
Working with Special Groups

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SECTION 1

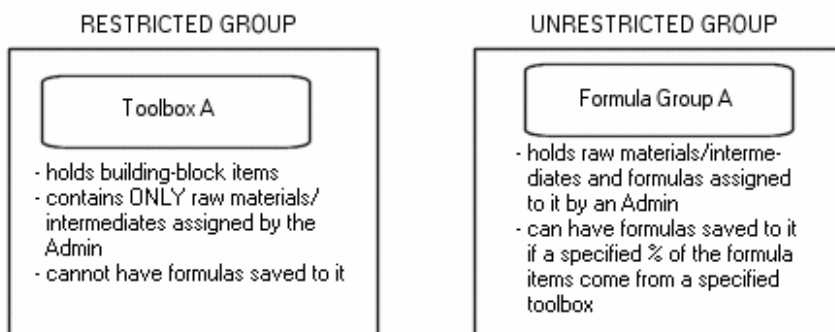
Understanding Special Groups

The Special Group concept meets the following business needs:

- Raw materials/intermediates and formulas can be categorized for use in specialized situations, such as customer-specific applications.
- Access to information about raw materials/intermediates and formulas can be controlled for users who are required to work with a restricted subset of materials.

Special groups are collections of raw materials/intermediates and formulas/recipes that are defined and set up by administrators.

- A toolbox is a restricted Special Group containing ONLY the building-block items assigned to it by an Administrator and specified for use by members of certain user groups.
- A formula/recipe group is an unrestricted Special Group of formulas/recipes--some assigned by an Administrator, others saved to the group based on criteria defined by an Administrator.



An Administrator can also define the toolboxes and formula/recipe groups so that certain groups of users can:

- See only specific toolbox items in their picklists.
- See only specific toolbox items and formulas/recipes on the Worksheet Editor and Formula Editor.
- Save formulas/recipes only to specific formula/recipe groups.

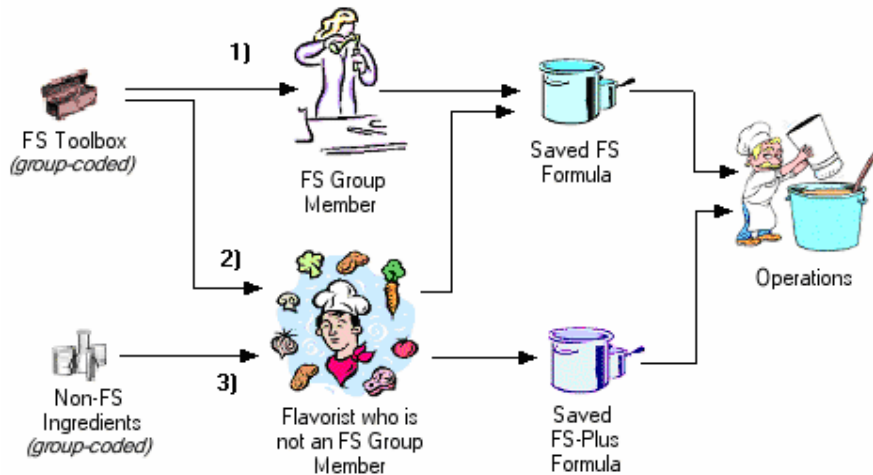
Special item groups can be defined to control access. For example:

- If you are a Flavor System (FS) user, you can create formulas using only the building-block items that belong to your FS toolbox.
- Application specialists can use raw materials/intermediates from the Application Toolbox and formulas from the Application Formula Group to create and save recipes to the Application Recipe Group.

