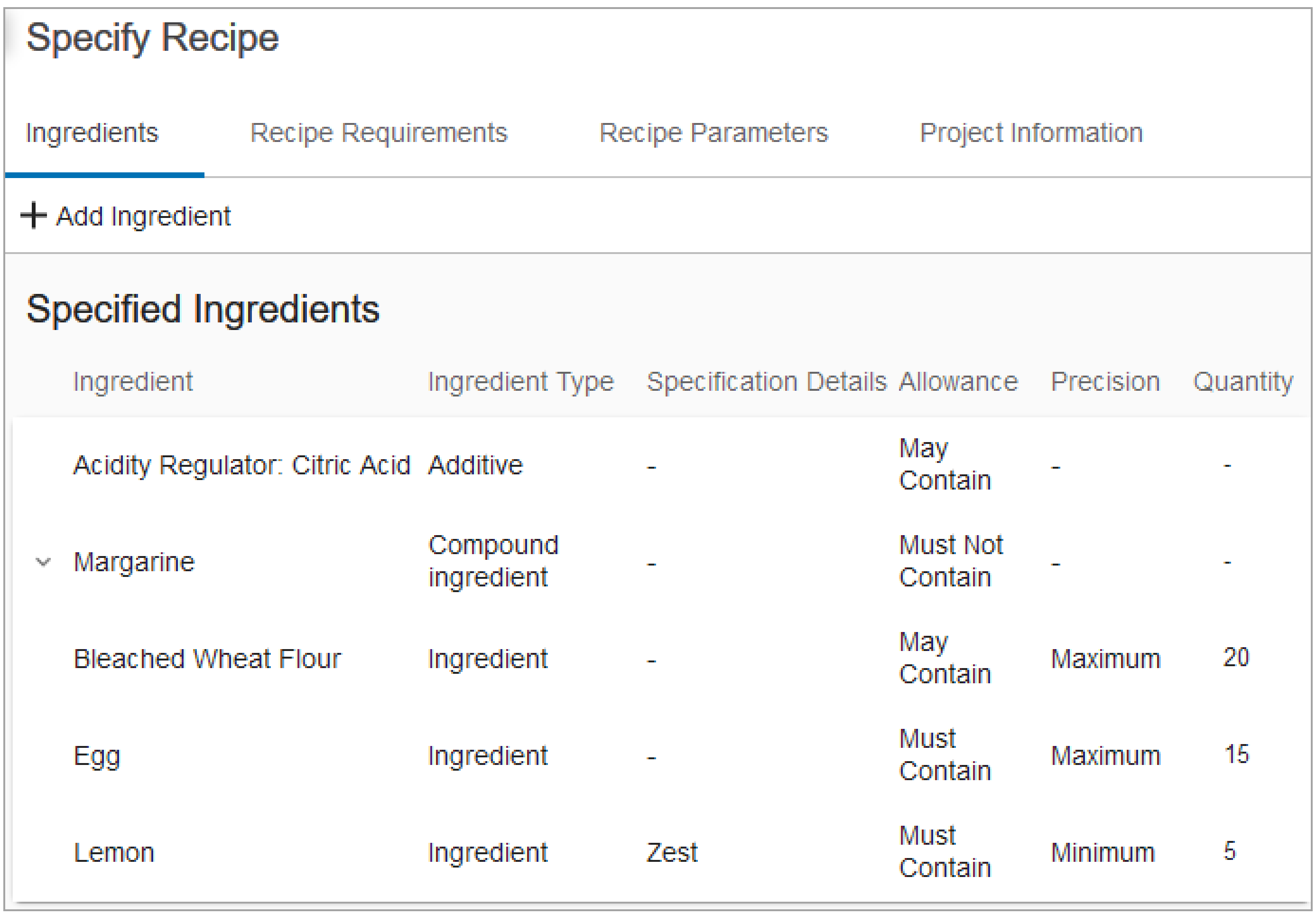
Recipe specifications from the customer aid suppliers in knowing what to include or exclude in the samples that they create and provide back. As a customer, recipe samples from suppliers detail exactly what was put into the sample product. While the **Specify Ingredients Tab** is used on the customer Web UI and the **Supplier Ingredients Tab** is used in the supplier Web UI, the basic principle behind recipe creation for both of these tab pages is identical though there are a number of differences in layout.

For more specific information on how to add ingredients to either of these tabs, see the **Using the Specify and Supplier Ingredients Tabs** topic in this documentation.

> **Note:** There is support for pre-translated ingredients and other information from the ingredient library. when a customer specifies a recipe in their language, (e.g., English), and sends the recipe to their suppliers, suppliers will see that recipe in their native language, (e.g., German). This is viewable by switching the context in the corner bar in Web UI.

Specify Ingredients Tab

The Specify Ingredients Tab displays a clean layout for customers to create their specification recipes.

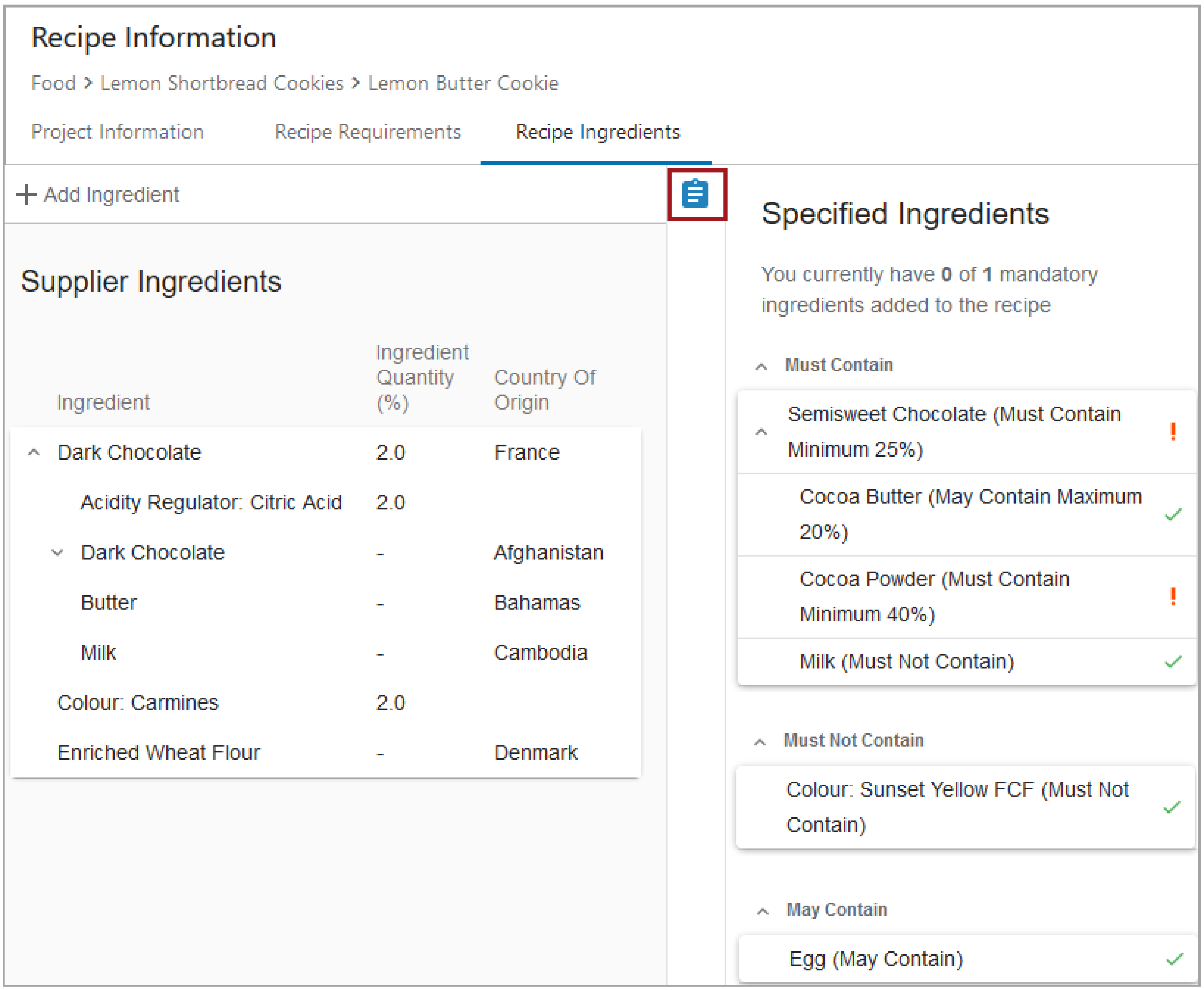


Ingredient	Ingredient Type	Specification Details	Allowance	Precision	Quantity
Acidity Regulator: Citric Acid	Additive	-	May Contain	-	-
Margarine	Compound ingredient	-	Must Not Contain	-	-
Bleached Wheat Flour	Ingredient	-	May Contain	Maximum	20
Egg	Ingredient	-	Must Contain	Maximum	15
Lemon	Ingredient	Zest	Must Contain	Minimum	5

Supplier Ingredients Tab

The **Supplier Ingredients Tab**, while again providing a clean layout for sample development, also has the Specified Ingredient Side Panel that displays the customers recipe specification. This provides for easy checks and cross references while creating the sample recipe. Additionally, each time an ingredient is added to or deleted from the sample recipe, it is validated in real time against the customer recipe specification, which displays in the Specified Ingredient Side Panel.

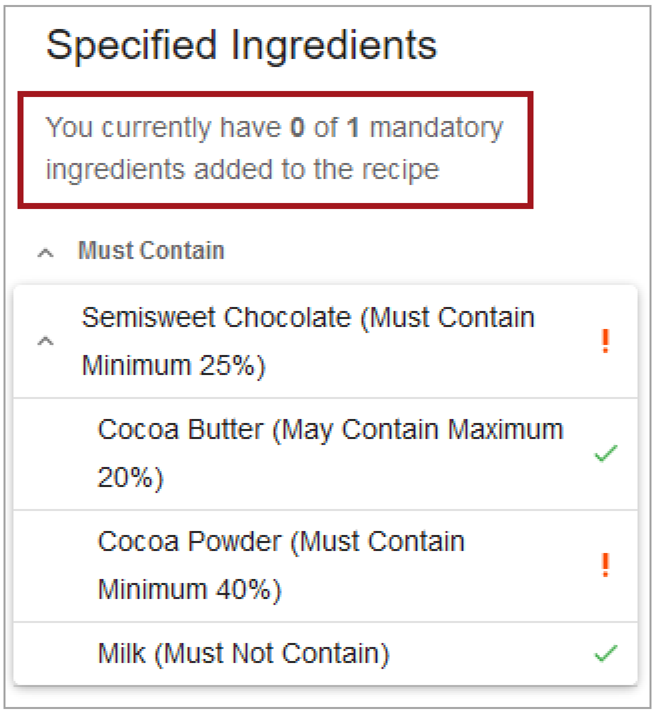
The Specified Ingredient Side Panel appears on the right hand side of the Supplier Ingredients Tab page. This panel can expand or retract according to user needs by clicking on the clipboard icon, and automatically expands when an ingredient is changed or added to the supplier recipe. When expanded, the specifications and guidelines for the product's recipe display.



Specified Ingredients Side Panel Key Indicators

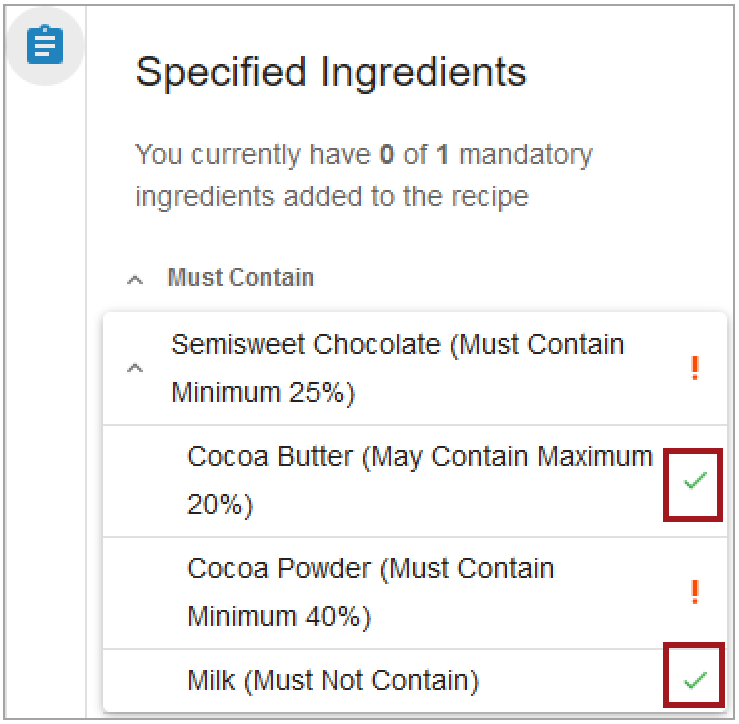
In the Specified Ingredients Side Panel, key indicators display to help suppliers create a recipe in accordance to the customer guidelines. These key indicators change in accordance to the automatic validations that occur each time an ingredient, additive, or compound ingredient is added, changed, or deleted from the supplier's sample recipe:

- Subtext tells the supplier how many 'Mandatory' / 'Must Contain' ingredients are added to the supplier's recipe.

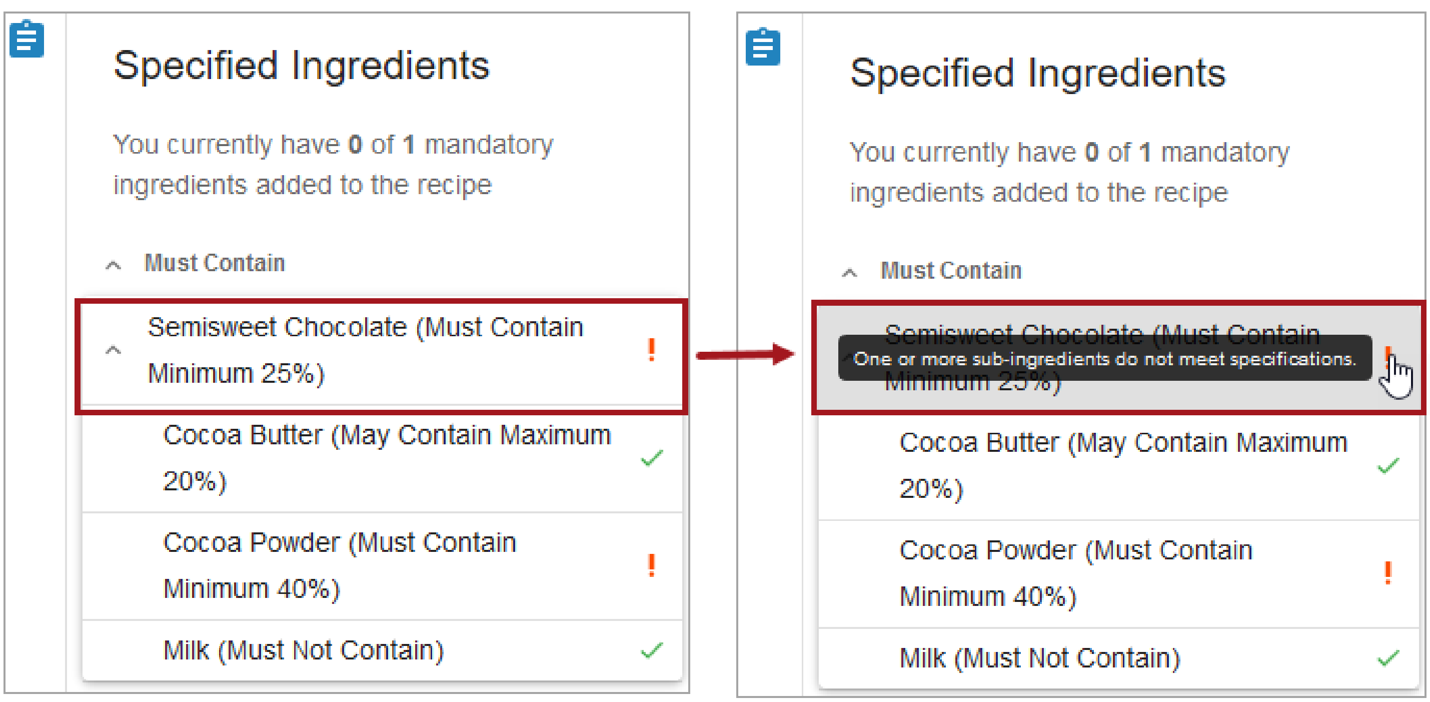


> **Note:** If a 'Must Contain' ingredient is specified without any precision and/or quantity, it will be counted when the supplier has added the ingredient in any quantity.

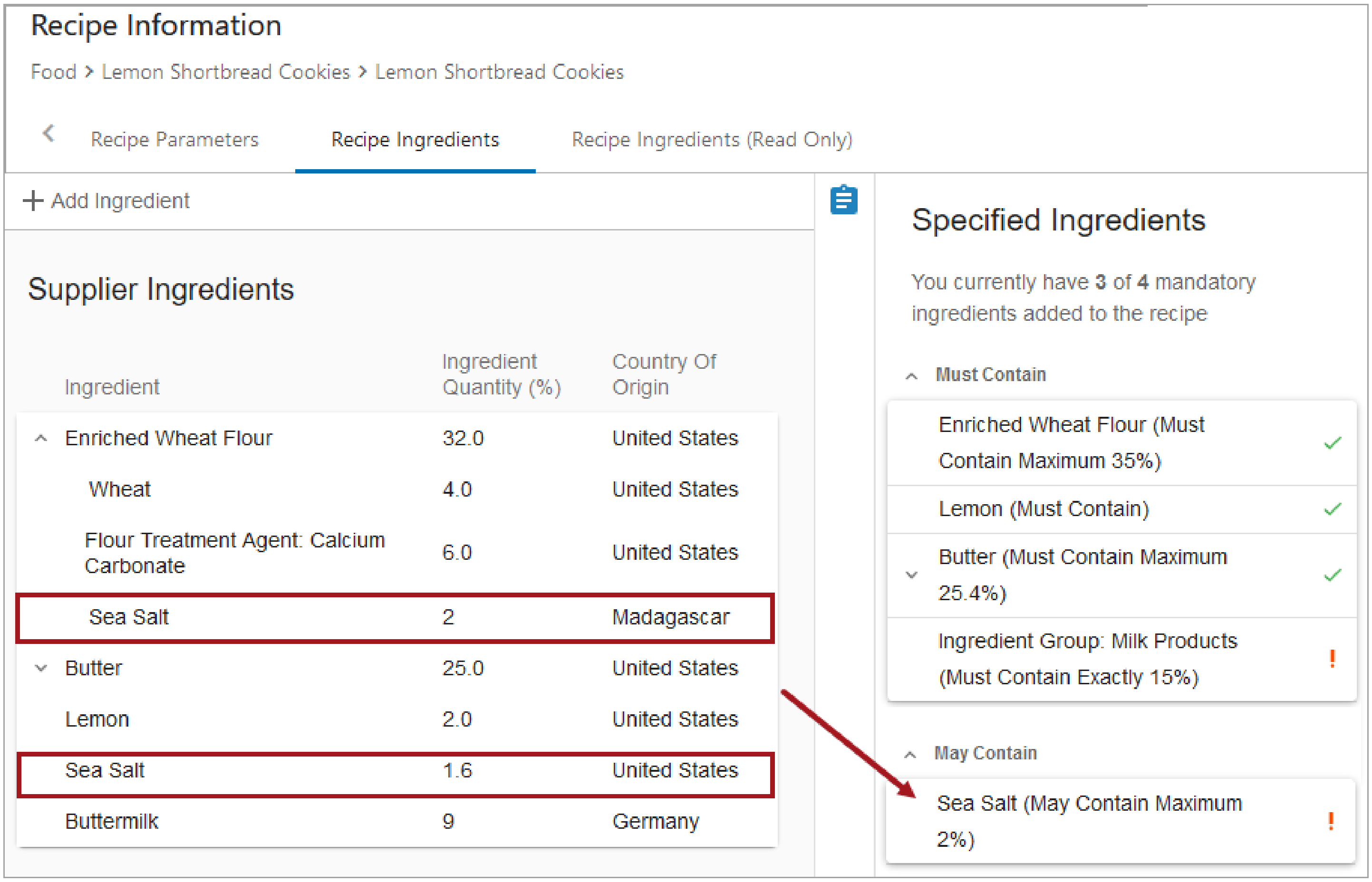
- A checkmark appears next to ingredients, ingredient groups, additives, and compound ingredients that comply with the customer recipe specification.



- Exclamation points appear next to any ingredients, ingredient groups, additives, or compound ingredients that are required by the customer but are missing from the supplier recipe, or have been added by the supplier but do not comply with the customer specification. For compound ingredients, hovering the mouse over the exclamation point provides further detail as to what is not compliant.

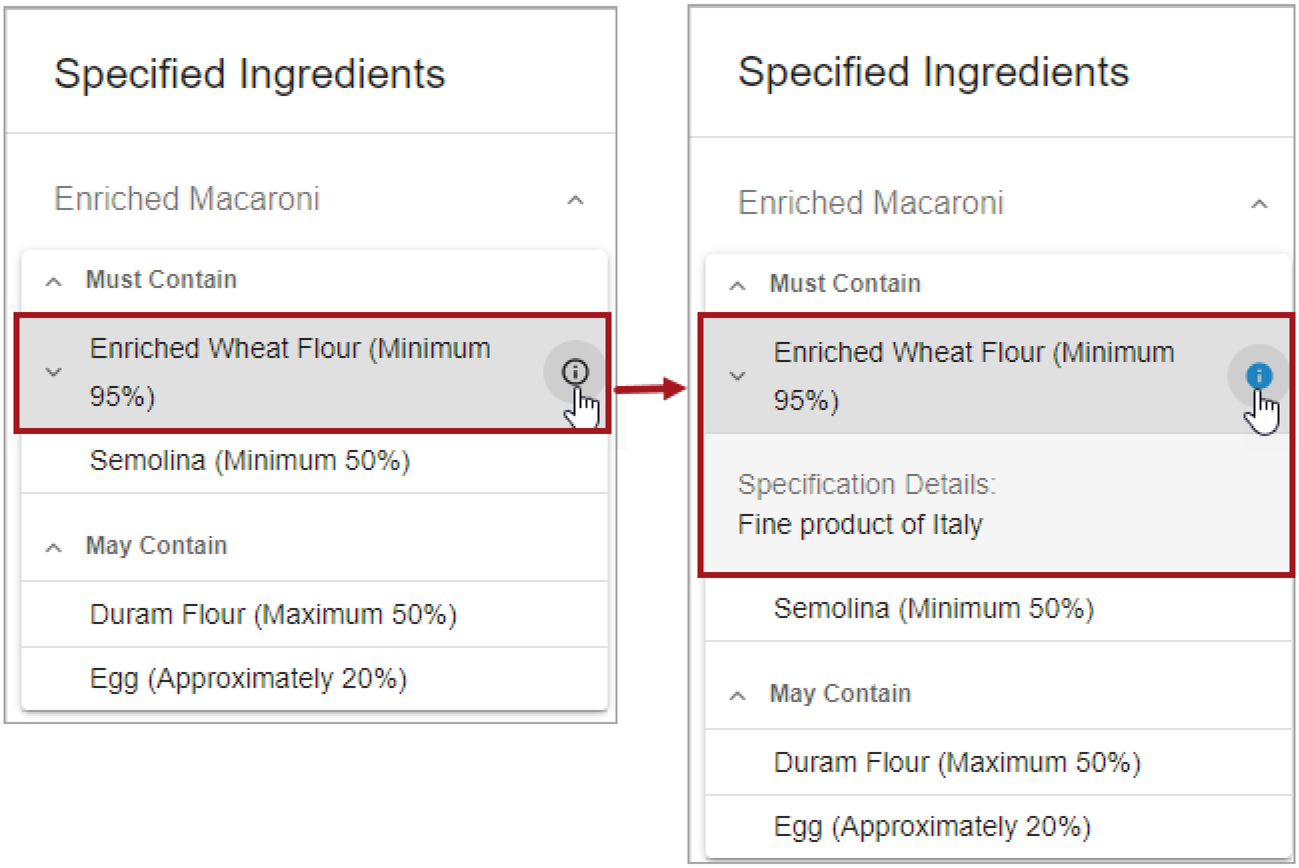


For compound ingredients, this also includes the evaluation of all sub-ingredients, which are counted towards the total specified quantity in the recipe specification. For example, if 'sea salt' is used as a main ingredient but is also part of a sub-ingredient, the automatic validation will ensure that the total amount of sea salt is acceptable when measured against the recipe specification. If the recipe specification is not met, such as too much sea salt in the recipe sample, a warning will display.

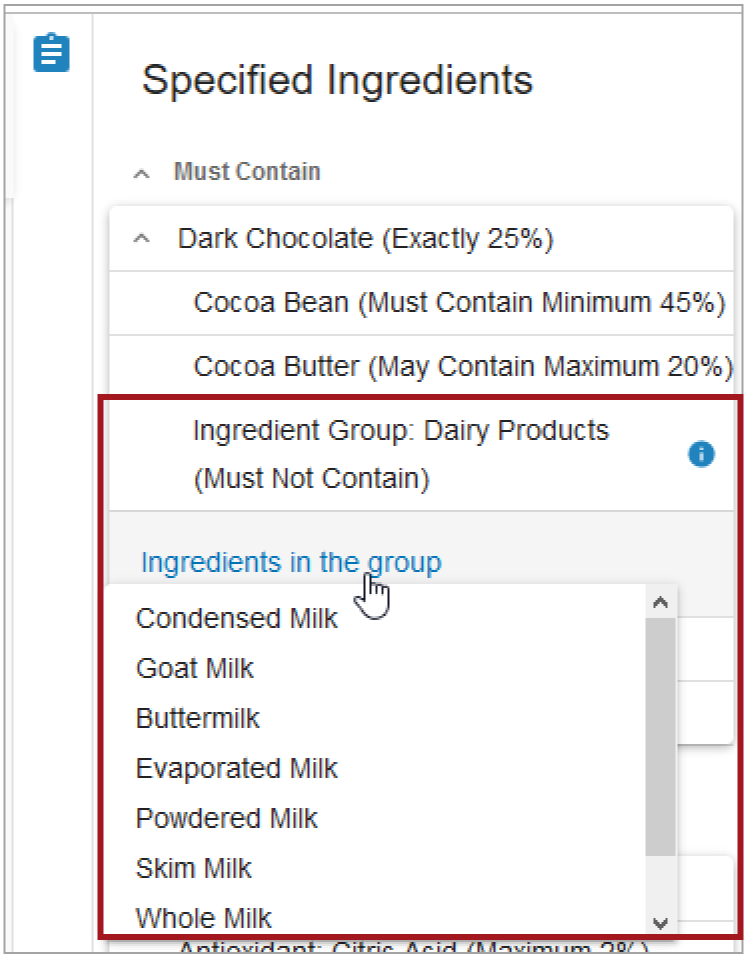


Note: For approximate amount allowances of an ingredient, an exclamation point will notify if the added ingredient is 10% higher or lower than the approximate amount indicated in the specification recipe.

- If the mouse is hovered over an ingredient, additive, or compound ingredient and an 'i' appears, it indicates that there is more information to be viewed. Clicking on the 'i' displays the additional information.



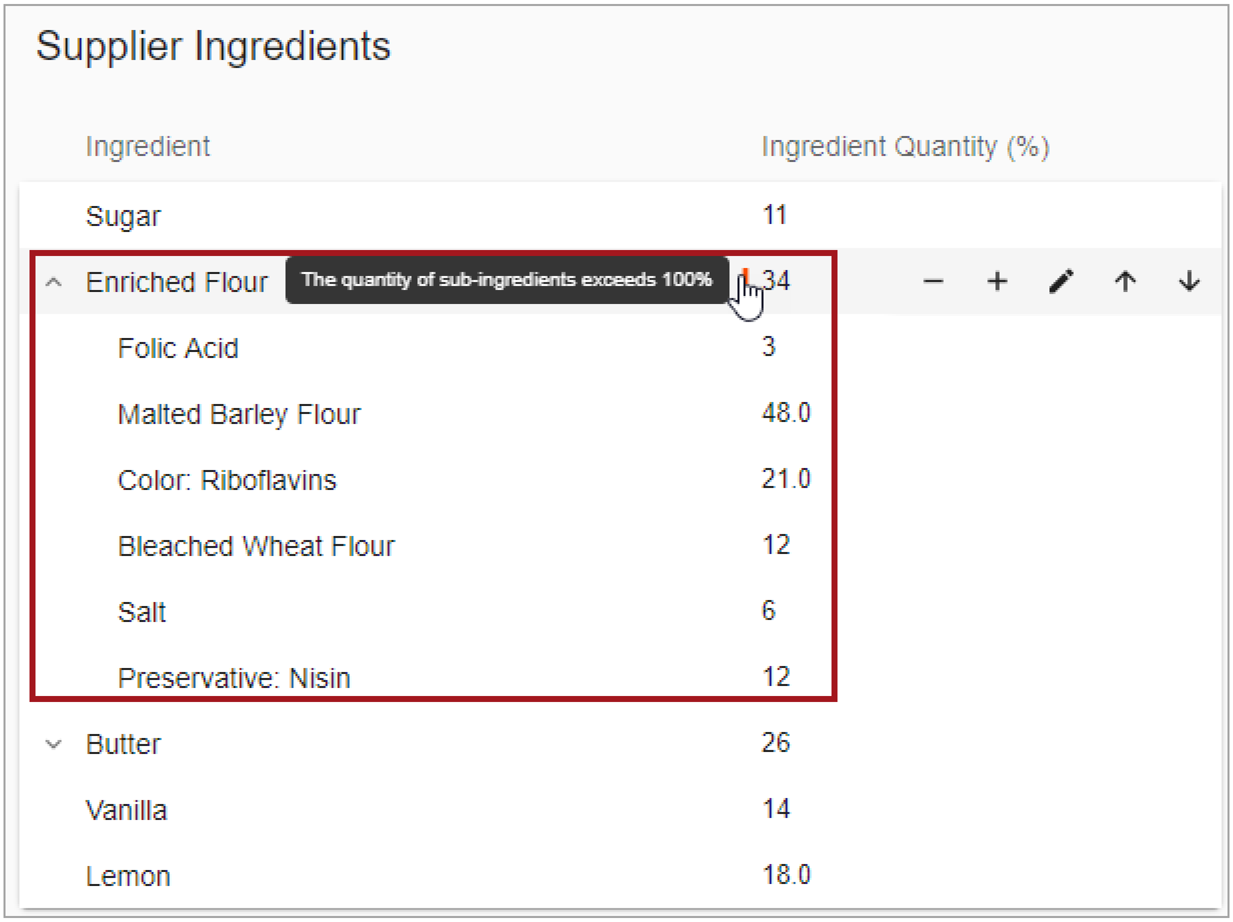
- When an ingredient group is listed in the Specified Ingredients Side Panel suppliers can view the ingredients in the group by clicking on the information icon and then clicking 'Ingredients in the group.'



Recipe Canvas Key Indicators

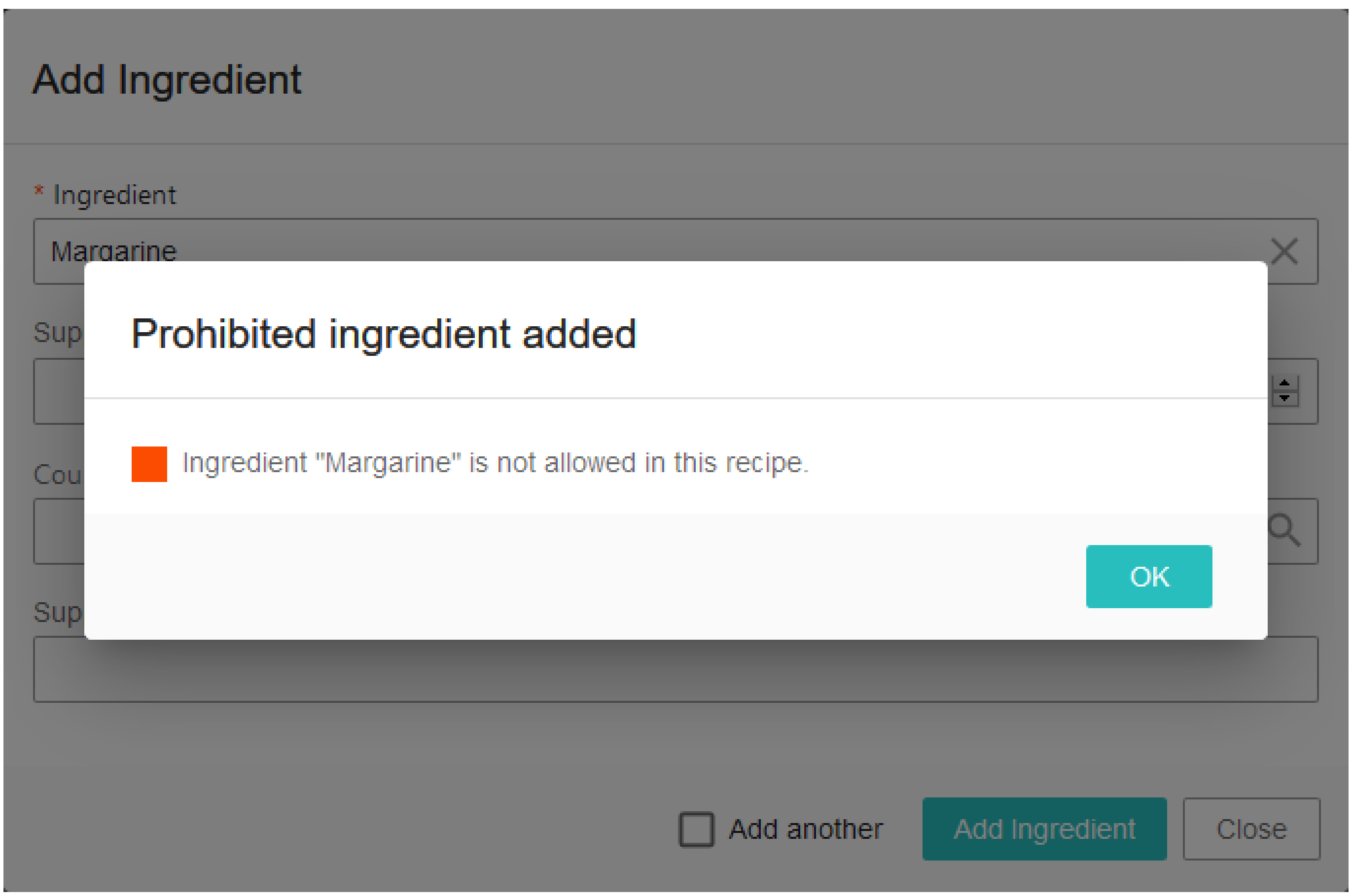
In addition to these key indicators in the Specification Side Panel, there are also additional key indicators that appear on the recipe canvas that the supplier receives as they create the actual sample recipe. Again, these key indicators change in accordance to the automatic validations that occur each time an ingredient, additive, or compound ingredient is added, changed, or deleted from the supplier's sample recipe.

- An exclamation point displays next to a compound ingredient if its sub-ingredients exceed 100%, as compound ingredients are validated for completeness. For example, in the image below, a supplier on the Supplier Ingredients Tab is notified that the quantity of sub-ingredients added to the compound ingredient in the sample recipe exceeds 100%.



- An exclamation point displays if a compound ingredient has sub-ingredients with quantities that equal 100%, but there are additional ingredients without a quantity specified. In the example below, a customer is looking at the Compare Ingredients Tab and is notified when looking at this supplier recipe sample that there is an error in the designated compound ingredient.

- If a non-compliant ingredient, additive, or compound ingredient is added to a sample recipe, a warning message displays as it is being added.



Using the Specify and Supplier Ingredients Tabs

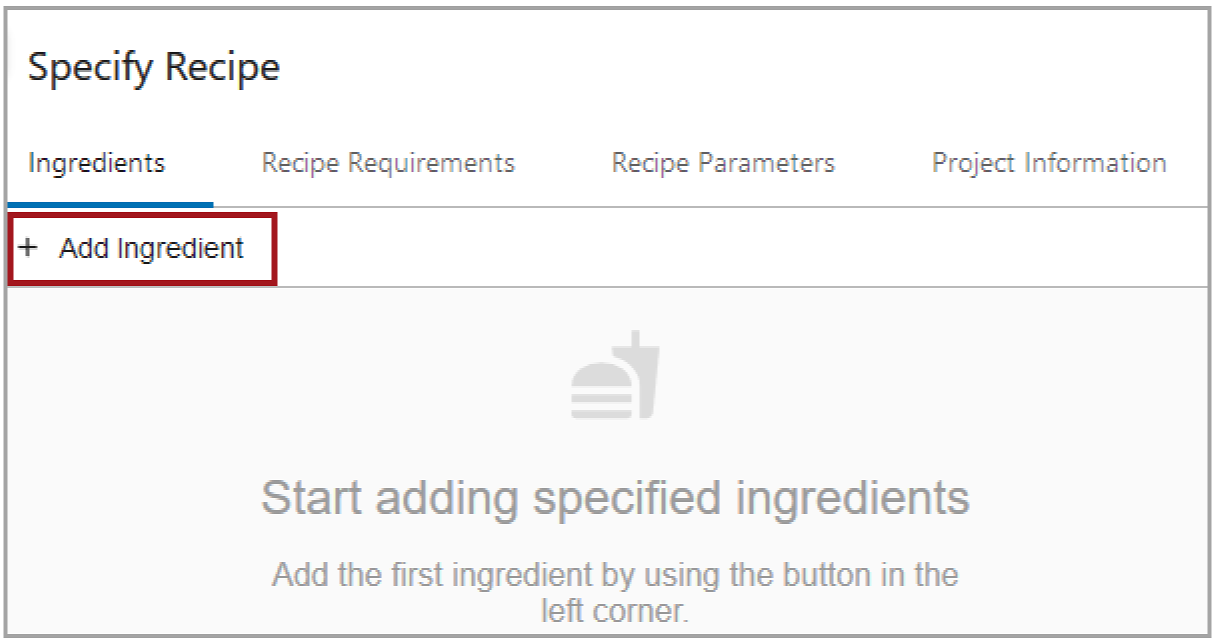
While the **Specify Ingredients Tab** is used on the customer Web UI and the **Supplier Ingredients Tab** is used in the supplier Web UI, the basic principle behind recipe creation for both of these tab pages is identical.

The example below uses the Specify Ingredients Tab to describe both the basic Specify Ingredients Tab and Supplier Ingredients Tab recipe creation functionality.

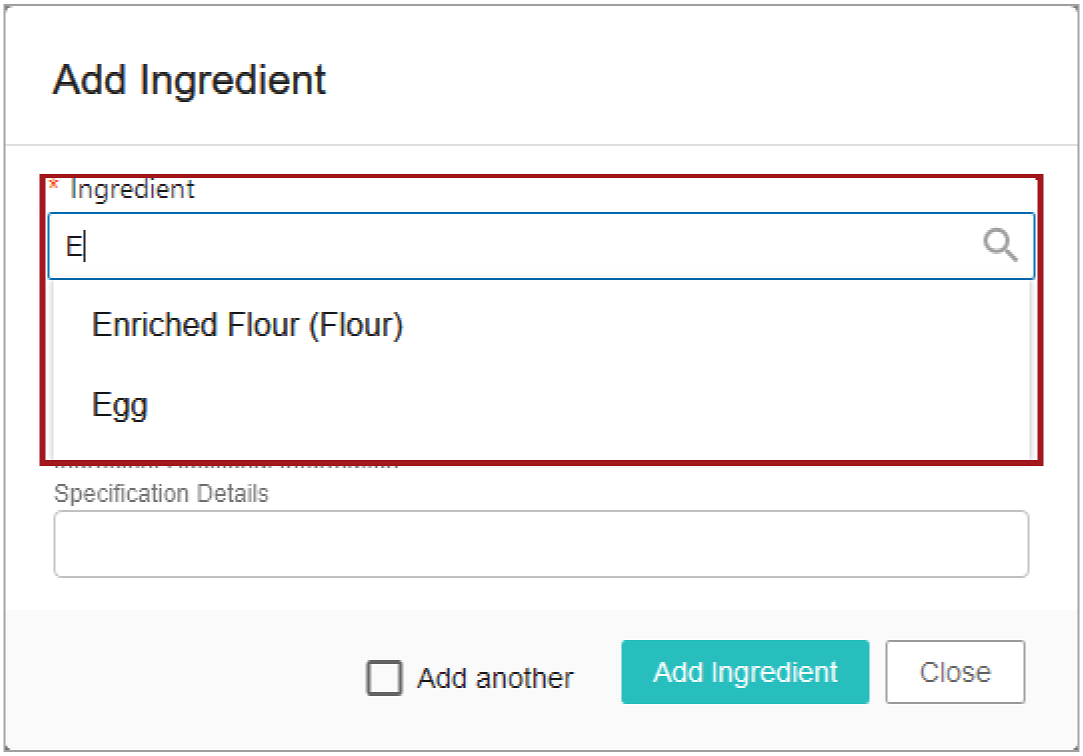
Note: All recipe specifications use ingredients, additives, and compound ingredients from the library on your current system.

To create a recipe specification:

1. Go to your Specify or Supplier Ingredients Tab, and click on **+ Add Ingredient**. In this example, the Specify Ingredients Tab is called 'Ingredients.'

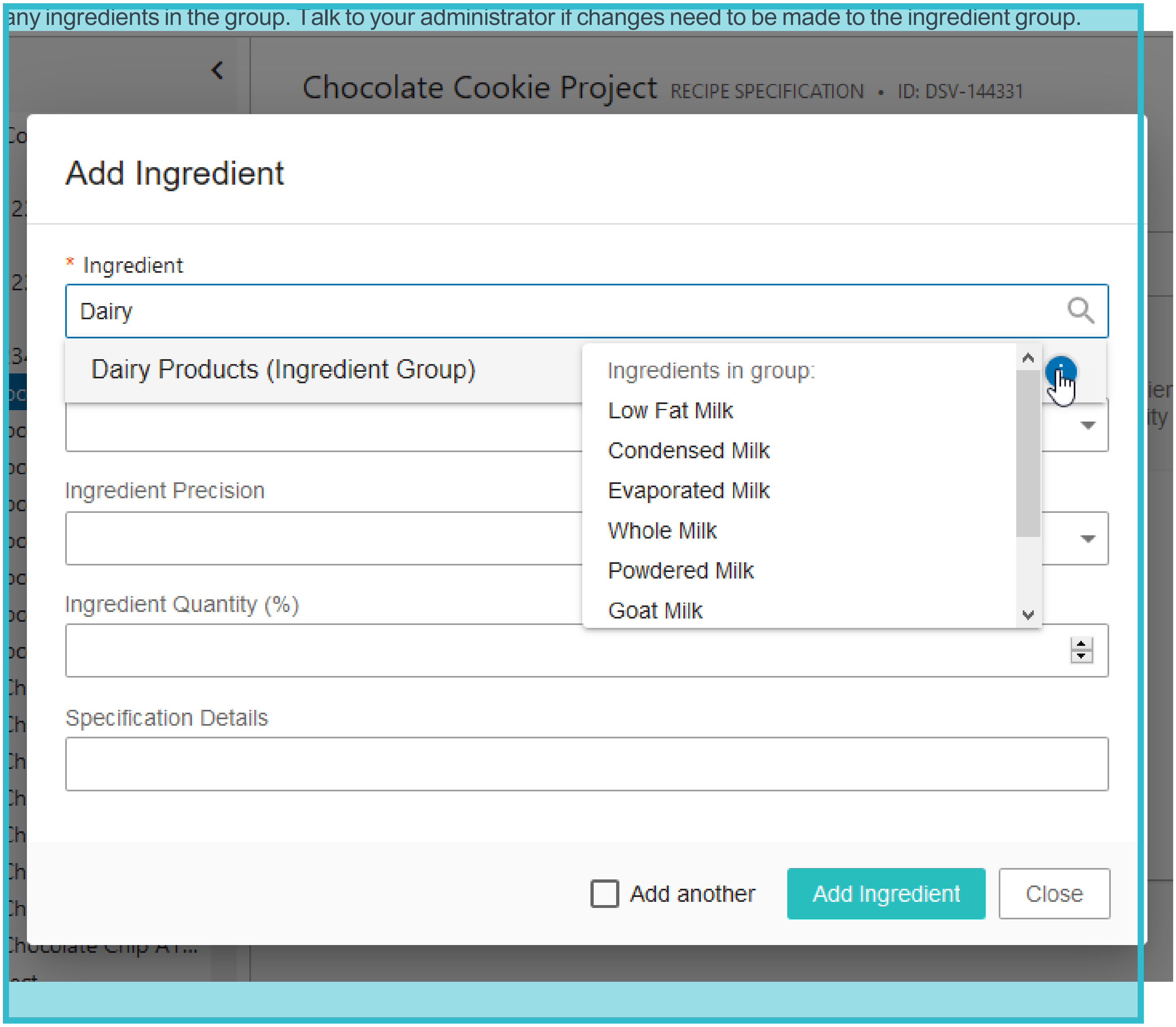


2. The **Add Ingredient** dialog box will display. Start to type the ingredient desired, and matching ingredients will appear, as well as any matching alternate names (if any) in parentheses. It is also possible to search for additives using E numbers or to add an additive class. Select the needed ingredient, additive, or additive class with the intended purpose from the typeahead list that appears.

