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GETTING SUPPORT

Technical support is free to all subscribers for problems and questions you may have for the following type of issues:

- Bugs
- Browser-related issues
- Security
- Advice on migration of your data
- Upgrading, billing and payment

**Free online training is included your subscription.** Please check your plan for the number of included 60-minute training sessions. We recommend that you schedule your training as early as possible after subscribing so that we can assist you in getting started and optimizing Cosmetri Product Manager to your requirements.

If you require additional training and support in using Cosmetri Product Manager, please click below to purchase support hours prior to scheduling your appointment.

[https://www.cosmetri.com/training-and-custom-support/](https://www.cosmetri.com/training-and-custom-support/)

You can use the following link to schedule a call at a time convenient to you. If you choose a web conferencing option (Zoom), we can share screens and walk you through the software in a live demonstration, customized to your requirements. Open our website and click on “Schedule Call”.

Error! Hyperlink reference not valid. Alternatively, drop us an email any time at support@cosmetri.com and let us know how we can support you.

SERVICE STATUS UPDATES

To view any current service status updates, including notifications for new releases and scheduled server maintenance, please subscribe to our Twitter feed @cosmetri

[https://twitter.com/cosmetri](https://twitter.com/cosmetri)
MINIMUM SYSTEM REQUIREMENTS

There’s no need to download or install any software on your computer to use Cosmetri Product Manager. You’ll just navigate to the Cosmetri login page in your preferred web browser and log in to your account.

Supported browsers are:

**Chrome**
Download: [https://www.google.com/chrome/](https://www.google.com/chrome/)

**Microsoft Edge**

**Mozilla Firefox**

**Safari (Mac only)**

Product Manager is designed for operation using most PCs and tablet devices running on a Mac, Windows or Linux operating system. Product Manager is not optimized for use on smartphones.

Product Manager does not have a minimum internet requirement, for an optimal performance we do recommend the use of ADSL or broadband and 3G internet speeds or greater for mobile connection. Keep in mind, the performance of Product Manager may vary depending on the amount of information you’ve asked your browser to download. For example, generating a detailed report such as a PIF would take longer to load than viewing a page or tab in the software.

Since you’ll be working in a web browser, there are a few browser-related settings you’ll need to know about.

**Enable cookies**
Make sure cookies are enabled in your browser so all parts of our application work as expected.

**Enable pop-ups and JavaScript**
Pop-ups and JavaScript should be enabled in your browser, so you can view errors, alerts, and preview screens.

**Set your screen resolution**
The minimum screen resolution should be set to 1024px x 768px. If you’re using a netbook, try setting the resolution to 1200px x 800px if things appear out of place.

**Check your web browser add-ons**
In some cases, browser add-ons, extensions, ad blockers, or plugins can interfere with the functionality of our application. You may want to disable these extras or try a browser without them.

For details of current system requirements see the following:
[https://www.cosmetri.com/system-requirements/](https://www.cosmetri.com/system-requirements/)
GETTING STARTED – IMPORT DATA

INTRODUCTION

Information on importing formulas, raw materials and companies data into Product Manager can be found in the Getting Started Guide.

GETTING STARTED – ADD PRODUCT AND FORMULA

INTRODUCTION

Information on adding a product and formula and getting started with Product Manager can be found in the Getting Started Guide.

PROJECTS

INTRODUCTION

Projects can be created in Product Manager to manage the requirements for a new product or entire product line, prior to commencing with R&D. You can create a project as an initial brief for keeping notes, images and links, further refining the concept until you are ready to proceed to the development stage. A checklist of project ‘to do’s’ can also be maintained.

Project details can be entered by authorized users within your team. Service providers for example, may gather information from a client questionnaire during project inception. It is also possible to provide a client with direct access to the projects-level of your Product Manager account, enabling them to add and edit their own project ‘requests’. Different approval statuses can be applied to a project and once set to ‘Approved’, you can associate a project with one or more products in Product Manager and, with a single-click, clone the project data to the ‘Requirements’ tab of the product. This tab serves as the specification required for the R&D stage and can be further refined before proceeding to formulate and develop samples. You will therefore retain a copy of the initial project brief as a reference, separate to the specification worked up by your team.

Projects may have custom tasks associated with them, enabling integration with your tasks and workflow management in Product Manager.
USER PERMISSIONS

Projects may be approved only by authorized users, such as your project or client manager. To select one or more users, you must be logged in as the Administrator. Go to the Global Settings/ Default Settings/Projects

For information on approving a project, see p.8.