Flavor System Groups

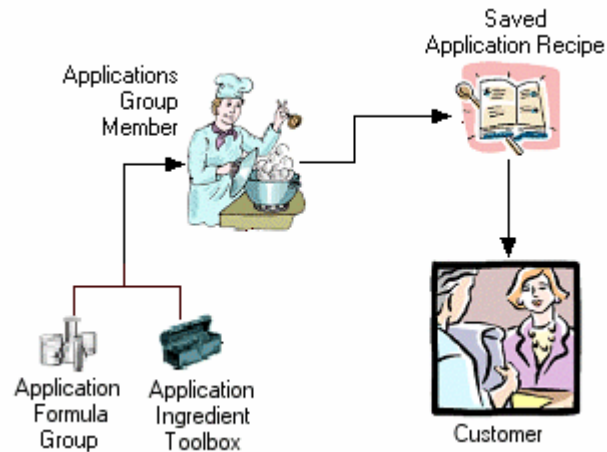
Modular systems are constructed with standardized units for flexibility, variety, and cost-effectiveness in use. FS groups use specially selected, modular, "building-block" items to create formulas; non-FS items are not allowed. As a result, FS formulas exhibit optimal manufacturing feasibility, cost-effectiveness, and marketability.

The following illustration shows how FS flavorists can work with Special Group formulations.



Applications Groups

Applications groups typically consist of specialists who develop recipes for use in customer-specific applications, as shown in the following illustration.



As illustrated, the components used in application-specific recipes fall into two categories: Application Formula Group formulas and Application Ingredient Toolbox items.

SECTION 2

Managing Special Groups (for Administrators)

Regional Administrators are responsible for creating and maintaining Special Groups. Special groups come in two categories: restricted and unrestricted.

Restricted groups (toolboxes)

All items in a toolbox are managed by an Administrator who sets up the Toolbox and maintains it by adding and deleting items as required.

Note: Users who are not in a defined user group can see all items.

Unrestricted groups

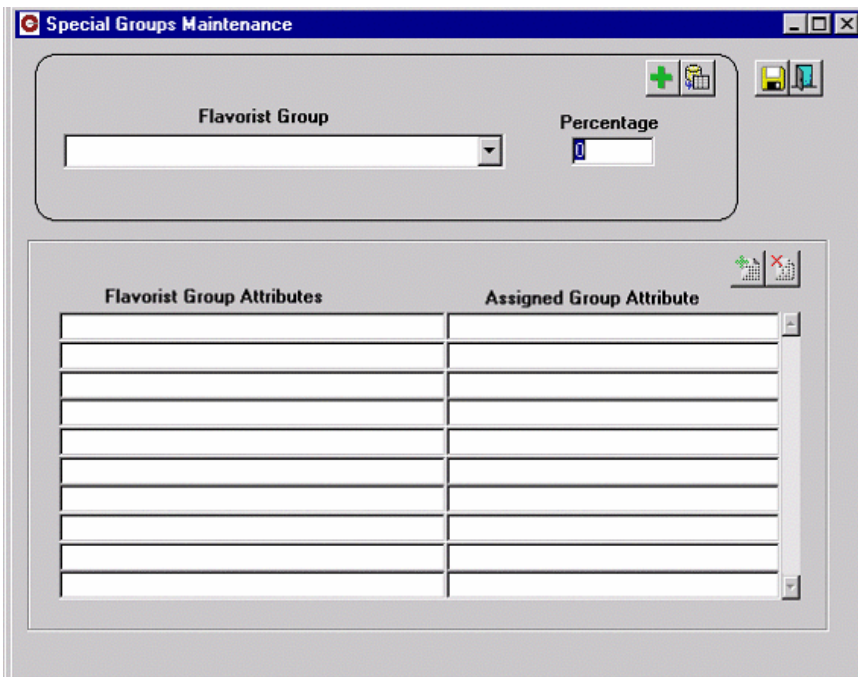
An unrestricted Special Group is a formula or recipe group consisting of formulas/recipes--some assigned by an Administrator, others saved to the group based on criteria defined by an Administrator. The Administrator defines preferences and attributes for the group.

NOTE: An administrator uses the Flavorist Maintenance dialog boxes to assign users to the user groups that restrict their access, as described in the Administration and Maintenance section of the User Guide.

Setting Up Toolboxes

➤ *To create and define a toolbox:*

- 1 On the Main Menu, click Maintenance and select Special Group Admin.
The Special Groups Maintenance dialog box appears.