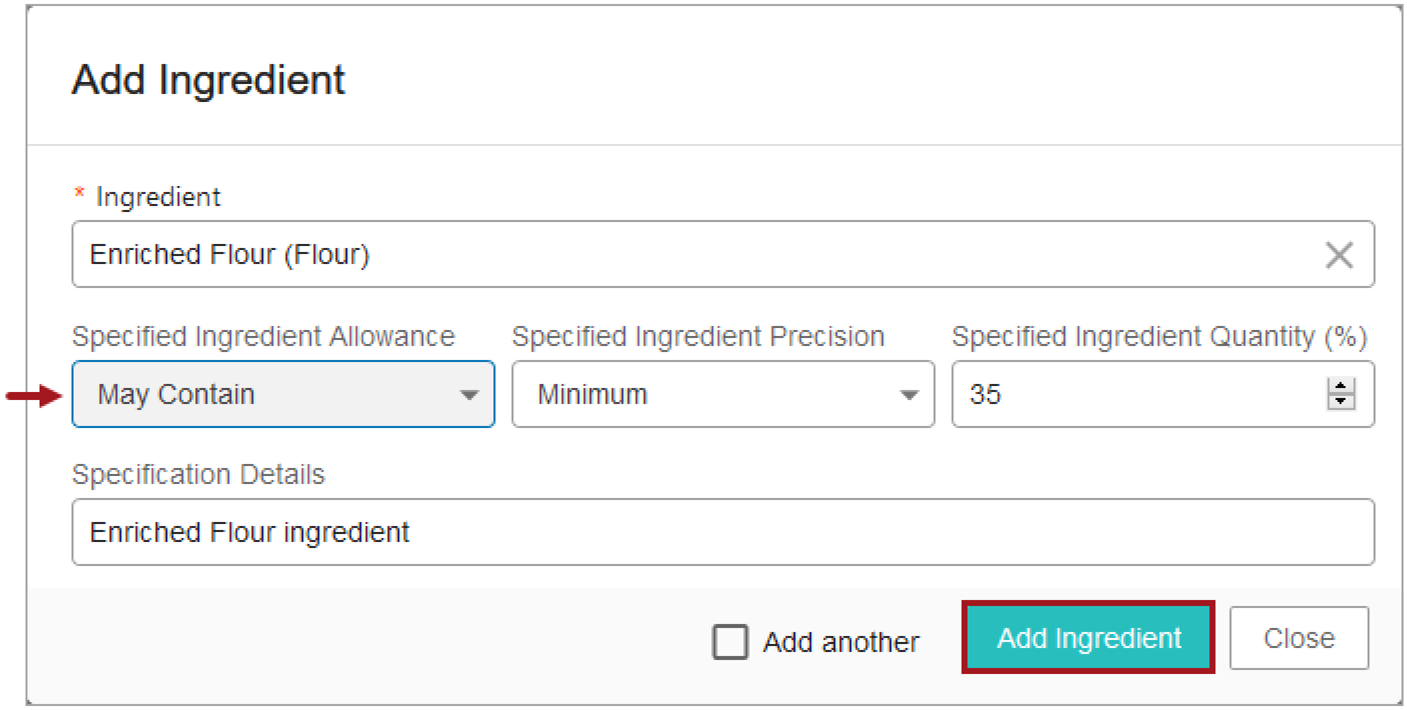


Note: Only ten options in the dropdown list will appear at a time even if more options are available in the library. The options will adjust as more letters are typed.

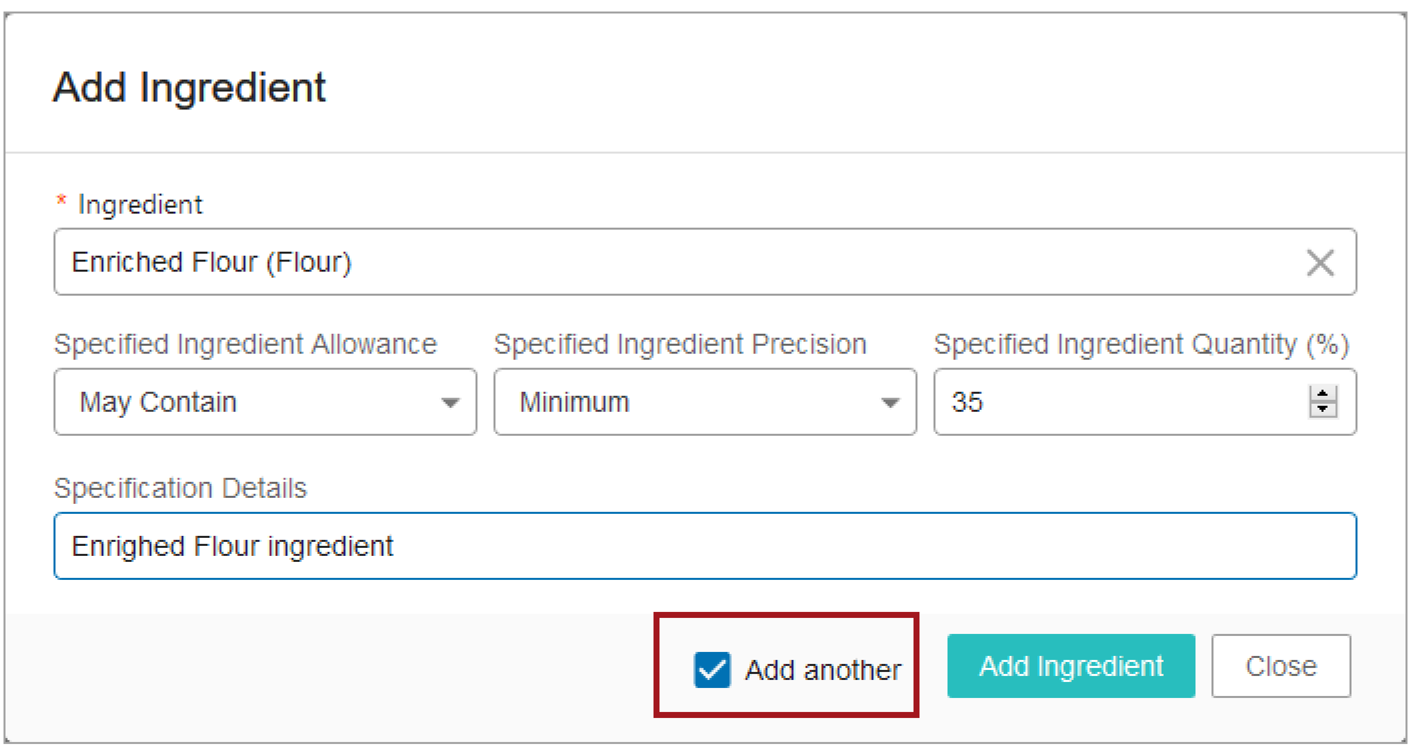
Note: Customers are able to also select an ingredient group on the Specify Ingredients Tab when creating their recipe specification for the supplier. When adding the group, they can specify the allowance, precision, and quantity for the group, and they can view what ingredients are part of the group, but they cannot change



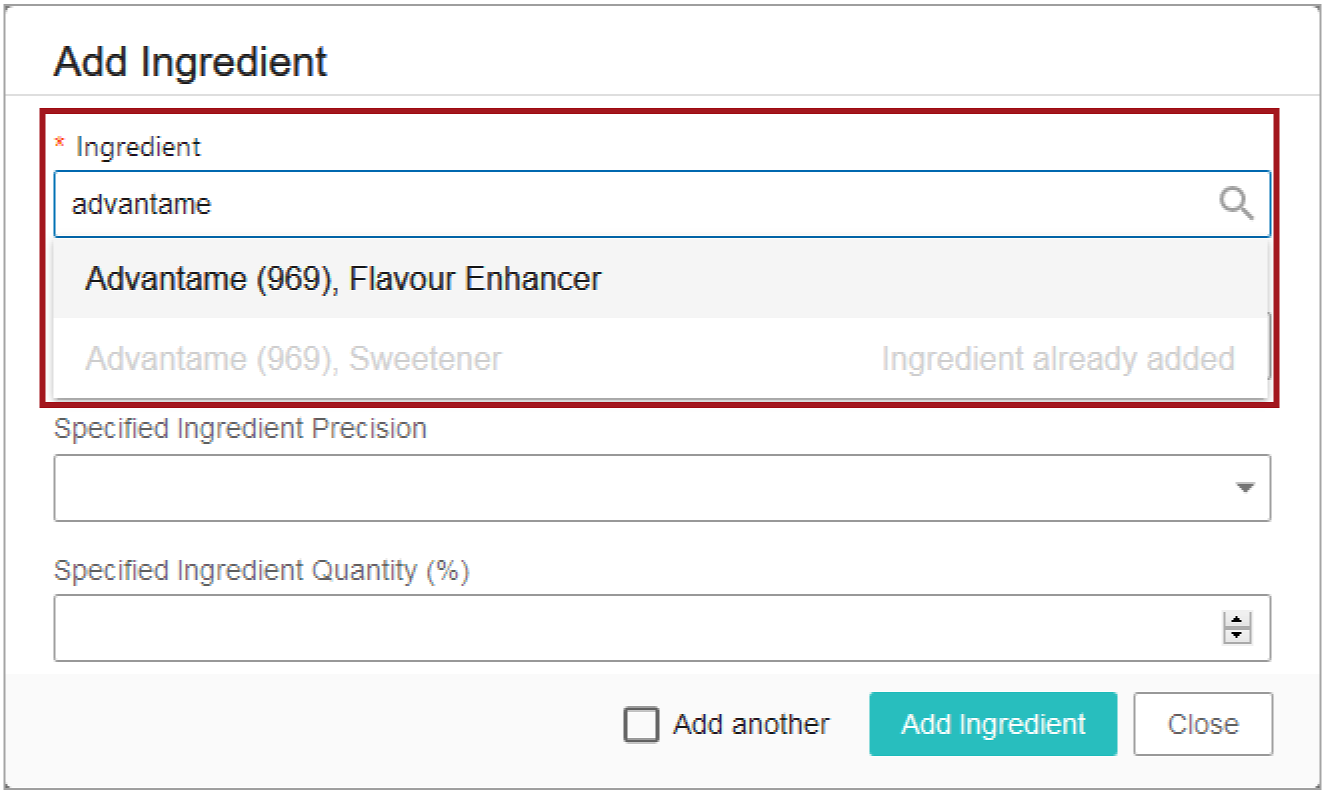
3. Once the ingredient is selected, specify the ingredient allowance, then fill in any other fields as necessary, and click **Add Ingredient**.



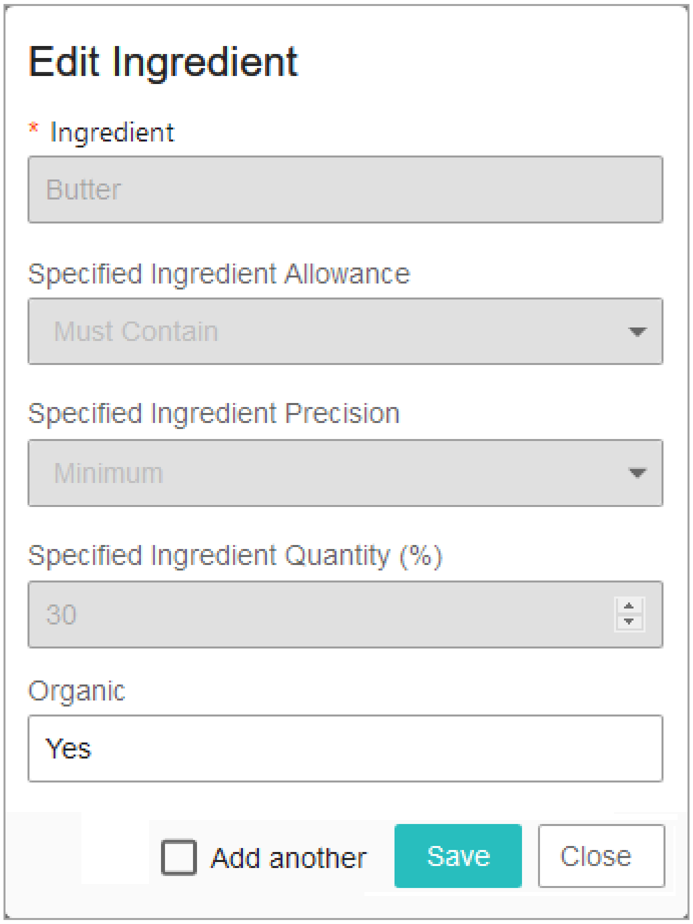
- To continue to add additional ingredients after submitting this one, check the '**Add another**' checkbox before clicking **Add Ingredient**. This enables another 'Add Ingredient' dialog box to populate after the current one is submitted. This feature will stay checked and keep populating additional **Add Ingredient** dialogs until it is unchecked.

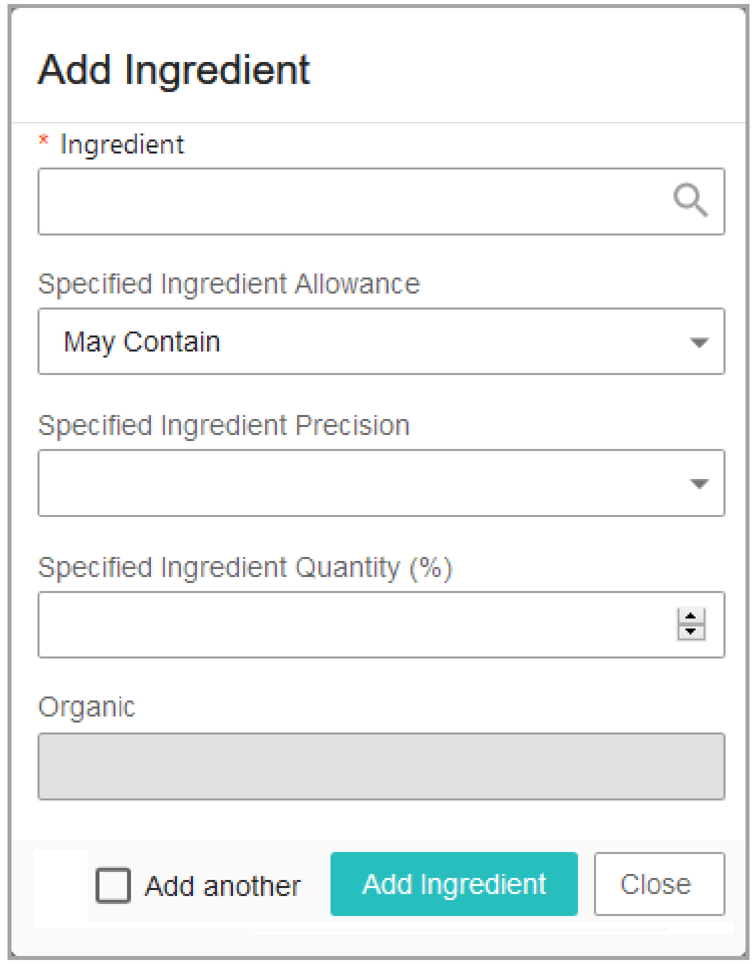


- If an ingredient, additive, or compound ingredient is already added to the recipe, it is not possible to add it again unless it is part of sub-ingredient list, or it is an additive being applied as part of a different additive class.

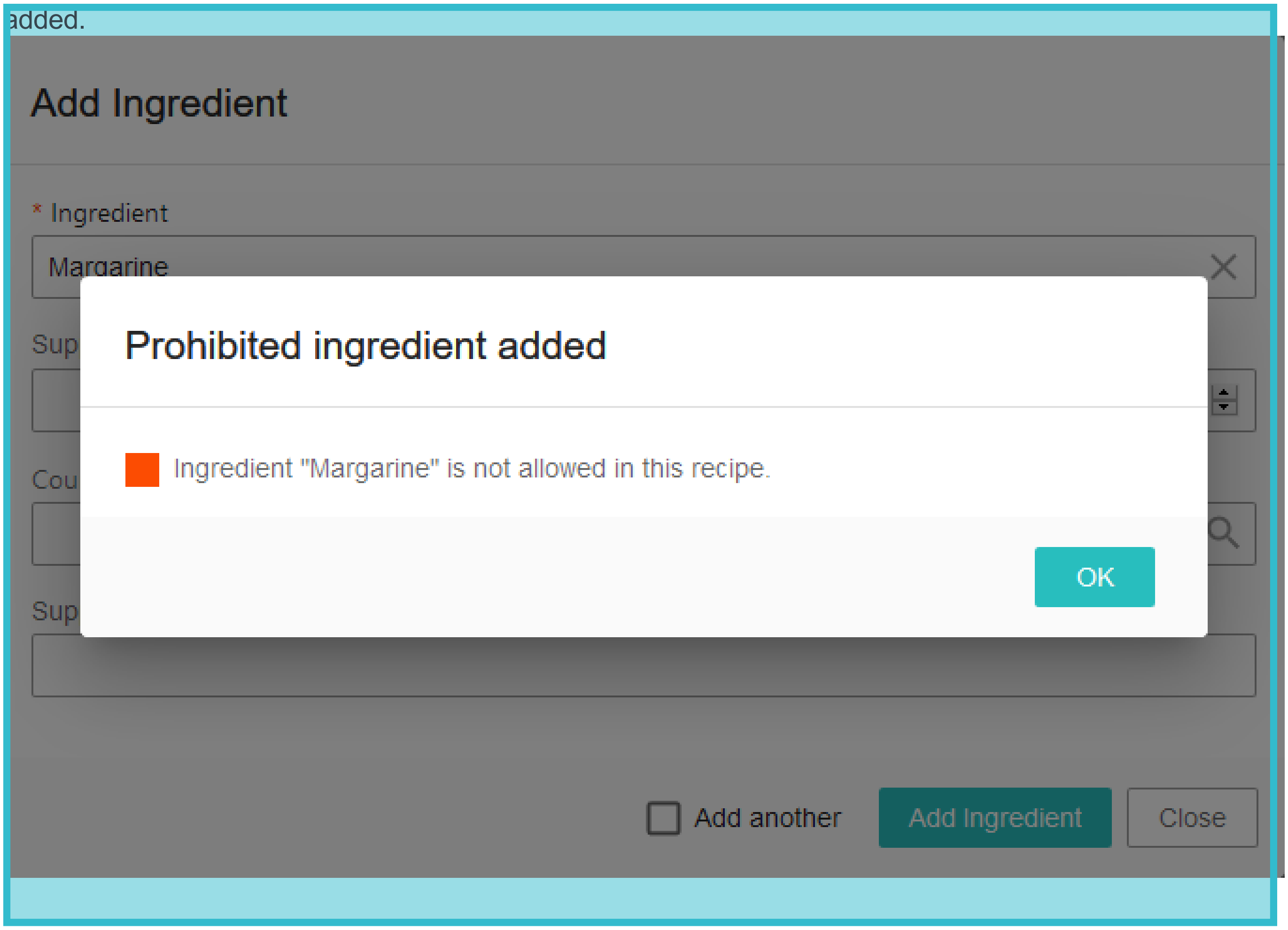


- If 'Read Only' is enabled or disabled, depending on configurations, there may be fields that are still editable or are strictly for viewing.

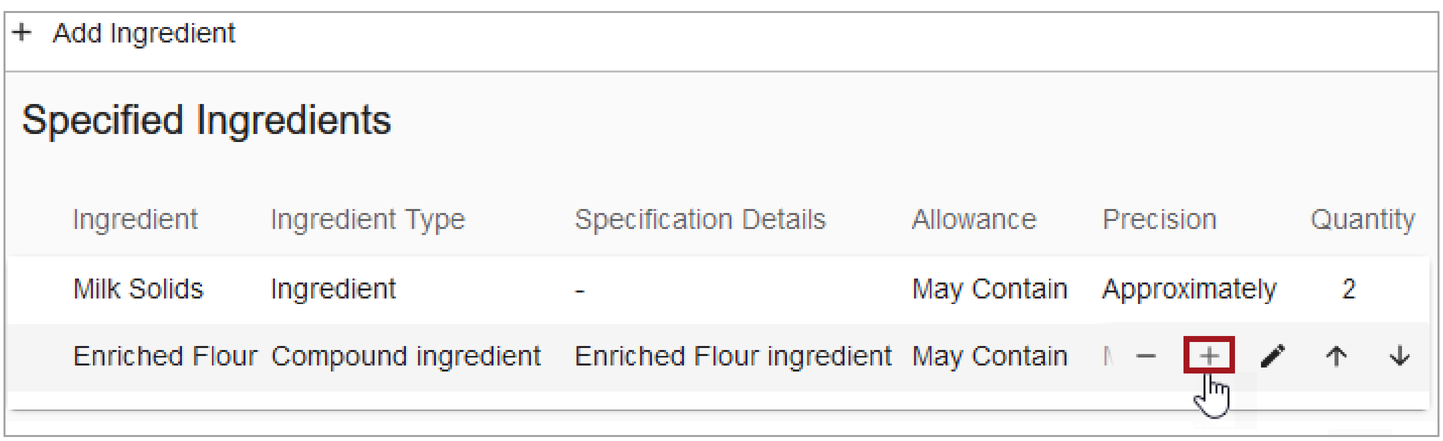




Note: For the Supplier Tab only, should a supplier add a non-compliant ingredient, compound ingredient, or additive, a warning message displays telling the supplier that it is not advised, though it is still able to be

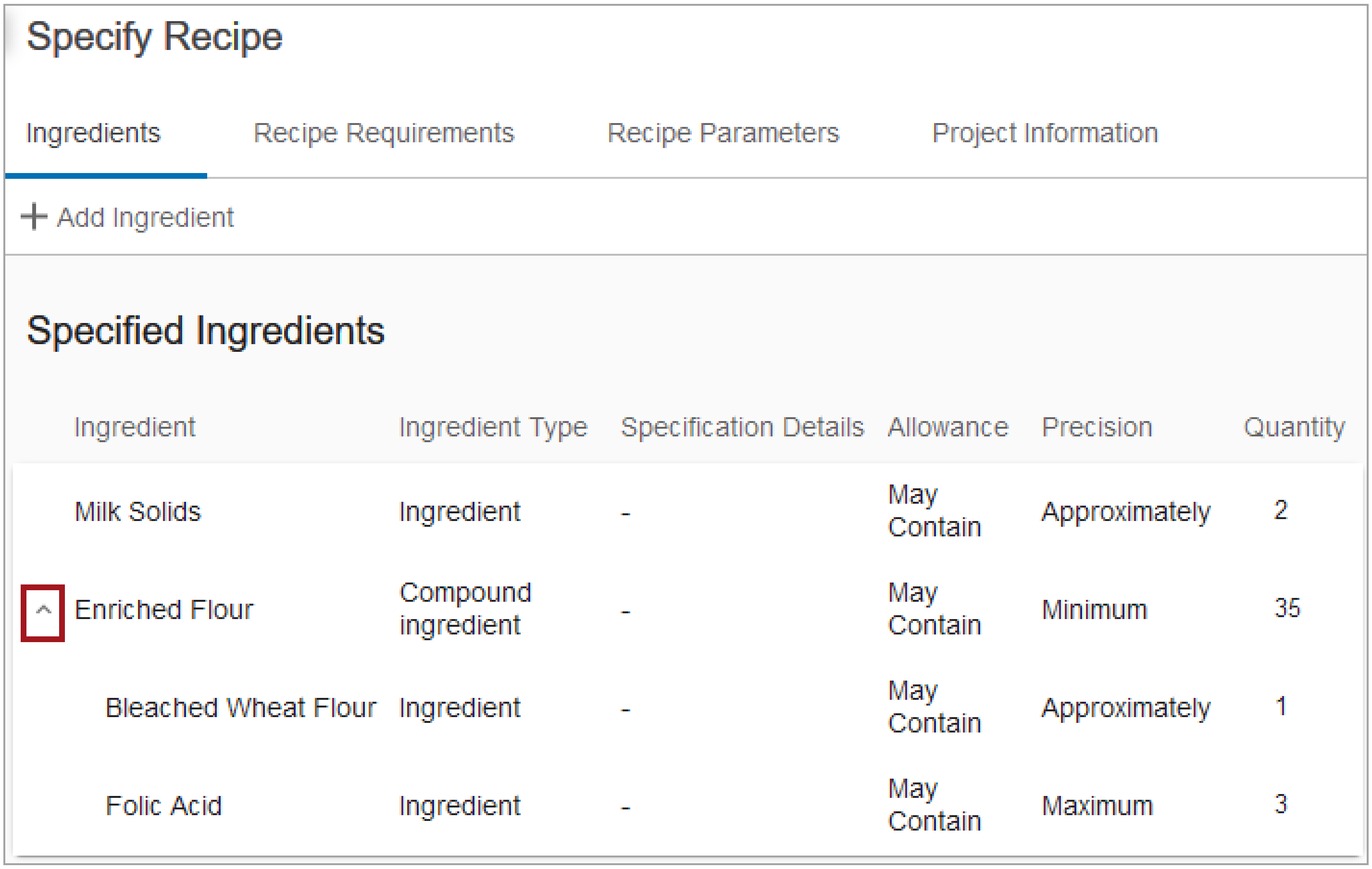


4. Continue to add as many ingredients to the recipe specification as needed. If an ingredient added is a compound ingredient, you will be able to add sub-ingredients. To do so, hover your mouse over the compound ingredient and select the plus sign, + .



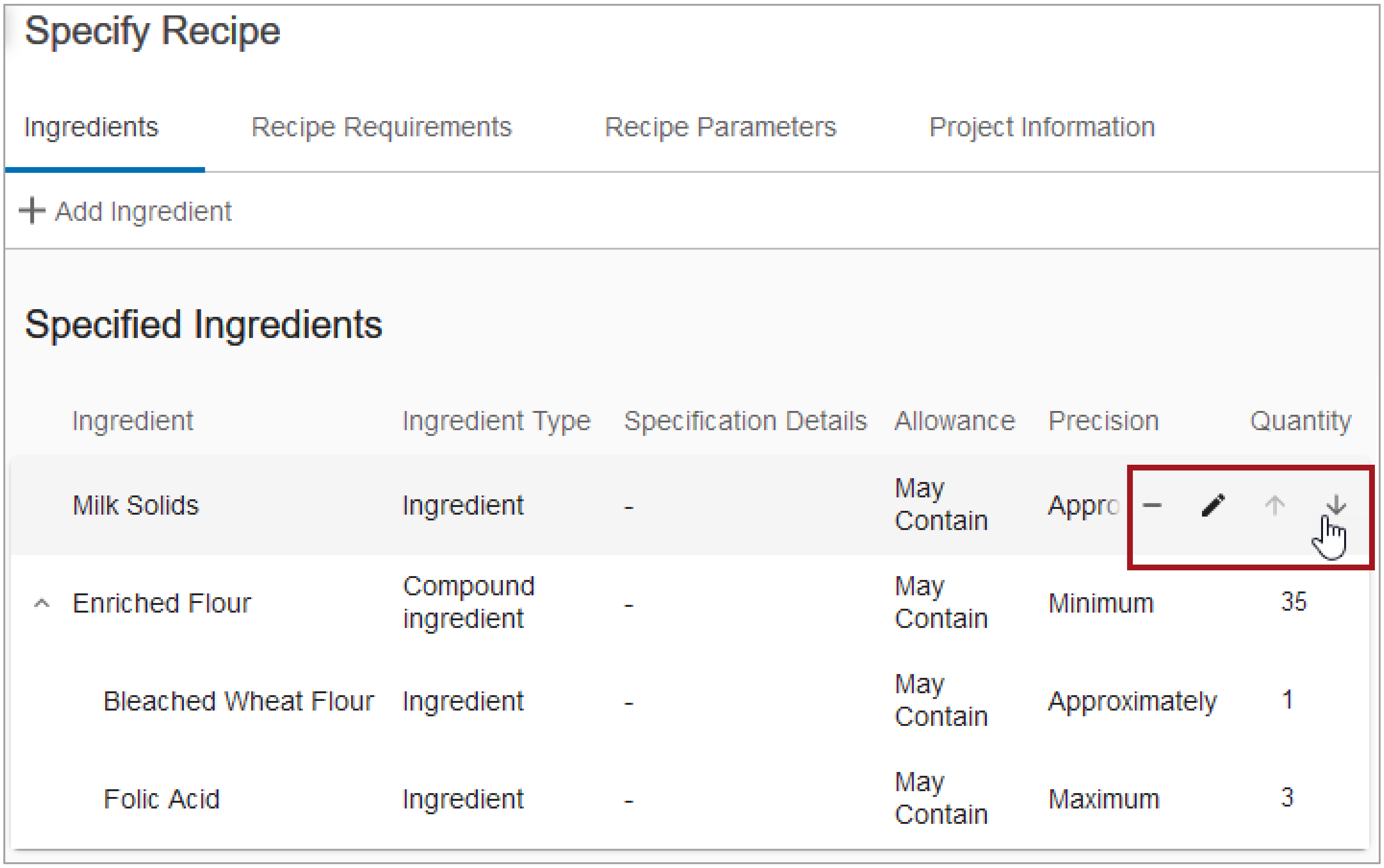
> **Note:** The plus sign will only appear if the ingredient added to the recipe specification is a compound ingredient.

Once a sub-ingredient or additive has been added to a compound ingredient, clicking on the arrow next to the compound ingredient will display all added sub-ingredients.



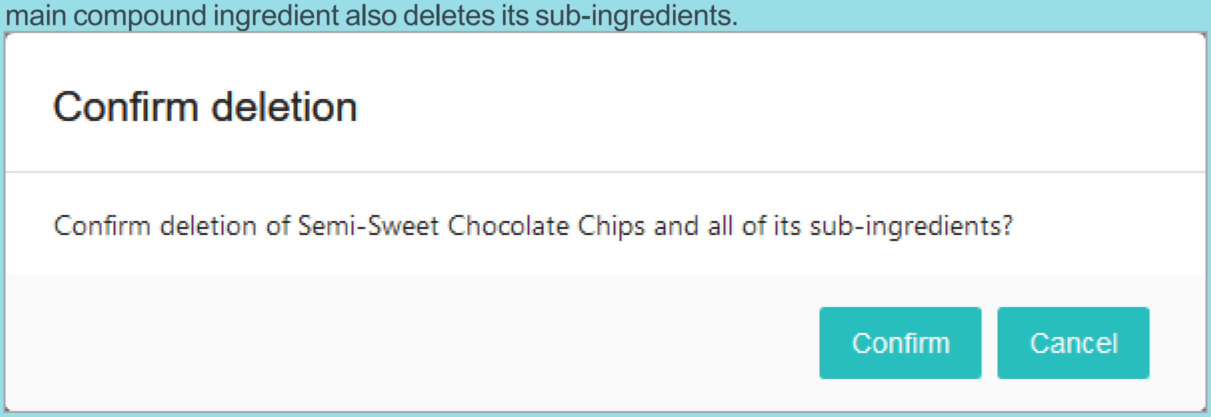
Ingredient	Ingredient Type	Specification Details	Allowance	Precision	Quantity
Milk Solids	Ingredient	-	May Contain	Approximately	2
Enriched Flour	Compound ingredient	-	May Contain	Minimum	35
Bleached Wheat Flour	Ingredient	-	May Contain	Approximately	1
Folic Acid	Ingredient	-	May Contain	Maximum	3

5. After all ingredients, sub-ingredients, and additives have been added, you are able to do the following actions by hovering the mouse over an ingredient:



- Change the order of the ingredients in the recipe specification by clicking the up and down arrows, .
- Edit the ingredient information by clicking the pencil icon, .
- Delete an ingredient, or a compound ingredient and all of its sub-ingredients by clicking the negative sign, .

Note: A warning dialog will only display when deleting the compound ingredient because deleting the main compound ingredient also deletes its sub-ingredients.



Selecting and Comparing Supplier Samples

After suppliers have submitted their recipe or packaging requirements, you are able to select which supplier requirements to review when comparing recipes or packaging requirements. Depending on the setup, this may be done by clicking the '**Compare BOMs Action**,' on a Task List, by object type or workflow state mappings, or other methods.

Depending on what is selected—a recipe sample or packaging sample—the user will be directed to the appropriate compare tab(s).

Recipe Samples	Packaging Samples
• Compare Ingredients Tab • Compare Parameters Tab • Compare Requirements Tab	• Compare Requirements Tab

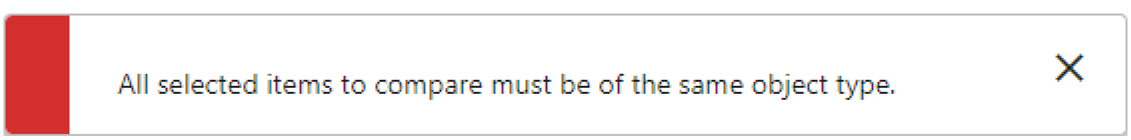
All selected samples must fall into one of the following cases:

- A composite sample related to the same composite specification
- Samples related to the same design specification variant

> **Note:** If the design specification variant is related to the composite specification then all related recipes for the selected suppliers display.

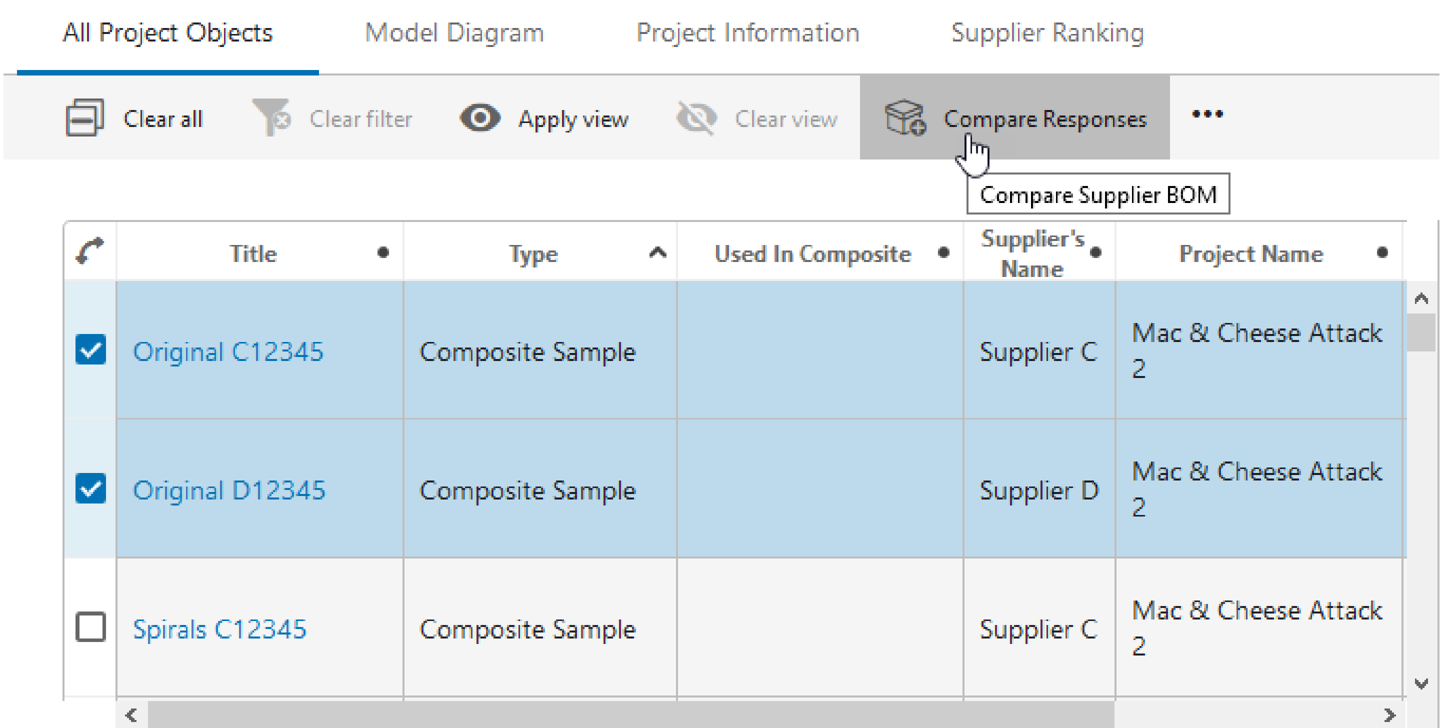
- Composite samples related to the same composite variant
- Packaging samples related to the same design specification packaging variant

If a supplier recipe or packaging sample was selected to be compared against an incompatible selection, an error message will appear. For example, if the samples selected are different object types, you might see the following message:

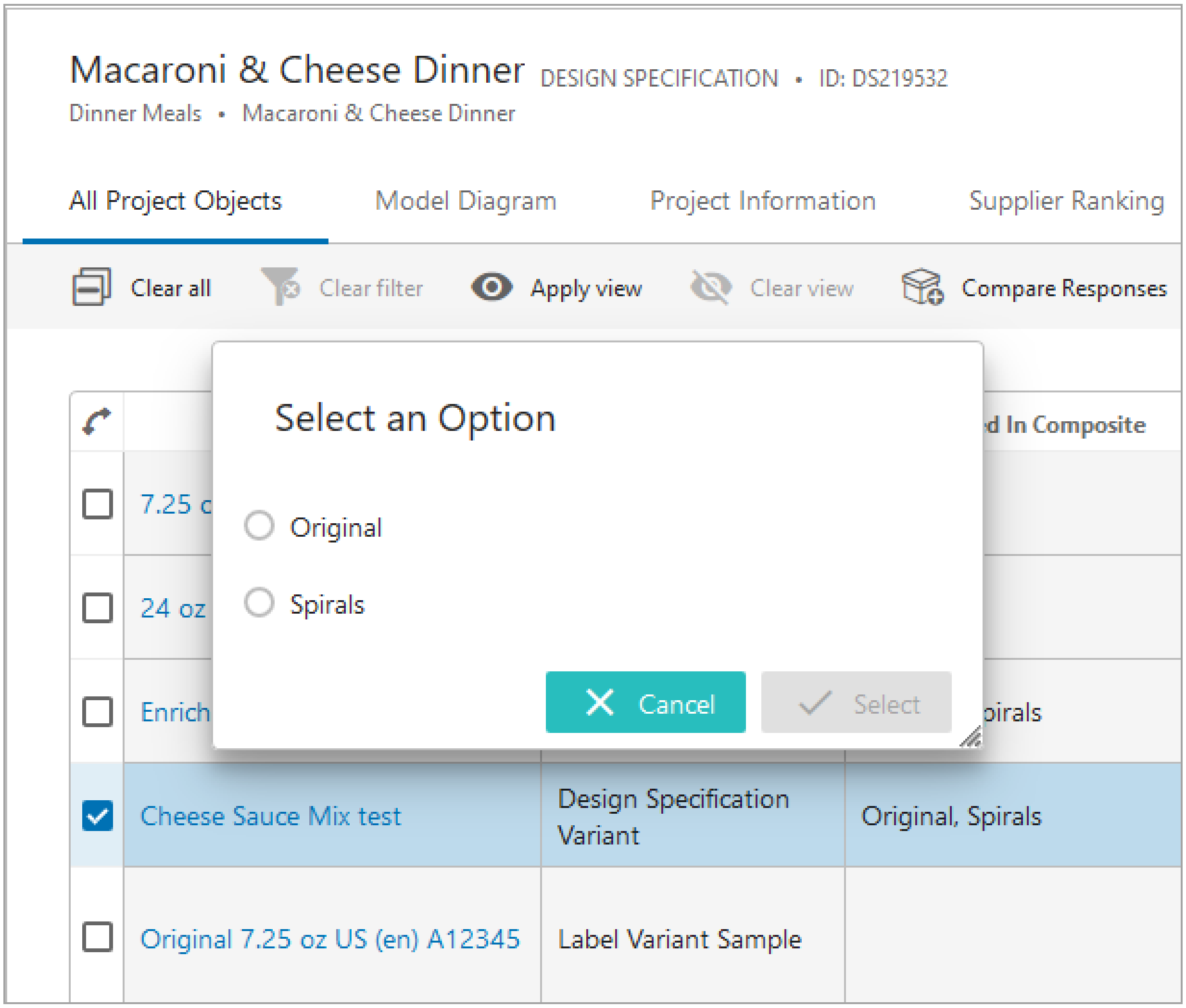


In the example below, recipe samples are compared against one another by selecting the '**Compare BOMs Action**' button. In this case, the action button is named 'Compare Responses,' to view the recipe's ingredients, parameters, and requirements.