To determine project access permissions for a logged in user, select the required settings for the following section of the Department associated with that user:

If you have configured customer groups, each project must also be associated with one of these – see from p.312 for further details. This enables exact permissions to be set for which products and projects a logged in user can access. Once a project is approved, it may only be associated with a product that also belongs to that same customer group.
**PROJECT DEFAULT SETTINGS**

In the global settings, you can also set custom statuses for your projects. Each project may have any one of up to three additional custom statuses assigned. Default statuses are Open, Approved and Closed. A maximum of 15 characters are allowed for the label.

1. New Request
2. Pending Approval
3. 

**ADD PROJECT**

To create a project, click on ‘Add Project’ under ‘Projects’ in the left-hand menu:

Or click on ‘Add New’ from the projects list when clicking on ‘List Projects’.

Each project has a unique ID, following the sequence PR0001, PR0001, etc. You may also enter a separate reference code for the project, title and select a customer group to associate with the project. Each project is listed in the projects list, showing its status and any associated product(s) (see p.8). Click on a product title to open the product.

Click in the ‘Actions’ column to edit, delete or clone the entire project. Optionally, clicking on the project ID also opens the project for editing.
To create a new project, click on ‘Add New’ and complete the details in the ‘Setup’ tab. The only required field in this tab is the ‘Title’. However, if you already have customer groups, you must select an available group. This ensures that your project is only visible to users authorized to view products and projects in that group. For further details on managing customers, see from p.312.

In the ‘Setup’ tab you may enter the following additional information to define the project’s setup, including:

- Date required
- Comments to project timeline
- Sample quantity required (kg/L)
- Sample request comments
- Bulk product cost target (raw materials + production costs) per kg/L
- Costs comments
- General comments

Click on ‘Save’ to save your changes and to create the project.

**PROJECT CONCEPT**

Once you have setup your project, use the ‘Concept’ tab to enter the details describing the concept.
The details you enter here need not be too technical since you will have the possibility later to clone the project data to any associated product’s ‘Requirements’ tab where you can add further information and refine the specification as the basis for beginning formulation (see p.10).

Enter a description for the project and upload any photographs (as .jpg, .gif or .png format), for example of competitor products, references for how the finishing packaging should look, etc. Uploaded images will be resized to 250px width.

Other options and fields in the ‘Concept’ tab of the project are:

- Benchmarks
- Select product type
  - If ‘other’ enter details below
- Target Market:
  - Used by
  - Age
- Appearance
- Color
- Appearance comments
- Perfume/Flavor
- Variants required
- Packaging

**PROJECT CHECKLISTS**

This tab enables management of ‘to do’s’ for a project. For full details of managing standard checklists, see from p.98.

Note – for details of checklists for quality management, see from p.193.
Projects can have different approval settings. Default statuses are 'Open', 'Approved' and 'Closed'. You may create up to three further custom statuses, which are managed in the default settings – see 'Project Settings' (p.5). In these settings you may also select any users authorized to set a project to the status 'Approved'.

Any other user with permission to access the project (see p.4) may set a project to any status except the status ‘Approved’.

A user audit log shows the approval status changes for the project.
If you are logged in as an authorized user with permission to approve projects (see p.4), once you are ready to approve the project, select 'Approved' from the options and then on 'Save' to apply the change.

You can now optionally select one or more products to associate with the project.

**TIP:**
Click on Products/New before approving the project and create these products so that they are already available for association with the project. You only need to enter three required fields of information to create each product as a 'container', adding the other information and formula data once the R&D stage commences.

Click on 'Save' to save the associations.

Products that are associated with the project are listed in the 'Approve' tab of the project.

To remove the association of a product with a project, click on the following icon in the 'Actions' column:
**Clone to Product ‘Requirements’**

Project information, including any uploaded images, can be cloned to any associated product’s ‘Requirements’ tab. This data can then be further refined, for example by the R&D team, as the basis for the specification.

To clone the project’s data to a product, click on the following icon in the ‘Actions’ column:

Once cloned, you can click on a product’s title to open the product at the ‘Requirements’ tab and view the project information.

A non-editable summary of the project data is displayed at the top of the tab.
Below this, the exact same fields and data are displayed as in the project’s ‘Concept’ tab. The data is editable – any changes you make in the product-level will not affect the information you entered for the associated project.

**TASKS**

Projects can have custom tasks associated with them – useful for example, if you have approved a project and wish to notify the R&D head to check the details. A client with permission to login and enter their own project ‘requests’ could also add the project information and then create a task for the project manager, instructing them to check the new request.

Note: Project-level tasks are different to tasks associated with specific checklist items for a project.

For full details of managing custom tasks, including information of managing tasks for projects, see p.245.