The screenshot shows the "Special Groups Maintenance" dialog box. It has a title bar with the text "Special Groups Maintenance" and standard window controls. The main area is divided into two sections. The top section contains a "Flavorist Group" dropdown menu and a "Percentage" text box with the value "0". The bottom section is a table with two columns: "Flavorist Group Attributes" and "Assigned Group Attribute". The table is currently empty.

- 2 Click . *The New Special Group dialog appears.*



The screenshot shows the "New Special Group" dialog box. It has a title bar with the text "New Special Group". The main area contains a "New Special Group" title, a "Flavorist Group:" text box, a "Percentage:" text box, and a checkbox labeled "Restricted Group". At the bottom, there are "OK" and "Close" buttons.

- 3 Enter the toolbox name in the Flavorist Group box.
- 4 Enter 0 in the Percentage box.

5 Click to check the **Restricted Group** field.

6 Click **OK**.


*You have created a new Toolbox. To assign items to the toolbox, use the **Item Grouping dialog box**, as described in **Adding Items to Special Groups**.*

Adding Items to Special Groups


➤ *To add items to a Special Group:*

- 1 On the Main Menu, click **Maintenance** and select **Item Grouping**.
The Item Grouping dialog box appears.


Local Code	Formula Name	Chem No
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	
99999	XXXXXXXXXXXX	

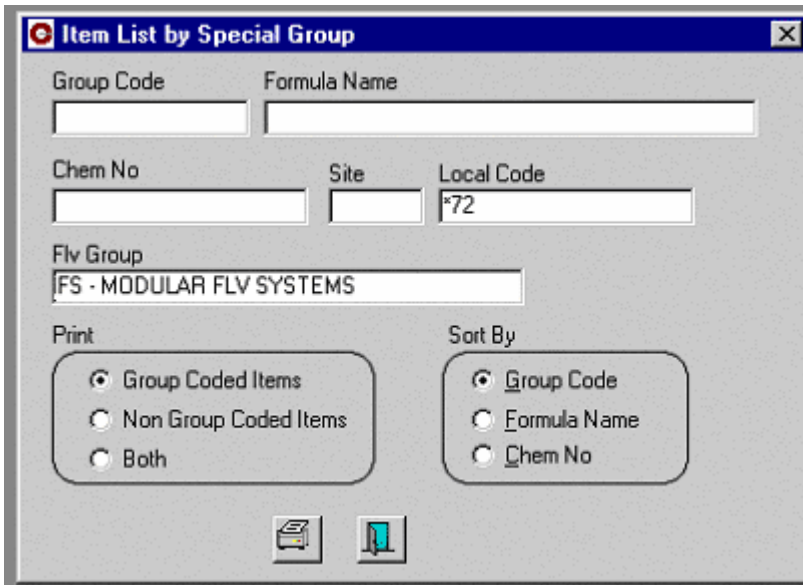
- 2 Double-click the **Assign to Flv Group** field to display a List of Values for the available Special Groups; then click to select the desired Special Group.
- 3 Then, if the desired formula name appears in the Formula Name listing, click the check box at the end of its line to flag it for addition to the selected Flv Group. You can check more than one item.
- 4 If the desired formula name is not visible, you can search the database in the usual way.
 - Indicate search criteria in the group code, Formula Name, Chem No, Site, or Local Code fields.
 - Click to select group-coded or non-group-coded as an additional search criterion, if desired.
 - Click  to perform the search.
- 5 When the desired items appear in the search results, click their check boxes to flag them for addition to the selected Flv Group.

NOTE: If you have a large number of items to add to a Special Group, call the Help Desk for assistance with a batch load.

- 6 When the items to be added have been checked, click  to save the transaction.

➤ *To print a listing of the items in a group:*

- 1 Click  to display the Item List by Special Group dialog box.