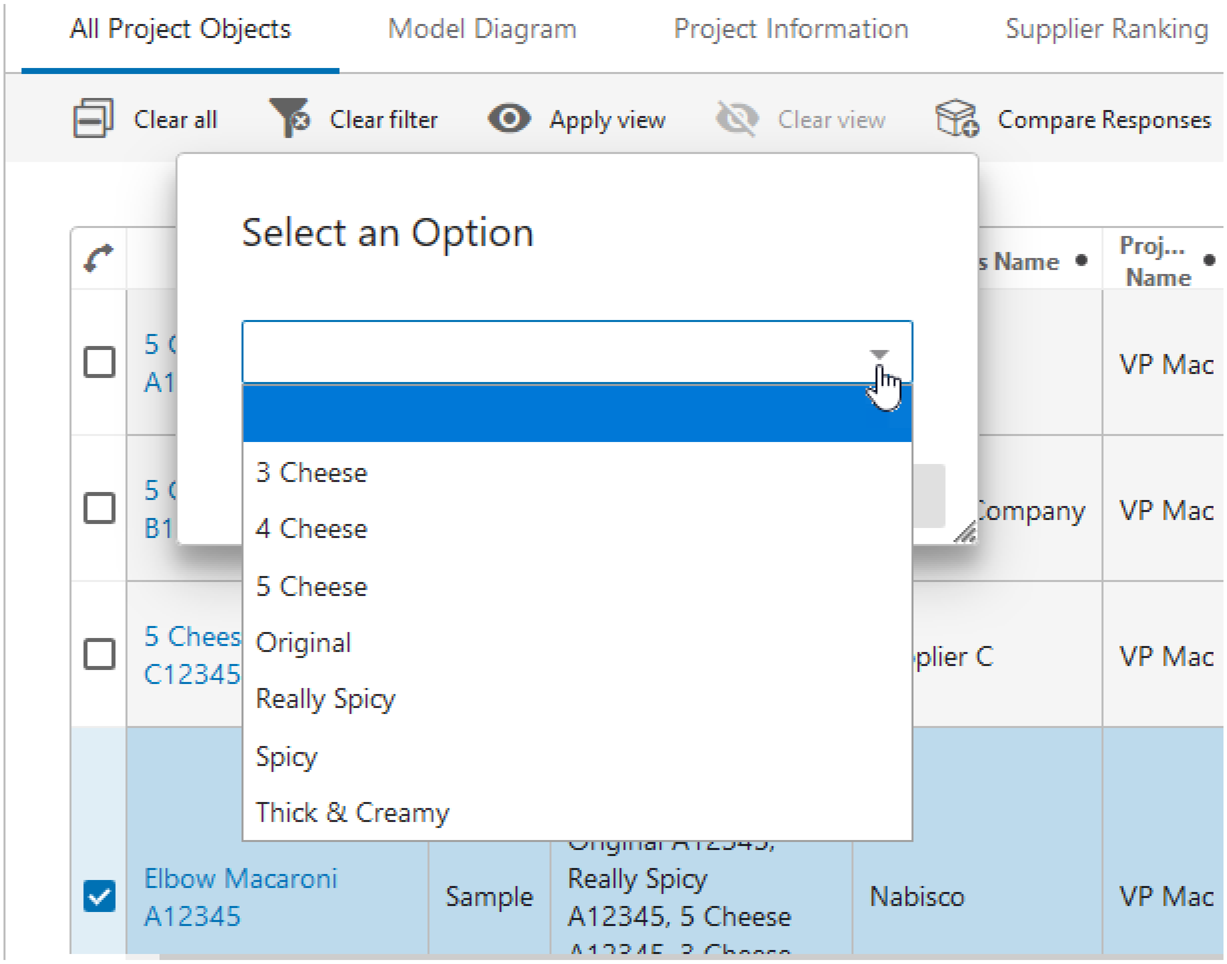
> **Note:** Depending on the setup of your Web UI, tables may look different than what is pictured below.



For composite products, if a particular recipe sample is used for more than one composite product, then a dialog will display asking the user to select which composite product they want to view. For example, if a cheese sauce is used in a macaroni and cheese box, but there are two versions of the noodle, one with spiral noodles and one with original noodles, the user would have to indicate which composite product they want to view.



If the sample is used in seven or more composite products, the dialog will provide a dropdown for the user to choose from. In this example, Elbow Macaroni is used in seven different composite products.



For more information on Node Details screens, see the **Node Details Screen** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

For more information on how to evaluate recipes or packaging samples, see the following topics:

- Compare Ingredients Tab
- Compare Parameters Tab
- Tabs for Comparing Requirements

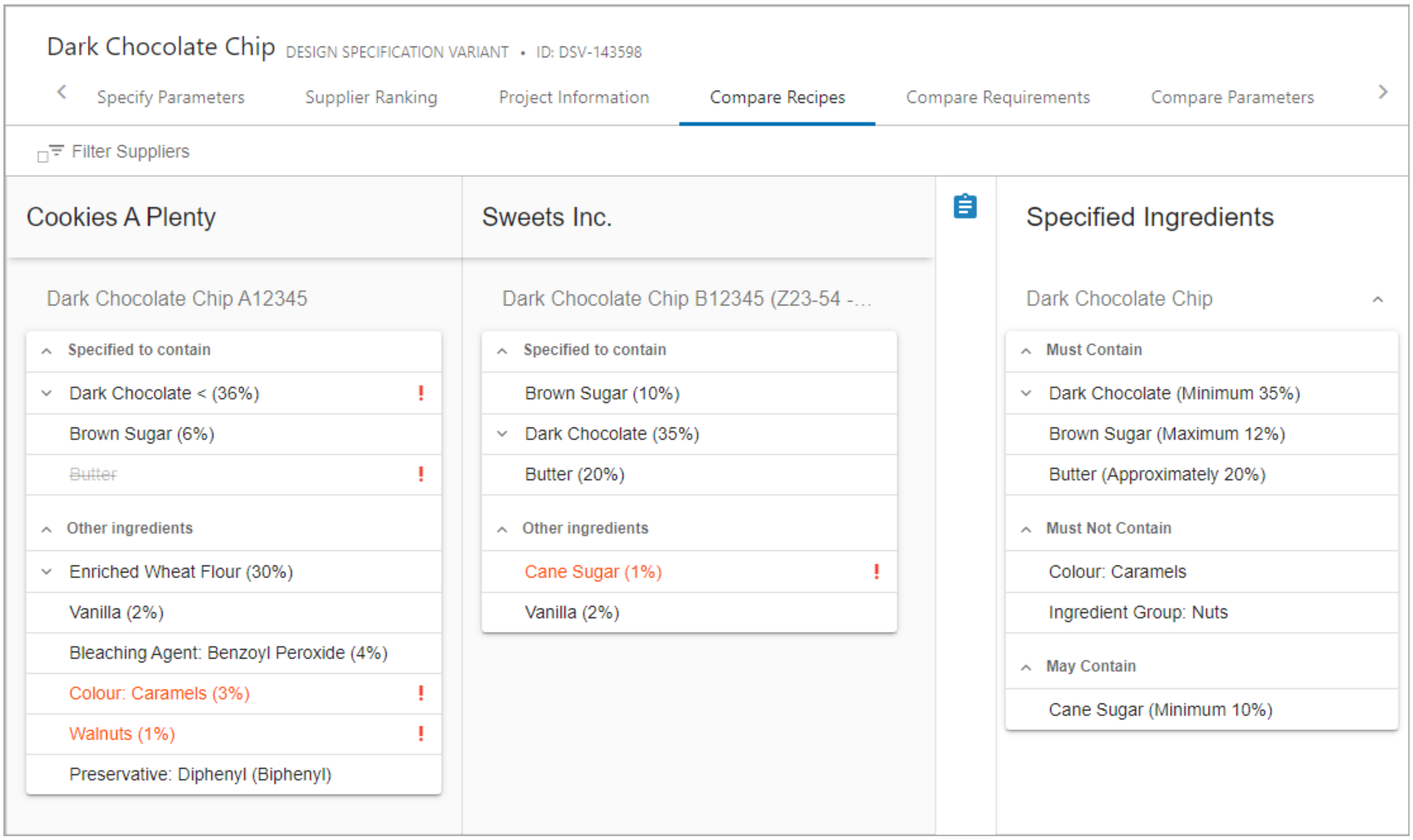
Note: If accessing a Compare Ingredients Tab, Compare Parameters Tab, or Compare Requirements Tab from a Task List, it is not possible to submit the viewed object type to a different step in a workflow. If the object type in a Task List is selected and viewed individually on a Node Details screen, the options to submit that object type to a different step in a workflow are still possible

Compare Ingredients Tab

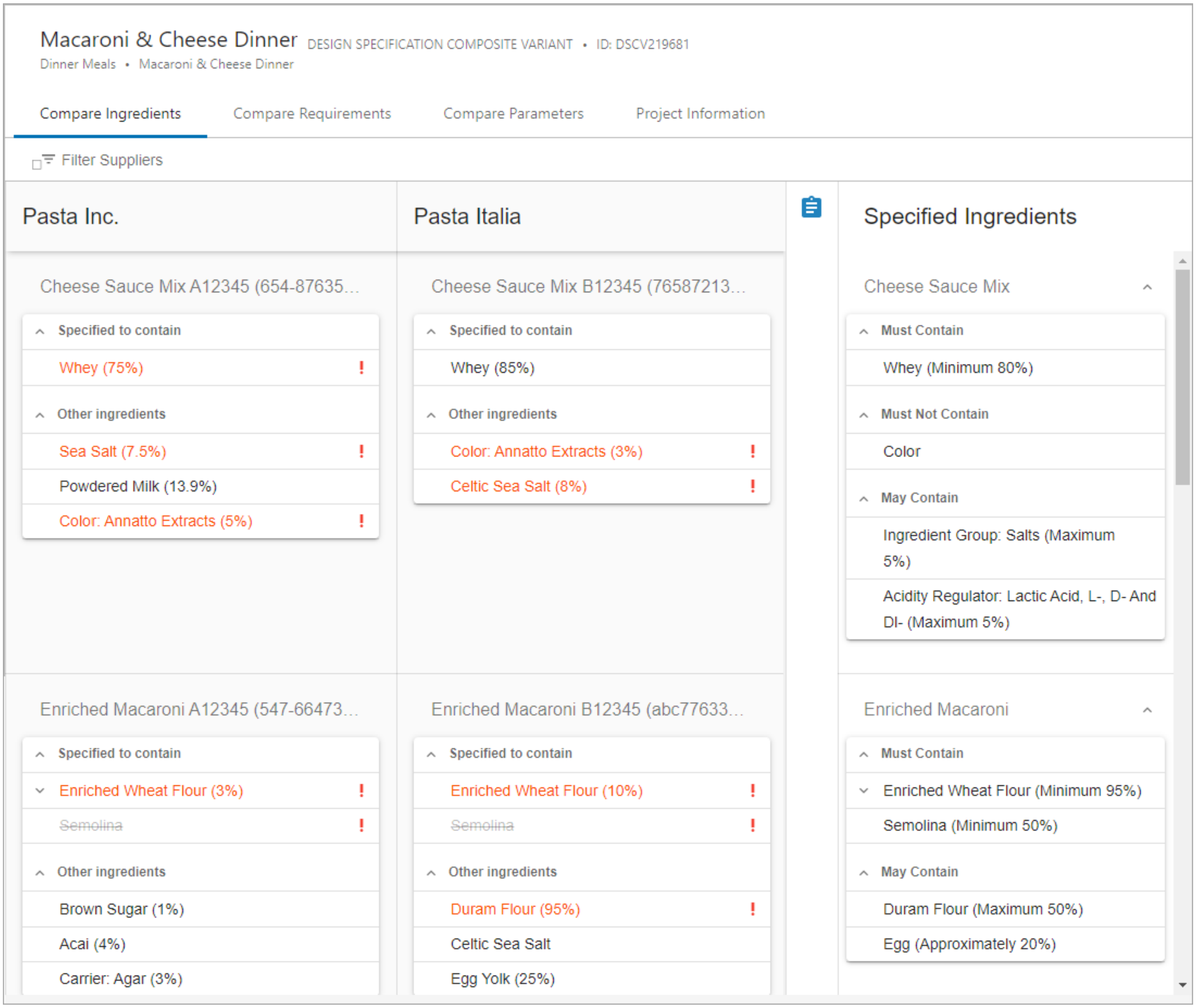
The Compare Ingredients Tab is a private label food tab. It displays the selected supplier's recipes for the variation being compared. This tab can display individual recipes as well as recipes that are part of composite products.

Note: Composite products contain more than one recipe for a single product. For example, if a customer wants to sell a box of macaroni and cheese, the macaroni and the packet of cheese each have their own recipe.

Individual recipes appear on recipe cards in supplier columns that are comparable to other suppliers and the Specified Ingredients Side Panel.

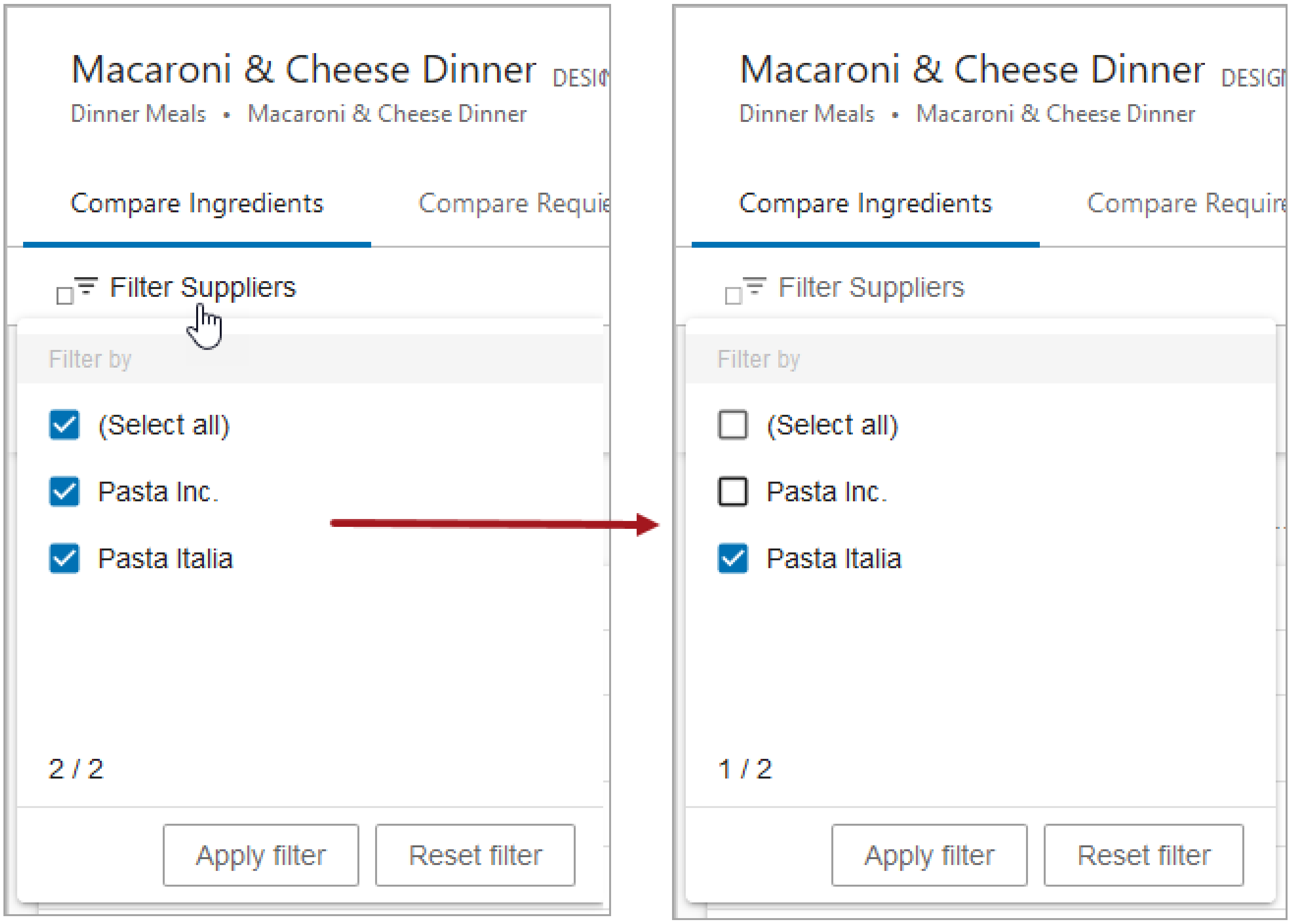


Recipes that are part of composite products appear on recipe cards in recipe panels with each recipe card under the appropriate supplier column. This display enables users to see all recipes for a composite product from an individual supplier and enables users to compare it to other suppliers' composite product recipes or the Specified Ingredients Side Panel, which will display the customer's recipe specifications for each composite product.

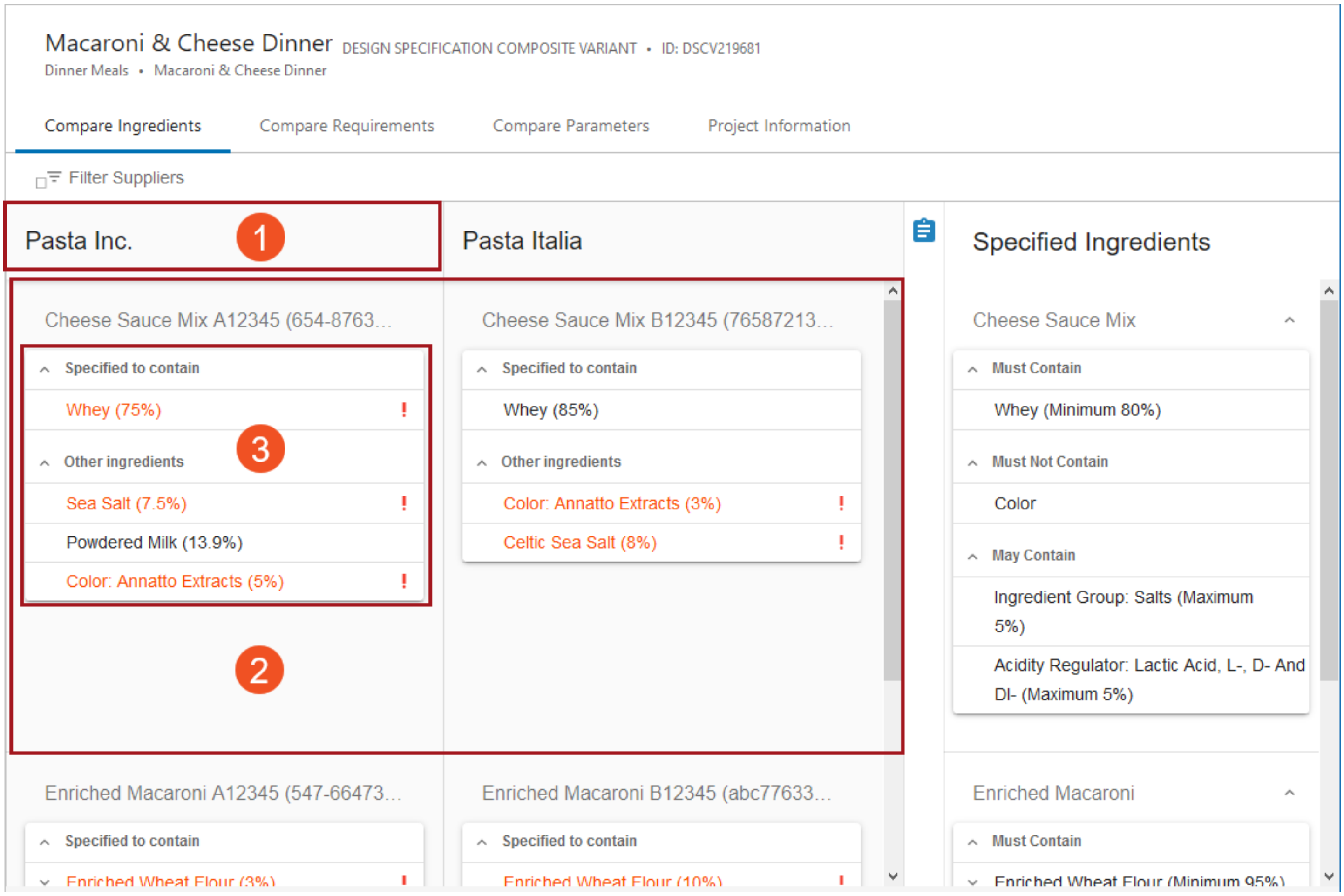


When properly mapped, selecting either an individual recipe or a recipe that is part of a composite product will trigger the Compare Ingredients Tab to display all similar recipes of its type from other suppliers. For example, if a user were to click on a 'Macaroni and Cheese Dinner' recipe from one supplier, any other supplier that also had a 'Macaroni and Cheese Dinner' recipe of the same object type would display.

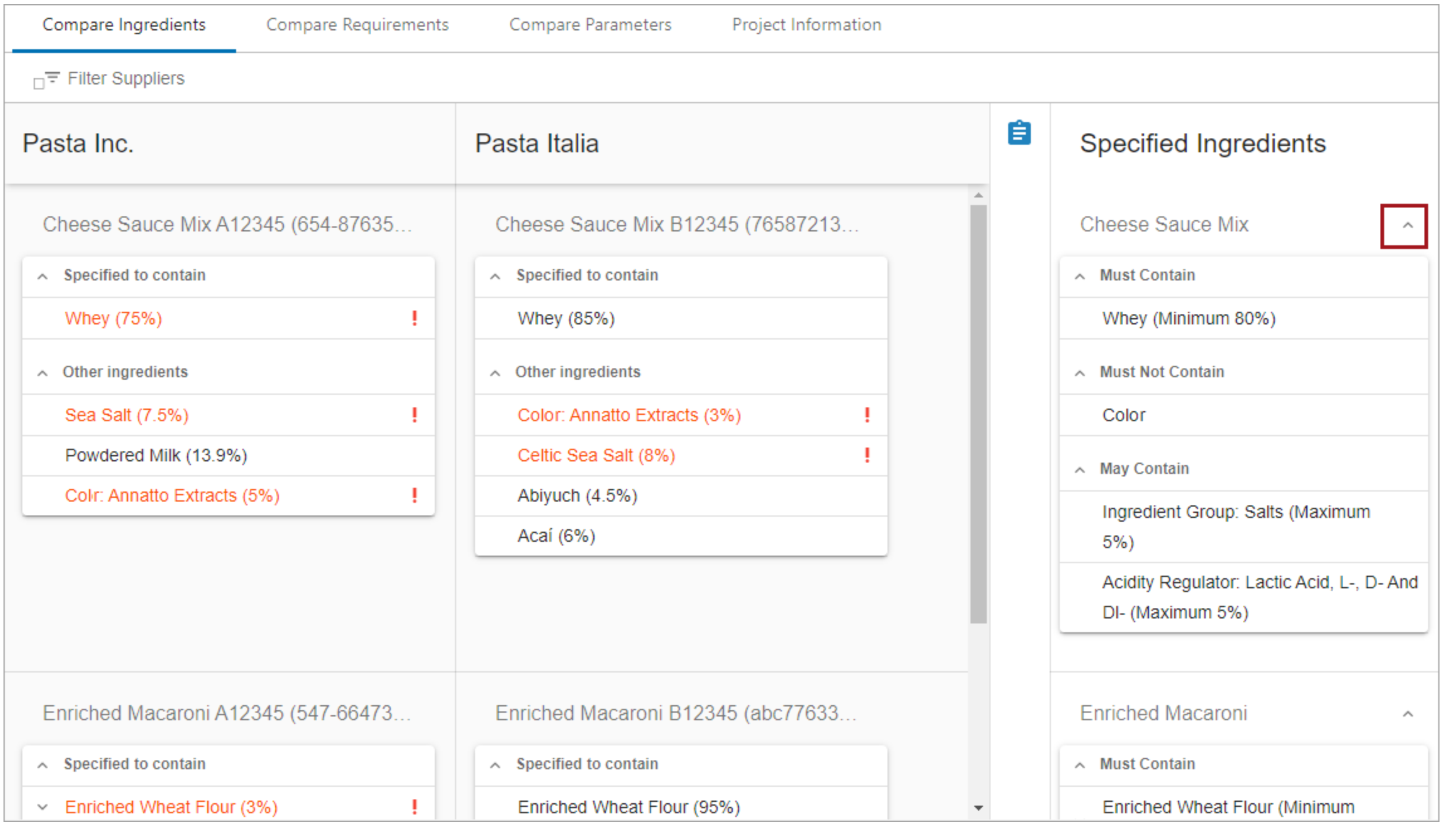
For both individual recipes and recipes that are part of a composite product, a **Filter Suppliers** button on the toolbar can be used to further refine the view of suppliers if needed.



For each supplier's recipe, there are three sections that display:

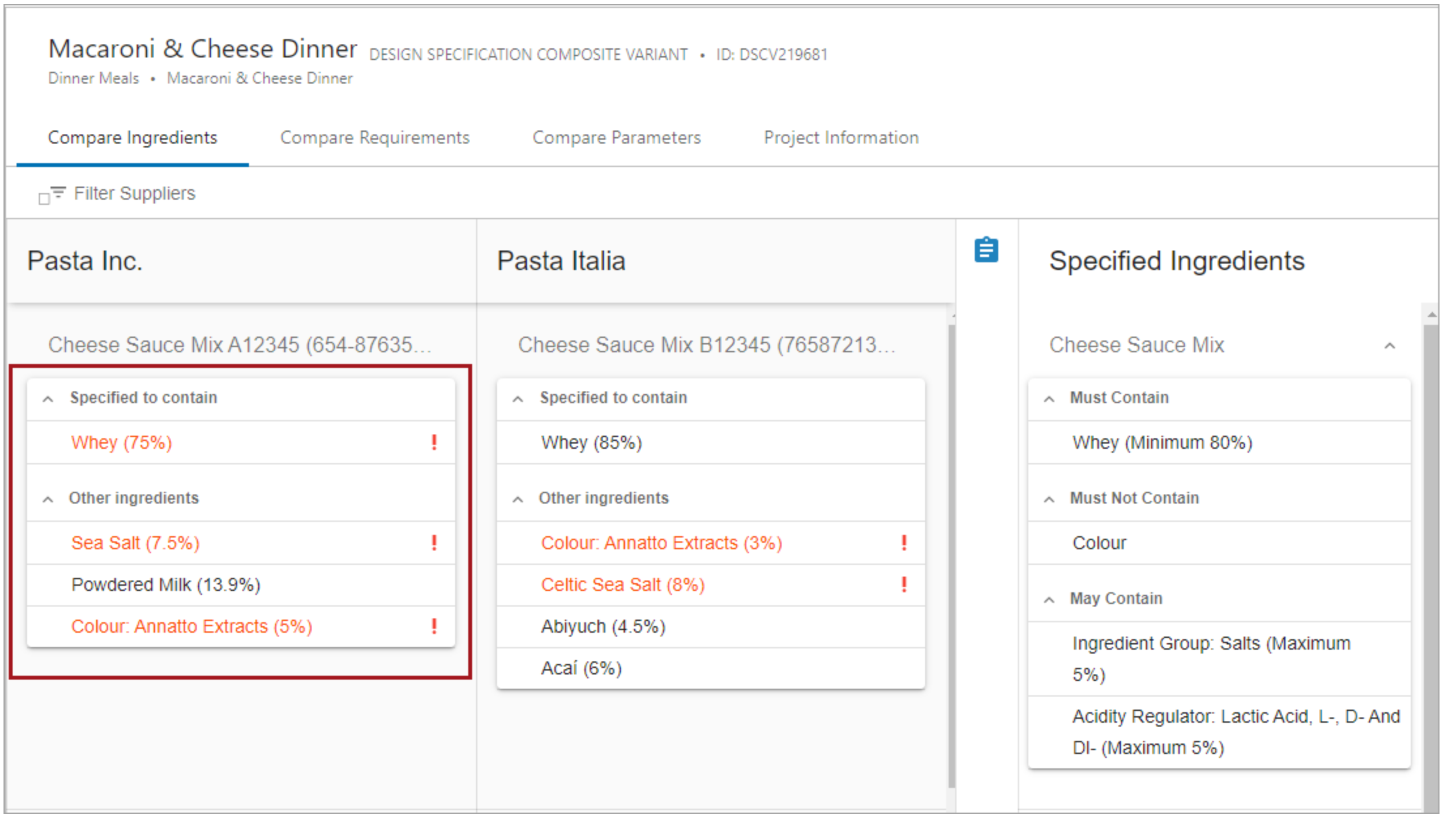


1. **Recipe Header**: Displays the supplier's name and the supplier's additional identifier, if configured. If the user scrolls on the recipe, the supplier's name and additional identifier will always remain visible.
2. **Recipe Panel**: Displays the sample name, recipe number, and version number. A recipe panel can be collapsed or expanded by clicking the arrow (^) next to the appropriate specified recipe in the Specified Ingredient Side Panel. However, even when collapsed, the supplier's recipe sample name, recipe number, and version number remain visible.



3. **Recipe Card**: Displays the 'Specified to contain' and 'Other ingredients' sections. The 'Specified to contain' section displays any added ingredients, ingredient groups, additives, additive classes, or compound ingredients and quantities that must be in the recipe. The 'Other ingredients' section displays any ingredients, ingredient groups, additives, additive classes, or compound ingredients that were in the 'May contain' section, were called out in the 'Must not contain ' section, or were added by the supplier and not part of the customer's specification recipe.

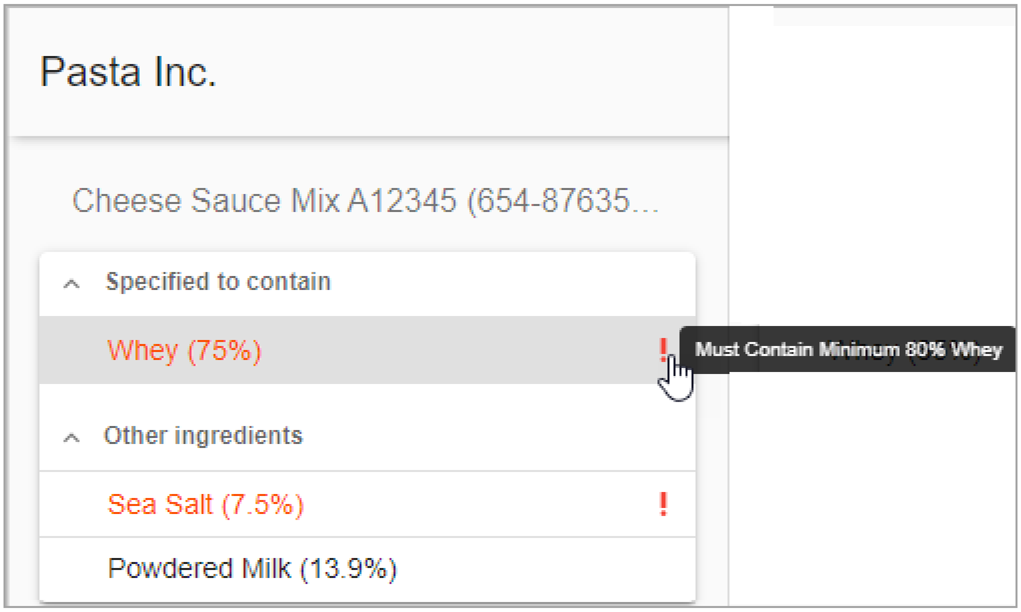
Recipe Card Details



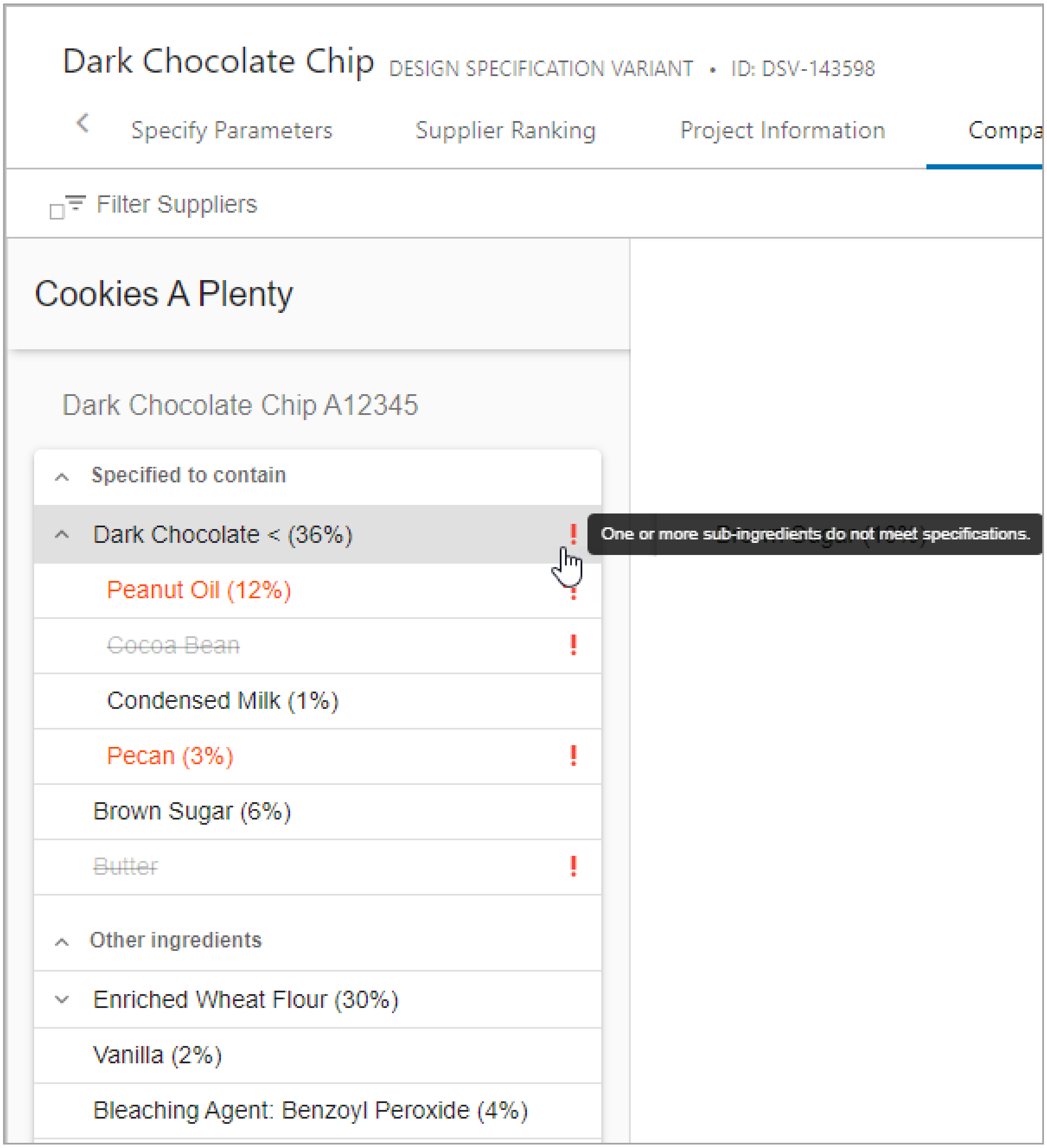
Clicking the arrow (^) expands and retracts the 'Specified to contain' and 'Other ingredients' sections, as well as expands and retracts any added compound ingredients. Additionally, within the 'Specified to contain' or the 'Other ingredients' sections, ingredients, additives, and compound ingredients are displayed in black, orange, or gray text with a strikethrough, with or without an exclamation point, depending on if recipe specifications are met.

Note: Additives are validated along with the class.

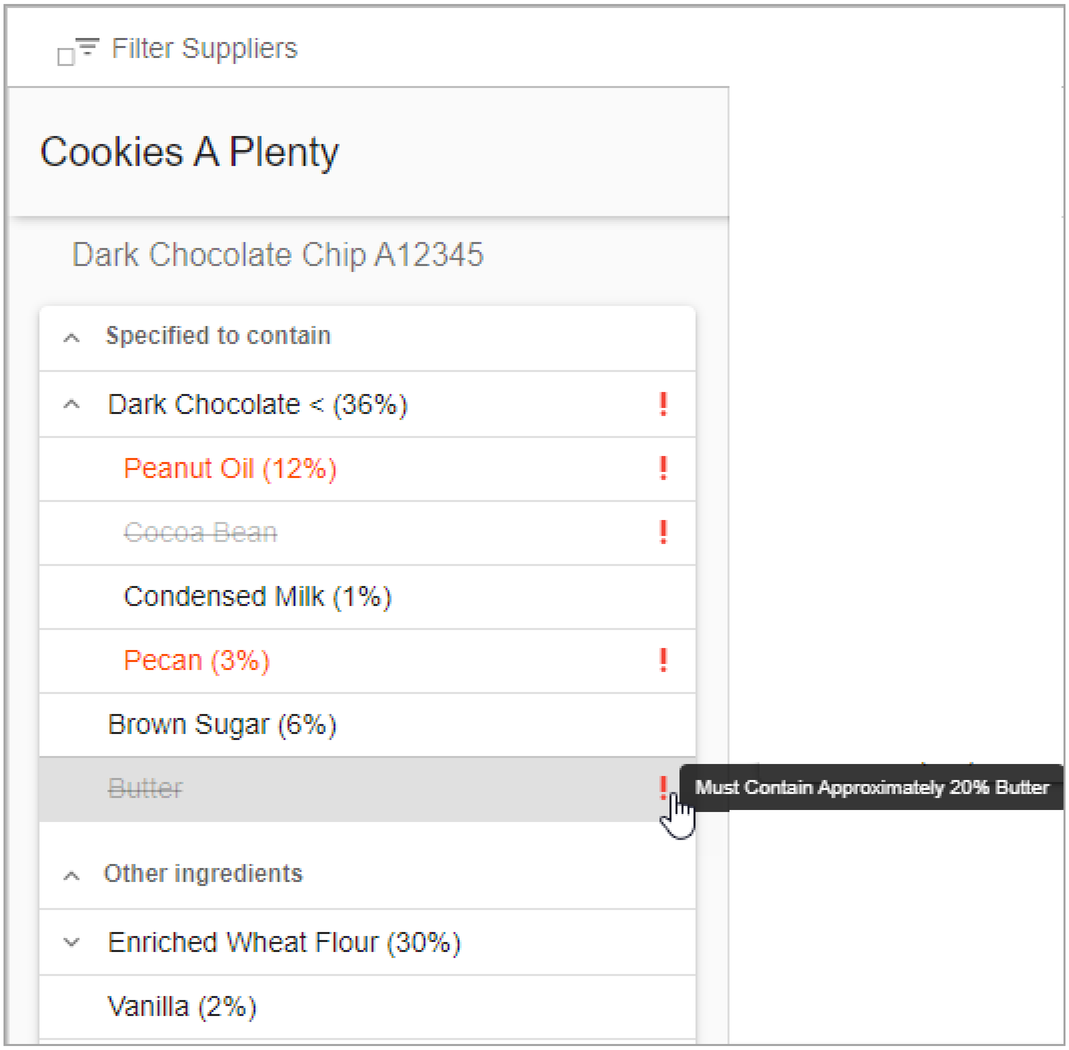
- **Black Text**: All recipe specifications for the ingredient, additive, or compound ingredient specified are met or not specified at all.
- **Orange Text with Exclamation Point**: Signals that the ingredient, additive, or compound ingredient is present but does not have the correct quantity or value as specified in the recipe specification, that the sub-ingredients in a compound ingredient exceed 100%, or that an ingredient is present when the recipe specification requested that it should not be. Hover the mouse cursor over the exclamation point to receive further details on what does not meet the recipe specifications.



- **Black Text with Exclamation Point**: Displays for compound ingredients if there are any alerts on the sub-ingredients or additives. Additionally, this displays if the ingredient was specified as ‘Must contain approximately’ an amount, so that attention is called to the ingredient for examination. Hover the mouse over the exclamation point to receive further details.

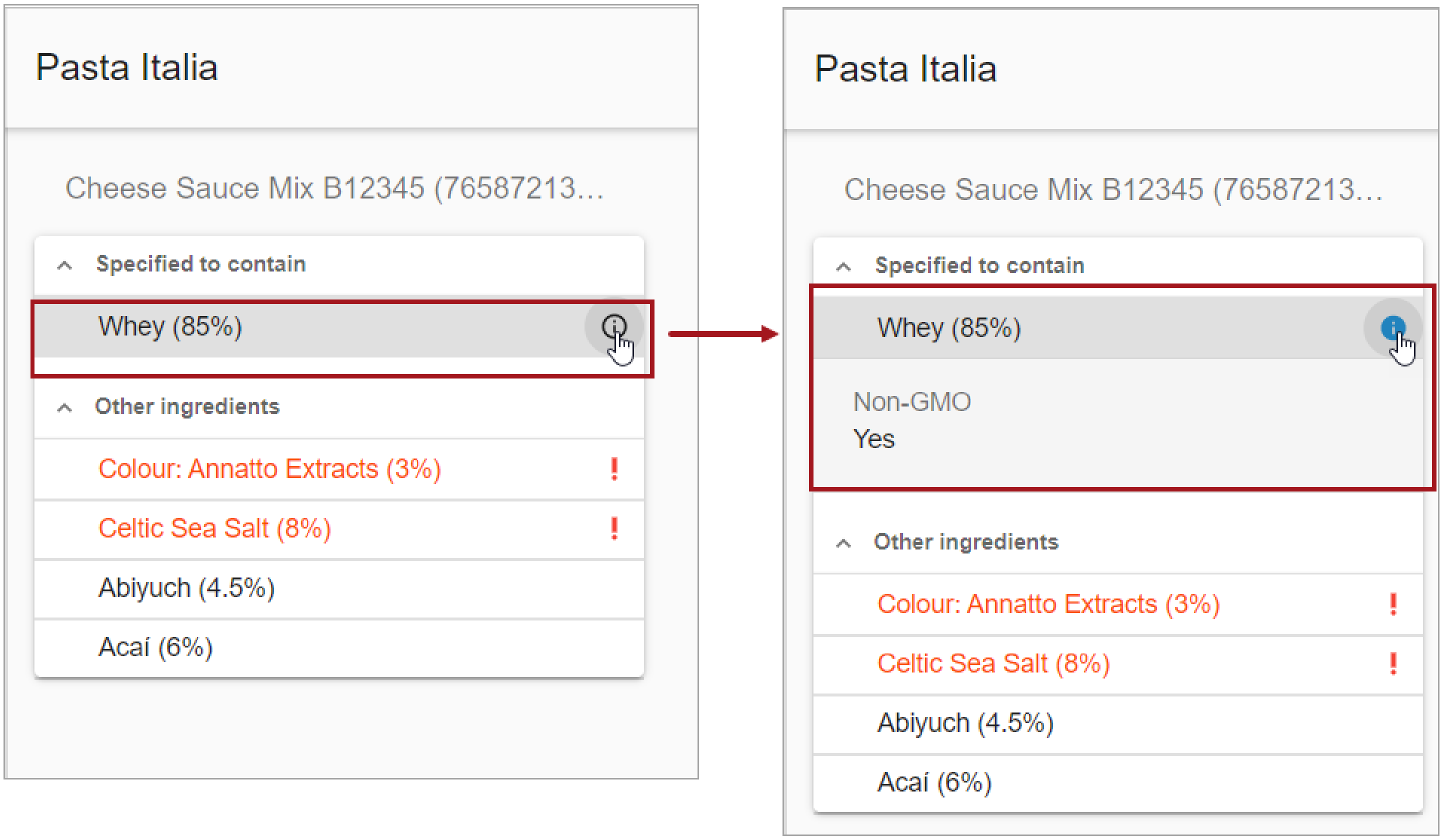


- **Gray Strikethrough Text with Exclamation Point**: Displays if an ingredient, additive, or compound ingredient is not present in the recipe, but it was part of the recipe specification.