Note: A project checklist can also have associated tasks – see from p.98 for details.
INGREDIENT-LEVEL DATA

INTRODUCTION

Product Manager’s ingredients database includes approx. 30,000 single ingredients for possible use in cosmetics and personal care products, searchable by fields including INCI, IUPAC, CAS no and filterable by function.

Note:
In Product Manager ‘Ingredients’ refers to single chemicals and should not be confused with ‘raw materials’. A raw material in Product Manager has its chemical composition defined in the ‘Composition’ tab and can consist of a single ingredient at 100% w/w or a mixture of multiple ingredients which can be entered in min. and max. %w/w ranges. Ingredients are therefore the ‘building blocks’ of raw materials. Regulatory data and compliance management in Product Manager is conducted at the ingredient (chemical) level.

Over 99% of required ingredients can be found in Product Manager. In the rare event that an ingredient cannot be found, a request can be submitted to have this ingredient added by Cosmetri to the database, further details of which can be found below in this section.

The ingredient level provides access to chemical properties, safety, toxicity, GHS and CLP fields. You may also enter your own notes for ingredients. Approximately 11,000 ingredients in the Product Manager database include chemical properties data. Over 3,200 ingredients include toxicity and LD50 values.

DISCLAIMER

Use of any data provided in Product Manager, including compliance/regulatory data, chemical properties, GHS and other chemical safety data assumes acceptance of Cosmetri’s terms of use. You can access these terms under the following link:

https://www.cosmetri.com/terms/

Specifically, please refer to the following sections:

(3) The Cosmetri service is not intended to replace the professional services offered by a certified safety assessor, cosmetic formulator or specialized laboratory service, or to validate the compliance of cosmetic products with any legal regulations.

(4) As well as EU CosIng regulatory data provided as default with all Product Manager plans, additional regulatory data may be provided. The regulatory data provided is supplied as information only, upon the condition that the person receiving it will make their own determination prior to use.

Cosmetri GmbH will in no event accept responsibility for damages of any nature whatsoever resulting from the use of or reliance upon the compliance/regulatory data provided. You are advised to verify the data as provided in Product Manager with the original source and to seek any clarification directly with the responsible agency. Cosmetri cannot and does not check this third-party data for accuracy.
ACCESSING THE INGREDIENT DATA

The ingredient level can be accessed wherever an ingredient is listed in Product Manager, as described below.

In any ingredients list, search or filter the list to locate an ingredient and click on the following icon in the ‘Actions’ column:

In the formula’s ‘Compliance’ and ‘Safety’ tabs, click on an ingredient name to open the ingredient data panel:

<table>
<thead>
<tr>
<th>Ingredient</th>
<th>CAS Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>SODIUM LAURETH SULFATE</td>
<td>3088-31-1 / 9004-8</td>
</tr>
<tr>
<td></td>
<td>1335-72-4 / 68585-1</td>
</tr>
<tr>
<td>SODIUM CHLORIDE</td>
<td>7647-14-5</td>
</tr>
<tr>
<td>ALCOHOL DEN</td>
<td>-</td>
</tr>
</tbody>
</table>

REQUESTING CUSTOM INGREDIENT

If you search for an ingredient in any of the following pages/tabs of Product Manager and cannot find the ingredient, a ’Submit Ingredient Request’ button will be displayed:

- Ingredients lists
- Formula Specification/Composition
- Raw Materials/Composition tab

Please conduct a thorough search before requesting Cosmetri to add an ingredient to the database. **Requests are only considered for single ingredients/chemicals and not for raw material mixtures.**

- Check the CAS no. is correct
- Search for a narrower string to get a match to the INCI/IUPAC
- Check for a generic version e.g. use ‘Honey’ instead of ‘Manuka Honey’
- Check that the ingredient is a single chemical and **not a mixture**
If you are sure that the ingredient does not exist in Product Manager, please submit the request form. We aim to review and add custom ingredients within 5 working days and will notify you once your submission has been reviewed.

To assist the Cosmetri chemist in assessing your submission, please provide as much information as possible to assist in their research. The form submission fields are as follows:

- **INCI** (international)
- **IUPAC** (chemical name)
- **US INCI**
- **CAS No.**
- **EINECS**

**COSMETIC FUNCTIONS:**

If you know of any specific functions that the ingredient can perform in cosmetic or personal care products, please select these from the list.

![COSMETIC FUNCTIONS:](image)

Please select any SDS or CoA document referring to this chemical. Click to select the file on your hard drive using your file browser.

Select file: [Choose File]

Before submitting the form, please confirm that the email address associated with your account is correct.