Item List by Special Group

Group Code Formula Name

Chem No Site Local Code

Flv Group
FS - MODULAR FLV SYSTEMS

Print

Group Coded Items
 Non Group Coded Items
 Both

Sort By

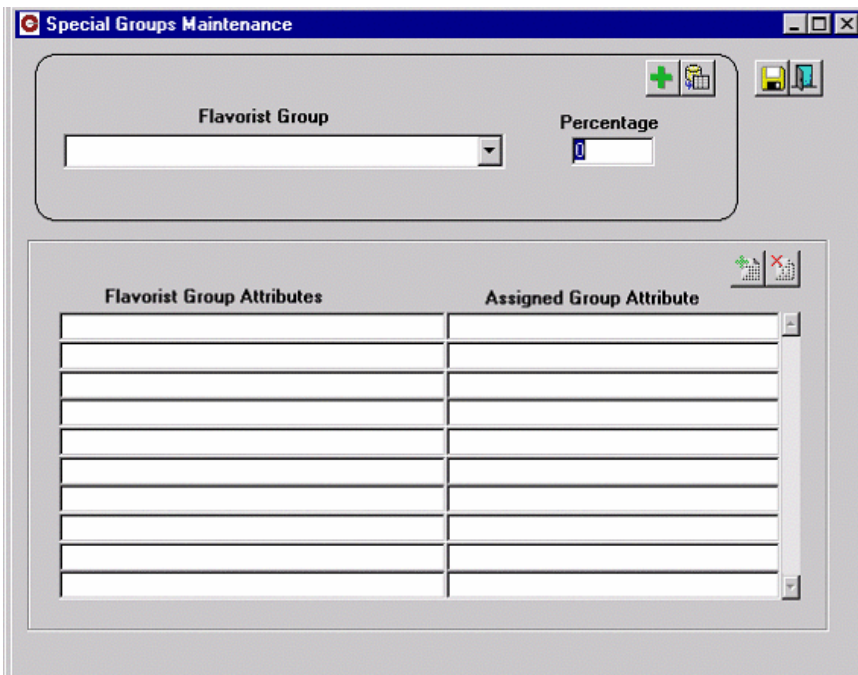
Group Code
 Formula Name
 Chem No

- 2 Enter the print criteria and click  to print the Items by Group report.

Setting Up Formula/Recipe Groups

➤ To create and define a formula/recipe group:

- 1 On the Main Menu, click Maintenance and select Special Group Admin.
The Flavorist Groups Maintenance dialog box appears.



The screenshot shows the "Special Groups Maintenance" dialog box. It features a "Flavorist Group" dropdown menu and a "Percentage" input field with a value of 0. Below these is a table with two columns: "Flavorist Group Attributes" and "Assigned Group Attribute". The table is currently empty.

- 2 Click . *The New Special Group dialog appears.*



The screenshot shows the "New Special Group" dialog box. It contains a "Flavorist Group:" text box, a "Percentage:" text box, and a checkbox labeled "Restricted Group". At the bottom are "OK" and "Close" buttons.

- 3 Enter the Group Name in the Flavorist Group box.



- 4** Enter a number greater 0 and less than or equal 100 in the **Percentage** box.
When a formula is saved to this formula group, a specified percentage of its component items must come from the specified Toolbox. If the percentage is 100, formulas saved to this group can contain only Toolbox items. If the percentage (let's call it X) is less than 100, then at least X% of the formula's component items must come from the specified Toolbox.
- 5** Leave the **Restricted Group** check box blank.
- 6** Click **OK**.
The New Special Group dialog box closes, and a new group is created. All formulas saved to this group must contain X% of Toolbox items, when X is the Percentage value.

SECTION 3


Special Group Reports

Users can access the Special Group reporting functions for any formula to which they have access.

1 To access Special Group reports from the Formula Editor:

- Click .
The Special Group user's picklist is restricted, based on the permissions defined by the Administrator.
- Click  to print the report.

2 To access Special Group reports from the Worksheet Editor:

- Right-click the Revision Number in the worksheet column header; then select Special Group Report.
The formula has to be saved before this report can be executed.
- Click  to print the report.

The Formula Ingredients by Group report shows:

- The raw materials/intermediates in a formula
- The groups to which these items belong