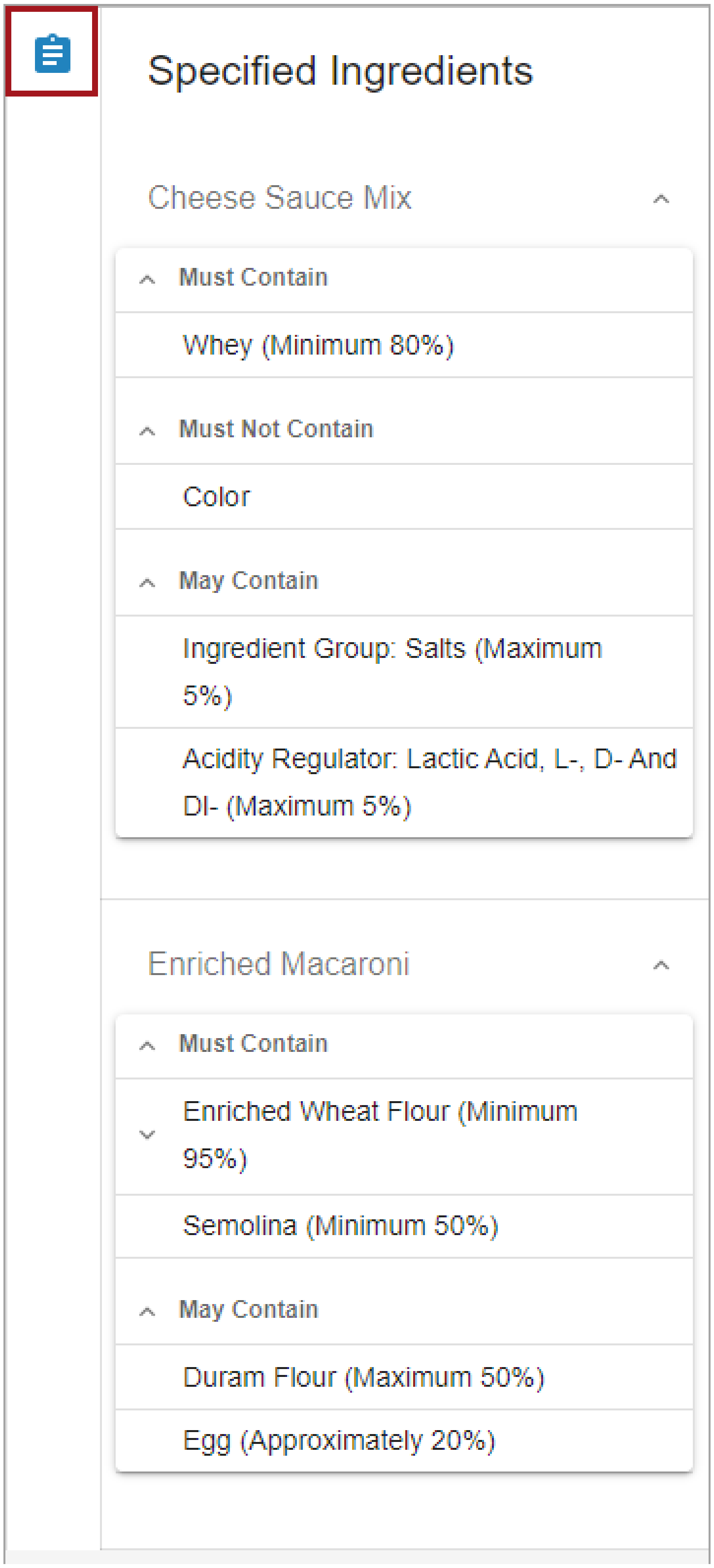
Information Icon

It is sometimes necessary for suppliers to provide more information on the ingredients, additives, or compound ingredients used in their recipe version. To view this additional information, hover the mouse cursor over an ingredient, additive, or compound ingredient to see if an 'i' appears. If one does appear, there is more information available. Click on the 'i' to view the additional information.



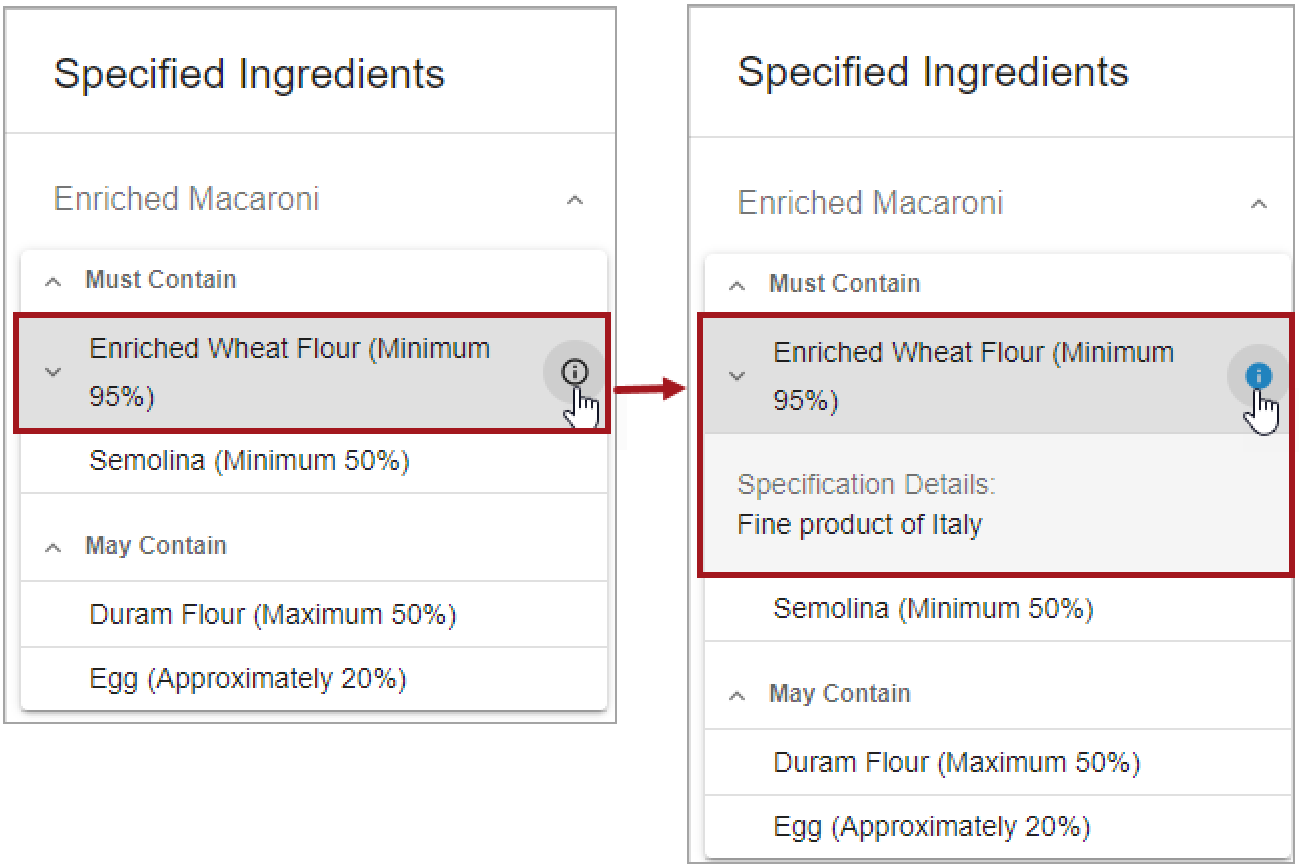
Specified Ingredients Side Panel

The Specified Ingredients Side Panel appears on the right-hand side of the Compare Ingredients Tab page. This panel can expand or retract according to user needs by clicking on the clipboard icon. When expanded, the specifications and guidelines for the product's recipe are shown and can display both for an individual recipe or recipes that are part of a composite product. In the image below, a recipe for a composite product's specification displays.



Clicking the arrow (^) expands and retracts the main specification groupings, recipe panels for composite recipes, as well as expands and retracts the compound ingredients, ingredient groups, and additive classes.

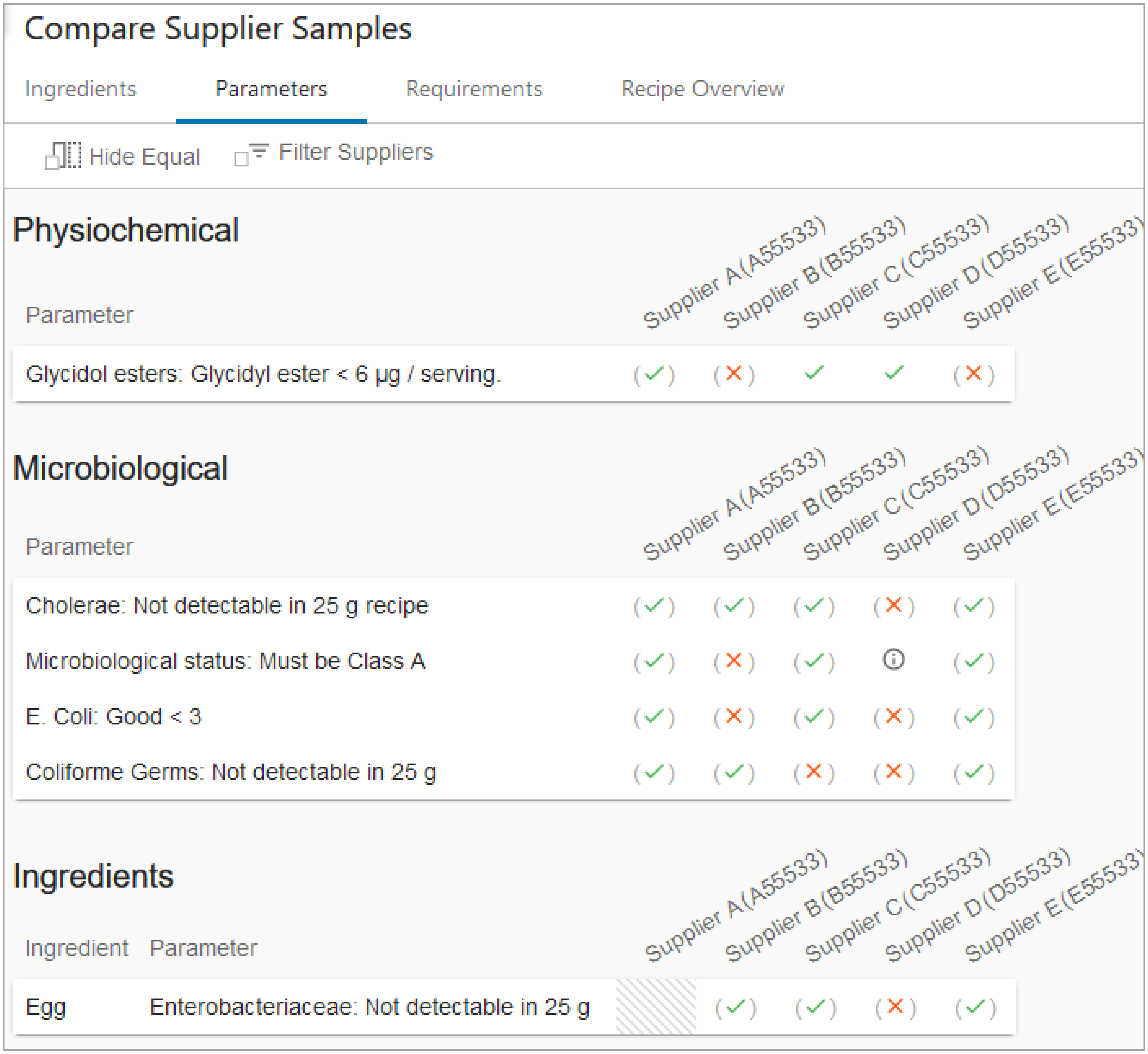
If you hover the mouse cursor over an ingredient, additive, or compound ingredient and an 'i' icon appears, it indicates that there is more information available. Click on the 'i' icon to view the additional information.



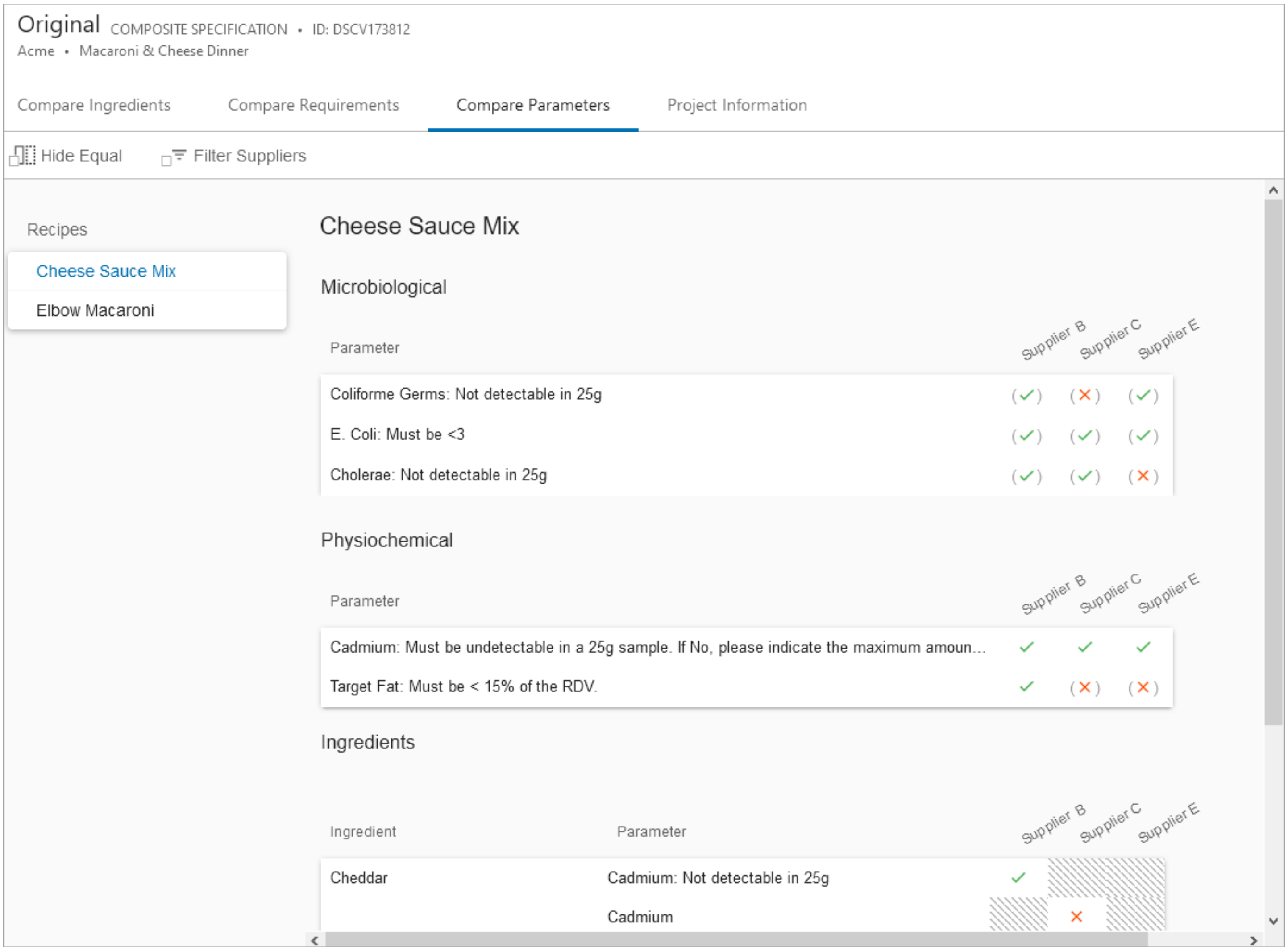
Note: If accessing a Compare Ingredients Tab, Compare Parameters Tab, or Compare Requirements Tab from a Task List Properties, it is not possible to submit the viewed object type to a different step in a workflow. If the object type in a Task List is selected and viewed individually on a Node Details screen, the options to submit that object type to a different step in a workflow are still possible.

Compare Parameters Tab

On the Compare Parameters Tab for both recipes and composite recipes, you are able to see suppliers' responses to the specified parameters for the recipe, ingredients, and compound ingredients, providing a complete and informative detailed view. This aids in the selection of the supplier recipe that best meets the recipe specifications. In the example shown in the screenshot below, a single recipe is being examined.



For composite recipe responses, the table displaying the suppliers' recipe responses are the same, but with the ability on the left-hand side to toggle between recipes. The selected recipe response being viewed appears blue.



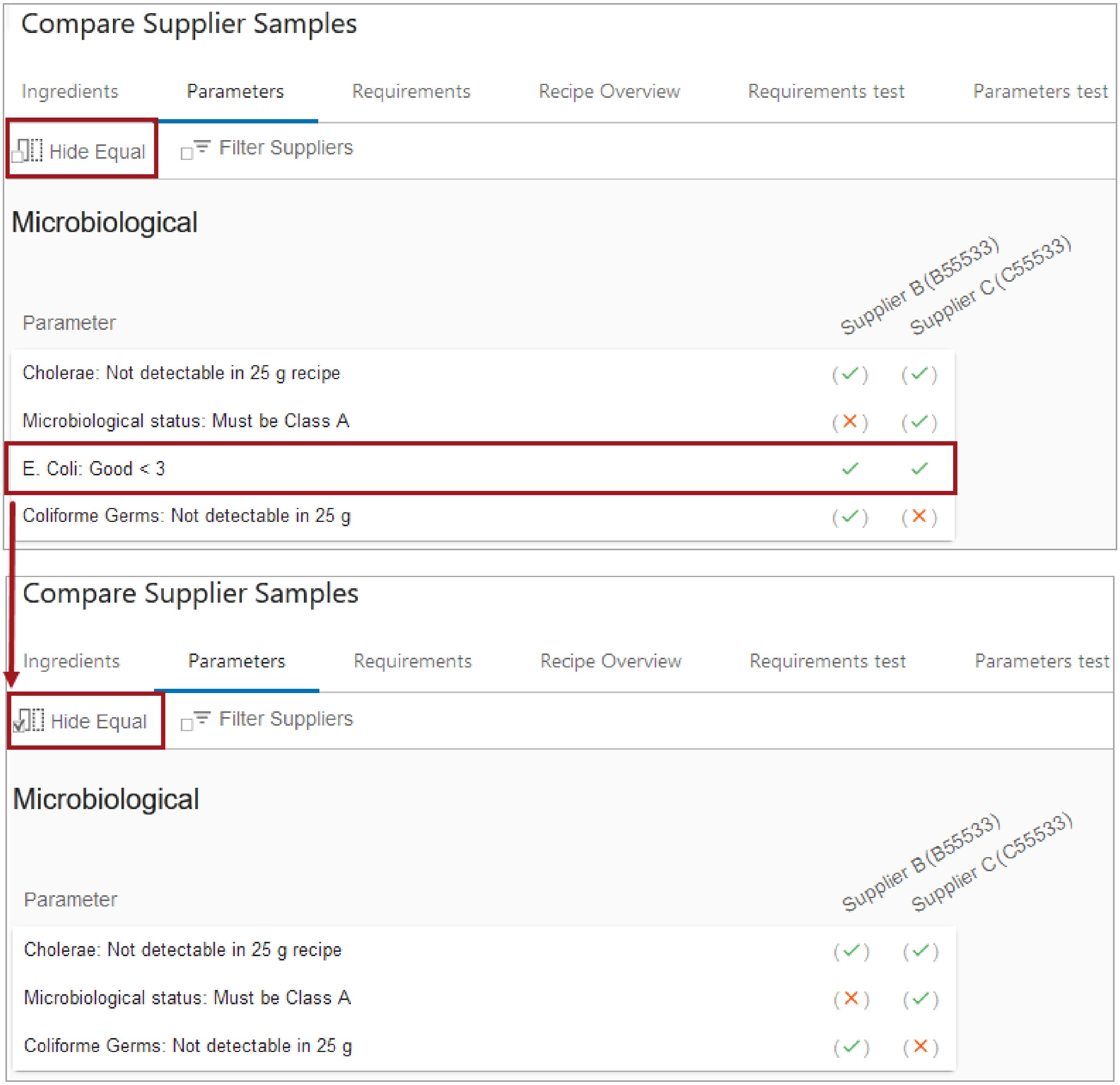
Note: The third Ingredients table (in the example image) shows only the parameters that apply to the ingredients that the supplier has chosen. This table can be configured to display or stay hidden. Talk to your administrator if you have further questions on the visibility of this table. Additionally, if the tables are large enough to require scrolling, the headers of each table section, including the supplier name and recipe number, continue showing so that users can more easily tell what they are viewing when scrolling.

The following table helps viewers determine how compliant the different suppliers' recipe parameters are with the recipe requirements:

Symbol	Icon	Description
Green Checkmark	✓	When the supplier has answered '**YES**' to the specification, and there are NO further details.

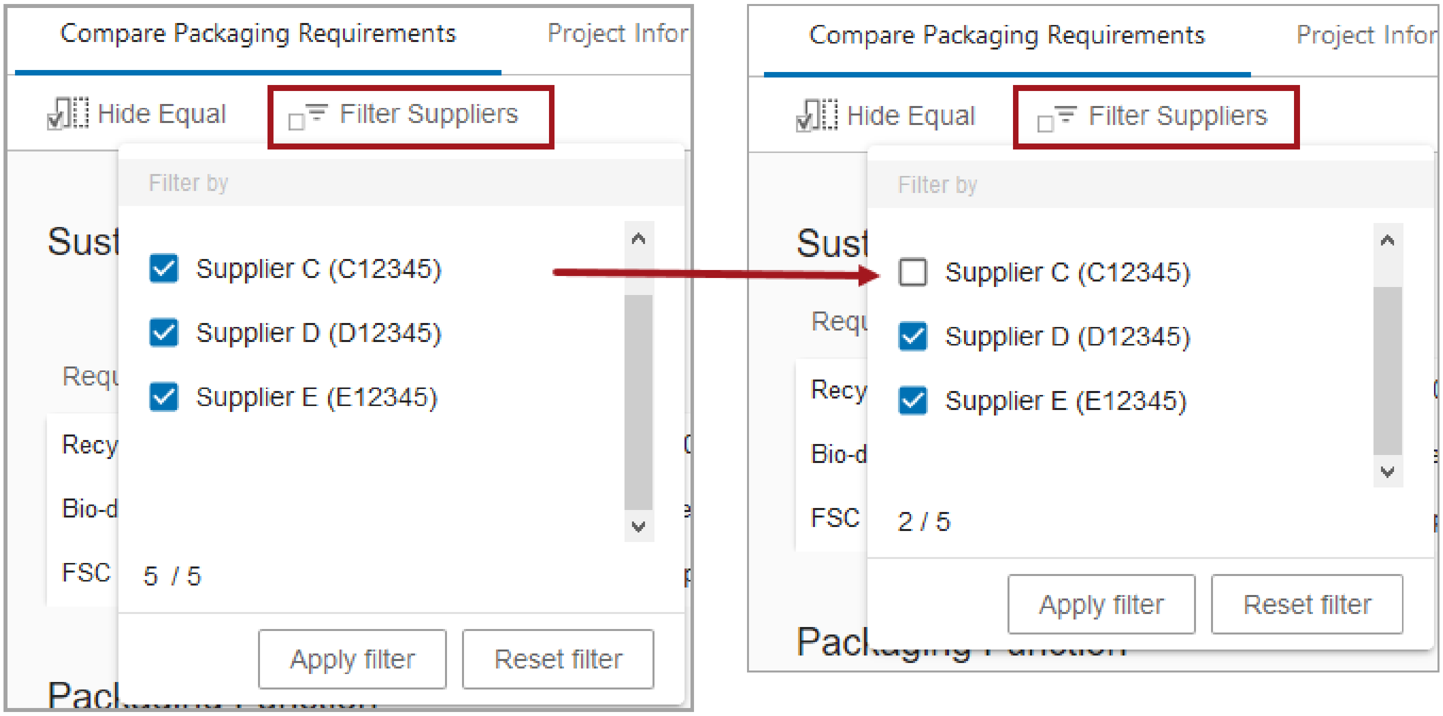
Symbol	Icon	Description
Green Checkmark in Parenthesis	(✓)	When the supplier has answered '**YES**' to the specification and has provided further details.
Red X	✕	When the supplier has answered '**NO**' to the specification, and there are NO further details.
Red X in parenthesis	(✕)	When the supplier has answered '**NO**' to the specification and has provided further details.
Information Icon	ⓘ	Displays if a 'Yes or No' value is not present, but there are further details.
Shaded Cell		Displays if the supplier did not add the ingredient to their recipe.

When looking at the parameters for the responses being displayed, users can select either **Hide Equal** or the **Filter Suppliers** toolbar actions. The **Hide Equal** toolbar action is used to hide or reveal any row where all suppliers have replied 'YES' to the 'Meets Requirements?' field, indicated by the green checkmark, ✓, and there are no further details.

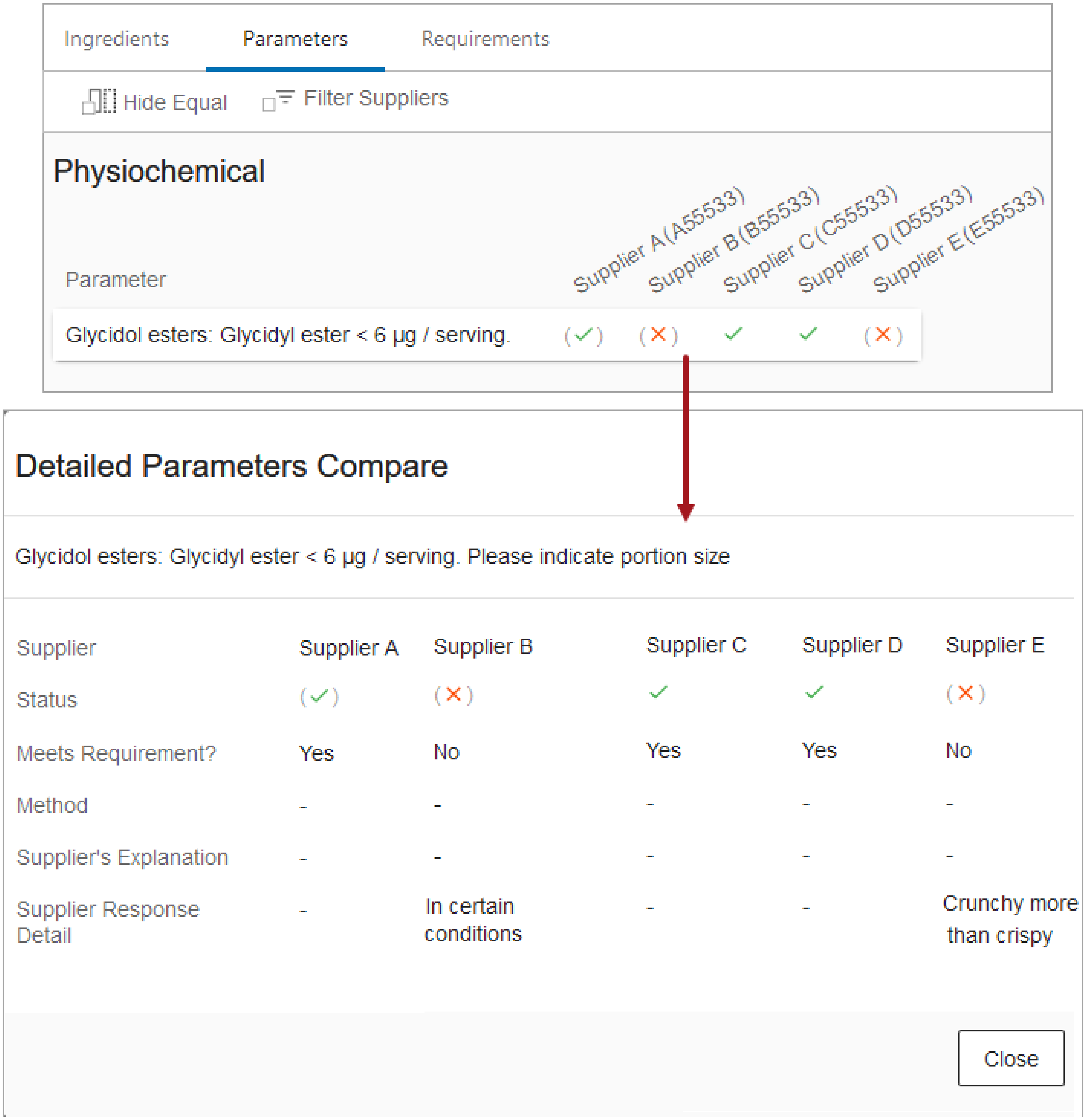


By clicking the **Filter Suppliers** toolbar action, users can refine the view so that it only displays the necessary suppliers.

> **Note:** For composite recipes, if a filter is enabled when viewing one recipe and the user switches to a different recipe, the filter will still remain enabled.



Additionally, it is possible to click on the green checkmark in parenthesis, (✓), the red X in parenthesis, (✕), and the information icon, ⓘ. Doing so will render the Detailed Parameter Compare pop-up. This displays further information or values about the parameters being studied.



Note: When accessing a Compare Ingredients Tab, Compare Parameters Tab, or Compare Requirements Tab from a Task List, it is not possible to submit the viewed object type to a different step in a workflow. If the object type in a Task List is selected and viewed individually on a Node Details screen, the options to submit that object type to a different step in a workflow are still possible.

Tabs for Comparing Requirements

On the Compare Requirements Tab and the Compare Packaging Element Requirements Tab, users are able to see suppliers' responses to the specified requirements, providing a complete and informative view of how suppliers respond to requirements for recipes, composite recipes, general packaging, or packaging elements. This aids in the selection of the supplier recipe, general packaging, or packaging elements that best meet the specifications. Below the two tabs are explained in further detail.

Compare Requirements Tab

A user may select a recipe or packaging: sample, design specification variant, or composite variant. This selection determines which set of requirements are shown, as a requirement tab will not show both recipe and packaging responses at the same time. The Compare Requirement Tabs will display one of the following:

- Supplier recipe requirement responses compared to the recipe requirements
- Supplier recipe requirement responses for composite recipes compared to composite recipe requirements
- Supplier packaging requirement responses for general packaging compared to general packaging requirements

Compare Packaging Element Requirements Tab

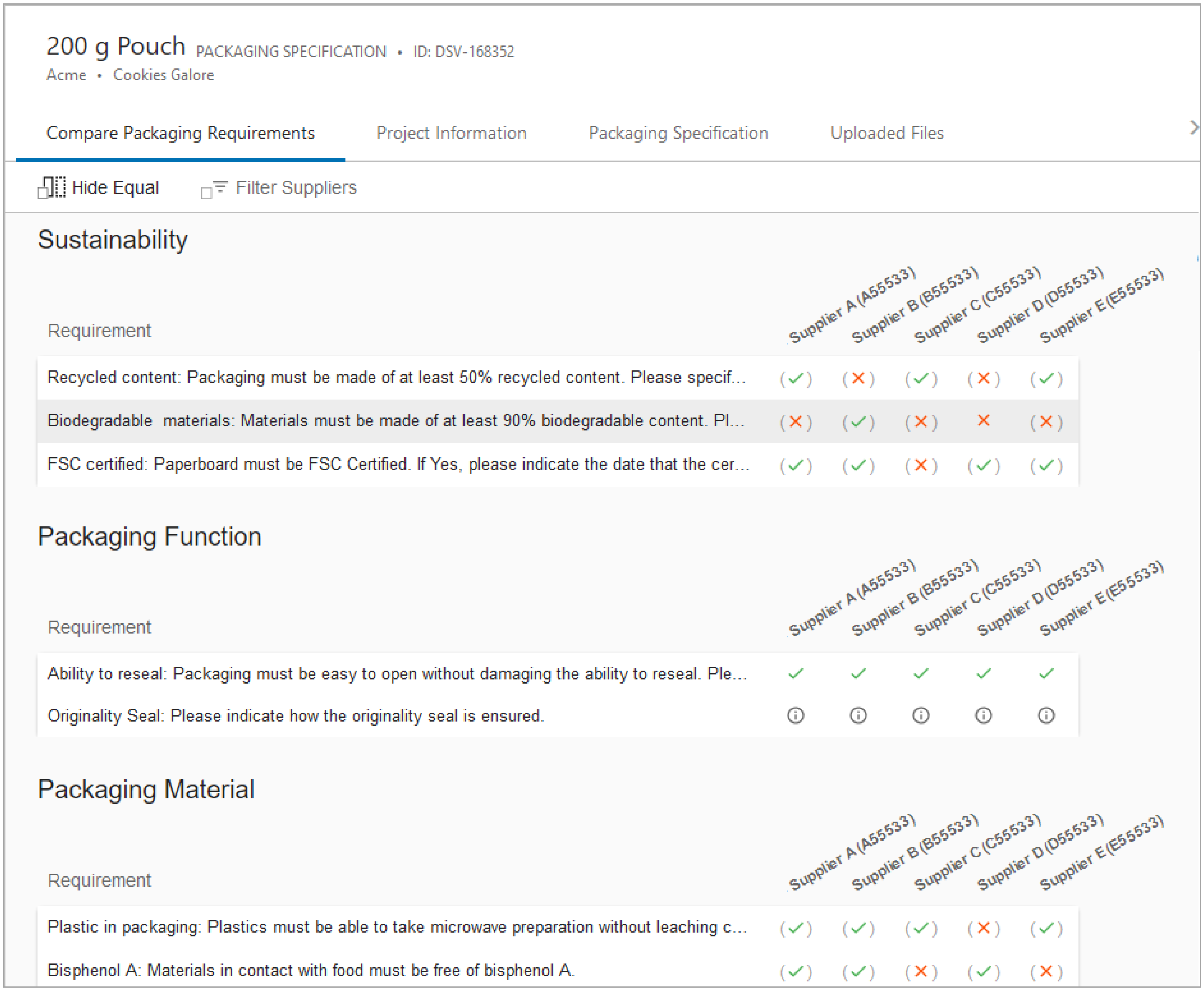
This tab shows the supplier packaging requirement responses for individual packaging elements compared to the packaging element requirements.

> **Note:** If the supplier was asked to provide their own recommendations for packaging, their selection of materials may prompt certain configured requirement questions that they need to answer. These requirement questions would not appear for suppliers who did not choose that particular material for their packaging. For this reason, some of the supplier requirement responses may differ from other supplier responses.

Comparing Requirements View for Recipes and General Packaging

The table layout for the Compare Requirements Tab when it is configured to show supplier recipe requirement responses is the same layout when the tab is configured to show general supplier packaging requirement responses.

In the example below, the tab was configured to view general packaging requirements.



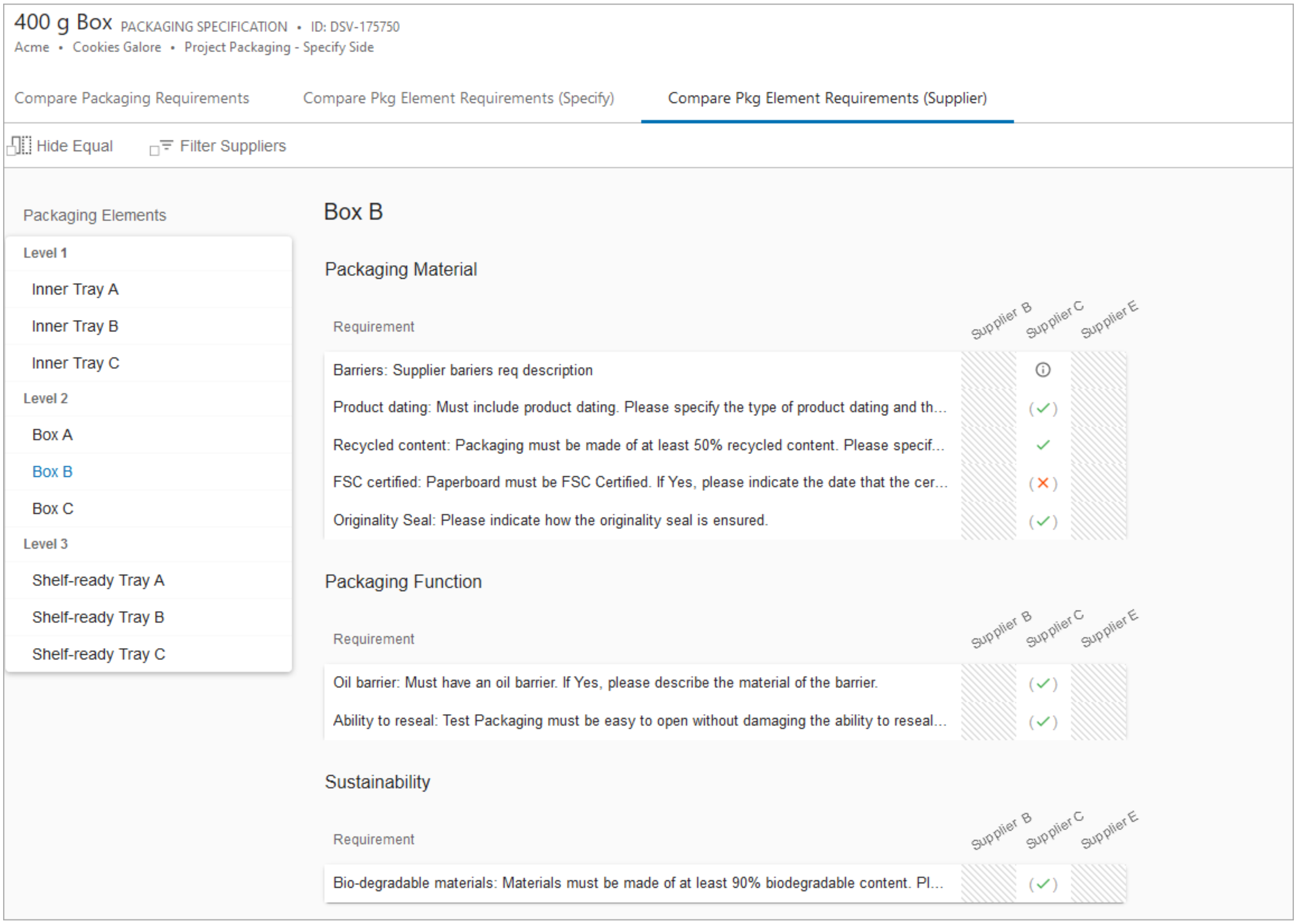
Note: If the table content is large and requires scrolling, the headers of the table, including the supplier name and additional attribute, are continuously visible as the table is scrolled so that users can easily tell what they are viewing. For recipe samples, the recipe number will also continue to display.

Compare Requirements View for Composite Recipes or Packaging Elements

When viewing either of the following tabs, the layout is the same:

- Compare Requirements Tab– configured to display composite recipes
- Compare Packaging Element Requirements Tab– configured to display packaging elements

Both of these tabs include a navigation panel on the left-hand side of the screen that enables users to toggle between composite recipes or packaging elements. The selected recipe or packaging element being viewed displays in the navigation in blue text. Below is an example of a Compare Packaging Element Requirements Tab view configured to display packaging elements.



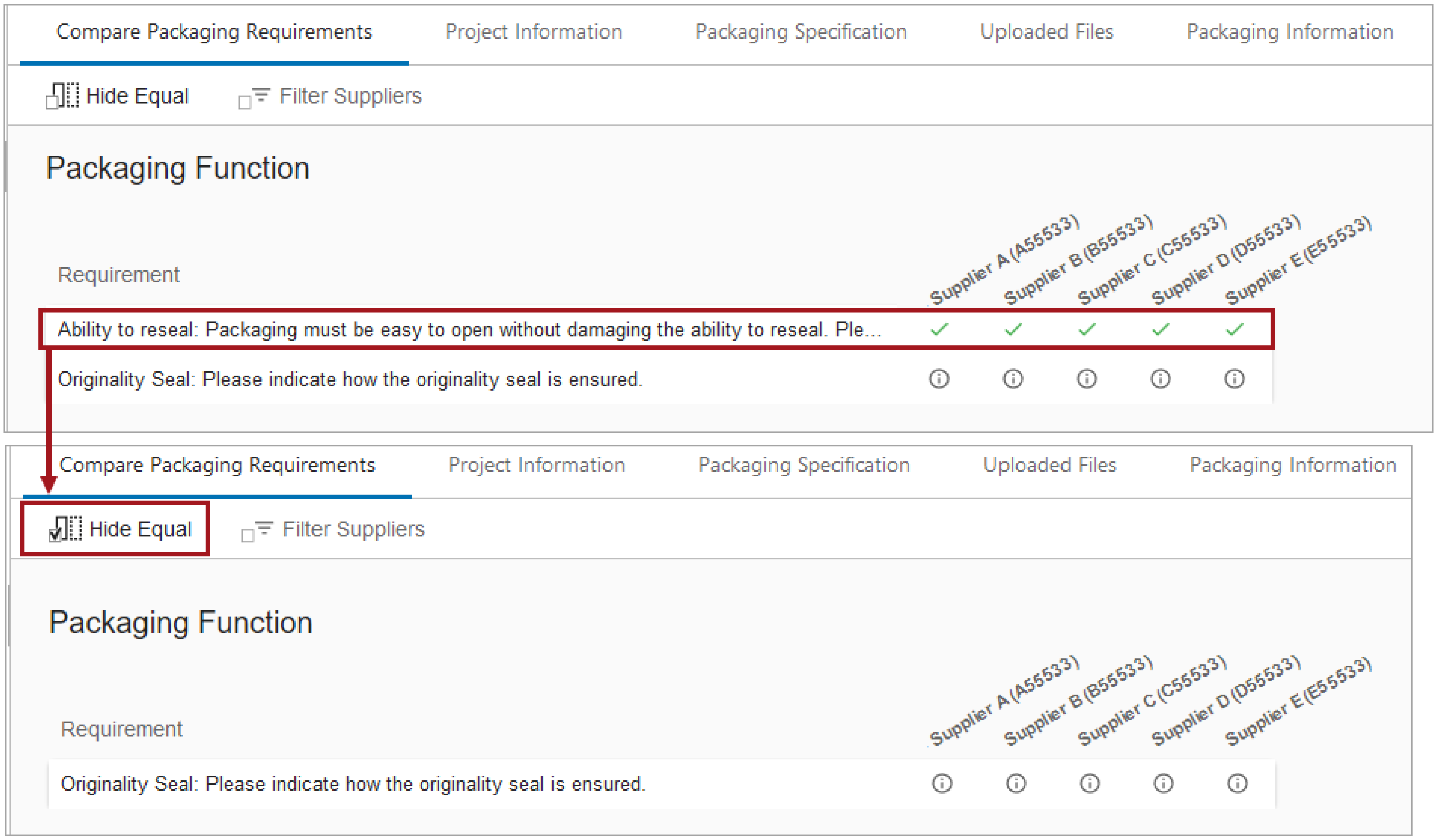
Note: If the table is large enough to require scrolling, the headers of the table, including the supplier name and additional attribute, are continuously visible as the table is scrolled so that users can easily tell what they are viewing. For recipe samples, the recipe number will also continue to display.

Reading and Interacting With Tabs For Comparing Requirements

Regardless of which compare requirements tab is configured or how it is configured, they all use the same table indicators to relay information about how compliant the different supplier responses are with the requirements. Additionally, the interactive components on the tabs used to compare requirements is the same.

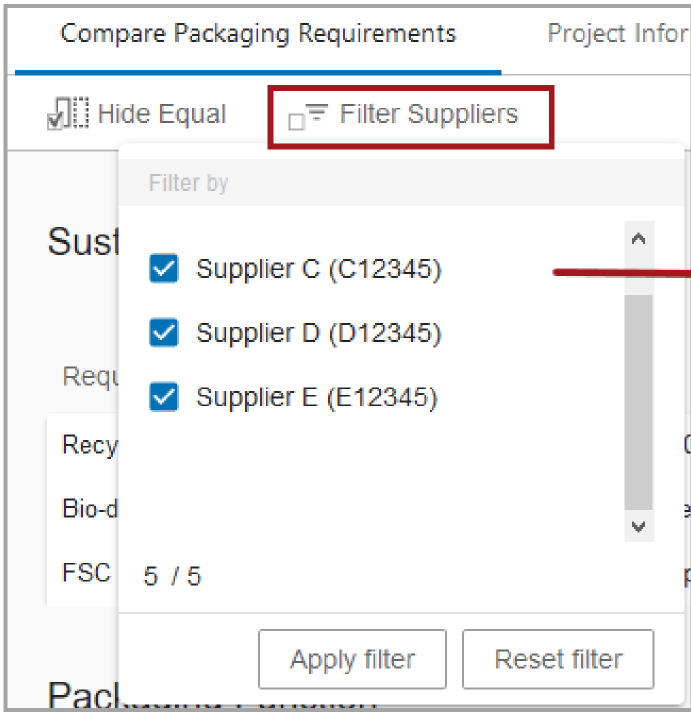
Symbol	Icon	Description
Green Checkmark	✓	When the supplier has answered '**YES**' to the 'Meets Requirements?' field, and there are NO further details.
Green Checkmark in Parenthesis	(✓)	When the supplier has answered '**YES**' to the 'Meets Requirements?' field and has provided further details.
Red X	✕	When the supplier has answered '**NO**' to the 'Meets Requirements?' field, and there are NO further details.
Red X in parenthesis	(✕)	When the supplier has answered '**NO**' to the 'Meets Requirements?' field and has provided further details.
Information Icon	ⓘ	Displays if a 'Yes' or 'No' value is not present, but there are further details.
Shaded Cell		Displays if the supplier did not add the ingredient to their recipe, or packaging element to their packaging.