**INGREDIENT / CHEMICAL DATA PANEL**

**MANAGING DEFAULT AND CUSTOM INGREDIENT DATA**

In the ingredient data panel, you can manage ingredient/chemical data including chemical properties, safety, toxicity, GHS and CLP information. For users of Product Manager prior to version 4, if you have already entered any custom data for a chemical, it may be necessary to click on the following button to load the default ingredient data:
If no default value exists for a field, any value you already entered will be retained. If after performing the above step, no or only partial population of the fields occurs, this is because default is not available for that ingredient.

Check that any custom data has not be over-written before clicking on 'Save'!

Use any default ingredient properties and safety data or enter your own values and click on 'Save'. To restore default data for the ingredient, click on 'Load Default Data' and then on 'Save'. **Use caution when entering this button, since your existing data may be overwritten!**

Any dermal absorption value and ingredient notes will always remain unchanged, since these values are required for safety calculations and exported safety data performed by Product Manager (see ‘Safety Calculations’, p.235).

**INGREDIENT IDENTIFICATION**

The first section of the ingredient data panel includes fields that describe the ingredient:

<table>
<thead>
<tr>
<th>INCI:</th>
<th>1,10-DECANEDIOL</th>
<th>Chemical name, IUPAC:</th>
<th>(none)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAS No.:</td>
<td>112-47-0</td>
<td>EINECS:</td>
<td>203-975-2</td>
</tr>
<tr>
<td>InChIKey</td>
<td>FOTKYAAJKYLFFN-UHFFFAOYSA-N</td>
<td>Common name</td>
<td></td>
</tr>
<tr>
<td>US INCI:</td>
<td>1,10-Decanediol</td>
<td>Chinese INCI:</td>
<td>1,10-癸二醇</td>
</tr>
</tbody>
</table>

**INCI** - This is non-editable, taking the official INCI (International Nomenclature of Cosmetic Ingredients) name from CosIng.

**Chemical name, IUPAC** - This is non-editable, taking any existing official names determined by the International Union of Pure and Applied Chemistry.

**CAS No.** - This is a non-editable field, taking any existing official CAS (Chemical Abstracts Service) number associated with the ingredient, as found in CosIng.

**EINECS** - This is a non-editable field, taking any existing official EINECS (European INventory of Existing Commercial chemical Substances) number associated with the ingredient, as found in CosIng.

**InChIKey** is the International Chemical Identifier developed under the auspices of IUPAC, the International Union of Pure and Applied Chemistry.

**Common name** - Enter a common name in your preferred language to describe the ingredient. In the 'Formula/Labels' tab under 'Label of Ingredients' you may select to include
the common name for listing ingredients on the product label. Any common name entered in this field will also be displayed in other locations to assist you in identifying the ingredient.

**US INCI** - If a US INCI exists, this will be automatically displayed and can be edited if required. If no value exists, you can enter a US INCI value.

**Chinese INCI** - If a Chinese INCI exists, this will be automatically displayed and can be edited if required. If no value exists, you can enter a Chinese INCI value.

Optionally, you can configure further Custom Ingredient Name fields on the Global Admin Settings ‘Custom Settings’ tab.

Once you added fields, you can find them in the Custom Ingredient Names sub-section. Add a custom name and save the ingredient.

You can present the Custom Ingredient Names on the Formula Specification Report.

**INGREDIENT – CHEMICAL PROPERTIES**

This section of the ingredient panel includes fields describing the chemical properties. Approximately 11,000 ingredients have chemical property data available as default. Existing users may need to click on ‘Load Default Data’ to view this. Alternatively, you can enter or update any field with your own values.
Molecular Formula (MF) is the chemical formula for a compound existing as discrete molecules that gives the total number of atoms of each element in a molecule. For example, there are 6 C atoms and 14 H atoms in a hexane molecule, which has a molecular formula of \( \text{C}_6\text{H}_{14} \).

Molecular Weight (MW) is measured in \[ \text{g/mol} \]. In a copy of the Periodic Table of Elements, find the relative atomic mass of each element in the molecule. Then, multiply the atomic mass of an element by the number of atoms of the element in the molecule. To complete the calculation, add up the mass of all of the atoms to get the molecular weight. Molar mass and molecular weight are often confused, but their values are very different. Molar mass is the mass of one mole of a substance, while molecular weight is the mass of one molecule of a substance. One mole is the number of particles, such as atoms, molecules, ions or electrons, in a substance.

Density of a substance is the relationship between the mass of the substance and how much space it takes up (volume). The mass of atoms, their size, and how they are arranged determine the density of a substance. Density equals the mass of the substance divided by its volume; \( \text{D} = \frac{\text{m}}{\text{v}} \).

Form - describes the physical form of the chemical in its pure state, such as liquid, crystal or powder.

Color - describes the color of the chemical in its pure state.