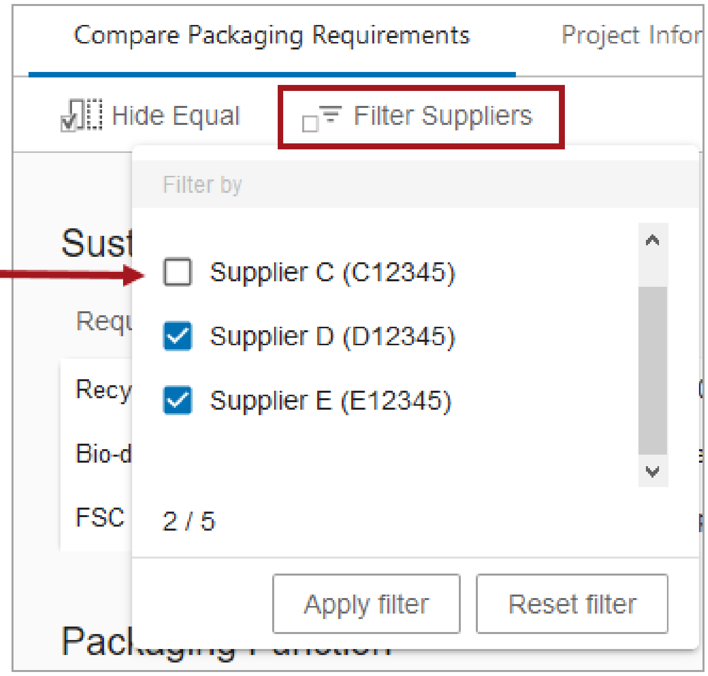
Additionally, users can interact with the tabs for comparing requirements the same way. When looking at the requirement, users can select either **Hide Equal** or the **Filter Suppliers** toolbar actions. The **Hide Equal** toolbar action is used to hide or reveal any row where all suppliers have replied 'YES' to the 'Meets Requirements?' field, indicated by the green checkmark, ✓, and there are no further details.



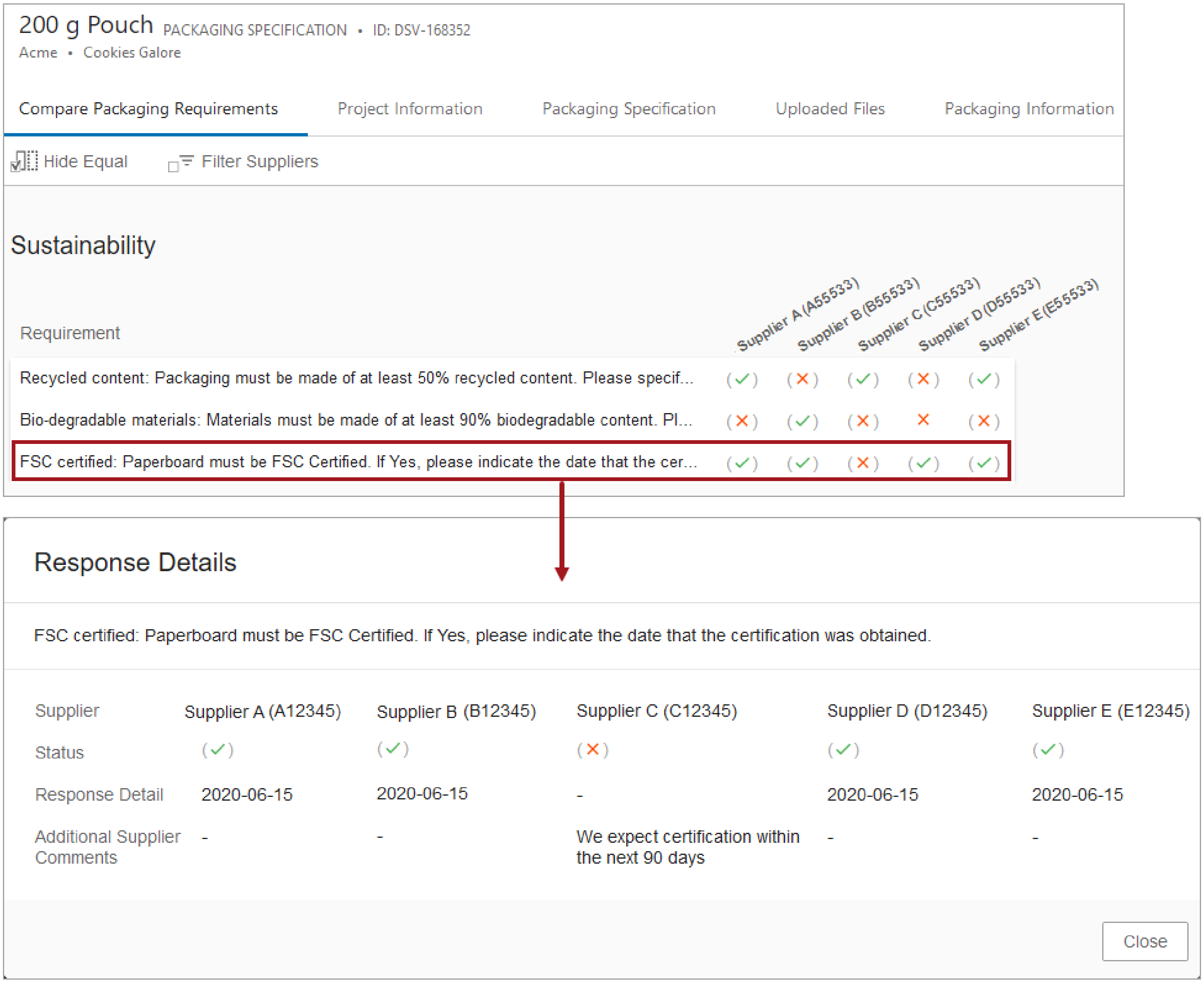
By clicking the **Filter Suppliers** toolbar action, users can refine the view to only display the necessary suppliers.

> **Note:** For composite recipes and packaging elements, if a filter is enabled and the user switches to a different composite recipe or packaging element, the filter will still remain enabled.





Clicking on either the row, the green checkmark in parenthesis, (✓), the red X in parenthesis, (✕), or the Information Icon, ⓘ will render the Response Details pop-up. This pop-up displays further information about the ingredient or package sample being viewed by displaying any values associated with the sample from the prospective supplier.



Important: When accessing a Compare Ingredients Tab, Compare Parameters Tab, or Compare Requirements Tab from a Task List, it is not possible to submit the viewed object type to a different step in a workflow. If the object type in a Task List is selected and viewed individually on a Node Details screen, the options to submit that object type to a different step in a workflow are still possible.

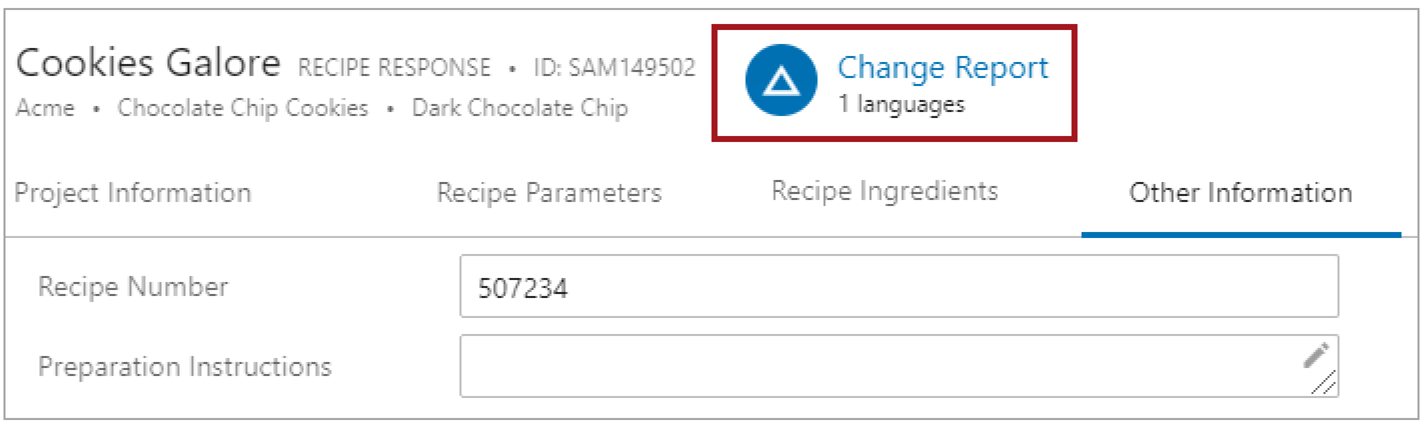
Using Change Reports

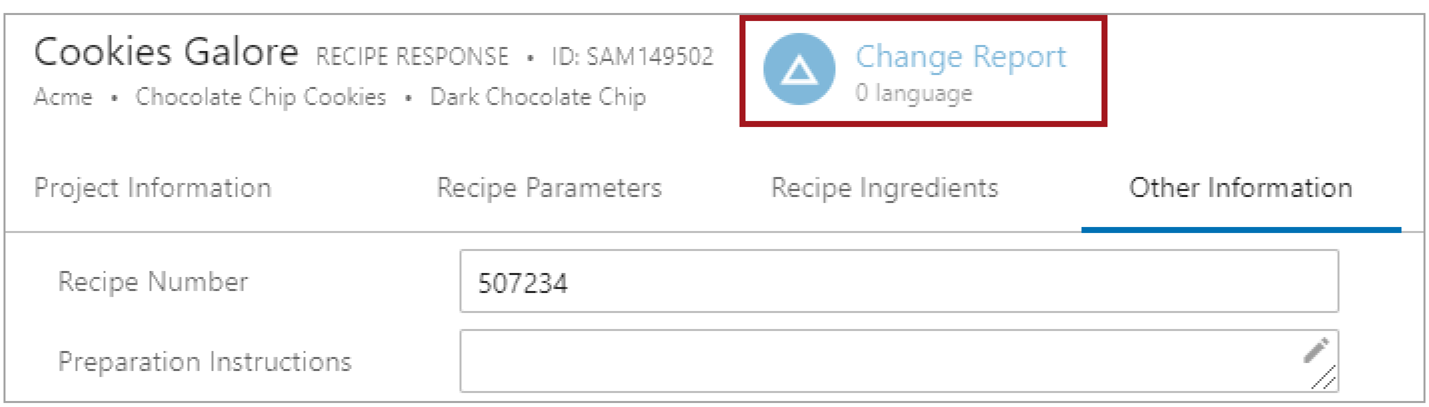
Change Reports, which are populated via highly configurable 'snapshots', highlight any changes that have been made during user-defined events, which could include changes in a workflow state, a trigger by an inbound or outbound integration endpoint, or a change by derived events through an Event Processor.

Change Reports are important so that changes are not overlooked accidentally. They reduce review time during collaboration between different roles who are often involved in bringing new products to market. Change Reports also reduces review time with supplier who are responding to requests to bid for supplying the new products. Clear visibility to changes in specifications and supplier responses throughout the process ensures that contractual agreements are well understood and compliance standards are met.

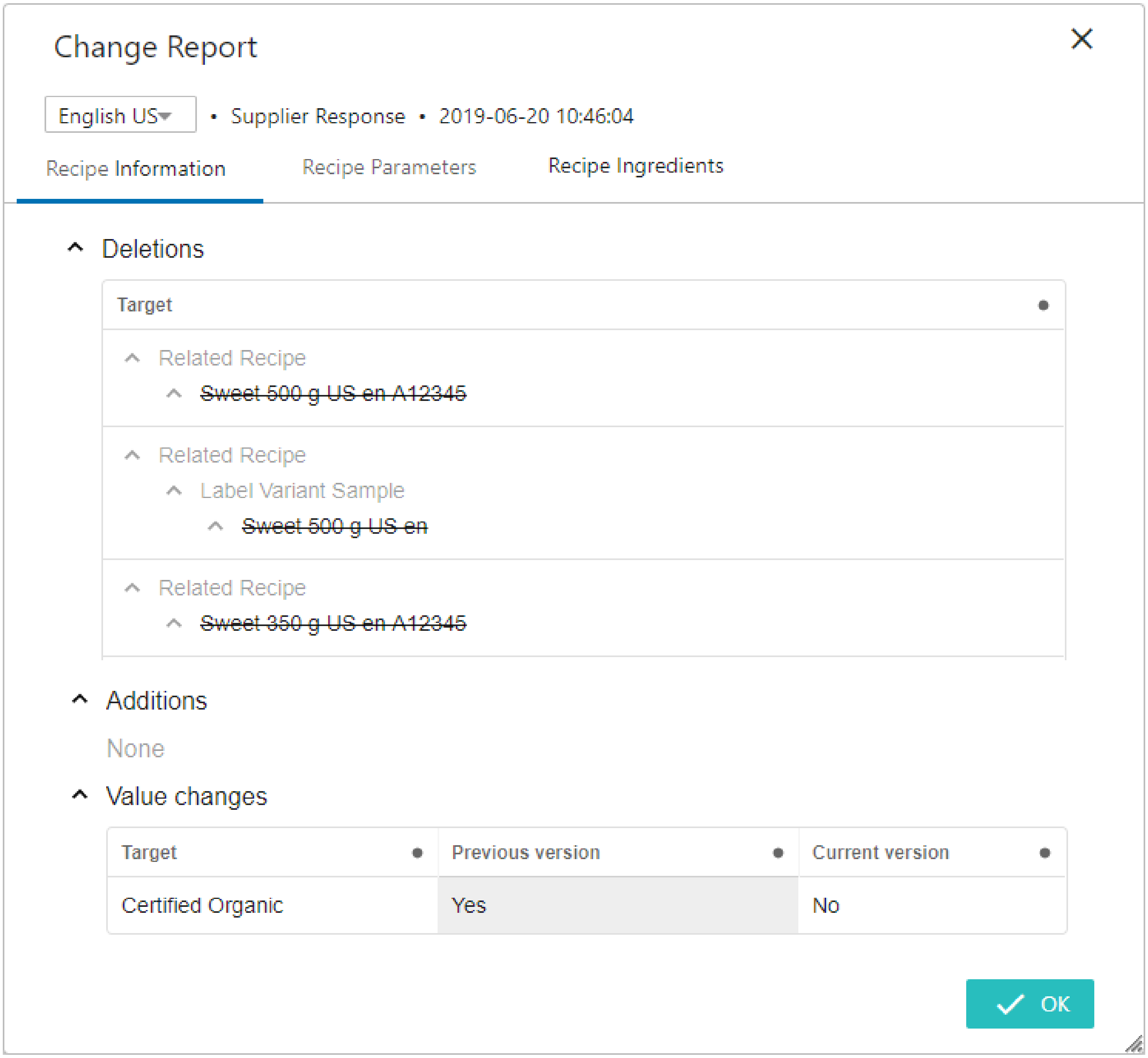
Note: The Change Reports functionality is highly configurable and must be setup (in workbench) prior to using in Web UI. For more on how to configure Change Reports and snapshots, see the **Change Reports** section in this documentation.

When changes between the snapshot and the current data are detected, an active notification at the top of the (Node Details) screen displays. This notification also informs the user if changes were made in more than one language. If there are no changes, the notification will appear grayed out and is not clickable. The functionality can be seen in the images that follow.

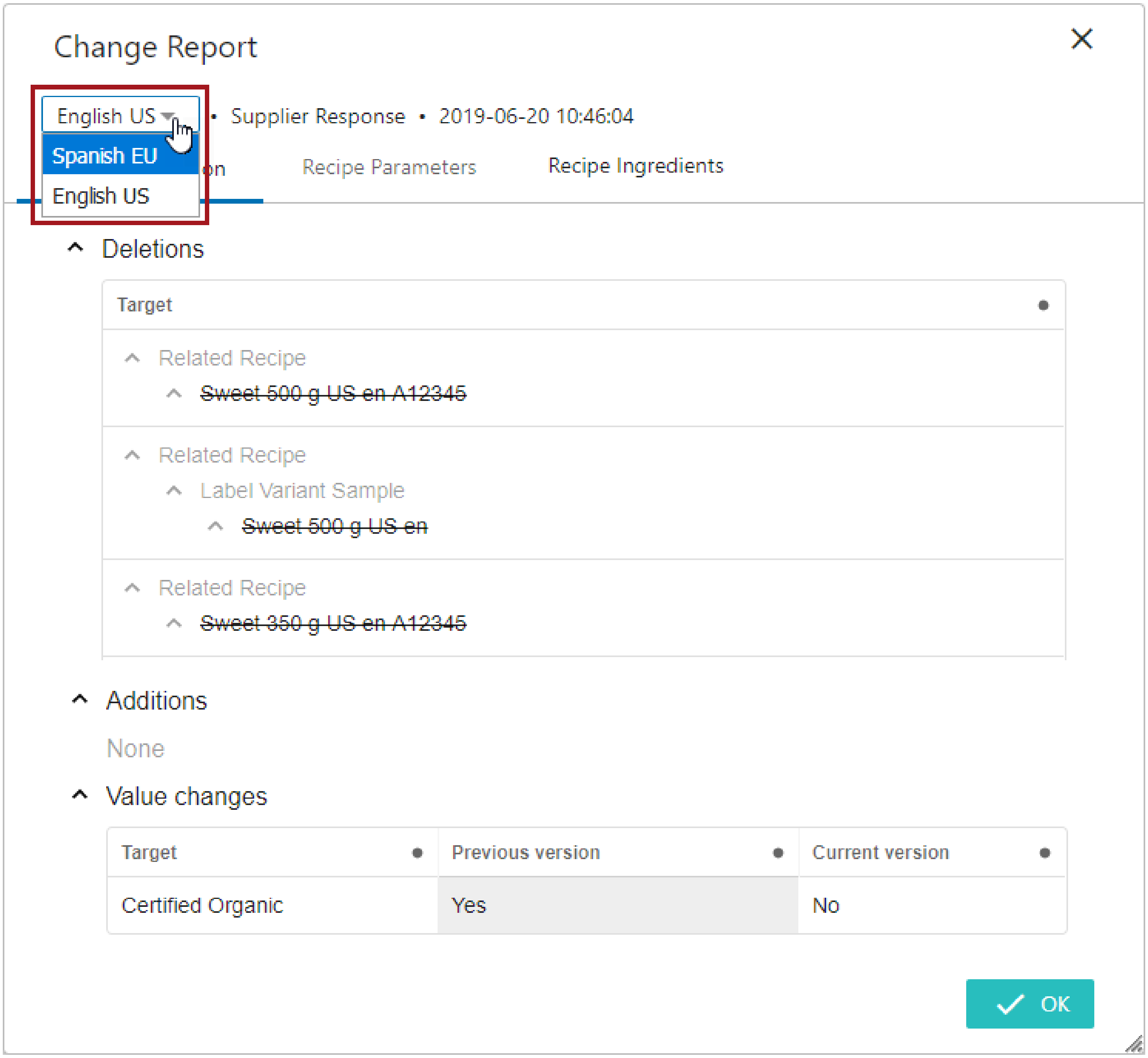




When the notification is active, you can click on it. A dialog displays showing a comparison of the changes that have taken place in the user's login context. The dialog displays with a number of tabs, based on the snapshot configuration, with each tab grouping the changes by the specified change type.



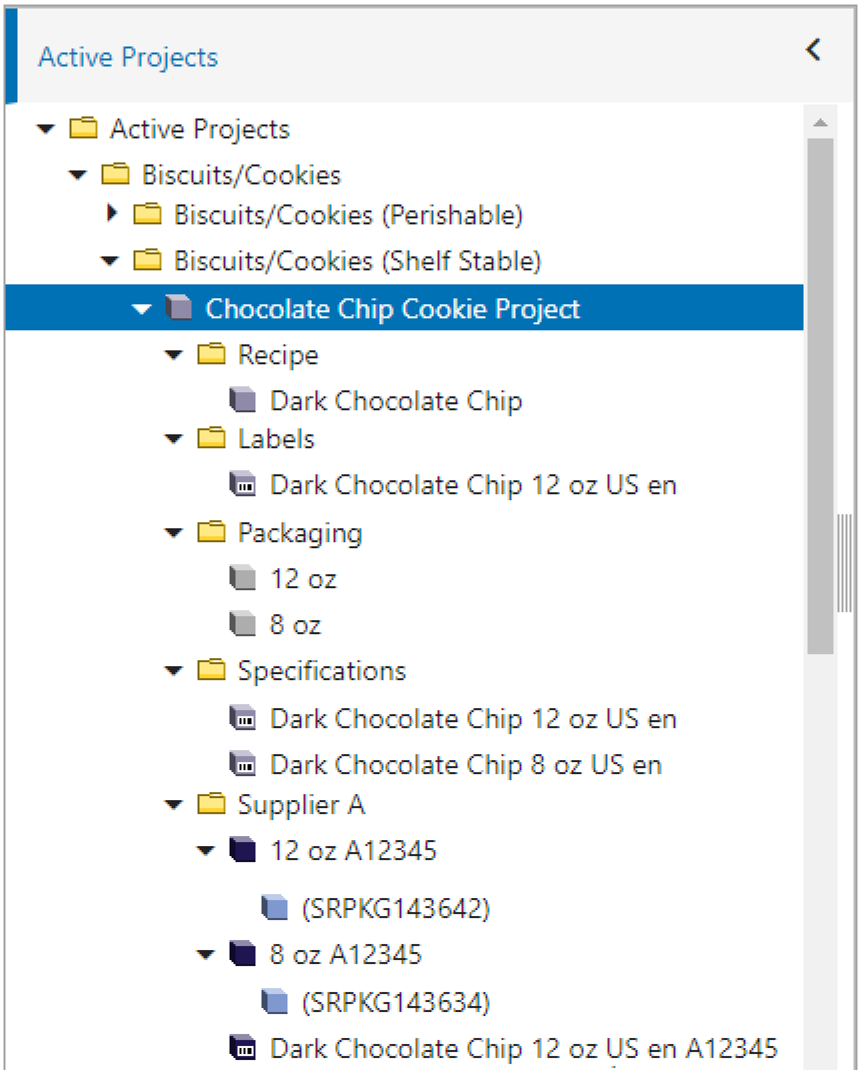
Keep the Change Report open, move it around, and resize it as you continue to make edits in Web UI. You can expand or retract each specified change type within the Change Report by clicking on the arrows next to them. Additionally, you can switch between contexts in the Change Report, and the report will refresh displaying any changes that were made in that context.



Note: Any changes made to the data model will not alter or delete information already captured previously by snapshots.

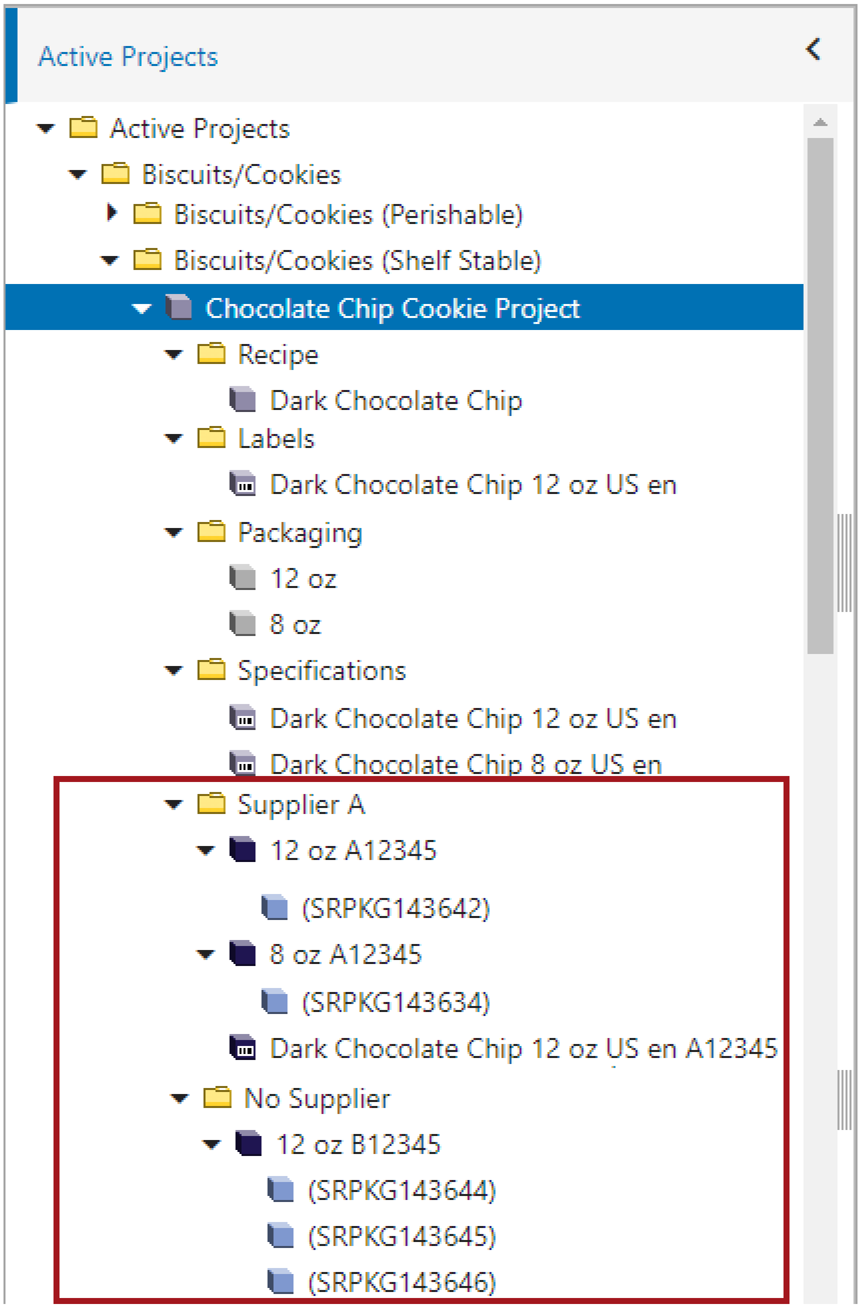
Using Project Navigator

Users are able to access design specifications (active projects) in workflows by selecting the classification folder configured to house active projects directly from the Tree navigation. With this view, users see all recipes, packages, labels, or suppliers associated with the design specification. Additionally, the project navigator enables the user to be faster when working on active projects, as there is no need to remember which state of a workflow the design specification is located.



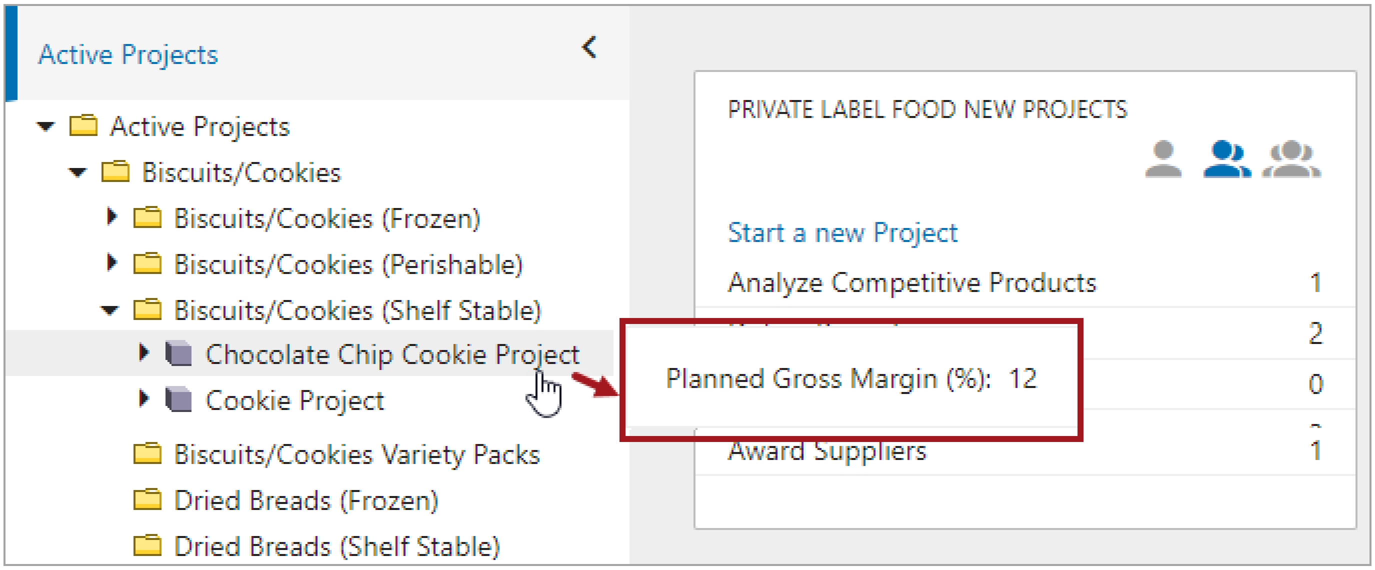
When using project navigator for active projects, the following aspects need to be kept in mind:

- Depending on the configuration, supplier responses may be grouped by supplier. For example, in the image below, all of the responses from Supplier A are grouped together under the Supplier A folder. If there are responses but it is unknown which supplier provided the answer, the responses will be grouped together under a configured folder. In the picture below, they are under a folder that uses the system default name of 'No Supplier.'

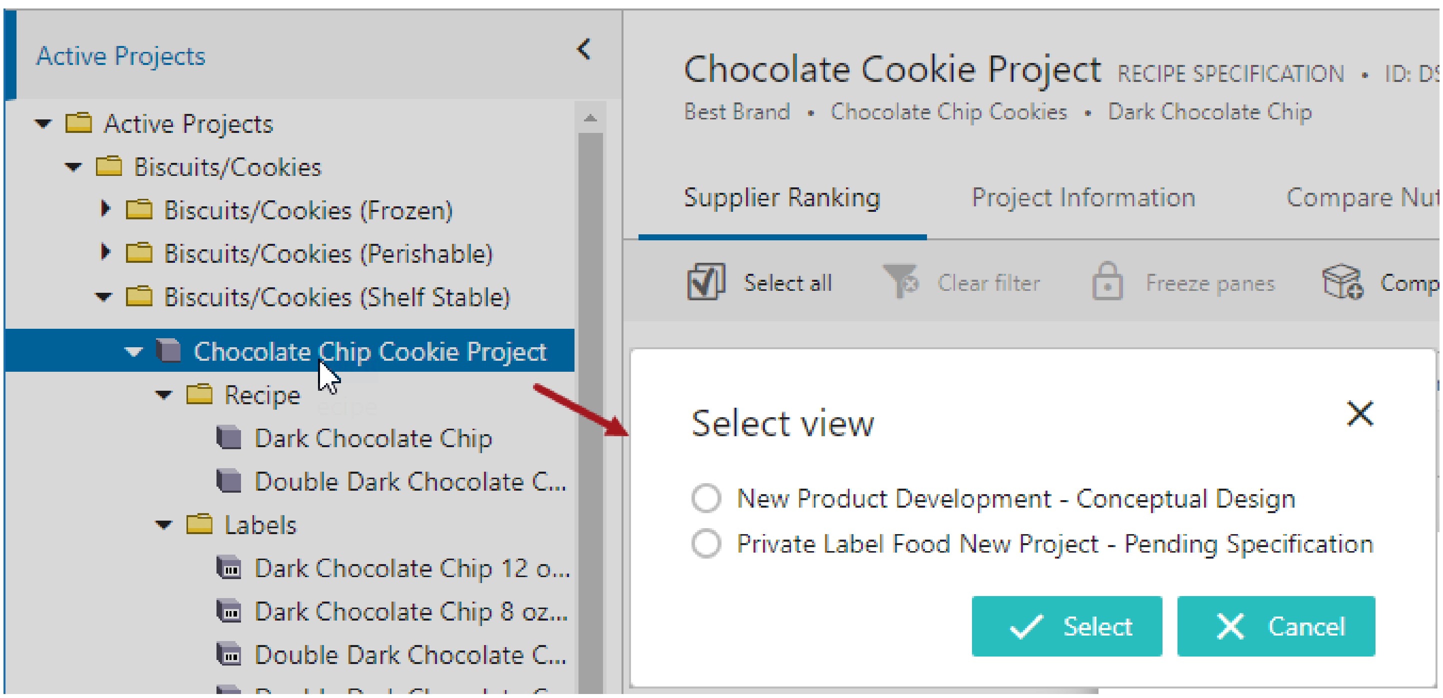


If the supplier responses were not configured to be grouped by suppliers, you will see all supplier responses listed together under the active project.

- If configured, you may see important information display when hovering over the design specifications, packages, labels, etc. Read all hover text as needed.



- If a design specification is clicked on, and it is in more than one workflow, a dialog appears asking which workflow to see it displayed in. Choose the appropriate workflow.



Note: Resulting screens are based on configurations. Talk to your admin if you have questions on any of the result screens that occur when clicking on active projects or object types.

Storyboards

Welcome to PLM Storyboards, where creative inspiration meets a platform for capturing that inspiration and making it a reality. With Storyboards, users are able to capture or upload pictures, colors, materials, etc., to a storyboard for easy collection development. With all inspirational resources needed for a collection kept in one place, users are able to efficiently complete any collection they are working on. Additionally, communication can be done directly through comments on storyboards for easy collaboration. To learn more about PLM Storyboards and how to use it, read the documentation that follows.

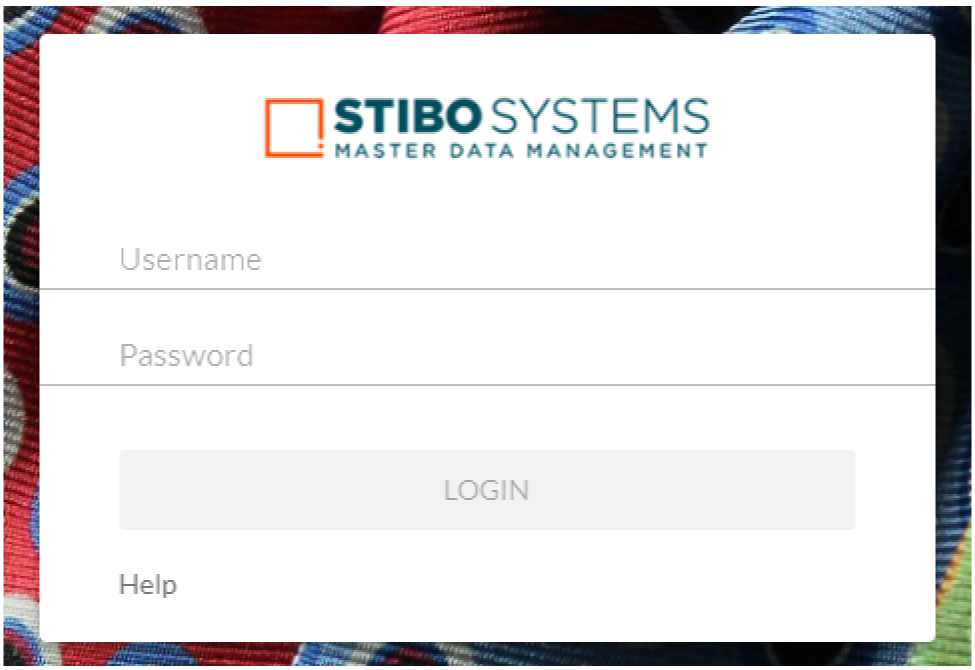
Logging In and Out of Stibo Systems' PLM

Accessing Stibo Systems' PLM is done through a web address. The start of the web address is tied to the server address, so this will change from company to company. The end of the web address will always end with **/spireplm**. For example, 'userl' at Clothing Inc. might use https://tom.clothinginc.com/spireplm as their web address to access PLM.

Once a user is logged into PLM, they are brought to the login page.

Logging In

When logging in to PLM, the first screen seen is the login screen. Depending on your company, the background image to the login screen will vary, but the Username / Password fields remain the same for everyone, as will the link to access PLM Help.

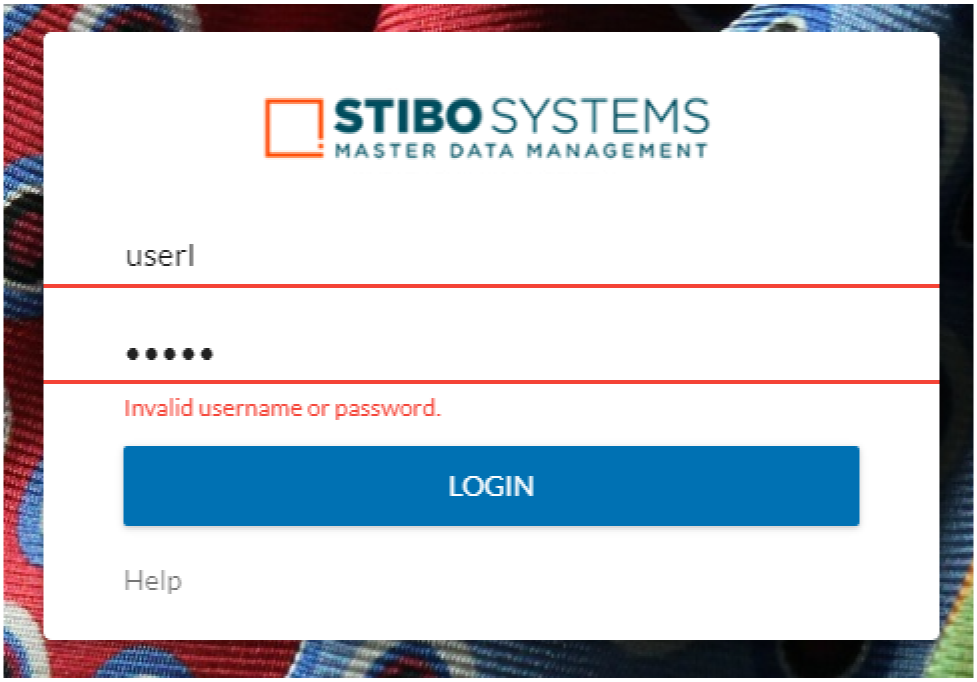


To access Stibo Systems' PLM:

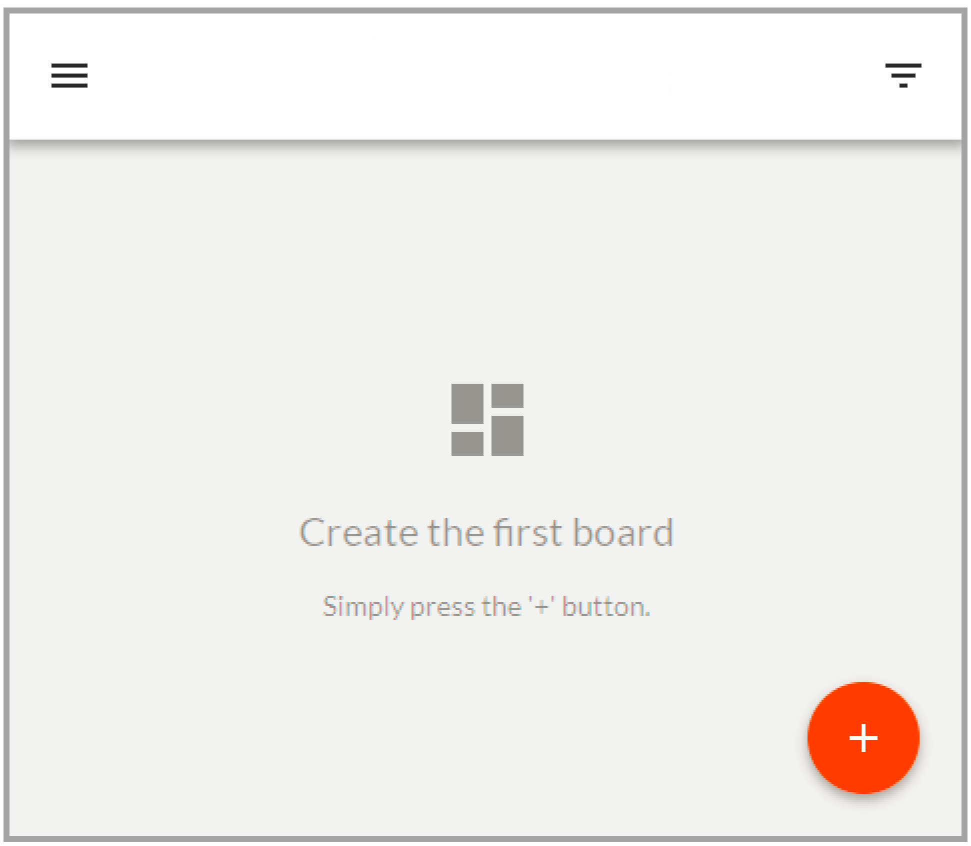
1. Enter in your STEP username. (This is the User ID set up in STEP.)
2. Enter in your STEP password. (This is the password associated with your User ID.)
3. Click **LOGIN** to enter PLM.

You will notice that the LOGIN button does not become active until both fields are filled out.

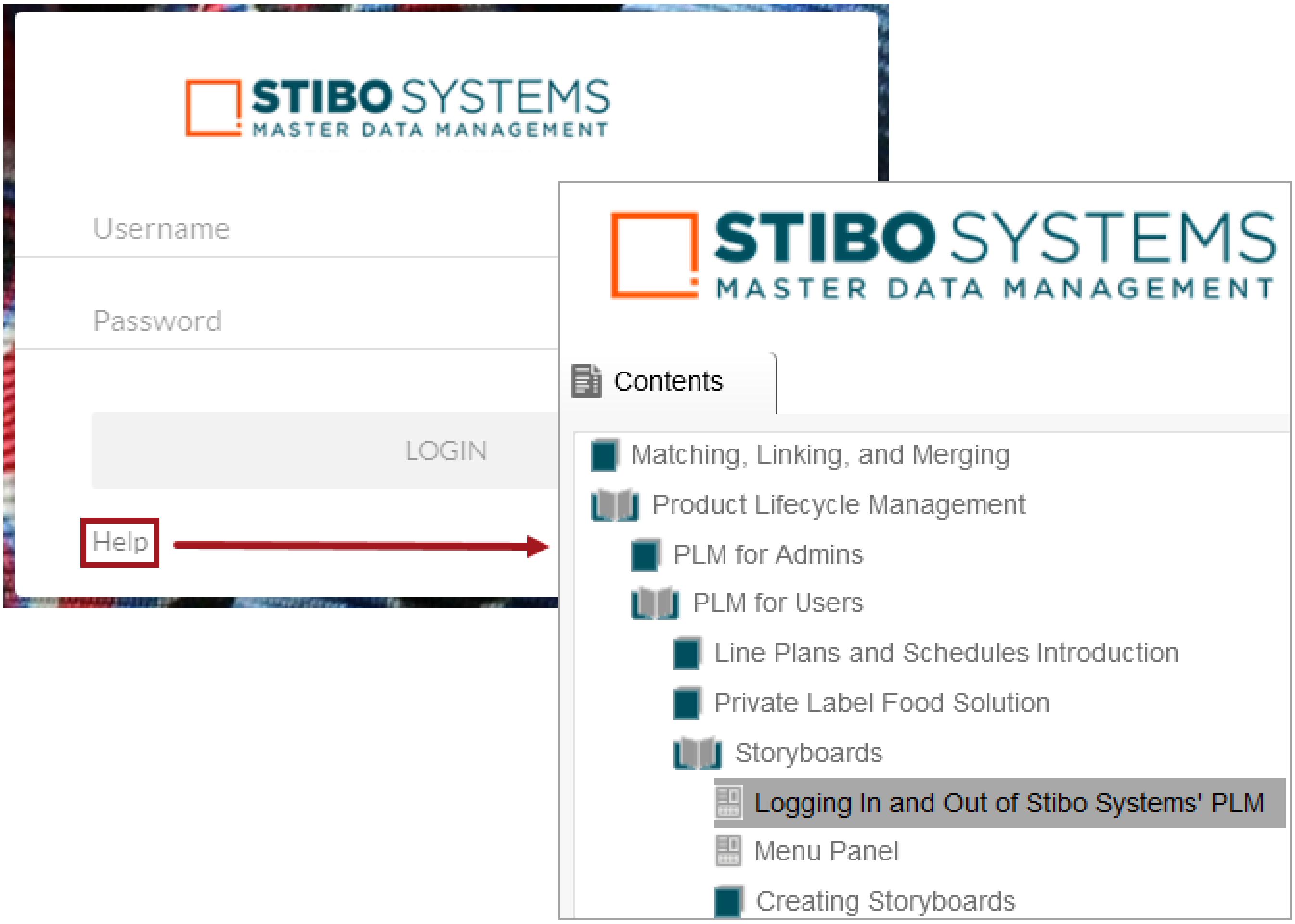
If incorrect credentials are entered in either the Username or Password fields, or the username entered does not have privileges to access PLM, a message will pop up notifying that the login failed.



To correct this, enter in the correct credentials, and press LOGIN again. When successful, PLM will open, and storyboards can be created.

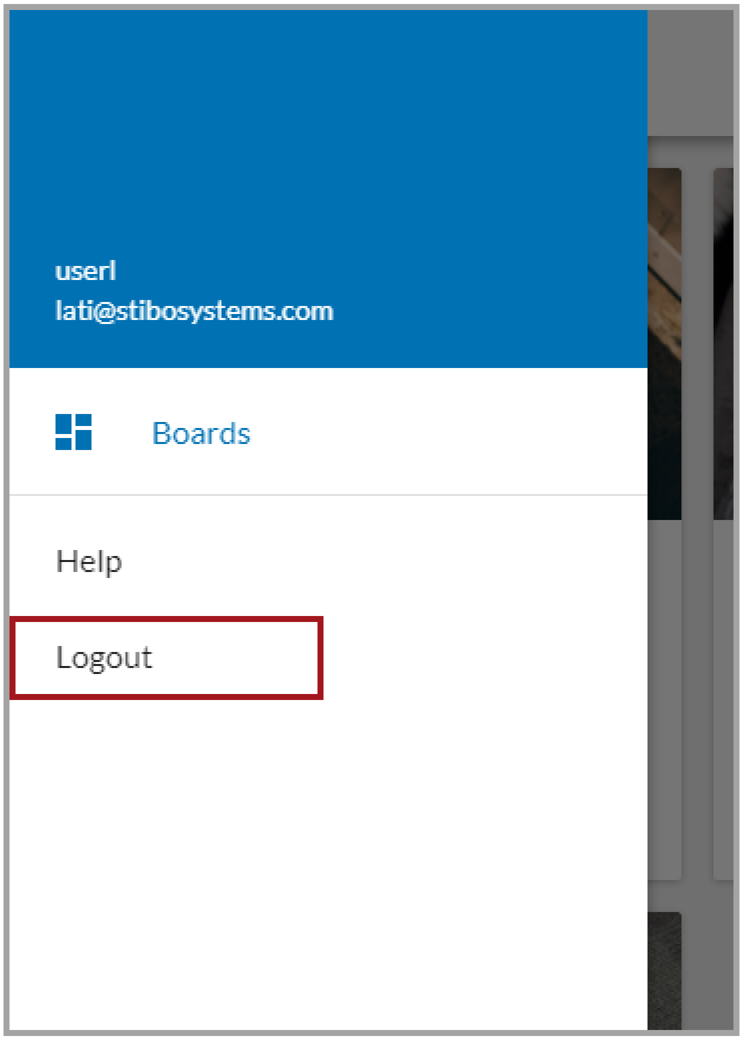


If assistance is needed while on the login screen, press the **Help** link to access the PLM documentation.



Logging Out

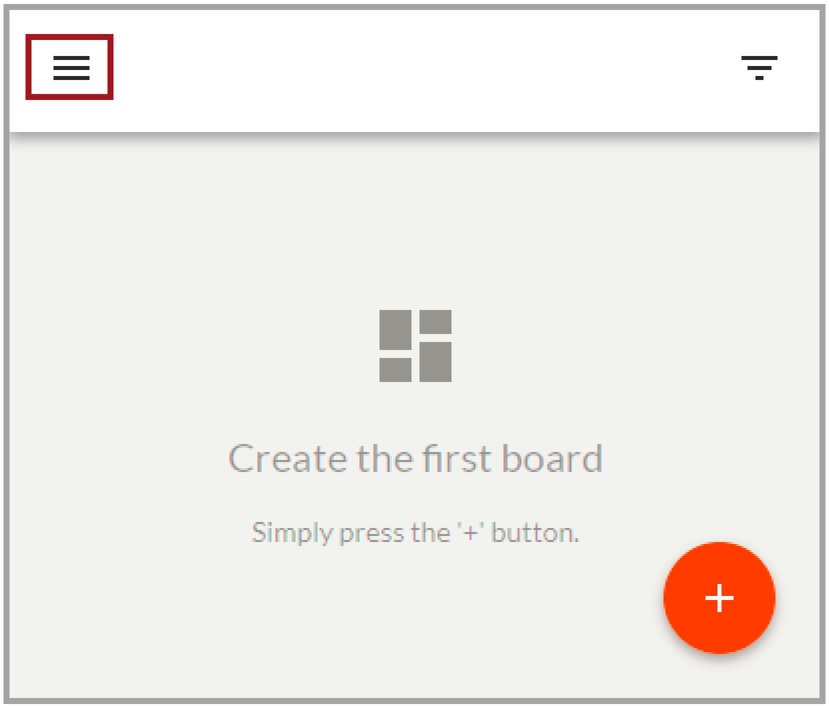
To log out of PLM, click on the menu icon, ☰ , on the upper left-hand side to open the menu panel. Click on Logout to exit.



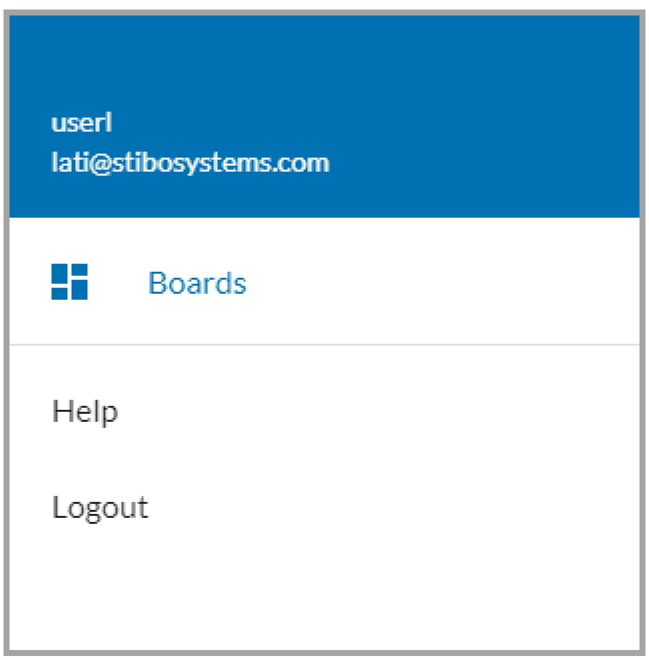
For more information on boards, see the **Creating Storyboards** topic in this documentation.

Menu Panel

The left-side menu panel is the area that is used to access various parts of PLM. It can be accessed by clicking on the menu icon, ☰ , on the upper left-hand side.



In this menu a user can:

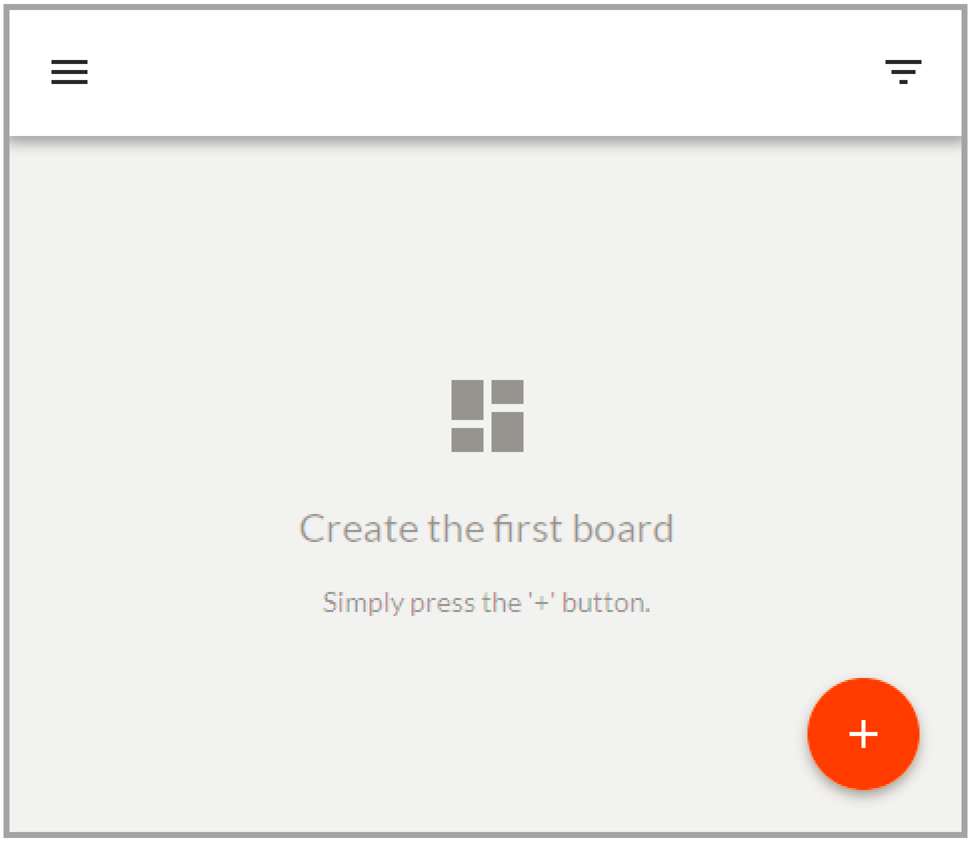


- See what user is signed into PLM. See the **Logging In and Out of Stibo Systems' PLM** topic in the **PLM for Users** documentation for more information.
- See what email is connected to the username. Talk to your administrator if the email is missing or incorrect.
- Return to the PLM board gallery. See the **Creating Storyboards** topic in the **PLM for Users** documentation for more information.
- Navigate to the PLM help. Look up information in the PLM documentation for more about PLM.
- Logout. See the **Logging In and Out of Stibo Systems' PLM** topic in the **PLM for Users** documentation for more information.

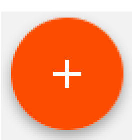
Creating Storyboards

Storyboards are containers for holding various content files, such as JPEGs, PNG files, etc. Storyboards can be used in a multitude of ways. For example, storyboards may be created to house ideas for the creation of new products.

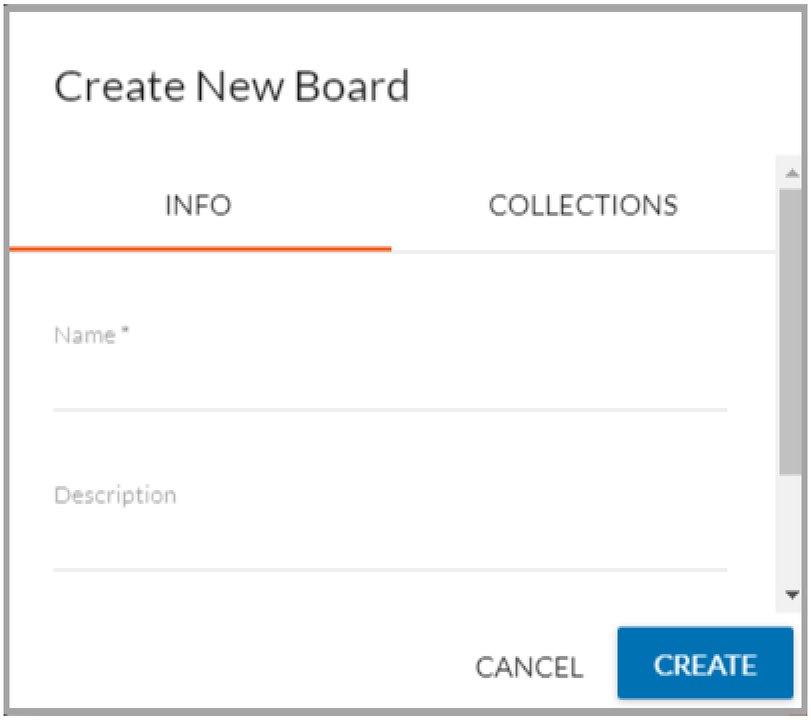
After signing into PLM, a user is brought to a blank board gallery were storyboards can be added.



To create a new storyboard, click the button with the plus sign in the lower right-hand corner of the screen



When this is selected, a 'Create New Board' dialog displays.

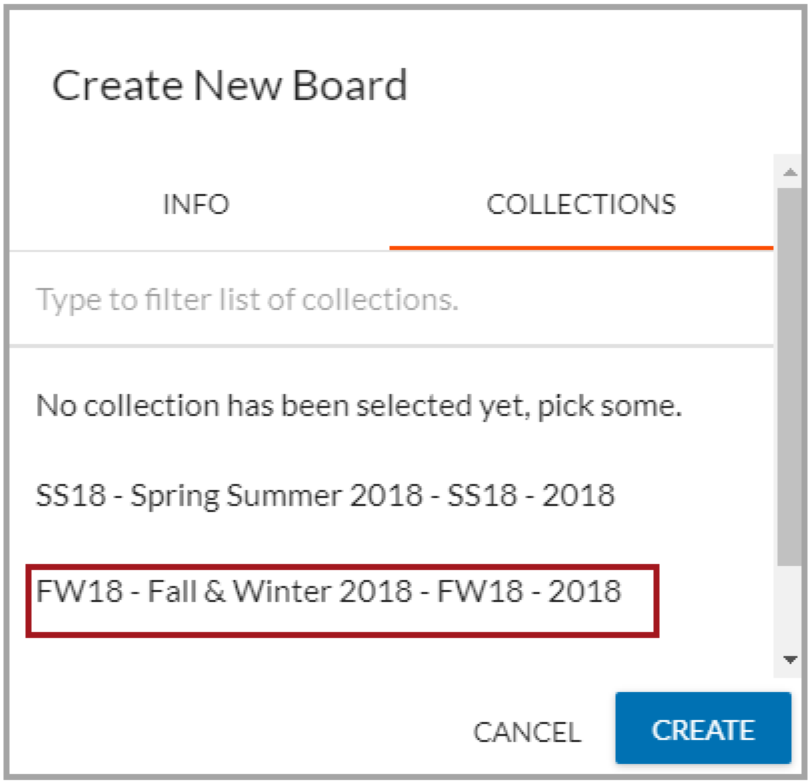


There are two tabs on this dialog:

- **Info**- Enter a name for the storyboard, and fill out any other fields that are needed.

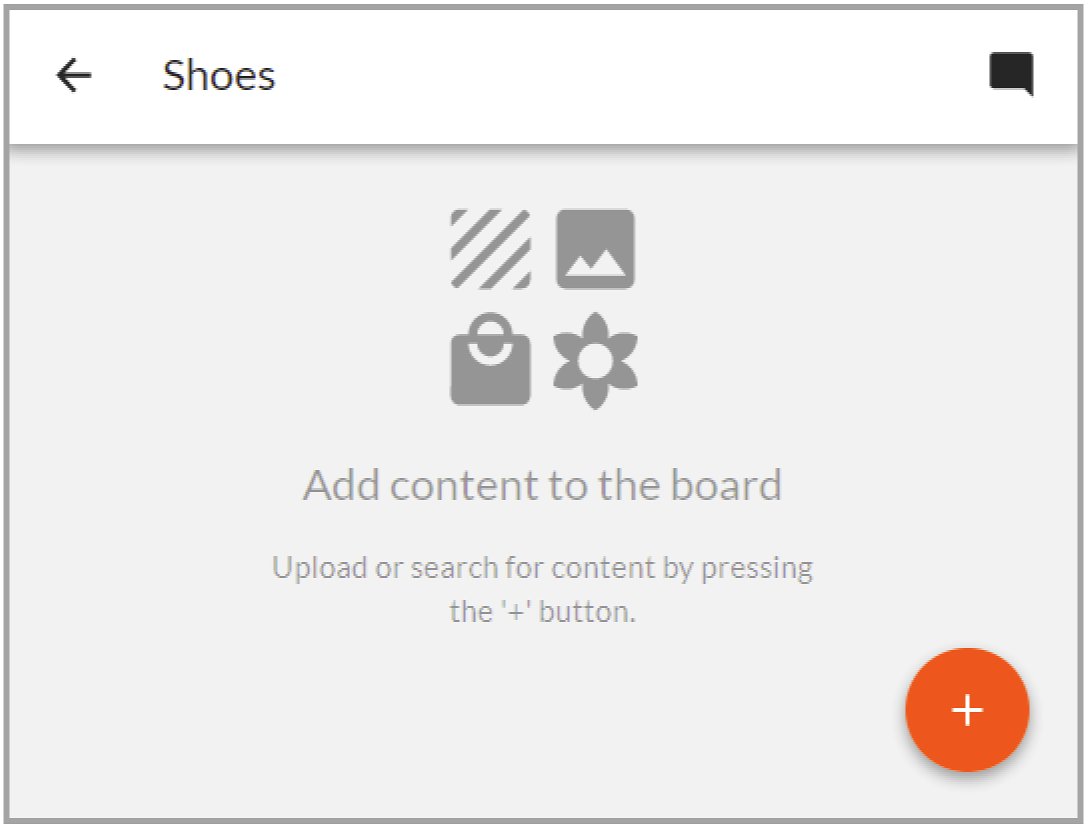
Note: It is required for the board to have a name. If it does not, it cannot be created. All required fields for the creation of new boards are marked with an asterisk.

- **Collections** - On this tab, add any labels / filters to the board that are required. These labels allow for better searchability of storyboards on the board gallery. For more information on using filters, see the **Using Filters** topic in this documentation.



Note: If a label that is needed is not in the system, talk to your administrator.

Once a storyboard is created, the next screen to display is the storyboard itself, were any content that is needed can be entered.



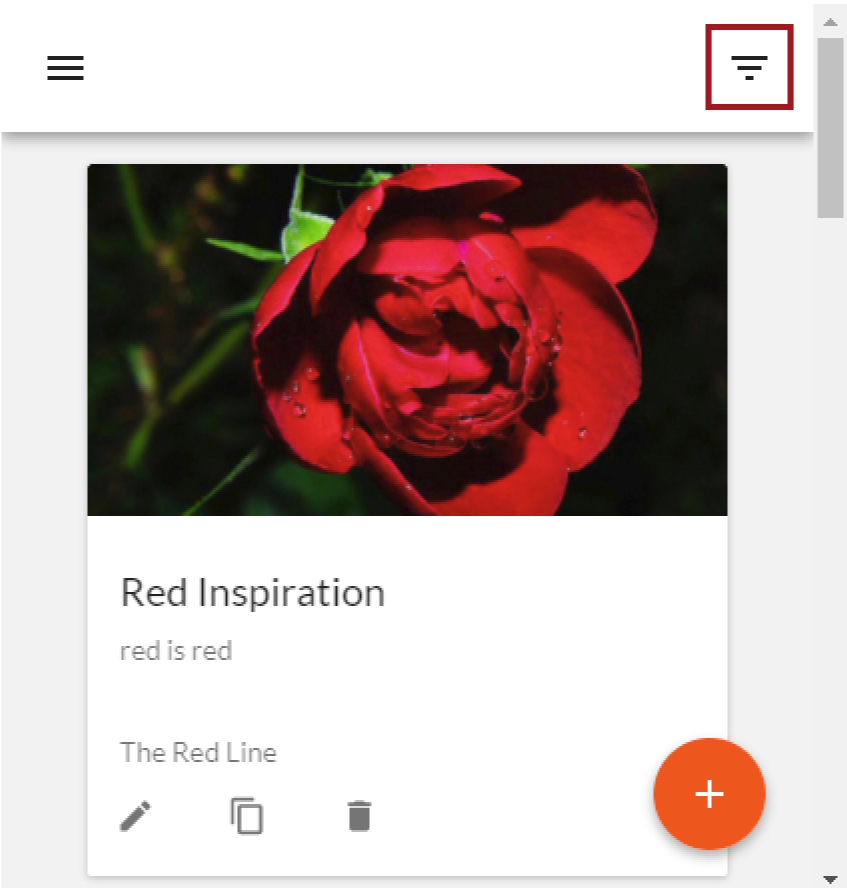
For more information on how to add content to a storyboard, see the **Adding Content to Storyboards** topic in this documentation.

Using Filters

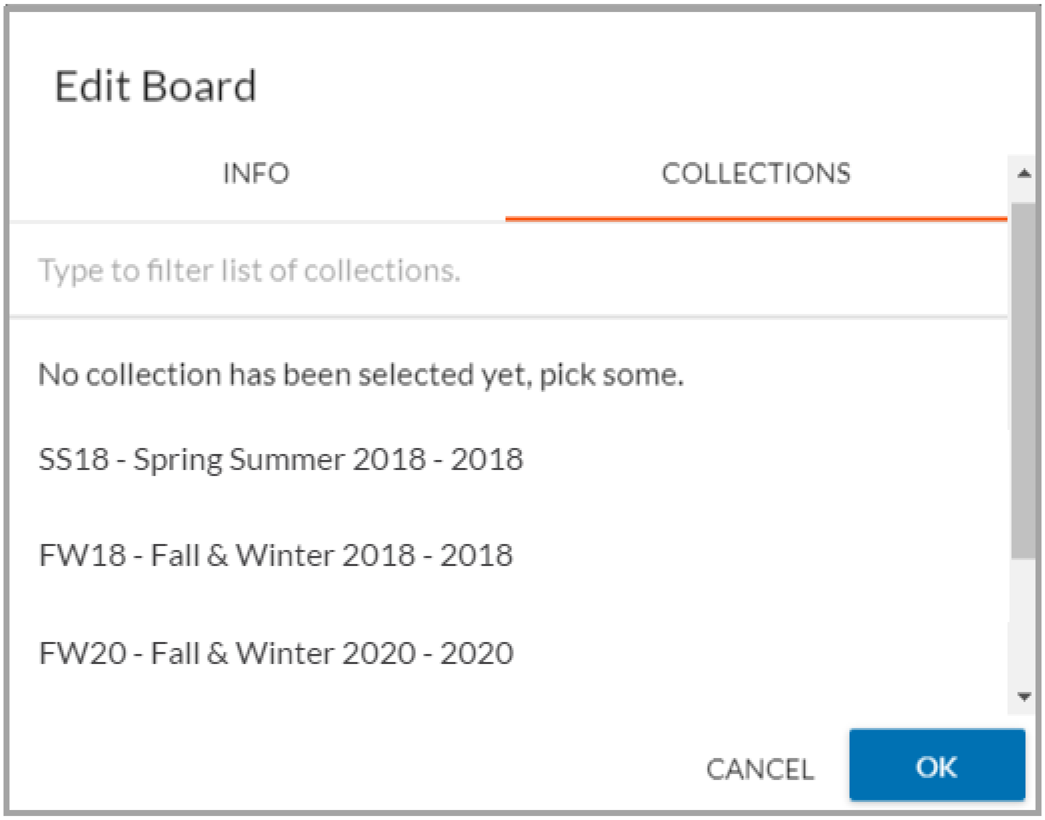
When creating storyboards, filters can be applied. These filters allow for efficient searchability among storyboards in the board gallery, allowing for quick continuation of work. The filters also enable users to navigate to certain storyboards with relevant content that can be perused for inspiration.

To use the filters while searching:

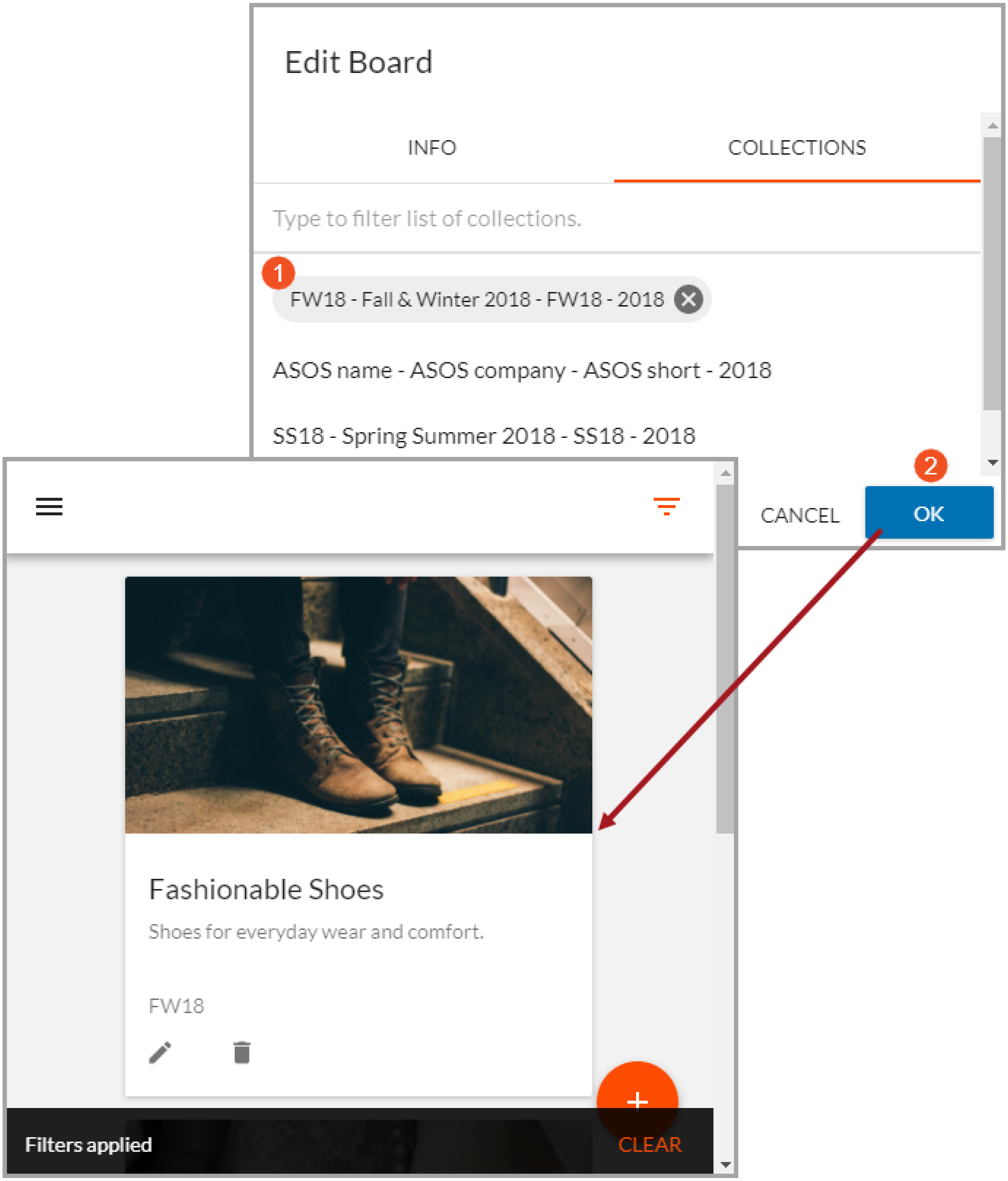
1. Click on the triangle menu, , in the upper right-hand corner of the screen. The **Filter Boards** dialog will appear.



2. The Collections tab displays, allowing you to start typing in a filter name from the list, or to directly select any filters that are needed for the search.

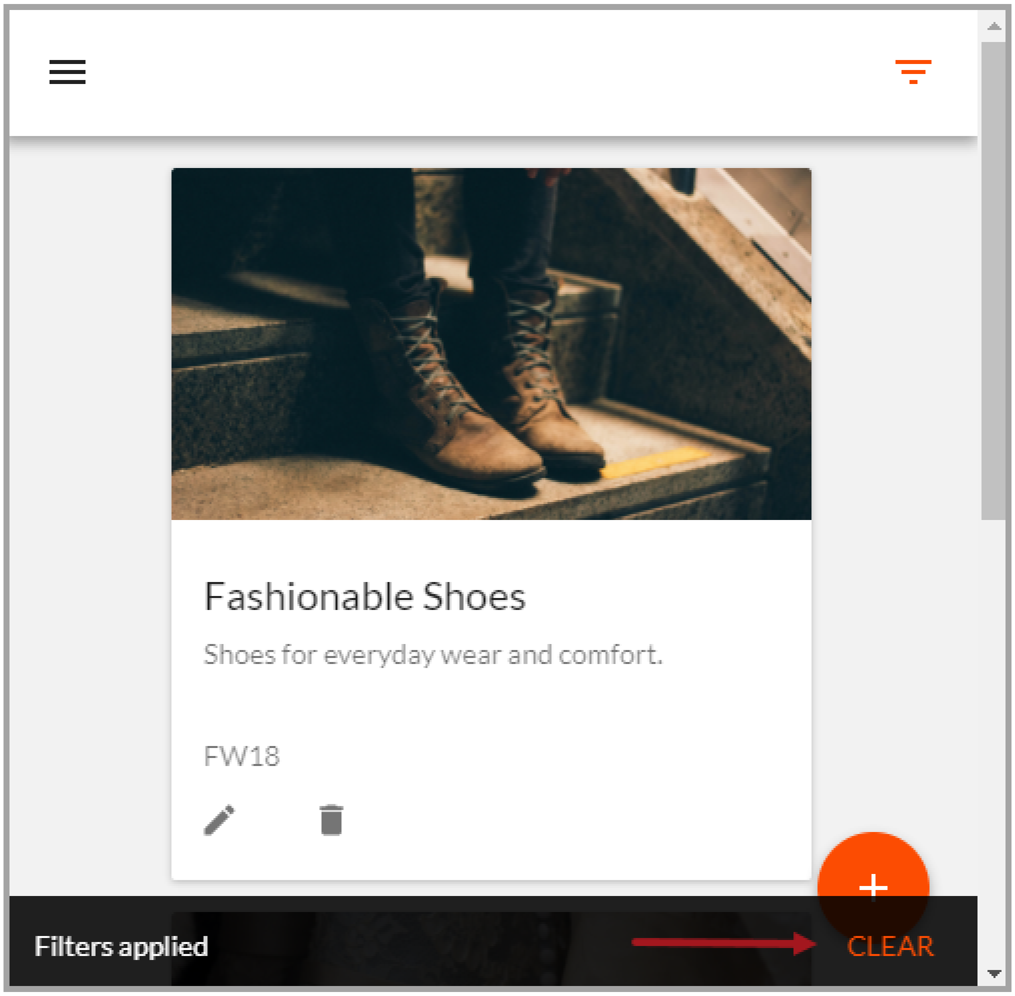


3. When finished, click **OK**, and the corresponding storyboards will appear.

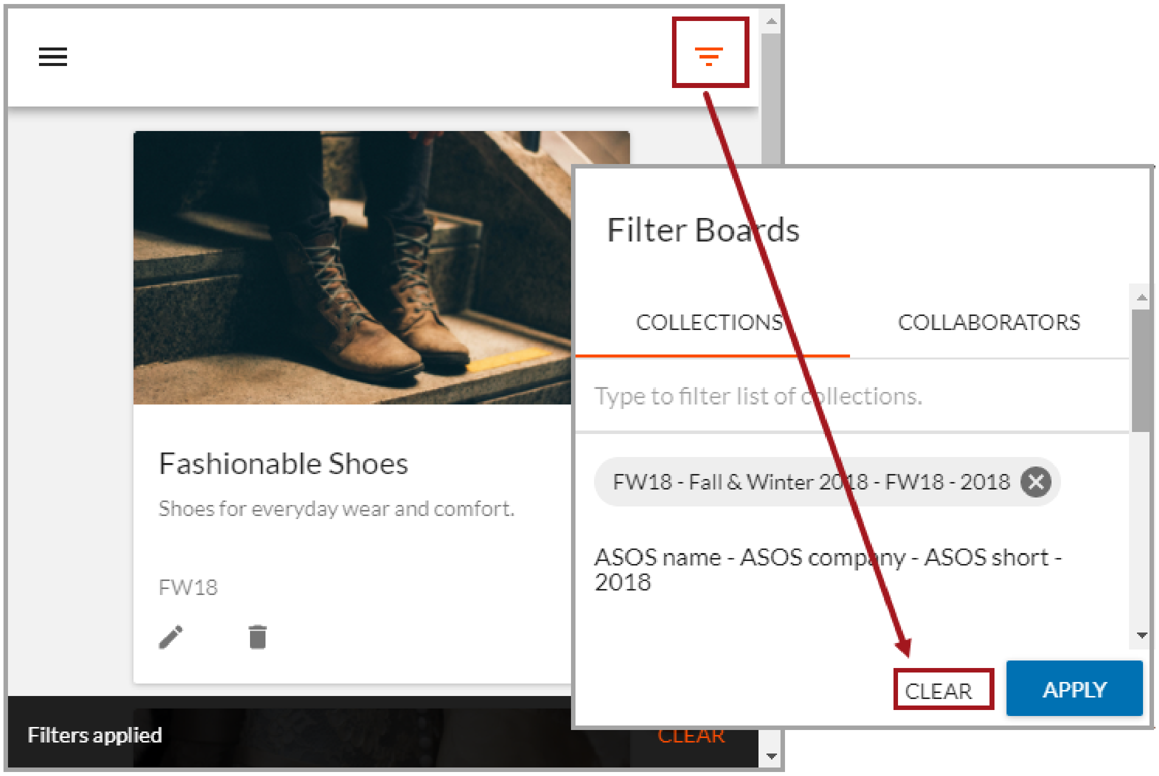


4. To clear the filter you can do it one of two ways:

- Click on the 'Clear' button that appears at the bottom of the screen.



- Click on the triangle menu again, and select 'Clear.'

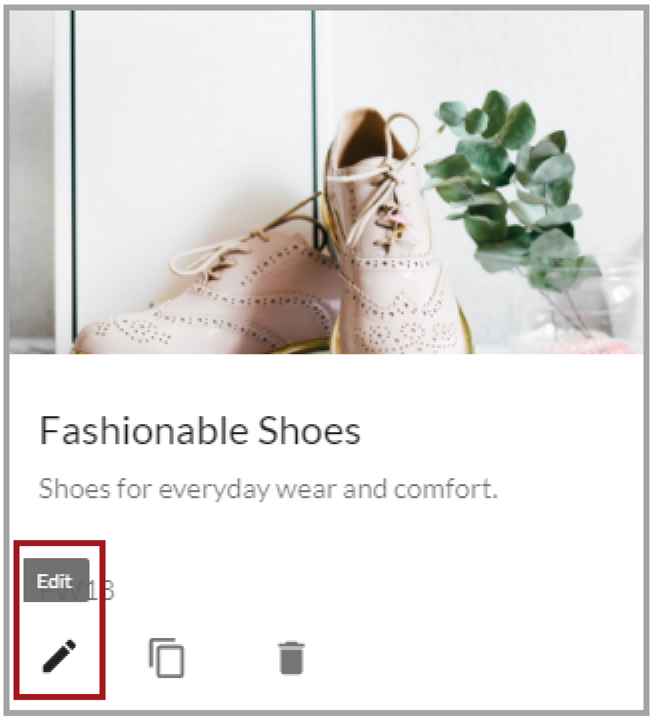

Fashionable Shoes
Shoes for everyday wear and comfort.
FW18
Filters applied
CLEAR
Filter Boards
COLLECTIONS
COLLABORATORS
Type to filter list of collections.
FW18 - Fall & Winter 2018 - FW18 - 2018
ASOS name - ASOS company - ASOS short - 2018
CLEAR
APPLY

How to Manage Storyboards

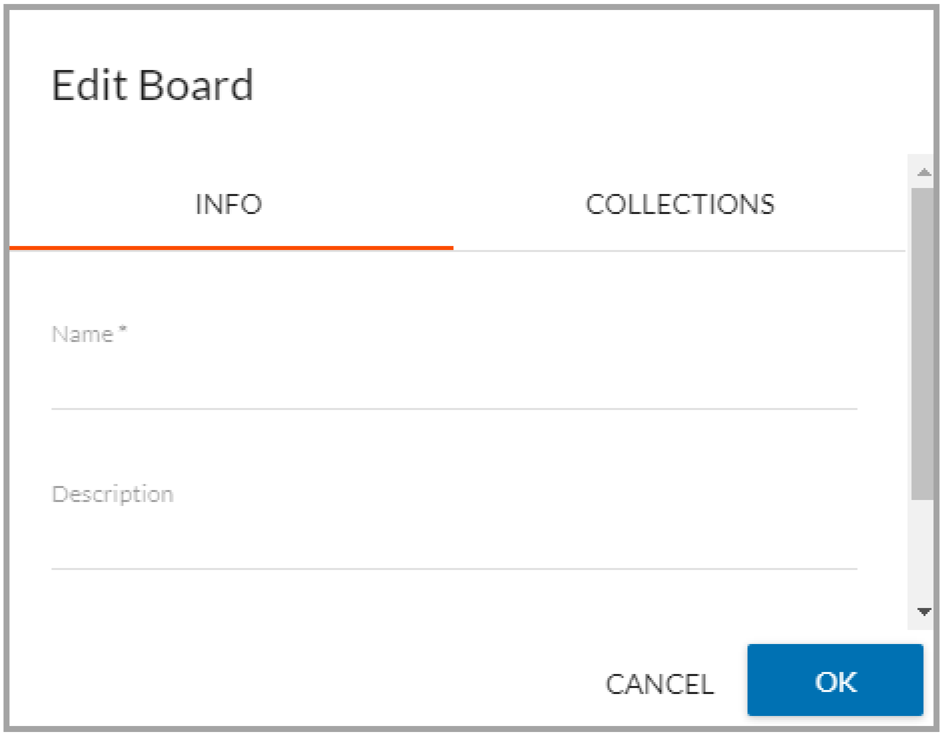
The storyboard canvas is where all storyboards are kept and managed. Users can edit, duplicate, or delete storyboards.

Editing a Storyboard

If a storyboard needs to be updated, go to the storyboard canvas > navigate to the storyboard > select the pencil icon.



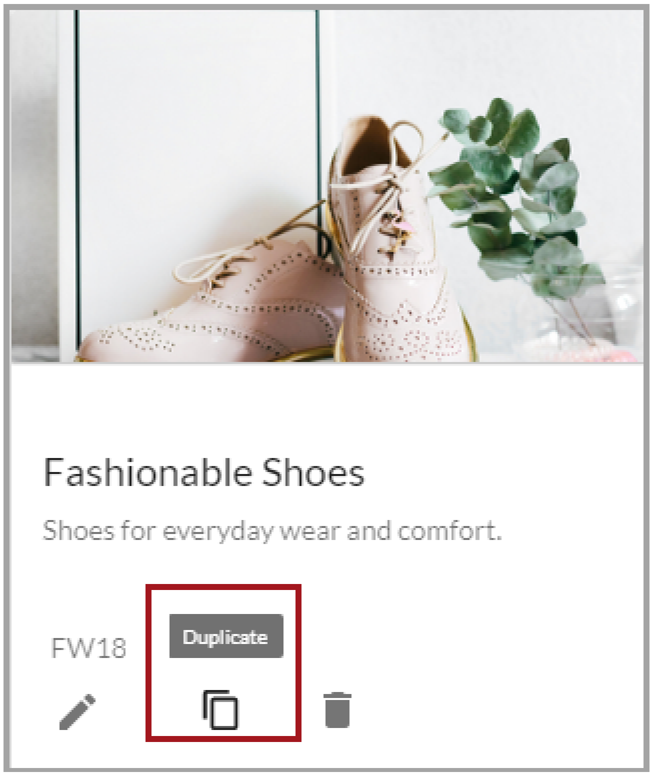
When selected, the Edit Board dialog appears. Change any information under the Info or Collections tabs that needs to be updated.



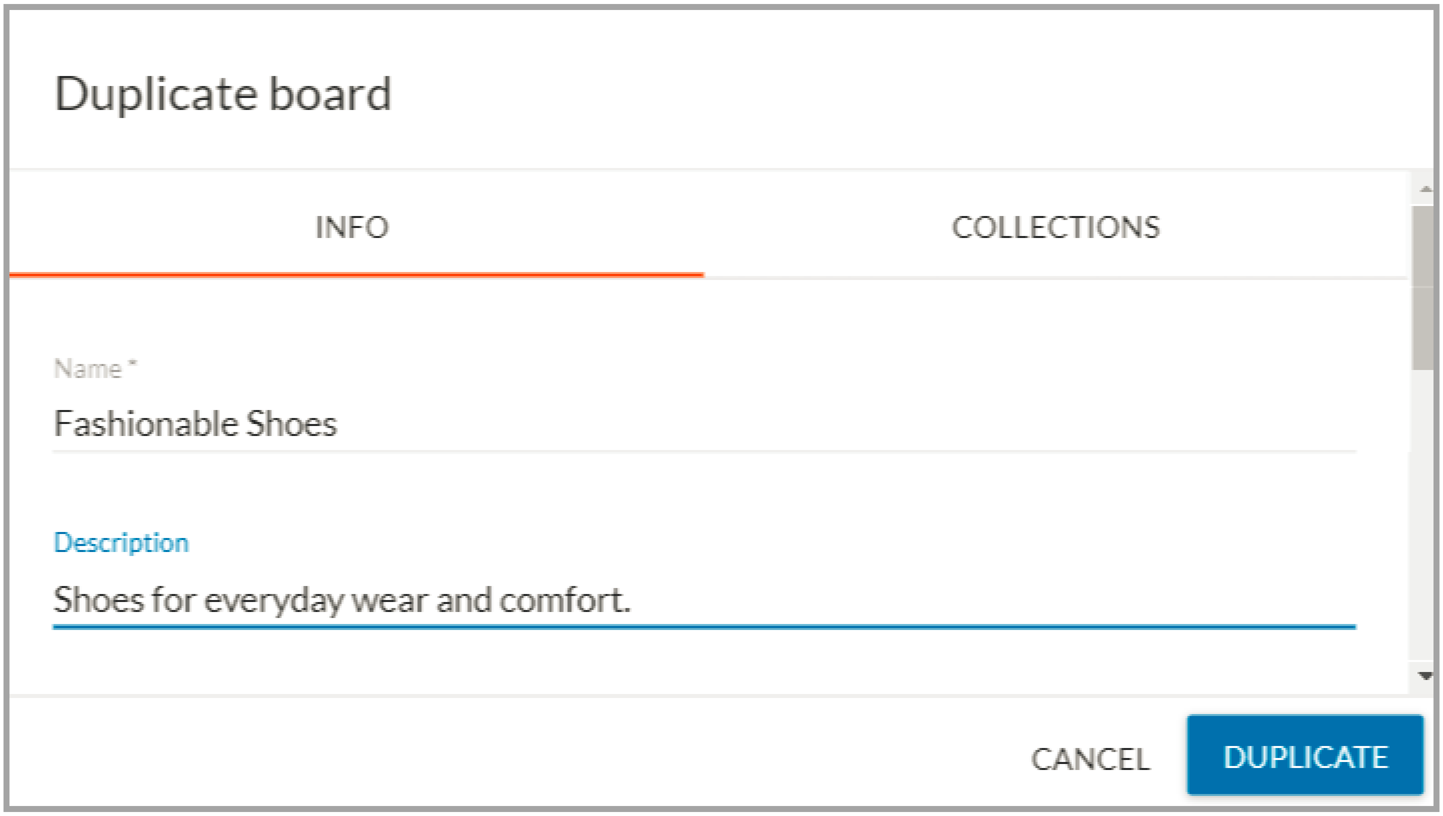
For more information on filling out the Edit Board dialog, see the **Creating Storyboards** and **Using Filters** topics in this documentation.