Refractive index is a measure of how light propagates through a material. The higher the refractive index the slower the light travels, which causes a correspondingly increased change in the direction of the light within the material.

\( \lambda_{\text{max}} \) - wavelength of maximum absorbance (\( \lambda_{\text{max}} \)). The extent to which a sample absorbs light depends upon the wavelength of light. The wavelength at which a substance shows maximum absorbance is called absorption maximum or \( \lambda_{\text{max}} \).

Boiling point, temperature at which the pressure exerted by the surroundings upon a liquid is equalized by the pressure exerted by the vapor of the liquid; under this condition, addition of heat results in the transformation of the liquid into its vapor without raising the temperature.

Solubility is the ability of a substance (the solute), to mix into a liquid (the solvent). It measures the highest amount of substance mixed into a liquid solvent while they are both at equal amounts.

pKa value is one method used to indicate the strength of an acid. pKa is the negative log of the acid dissociation constant or Ka value. A lower pKa value indicates a stronger acid. That is, the lower value indicates the acid more fully dissociates in water.
Vapor pressure or equilibrium vapor pressure is defined as the pressure exerted by a vapor in thermodynamic equilibrium with its condensed phases (solid or liquid) at a given temperature in a closed system.

Vapor density is the density of a vapor in relation to that of hydrogen. It may be defined as mass of a certain volume of a substance divided by mass of same volume of hydrogen. Vapor density = mass of \( n \) molecules of gas / mass of \( n \) molecules of hydrogen.

**INGREDIENT SAFETY AND TOXICITY**

In the lower section of the ingredients panel, data describing the safety, toxicity, GHS and related data for the ingredient can be managed. For information on managing safety calculations and data as the basis for safety assessments, see p.235. Most of these fields have an icon that you can click on to access a webpage with further information describing the field.

**Toxicity default data**

If an ingredient has any available default toxicity data, this is displayed in a table at the top of this section of the ingredient data panel:

<table>
<thead>
<tr>
<th>Organism</th>
<th>Test Type</th>
<th>Route</th>
<th>Reported Dose (Normalized Dose)</th>
<th>Effect</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>guinea pig</td>
<td>LDLo</td>
<td>intraperitoneal</td>
<td>300mg/kg  (300mg/kg)</td>
<td></td>
<td>Neurey-Schneidberg’s Archiv fuer Experimentelle Pathologie und Pharmakologie. Vol. 131, Pg. 171, 1928.</td>
</tr>
</tbody>
</table>

**Toxicity (exported with safety data)** field is for entry of toxicity notes to supplement the toxicity data entered in the specific fields described below. Mostly this will include LD\(_{50}\) type data that is required to be exported with the safety data (see chapter on Safety Calculations, starting p.235). LD\(_{50}\) is an abbreviation for ‘Lethal Dose 50%’. The LD\(_{50}\) value for a chemical is
the amount of chemical that can be expected to cause death in half (50%) of a group of an animal species when the chemical enters the body by ingestion or skin absorption.

If default toxicity data exists in the panel above this field and you require any of this to be exported with your safety data, copy/paste this into this field.

**RID/ADR** - Most European countries have extensive laws and legislation concerning the transport of dangerous goods by road or rail. These laws are part of the ADR/RID regulations. ADR concerns road transport, while RID is for transport by rail. Click on the link icon to the right of this field to open a web page describing this value.

**German Water Hazard Class (WGK)** sometimes is also called German Water Endangerment Class (WGK). Germany's Federal Water Act requires that facilities handling substances that are hazardous to waters must be built and operated in a way that water bodies are protected from pollutions. Click on the link icon to the right of this field to open a web page describing this value.

**TSCA Status** - Toxic Substances Control Act (TSCA) Chemical Substance Inventory contains all existing chemical substances manufactured, processed, or imported in the United States that do not qualify for an exemption or exclusion under TSCA. This may be your starting place for interaction with EPA on TSCA regulatory matters. Click on the link icon to the right of this field to open a web page describing this value.

**Flash point** of a volatile material is the lowest temperature at which vapors of the material will ignite, when given an ignition source. The flash point is sometimes confused with the autoignition temperature, the temperature that results in spontaneous autoignition.

**Explosive limits** specify the concentration range of a material in air which will burn or explode in the presence of an ignition source.

**Stability** is the tendency of a material to resist change or decomposition due to internal reaction, or due to the action of air, heat, light, pressure, etc.

**Storage** - description of any storage conditions under which the chemical should be stored to maintain maximum shelf life.