Duplicating Boards

If an existing storyboard needs to be duplicated, go to the storyboard canvas > navigate to the desired storyboard > click the duplicate icon.

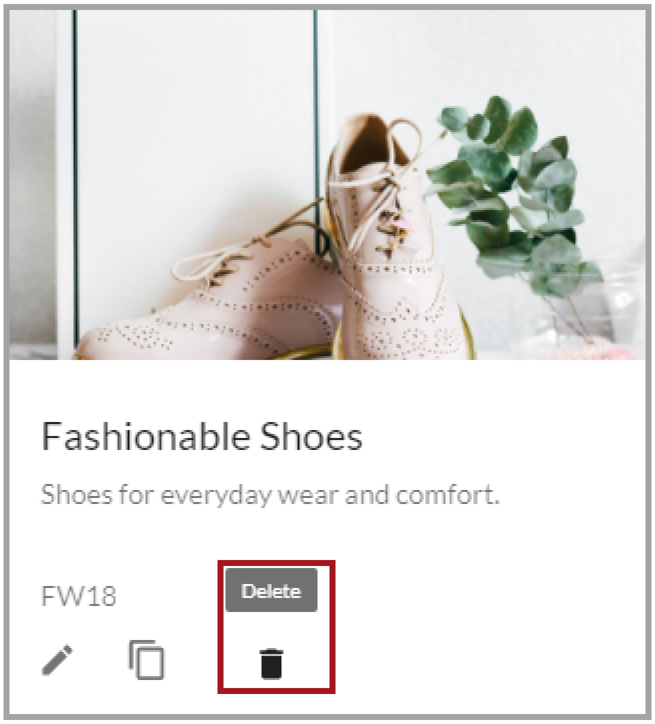


Once selected, a 'Duplicate board' dialog appears. Either keep or change the name and any necessary data, and click **DUPLICATE**. A new storyboard will be created with all of the original storyboard's references.

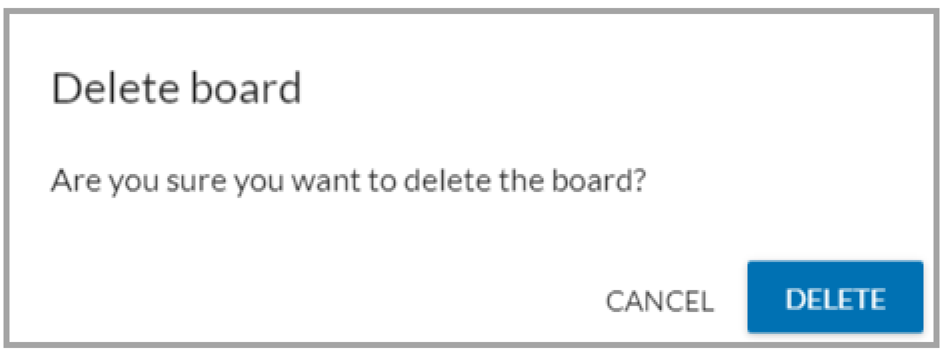


Deleting Storyboards

If a storyboard is no longer needed, it can be deleted by going to the storyboard canvas > navigating to the storyboard > clicking on the trash icon.



Once clicked, a prompt will appear confirming that the selected storyboard is to be deleted.



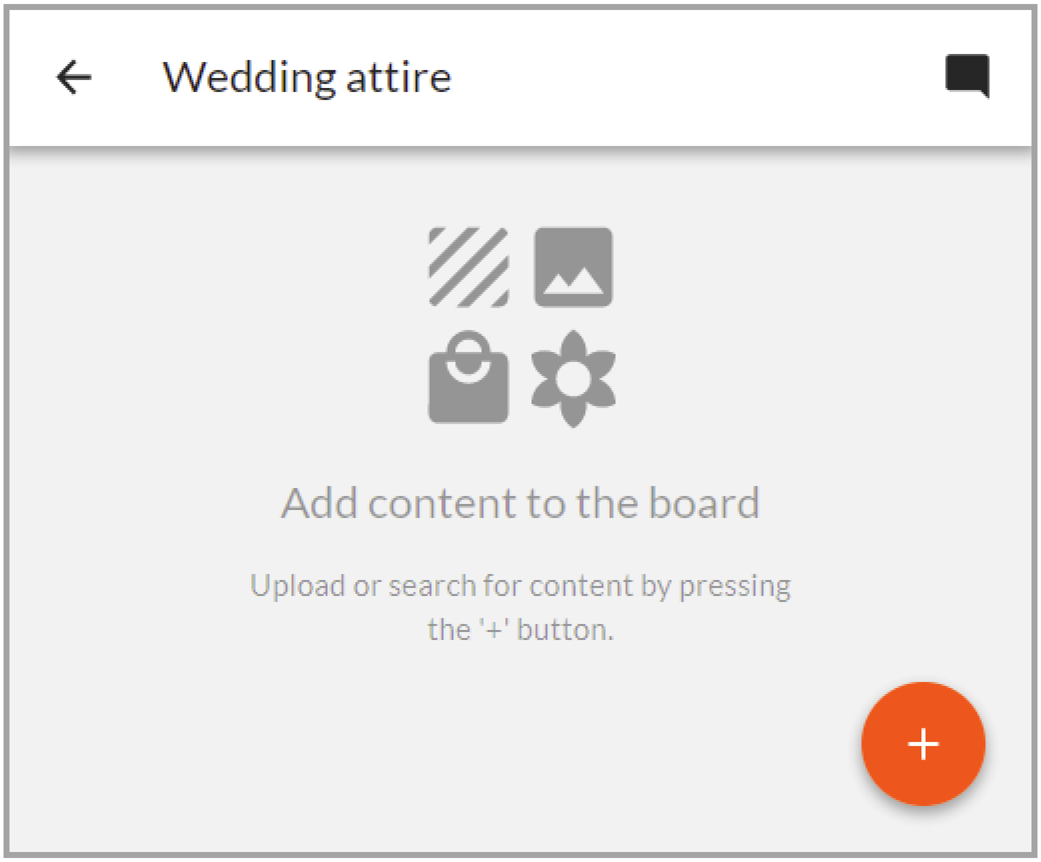
Clicking the **DELETE** button will discard the storyboard.

Important: Once a storyboard is deleted, it is not able to be recovered again. Caution should be used when deleting storyboards.

Adding Content to Storyboards

Once a storyboard has been created, a user is brought to the blank storyboard canvas where they can add various types of content. A few examples of content that can be added to a storyboard are trims, images, colors, and materials. The storyboards allow users to keep all content in one spot while they are developing ideas for various collections.

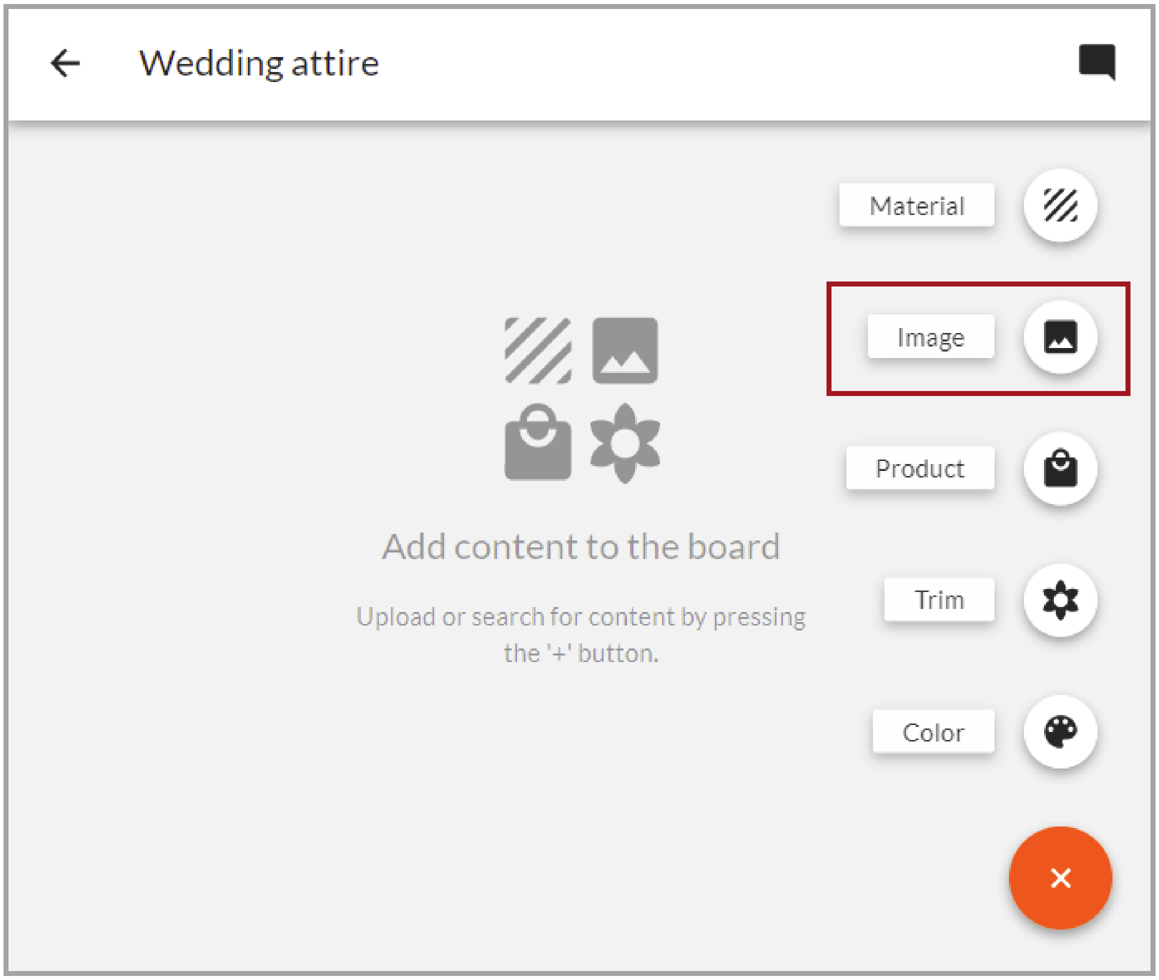
In the example below, the blank storyboard canvas is meant to hold inspirational content and sketches to create a new wedding clothing line.



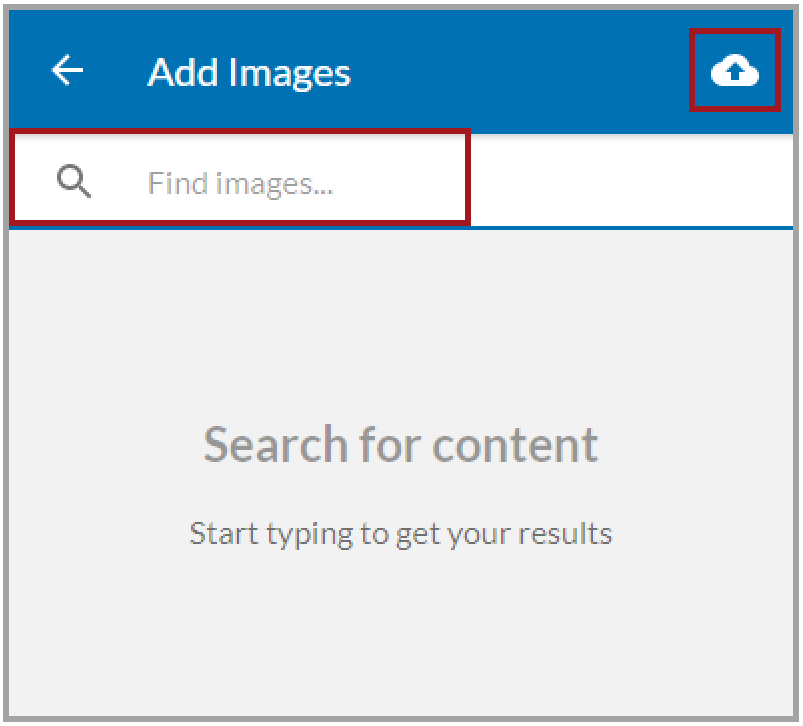
Follow the steps below when adding content to a storyboard:

1. Click on the round button with the plus sign on it in the lower right-hand corner of the screen. A list of available content types will scroll up.
2. Click on the content type that needs to be added. In this example, 'Image' is selected.

Note: Clicking the round button with the plus sign on it may display different content types than pictured. Content types will differ in availability according to user needs (and setup) from company to company.



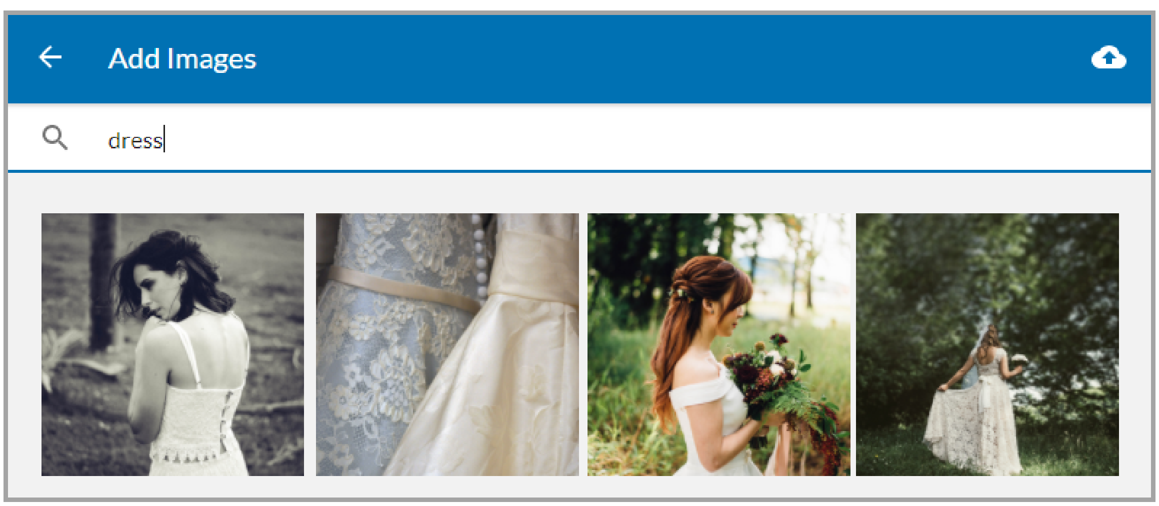
3. Next, on the **Search for content** dialog, either search for existing content already in the PLM system via the search bar, or upload new content via the upload cloud icon in the top right corner.



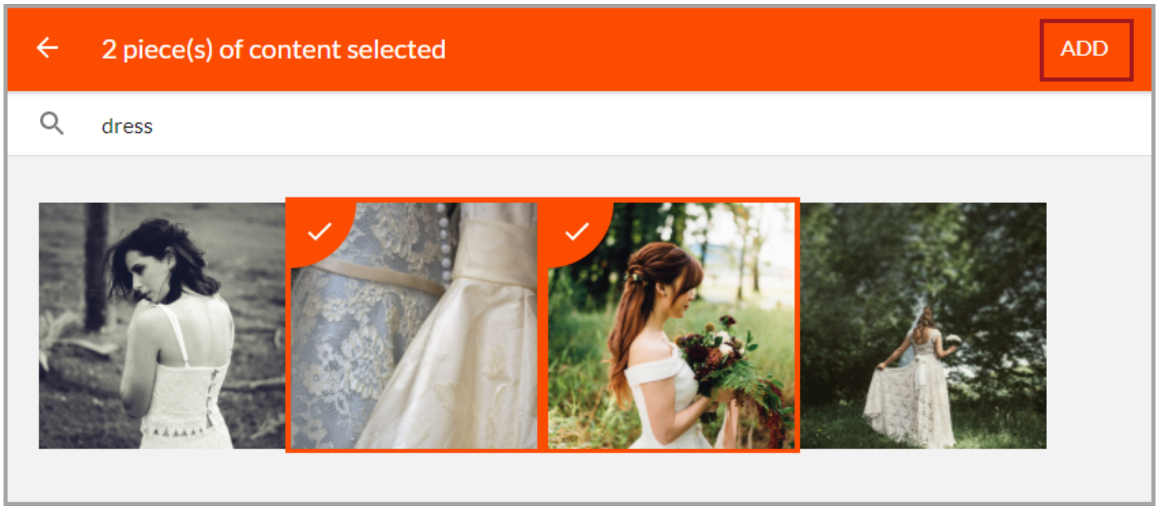
Depending on if you are using a computer or an iPad, searching for and uploading content is generally the same, though there are some differences. Read the following section below for further details.

Searching for Content

1. For either the computer or iPad, when searching for content already in PLM system, click in the search field and start typing either the file name, ID, tag, or other information known about the file(s) being sought. Results will display below the search bar.



2. Select the desired content to add to the board, and press 'Add.'

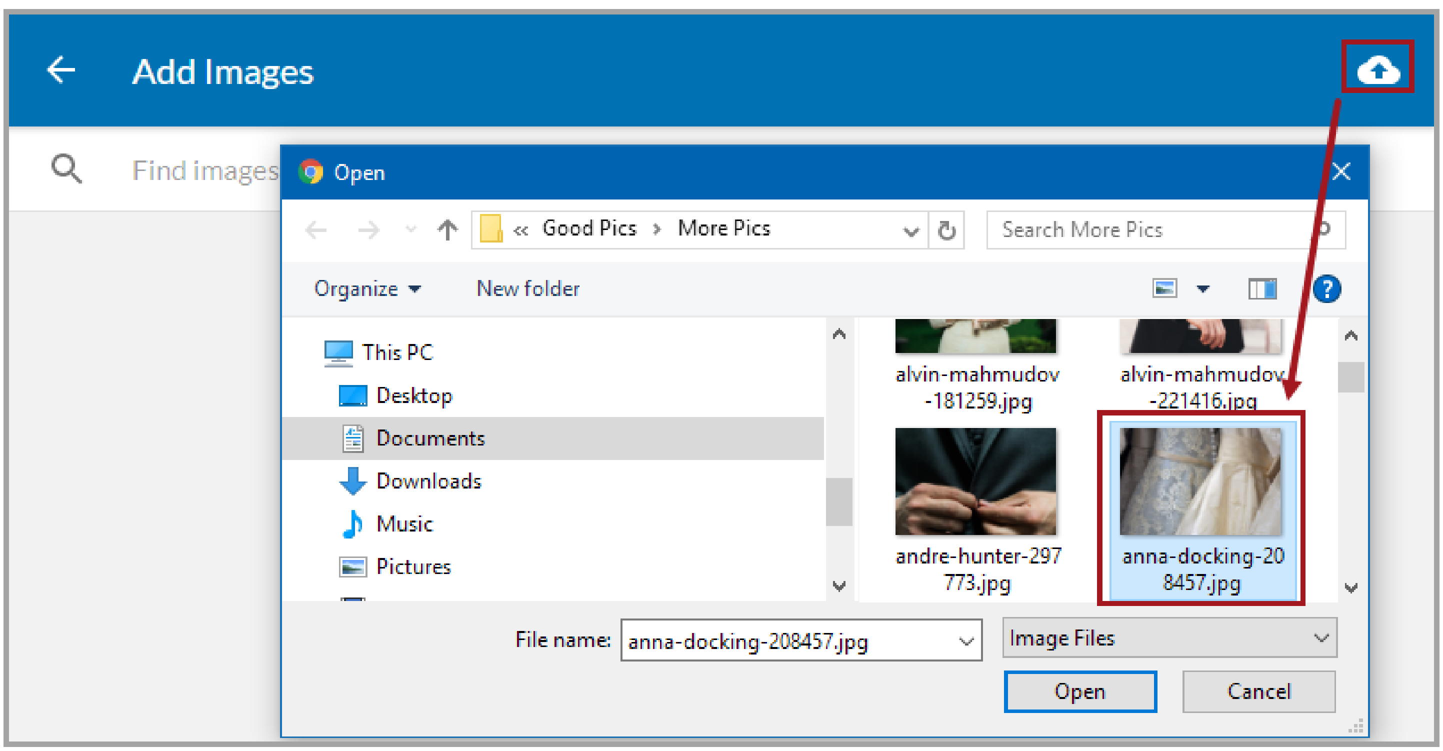


3. The selected content will be added to the board instantaneously.

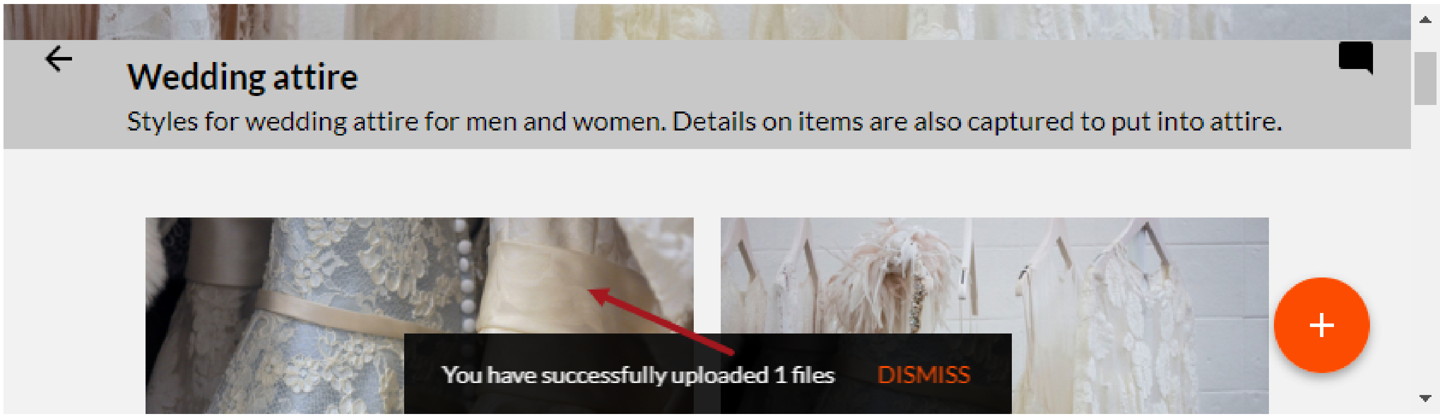
Uploading Content

For both the computer and iPad, content can be uploaded to storyboards by selecting the upload cloud in the upper right-hand corner.

- **If using a computer**: Select the necessary folder that contains the content for upload. In this example, it is an image.

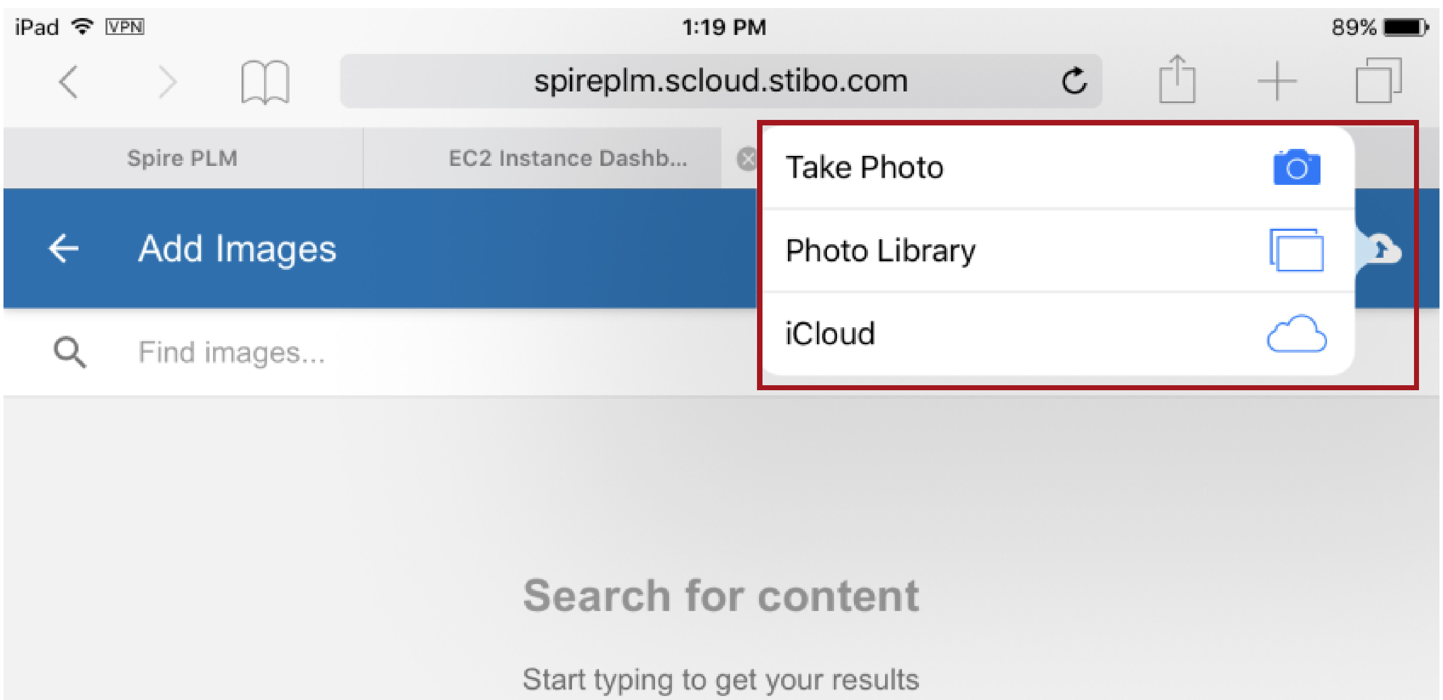


Once added, it will appear on the storyboard.



The upload message disappears once something else is clicked on in the storyboard, or clicking the 'DISMISS' button also makes the message disappear.

- **If using an iPad**: Upload content via the upload cloud icon in the top right corner. When clicked, three options appear. Choose from content stored either directly on the iPad or in iCloud, or take a picture for instant uploading.



Note: Only one of these three options can be chosen and performed at a time.

Selecting Storyboard Content

When interacting with and selecting content on storyboards, there are two modes a user can enter: **Full Screen View** or **Selection Mode**. While both modes allow a user to interact with data, Full Screen View allows the user to concentrate on an individual item, and Selection Mode is used for managing a group of items.

Full Screen View

Full Screen View enables the selected content to be viewed on a larger scale. It also enables certain actions to be performed on the currently viewed content item.

- **On a computer**: After opening the desired storyboard, content can be viewed in Full Screen View by clicking on the content.
- **On an iPad**: After opening the desired storyboard, content can be viewed in Full Screen View by tapping the content.

While in Full Screen View:

1. The name of the content displays at the top of the item being viewed.
2. Any tags applied to the content appear at the bottom of the view.
3. Content can be rotated, selected to be the hero image, or deleted by clicking one of the icons in the top right of the view.

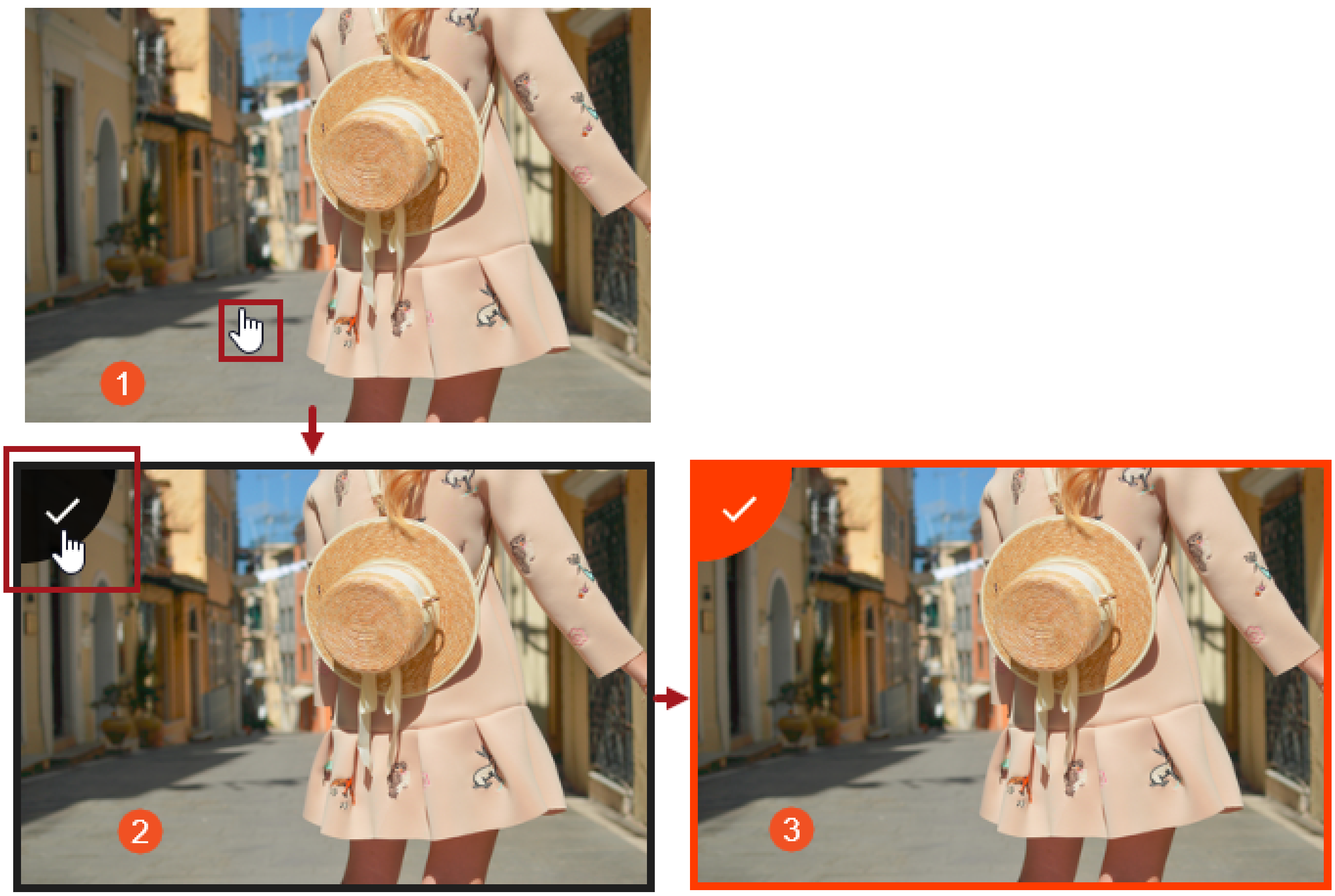
Scrolling through the rest of the content on the storyboard in Full Screen View is enabled until the 'x' in the upper-left corner is clicked, which exits Full Screen View. For more information on hero images and rotating items, see the **Interacting with Data on Storyboards** topic in this documentation.

Selection Mode

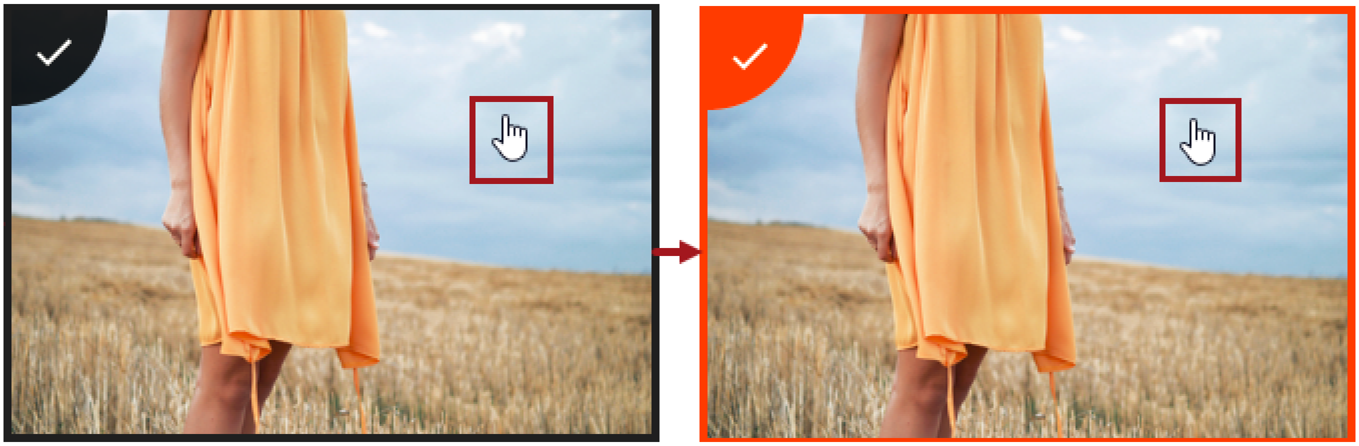
In Selection Mode, once the desired storyboard is open, multiple items can be selected at a time. This is useful when a particular action needs to be performed on a group of items. For both the computer and the iPad, entering into Selection Mode only needs to be done for the first content item. Once the initial item has been selected using Selection Mode, click or tap anywhere on as many other content pieces as needed to add them to the selected items.

Entering into Selection Mode

- **On a computer**: Selection Mode can be entered in two ways:
    - Hover the mouse over the desired content item, and select the checkmark in the upper left-hand corner.



    - Hold the mouse button down over the desired content until the checkmark becomes engaged and appears in the upper left-hand corner.



- **On an iPad**: You can enter into Selection Mode on an iPad by long pressing the desired content.

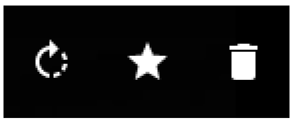
After all needed items have been selected, decide which action to take on the content. To deselect any of the content, including the original item, just click or tap on the selected items again.

To learn more on what a user can do with the content on storyboards, see the **Interacting with Data on Storyboards** topic in this documentation.

Interacting with Data on Storyboards

Once a board is created and has content on it, users can easily interact with it in a number of ways: they can add tags to content, choose a different feature / hero image, or delete content by using the options in the upper right-hand corner of each storyboard when in Selection Mode.

In Full Screen View, users are able to rotate content, make content the hero image, or delete content.



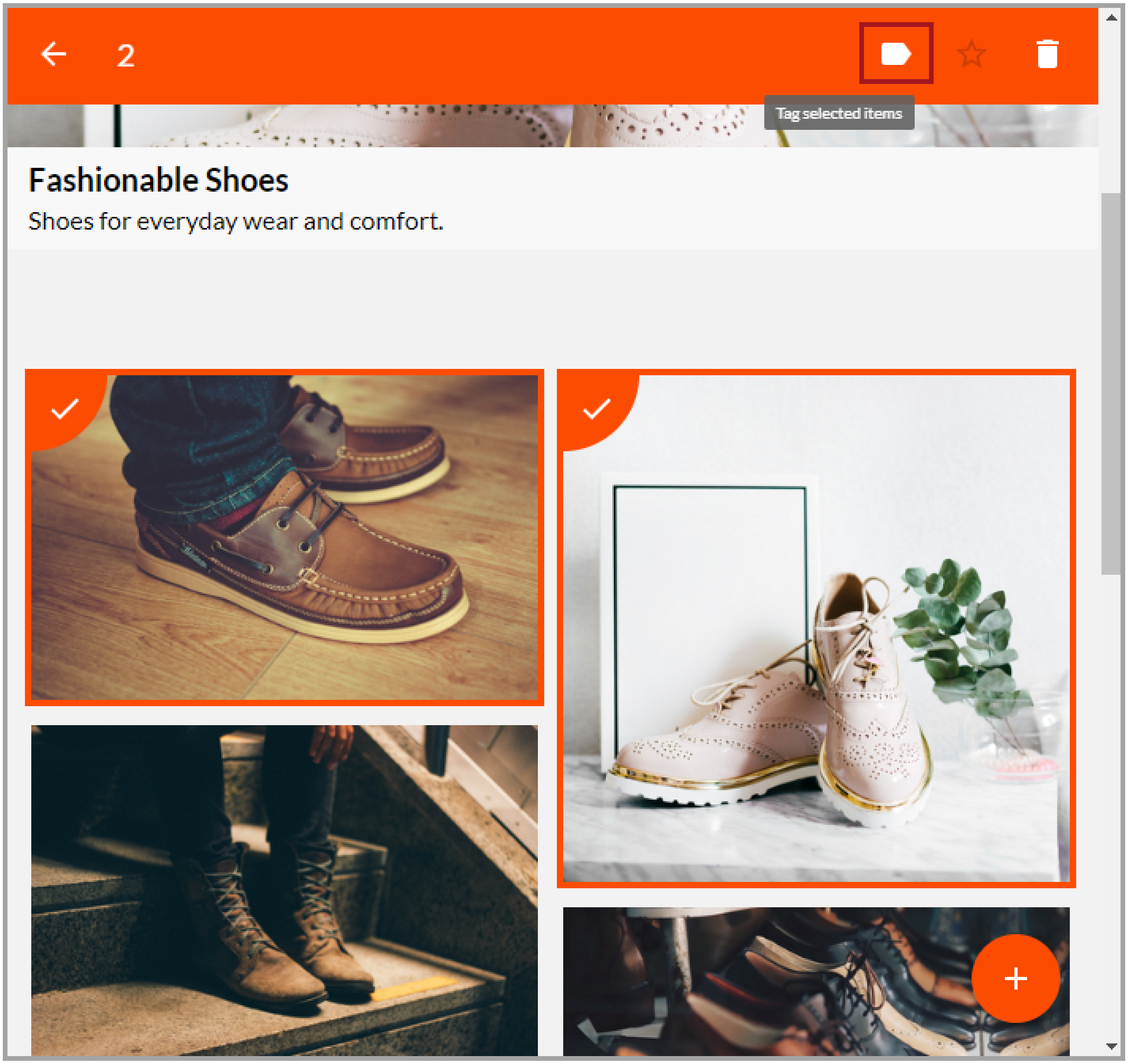
Tagging Storyboard Content

After images, trims, materials, etc. are placed on a storyboard, it is possible to apply tags to them. This allows users to add more data onto their storyboard, and allows content to easily be identified and categorized for use and concept development.

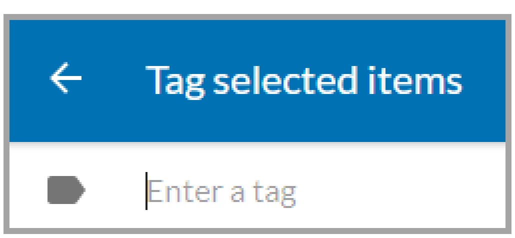
Additionally, once a content file has been tagged, a user is able to search for that content again on other storyboards by typing that tag in the search field. This allows for smarter searching within PLM.

Applying Tags

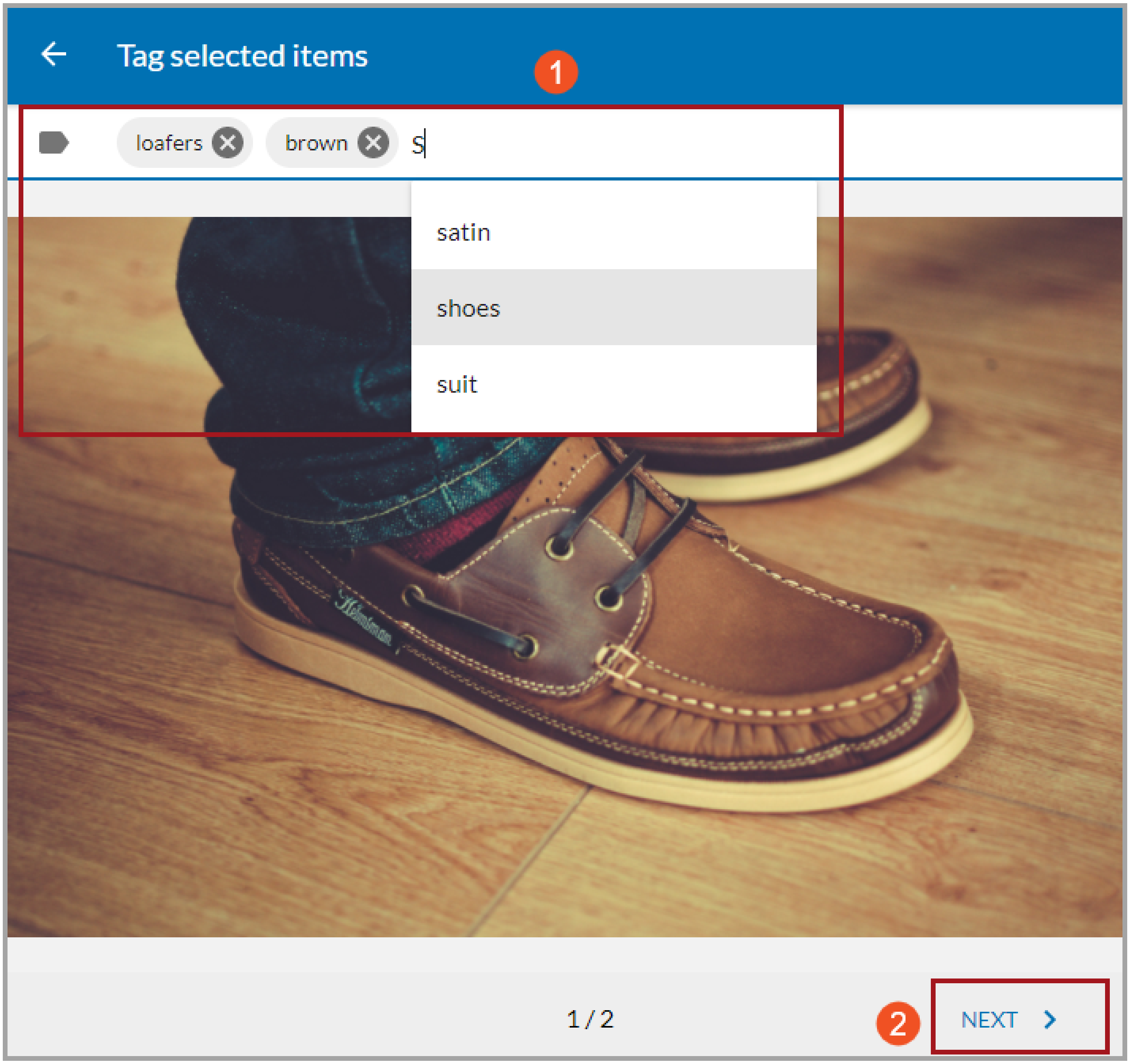
In order to apply tags to content on a board, you must be in Selection Mode. You can then select all desired content, and click the tag icon that appears in the upper right-hand corner of the storyboard. Selected content file (s) are highlighted with a checkmark in the upper left-hand corner of each file.