**Dermal absorption** value is required for calculation of the SED (Systemic Exposure Dosage) and therefore also for the MoS value. Dermal (percutaneous, skin) absorption is a global term that describes the transport of chemicals from the outer surface of the skin both into the skin and into the systemic circulation. This figure is expressed as a percentage. If you do not know this value and wish to assume the 'worst case scenario', enter 100 in the field to represent 100% i.e. total percutaneous absorption of the ingredient. Any dermal absorption value and ingredient notes will always remain unchanged, since these values are required for safety calculations and exported safety data performed by Product Manager (see 'Safety Calculations', p.235).

**NO(A)EL** stands for 'no-observed adverse effect level' and is a value measured in mg/kg bw/day required for calculating the Margin of Safety (MoS). It is determined or proposed by qualified personnel (pharmacologist, toxicologist) depending on the study, drug indications and its pharmacological therapeutics side/adverse effects. NO(A)EL could be defined as 'the highest experimental point that is without adverse effect.'

**LD_{50} (deprecated)** – may only be displayed for users pre v4 where a value was already entered. We recommend using the Toxicity (exported with safety data) field described above.
GHS CLASSIFICATION

GHS stands for the Globally Harmonized System of Classification and Labelling of Chemicals. GHS defines and classifies the hazards of chemical products and communicates health and safety information on labels and safety data sheets.

Many ingredients have full REACH information available on the ECHA website. The European Chemicals Agency is an agency of the European Union which manages the technical and administrative aspects of the implementation of the European Union regulation called Registration, Evaluation, Authorization and Restriction of Chemicals (REACH). If the following button is displayed, click to view the REACH data for this substance on ECHA. This non-exclusive information is provided free of charge by ECHA. Provision of this link does not infer any endorsement of the Cosmetri service by ECHA. For terms and conditions please see:


GHS stands for the Globally Harmonized System of Classification and Labelling of Chemicals. GHS defines and classifies the hazards of chemical products and communicates health and safety information on labels and safety data sheets. Click on the link icon to the right of this field to open a web page describing these.

Hazard Class and Category Codes [?]  
| Acute Tox. 4 *  
| Acute Tox. 4 *  

Hazard Statement Codes [?]  
| H332  
| H302  

Hazard Class and Category Codes – default data may exist for this ingredient or enter your own.

Hazard Statement Codes – for GHS classification. Default data may exist for this ingredient or enter your own. Enter any CLP (classification, labelling and packaging) codes applicable to the ingredient, such as found on the ECHA (European Chemicals Agency) website at
https://echa.europa.eu/information-on-chemicals. You can enter multiple CLP codes by separating them by a comma such as:
H315, H319, H373, H373

GHS/CLP LABELLING

Pictogram, Signal Word Code(s) – GHS warning pictograms may be pre-selected for the ingredient.

To edit the Pictograms, click in the field to select and add or to delete any existing selection:

To delete a pictogram, click on the X symbol:

Hazard Statement Codes - for labelling. Default data may exist for this ingredient or enter your own.

Suppl. Hazard Statement Codes - for labelling (any additional notes). Default data may exist for this ingredient or enter your own.
GHS OTHER
Two field exist in this sub-section where additional GHS data may be managed:
Specific Conc. Limits, M-factors
GHS Notes

INGREDIENT NOTES
Ingredients notes entered here are not exported with the safety report data. Click on 'Save Note' to save any changes.

RAW MATERIALS

INTRODUCTION
Please first read the Getting Started Guide before you proceed with the steps explained in this document. This guide includes the following basic principles for managing your raw materials, including:
1. Understanding the difference between 'ingredients' and 'raw materials' levels in Product Manager
2. Auto-creation of raw materials when adding ingredients directly to your formula

CREATING RAW MATERIALS
There are three ways to create a raw material in Product Manager:
1. ADD AS NEW RAW MATERIAL
2. Select Raw Materials/Add New in the main menu. Usually, you would use this method for creating multi-ingredient raw materials. For details see the Getting Started guide, under 'Creating multi-ingredient raw materials'.
3. CONVERT INGREDIENT
4. From any of the ingredients lists, just click on the following icon in the 'Actions' column to save the ingredient as a raw material:

5. ADD INGREDIENT DIRECTLY TO FORMULA COMPOSITION
6. When building your formula, adding any ingredient directly to your formula will convert this automatically to a raw material. If a raw material with the same composition already exists, you will be prompted to use this, thus avoiding duplicates. For details see the Getting Started Guide, under ‘Enter formula composition.’

**MULTI-INGREDIENT RAW MATERIALS**

To create a multi-ingredient raw material - go to ‘Raw Materials / New’. In the ‘Information’ tab enter a ‘Trade Name’. Click on ‘Save’ and then click on the ‘Composition’ tab.

Note – you will usually find the raw material composition in Section 3 of the SDS (or MSDS) document received from your Supplier. If this information is not included, please contact the Supplier.

See Step 4 for how to add an ingredient via CAS or ingredient name. Selecting an ingredient in the raw material’s composition is almost identical.

You can also click on one of the following four buttons if you wish to browse or search for one of the ingredients from these lists.

<table>
<thead>
<tr>
<th>Ingredient</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfume Allergens</td>
<td>PERFUMING</td>
</tr>
<tr>
<td>Preservatives</td>
<td>PRESERVATIVE</td>
</tr>
<tr>
<td>Colors</td>
<td>COSMETIC COLORANT</td>
</tr>
<tr>
<td>UV Filters</td>
<td>UV FILTER</td>
</tr>
</tbody>
</table>

Ingredients added directly to your raw material from one of these separate lists will automatically assume the following associated function, which cannot be changed. You may however assign further functions.

When you add the raw material to your formula, the functions set for each ingredient will then be displayed in the formula’s ‘Compliance’ tab.

**IMPORTANT**: We recommend that you do not select grouped ingredients (e.g. *ASPERGILLUS/CAMELLIA SINENSIS LEAF FERMENT EXTRACT*) in your formulas or raw material compositions. These are listed for advisory reasons only. Select wherever possible the single ingredient version, such as *ASPERGILLUS FERMENT*, as shown below:
Now enter the **min. %w/w** and **max. %w/w** values for the ingredient in your raw material. If you know the exact percentage use the ‘Enter exact’ checkbox. This will lock the **min. %w/w** and the **exact %w/w** will be stored as the ‘**Exact/Max. %w/w**’ value.

<table>
<thead>
<tr>
<th>Enter exact</th>
<th>Min. %w/w</th>
<th>Exact/Max. %w/w</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10.000000</td>
<td>10.000000</td>
<td>UV FILTER</td>
</tr>
</tbody>
</table>

Once you have entered the ingredient details, click on ‘Add New’ to add a further ingredient.

**TIP:** Some suppliers publish the %w/w range of concentration for each ingredient in the raw material composition. It’s always best to obtain exact percentages, but some Suppliers do not disclose this data. They are however obliged to provide data on the ingredients and a **min. %w/w** and **max. %w/w** for each.

Click ‘Save’ to complete this step and to save your raw material composition!

Your multi-ingredient raw material will now be available for selection by ‘Trade Name’ or ‘Part Code/ID’ when adding this to your formula’s composition.
**Parents and Batches**

A **parent** raw material is the **first version** that you create. The function of the parent is to describe the raw material and act as a ‘container’ for all associated batches that you later create. Enter all data and documents for the parent that will be relevant to any associated batches. Each time you clone a new batch, all the data and documents will be copied to that batch, enabling you to update any information for the batch as required, without needing to re-enter anything.

If you edit any of the data in the parent version, you will be offered the option to update the parent only, or all its associated batches, making editing of multiple batches easy and fast.

Note that the ‘**Unit of measurement**’ must be identical between batches. If you only choose to update the parent raw material, the unit of measurement will automatically be copied to all the batches, regardless of the selection.

**Tip:**

If you do not intend to use Product Manager for manufacturing, inventory control or batch traceability of your raw materials, you may only require parent versions of each of your raw materials.

View of parent raw material with selection of available batches:
Best Practices for Managing Parents and Batches

To effectively manage your raw materials batches, we recommend that you adhere to the following key practices:

1. **Use the parent version of your raw material to manage data common to all batches.** Cloning a parent to create a new raw material batch will also clone data and documents associated with the parent. If you wish to update data that should be applied to all associated batches, you can edit the parent version and then upon save, select the ‘Update all batches’ option. You can change the unit of measurement only for parents, and it is copied by default to all of the associated batches, regardless of the selection.

2. **Check that the data cloned from the previous batch is still accurate for the new batch.** For example, a cloned CoA or SDS document may need to be updated. The Product Manager Compliance Checker will for example, only alert you to a missing SDS for a raw material batch, but not whether the document is the correct version.

3. **Avoid creating duplicate raw materials** in your raw materials list. Provided that the raw material is the same, you can store different batches of the raw material under the same raw material parent. You can even change the trade name, Supplier and manufacturer details between batches. For managing raw materials containing perfume allergens see p.27 for how to unlock the ‘Composition’ tab to enable editing for each batch.

4. **Enter your raw materials batches as separate batches.** To enable batch traceability and conform with GMP, we recommend that you always **enter each new batch of your raw material as a separate batch**, by cloning the last batch and then entering the new batch information such a Supplier batch no., expiry date and inventory.
You can enable a higher level of control for parent and batch management in the Global Admin Settings.