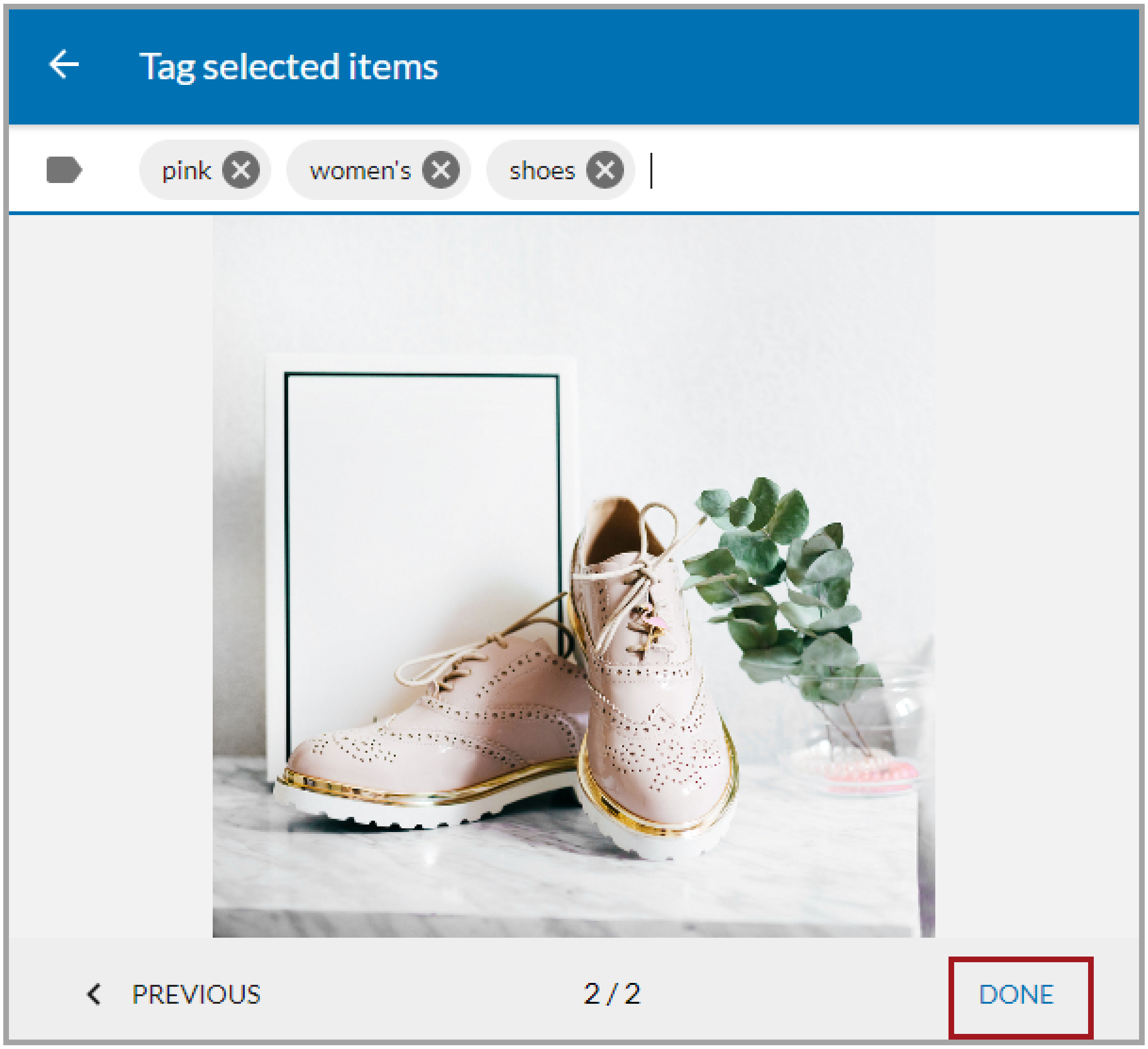
Once clicked, you are brought to a window where as many tags as needed can be added to each individual item by typing in the 'Enter a tag' field.



After all needed tags have been entered, press the 'Enter' or 'Return' key and the tag will be created. A typeahead feature is activated if a letter sequence for a tag already exists in the system. To use an existing tag, use the down arrow to select it before pressing enter, or click on the existing tag directly. When finished and ready to move on to the next picture for tagging, press '**NEXT**.'



After all tags have been applied, select 'DONE,' and the individual tags will be saved to the individual content files that they were applied to.



If these content fields are ever viewed again in either Full Screen View or Selection Mode, you will see any applied and saved tags on them.

Note: Once a content file is tagged, that tag stays with the content file no matter what storyboard it is placed on, until the tag is removed.

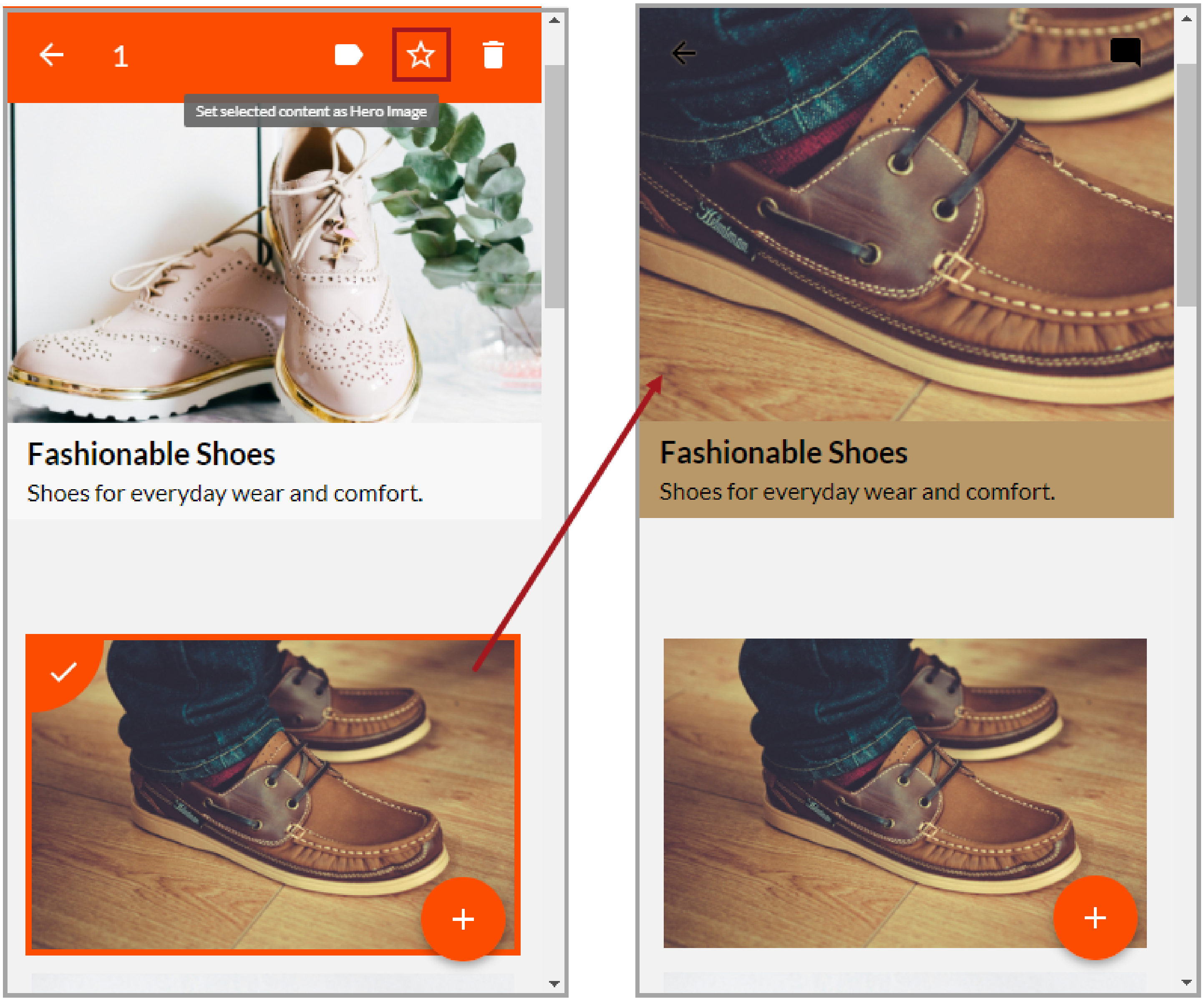
Choosing a Different Hero Image

A hero image, or 'feature' image, is the image chosen to display at the top of a storyboard. This is also the image that will represent the board when searching through storyboards in the board gallery.

By default, the first item added to a board becomes the hero image. If the hero image needs to be changed, you can select a new feature image by two different methods:

1. Entering into Selection Mode, click on a different picture and then select the star in the upper right-hand corner of the board gallery. The selected image is now the new feature image.

> **Note:** The star will be activated only if one image is selected, otherwise a user is unable to select this action.



2. Entering into Full Screen View, select the star in the upper right-hand corner. The currently viewed image is now the new feature image.

Rotating Content in Full Screen View Mode

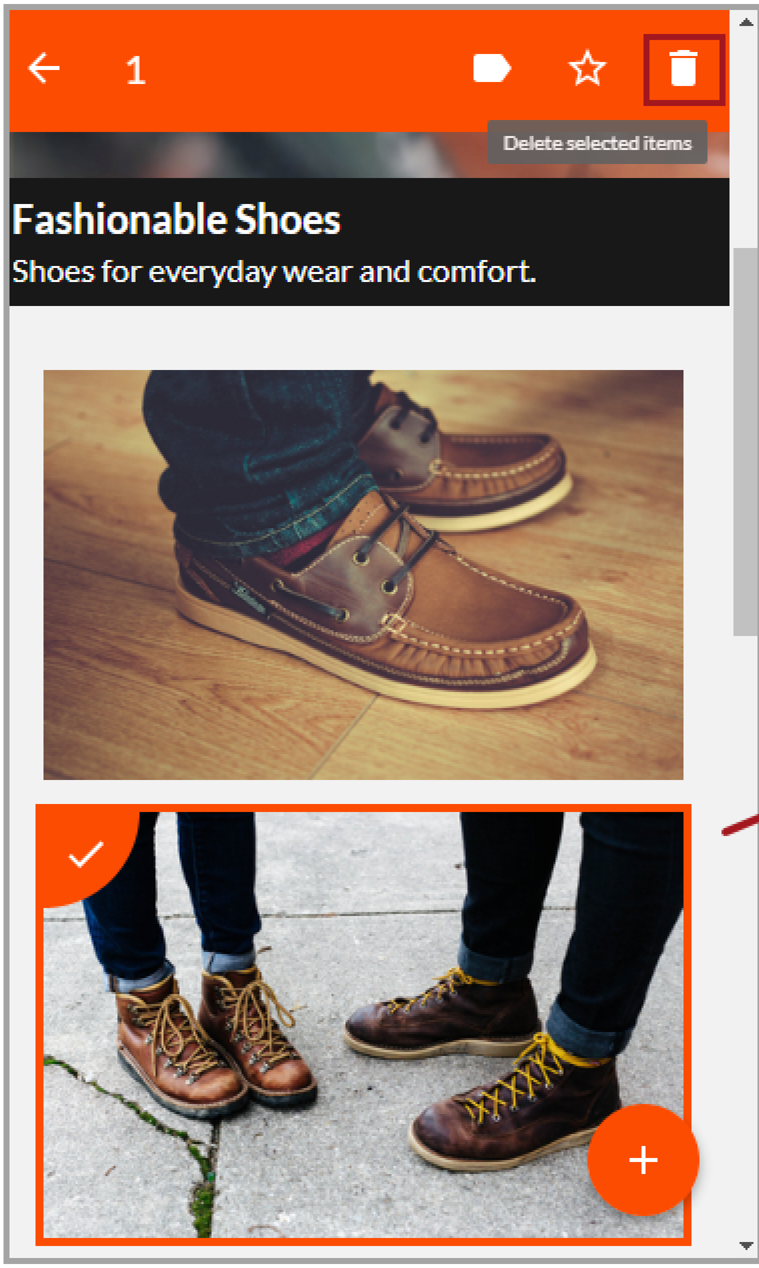
If a piece of content is uploaded or added to the storyboard, but is in an undesired orientation, the user is able to rotate the content after entering into Full Screen View.

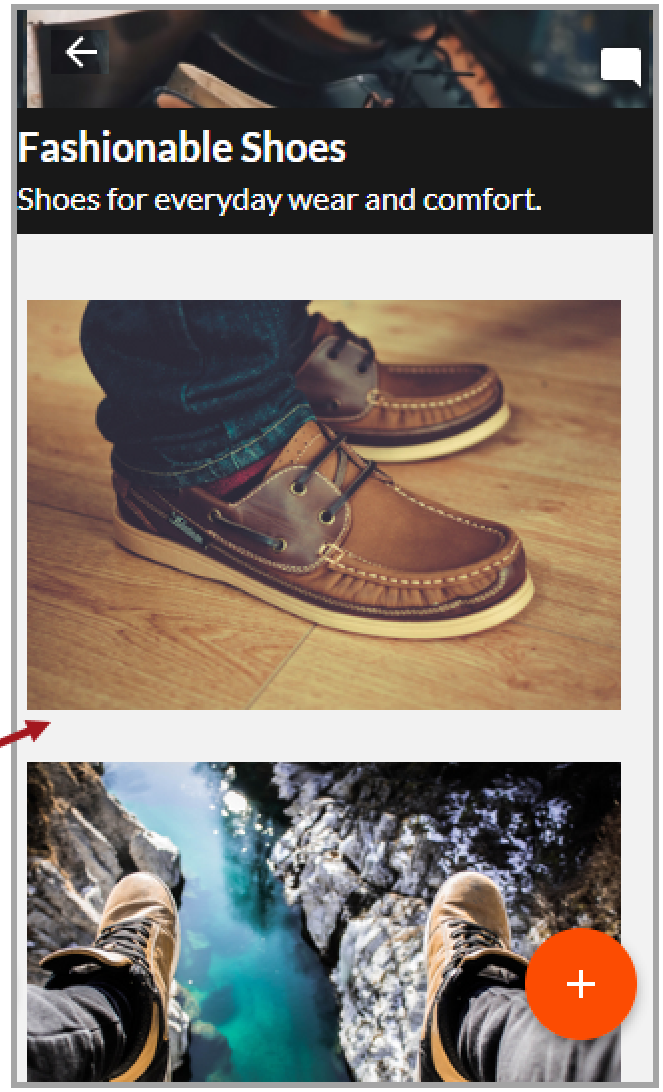
After entering into Full Screen View, click the rotate icon to rotate the image.

Continue to press the rotate icon as many times as needed to get the content piece in the desired orientation.

Deleting Content From Storyboards

To delete any unwanted content on a storyboard, click on the item or items, and then select the trash icon in the upper right-hand corner. This can be done in either Full Screen View or Selection mode. The desired item(s) disappear from the storyboard, and the remaining content moves up to take the deleted item's place.

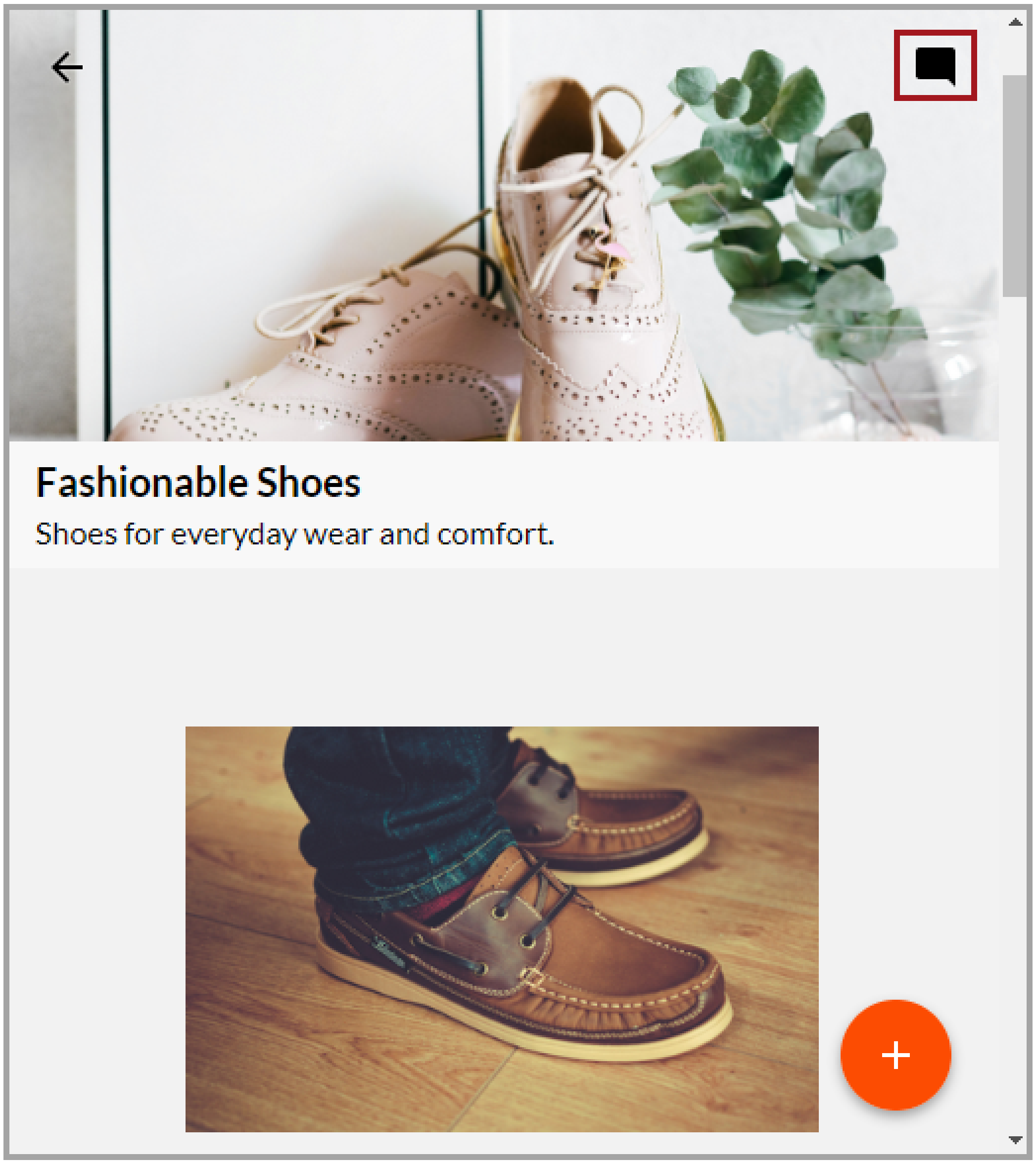




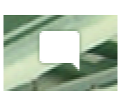
Note that if the item deleted is currently the hero image, then a different content piece on the storyboard automatically updates and becomes the new hero image.

Adding Comments

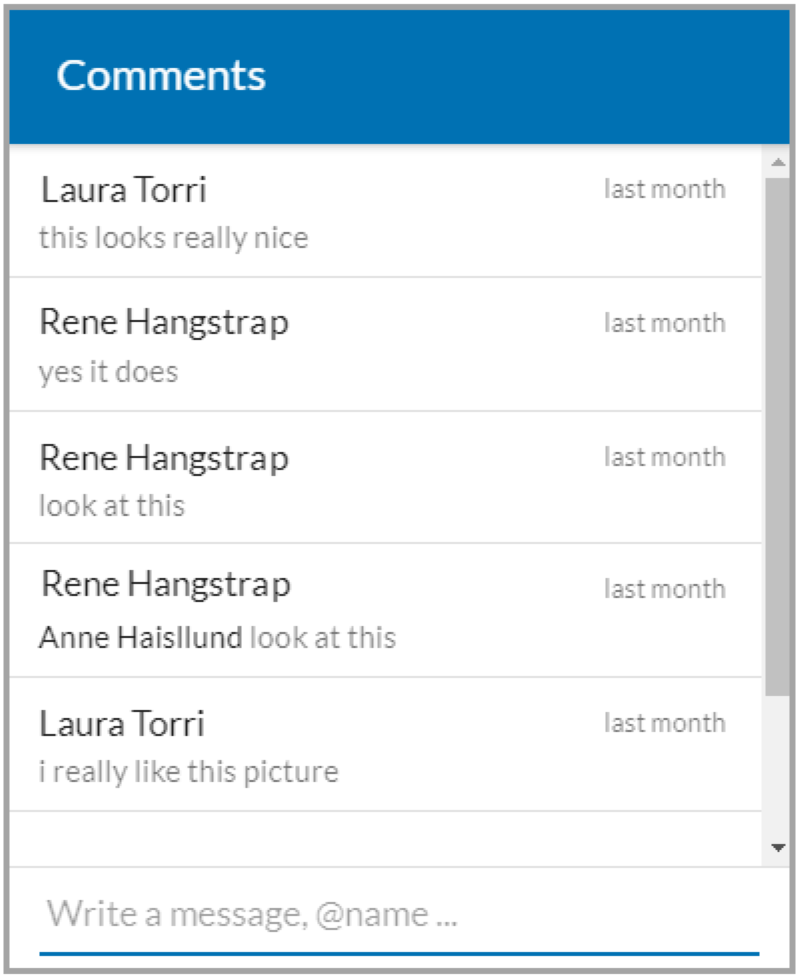
When working on a storyboard collection, it is often helpful to collaborate with colleagues to discuss and share ideas. In PLM, users are able to do this by using the speech balloon feature located in the top right corner of each storyboard.



Depending on the color of the hero image, the speech balloon color might differ from storyboard to storyboard.

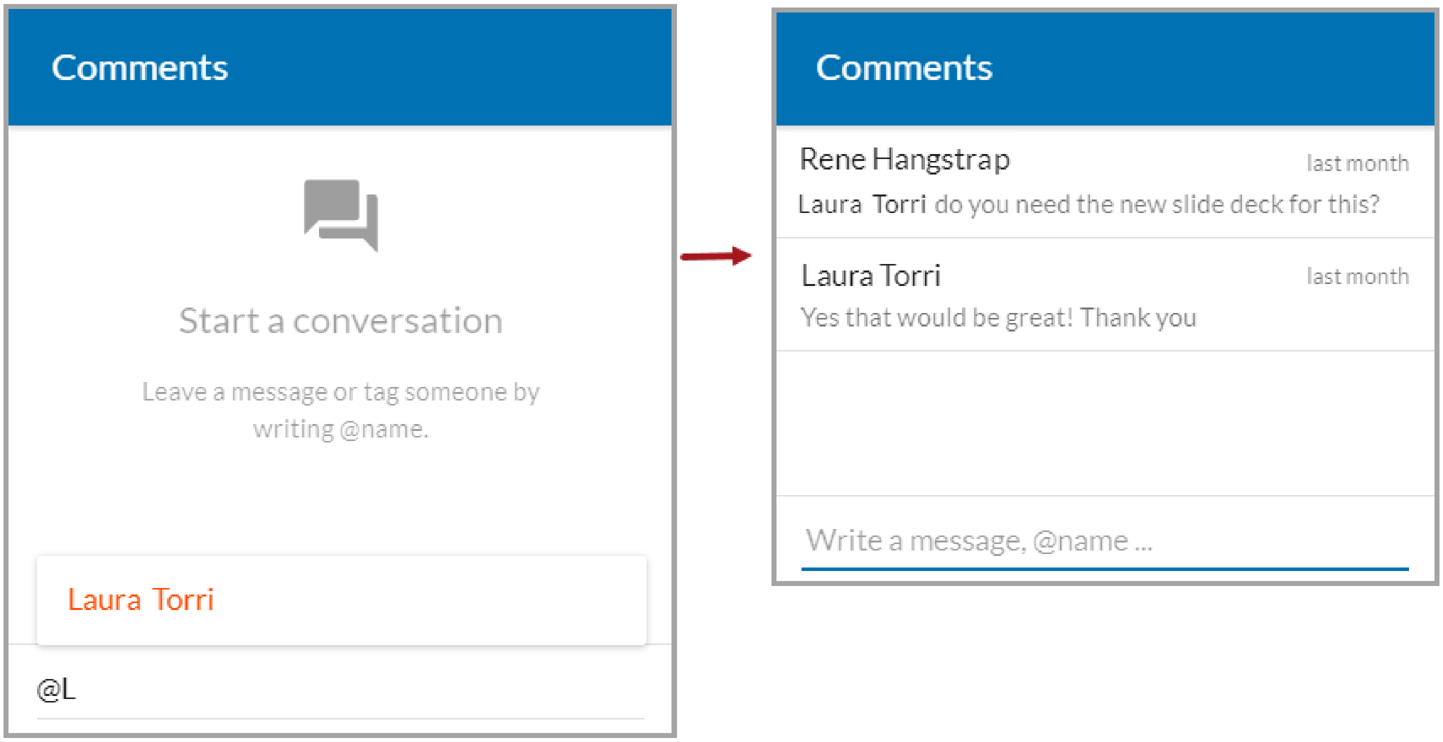


When clicked, a side Comments panel opens, where all current and past dialog is visible.



The comments panel shows the user name of who made the comment, the comment itself, and the time the comment was made.

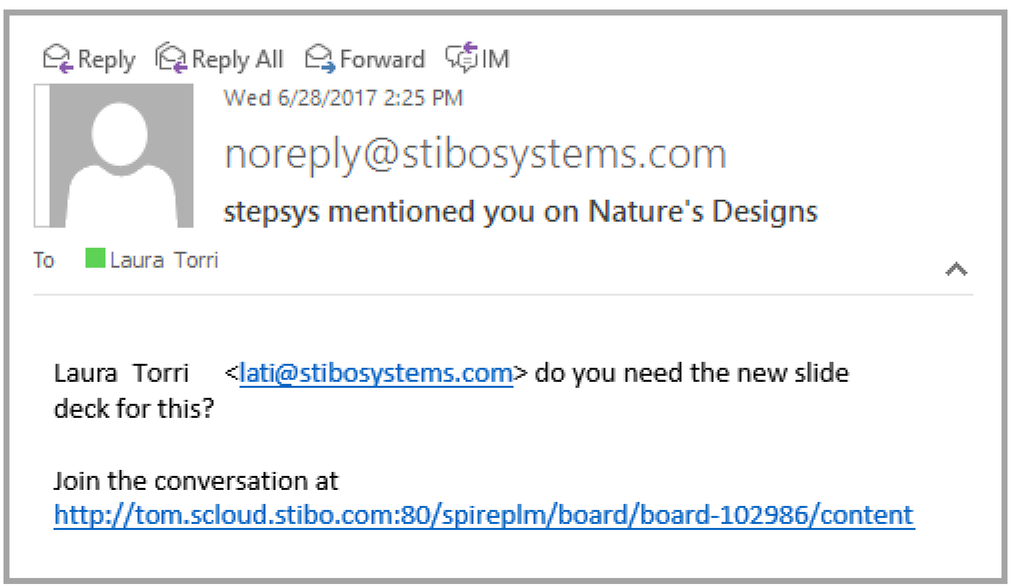
To enter dialog, click in the open bottom field where it says 'Write a message, @name...' type a message, and press the Return or Enter key on your iPad or keyboard. It will now be visible to anyone who has access to the storyboard. Additionally, if the '@' symbol is typed in front of a colleague's user name, their name will pop up as a suggestion to select.



If selected and a message is entered, the mentioned user will be notified via an email.

Note: Setup for receiving email is done on the admin side through STEP Workbench. If a user feels their email is not properly set up, they should talk to their administrator.

The email notification to the mentioned user will include the message and the storyboard URL so that the individual can quickly navigate to that storyboard and read the comments thread.



Multi-Reference Editor Actions in Web UI

The PLM-centric actions for the Multi-Reference Editor allow users to configure metadata to appear on the dialogs that show up when creating or editing a reference.

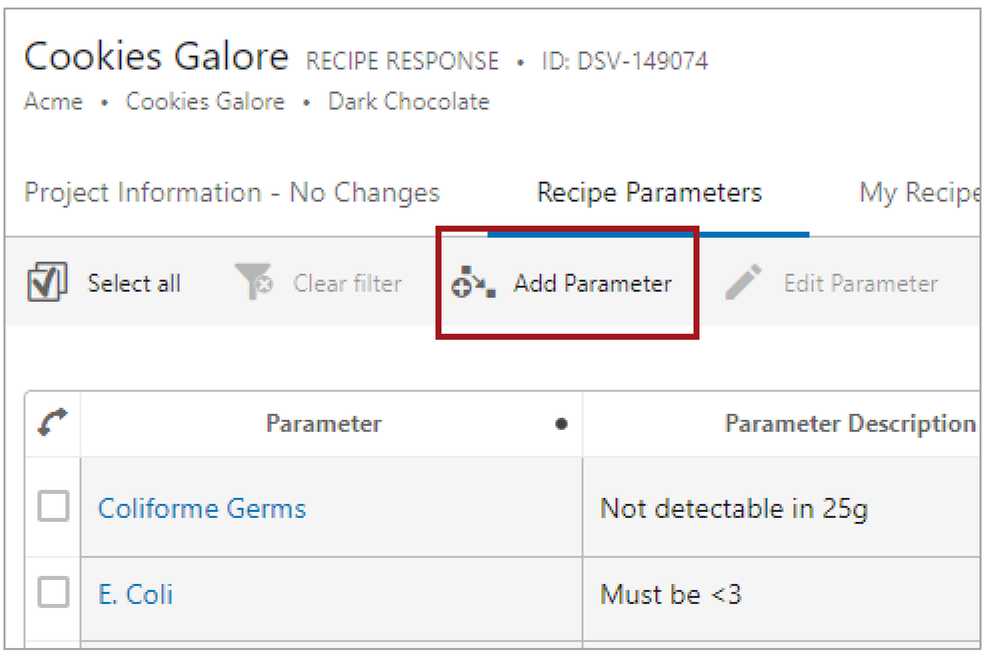
Prerequisites

This topic assumes an understanding of Web UI as well as having configured these Multi-Reference Editor action buttons. For more information on configuring these actions, see the **Multi-Reference Editor in PLM** topic in this documentation and the **Multi-Reference Editor** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

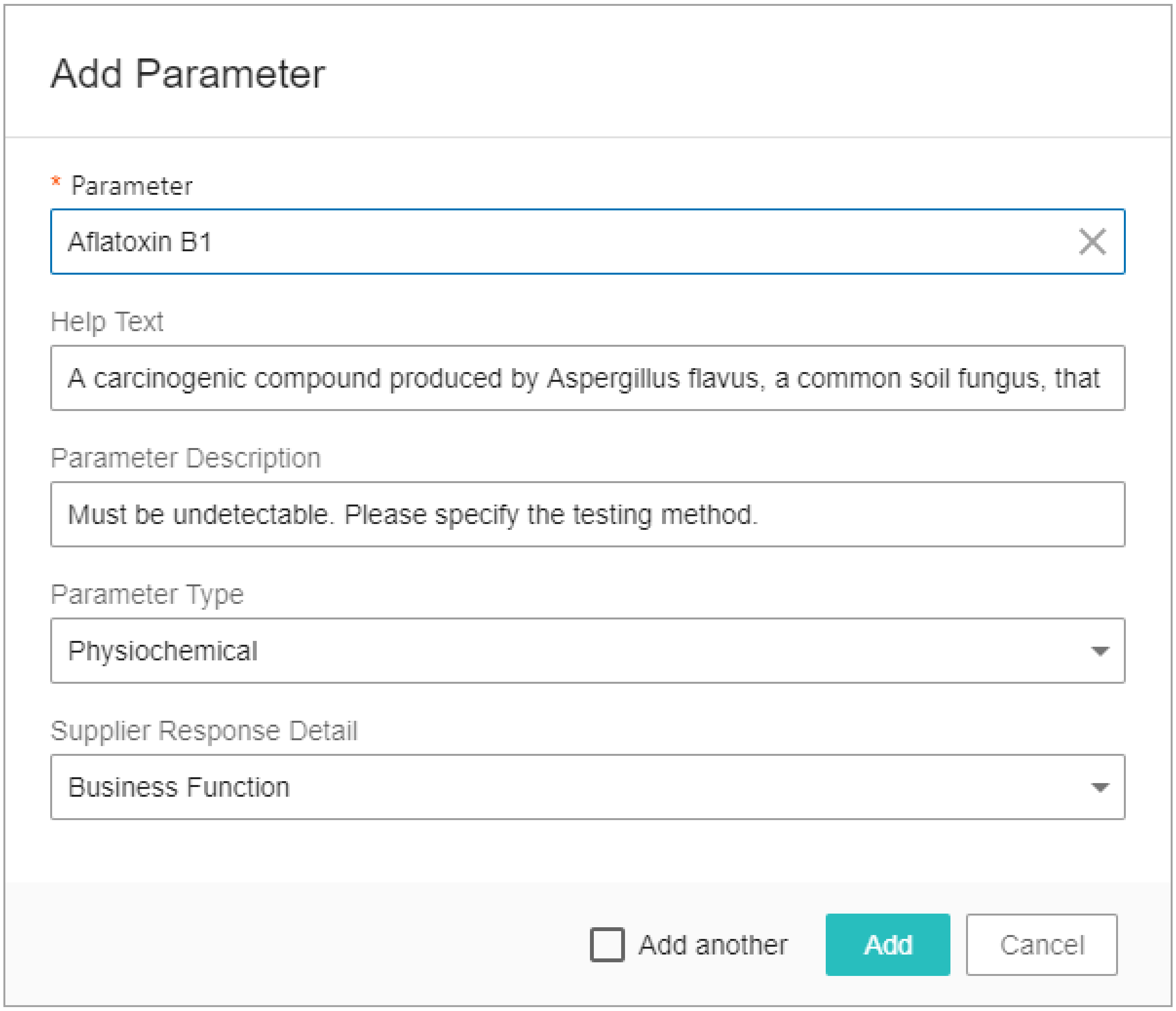
Using the Actions

PLM Create References Action

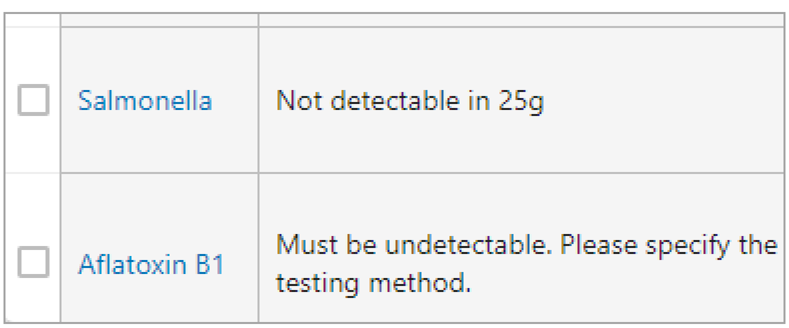
1. This action is used to add a new reference to the object where the Multi-Reference Editor appears. In this example, containment limits are used to ensure limits on various toxins going into food. From the Multi-Reference Editor on the desired object, select the 'Add Parameter' action.



2. The 'Add Parameter' dialog will display. Enter the desired Parameter in the designated field. This field has typeahead search based on the Root Nodes URL set in the configurations. Additionally, metadata attributes allow for more details to be added with the parameter. Select the 'Add' button to add the reference.

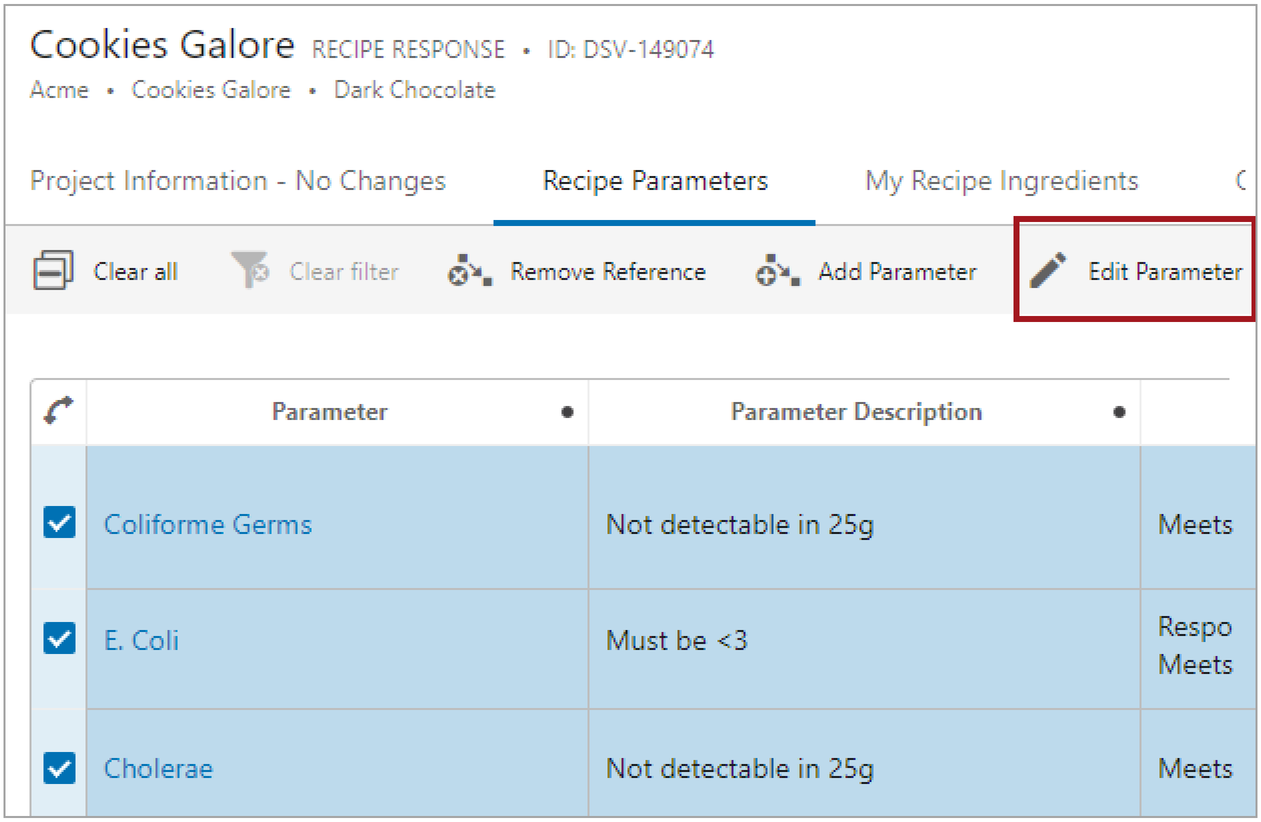


3. Once complete, the added reference with the metadata value can be seen in the Multi-Reference Editor list.

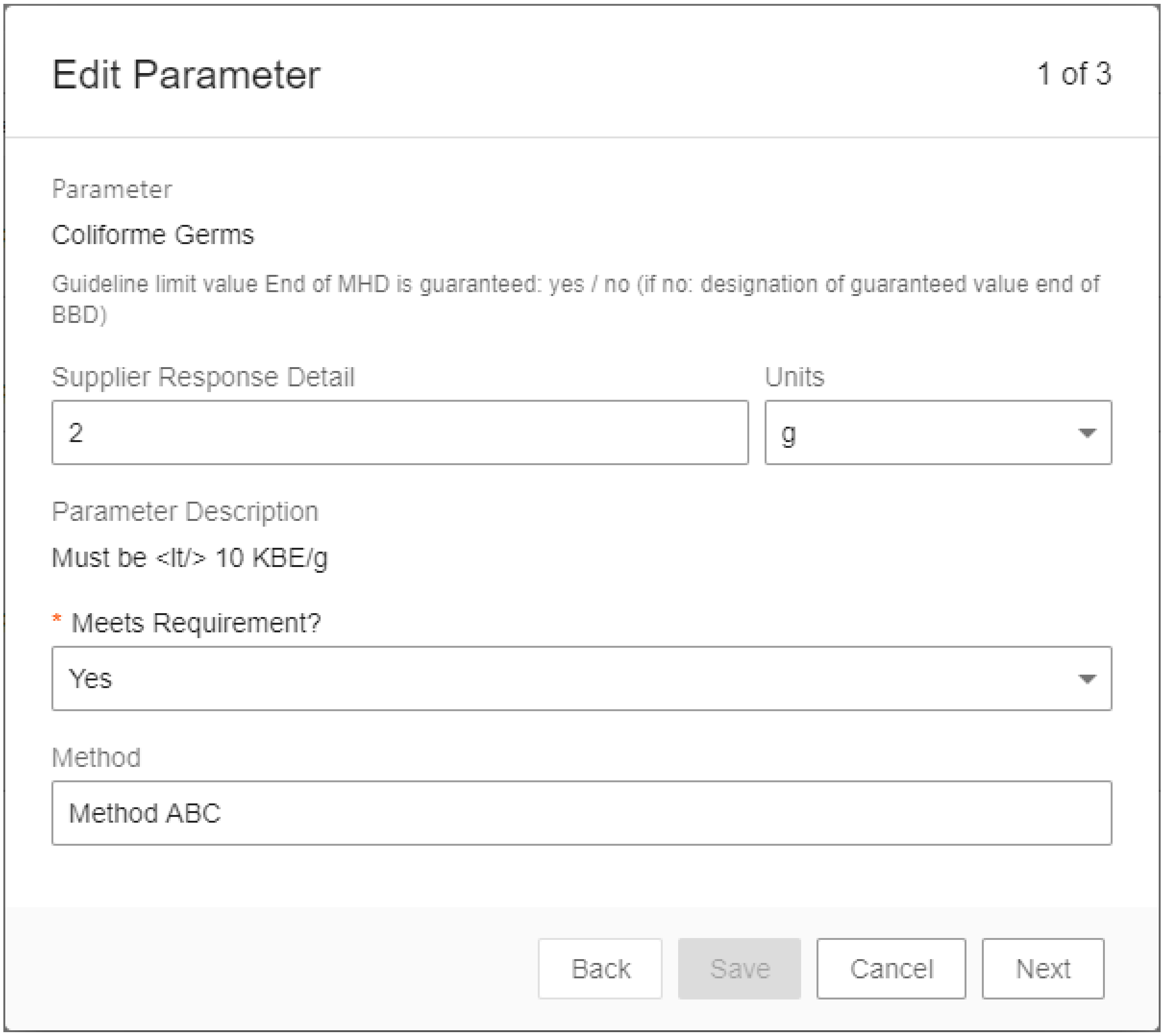


PLM Edit Reference Action

1. This action allows users to select one or more references from the Multi-Reference Editor table and change configured metadata attribute values. From a Multi-Reference Editor on the desired object node, select the references to edit. This action will activate the 'Edit Parameter' action.



2. The 'Edit Parameter' action will display the following dialog. The metadata attributes that were configured will appear for modifying. Once any values are changed, the 'Save' button is activated. To move to the next reference, save any changes then select 'Next.'



3. When finished editing the references, select 'Cancel' to return to the Multi-Reference Editor. Any changes made will be displayed in the Multi-Reference Editor list.

	Parameter	Parameter Description	Responses Required For	Meets Requirement?	Supplier Response Detail	Method
☐	Coliforme Germs	Not detectable in 25g	Meets Requirement?	Yes	2 g	Method ABC
☐	E. Coli	Must be <3	Response Detail Meets Requirement?		0 g	