On the ‘Custom Settings’ tab, under the Integration Options section you can set how the Part Code/ID field should behave. For the highest level of control, you can set the field required and the same for all batches of the same parent.

Integration Options

Part Code/ID

This field is available for identifying materials (packaging items and raw materials). It is not the same as the batch no.

Select the required options:

- [x] Part Code/ID is a required field [Y]
- [x] Require same Part Code/ID for all batches of same parent [Y]

LOCKING/UNLOCKING THE COMPOSITION

For compliance purposes, it is generally good practice to ensure that each batch of a raw material associated with the same parent is chemically identical. Product Manager safeguards your raw materials batches through a default ‘lock’, preventing editing of the ‘Composition’ tab for each raw material batch. In this case, you will only be able to edit the composition of the parent version and apply the change to all associated batches.

A further safeguard prevents such an update of any batch’s composition, if it is associated with any dispensed manufacturing order.

View of a locked raw material ‘Composition’ tab:
If a raw material batch has no such association, you can override the default lock by setting the following switch to 'Off':

This function is especially useful for managing raw materials which contain perfume allergens – such as perfumes/fragrances and essential oils. Perfume allergen concentrations often vary between batches of the same raw material. Unlocking the composition enables you to adjust these levels for each batch. When you then dispense these batches for a manufacturing order, your production-mode formula will be auto-updated to the correct concentration levels for each allergen and you will be easily able to monitor any changes between product batches which may affect labelling requirements.

**RAW MATERIAL ‘INFORMATION’ TAB**

The following section covers the most important fields in this tab. Other optional fields such as CLP, MSDS etc. are explained by clicking on the [?] adjacent to the field.
**TRADE NAME**

Use this field to enter the trade name used by a manufacturer for the raw material. These trade names can vary from brand to brand. Product Manager therefore allows you to keep all such batches grouped together under one parent with the trade name able to be changed between batches.

When a raw material is auto-created by Product Manager, the trade name by default uses and available INCI name for the ingredient. For example, ISOAMYL LAURATE is the INCI name for the ingredient which is often sold under the trade name ‘EcoSilk’. You can therefore update the Trade Name value accordingly.

If your raw materials batches have different trade names, you can search according to trade name and all associated batches will be listed, as shown in the following example:

<table>
<thead>
<tr>
<th>Filter by properties</th>
<th>ecosilk</th>
<th>List by SUPPLIER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PART CODE/ID**

Use this field to help further identify your raw material, such as by use of an internal ID or part code. This can be useful where you have different versions of a raw material stored under the same trade name.

Raw material Part codes / IDs are displayed as follows, making for easier identification:
Note – the Part code/ID is normally the same for all batches of a raw material. It is not the same as the batch number, which should always be unique to each batch entered.

Part codes/IDs for raw materials are displayed in the raw materials list. It is also possible to search by this field using the search box above the list.

Part Code/ID column in raw materials list:

![Part Code/ID column](image)

**CUSTOM RAW MATERIAL ID**

You can enable a custom ID under the Global Admin settings Custom Settings tab. You can optionally set the field required and edit the field label.

![Custom ID settings](image)

Once you turned the field on, it becomes accessible on the raw material ‘Information’ tab and on the Raw Materials list view.

![Custom ID field](image)

You can also filter the list view based on the values stored in the Custom ID field using the main search box.

**RAW MATERIAL CATEGORIES**

For ease of management, you can create categories for your raw materials and assign them accordingly.
To create or edit your raw material categories, select the following menu item:

If a category includes raw materials, the number of parent items will be displayed. Click on the link to view these:

In this view, click on any raw material to open the raw material parent. To move raw materials to a different category, click in the checkbox to the left – or the topmost checkbox to select all – and then select a target category from the list. Click on ‘Move Selected’ to move those raw materials to the selected category.
Move Raw Materials

Select one or more of the following raw material parents, then below the list select a category to move the parent and any associated batches to the destination category. Click on 'Move Selected' to complete the action.

Other

- Cetyl alcohol 30/70 | 36653-82-4
- Rose Hydrolate | none
- Shea Butter (Organic) | 194043-92-0 - 91080-23-8

Other

Select a category to move the selected raw materials to:
Once a category has no raw materials associated with it, it is possible to delete it by clicking on the delete icon in the ‘Actions’ column of the raw materials list.
PROPERTIES

You can create any custom properties for your raw materials, making it easy to search, sort and identify these.

To configure these properties, you must be logged in as the Administrator. Under ‘Global Settings/Default Settings’ look for the following options. Click on ‘Add’ to create a new property.

Raw Materials

Create custom properties such as IFRA, Organic or Contains Palm Oil, which can be applied to your raw materials by checking a checkbox in the raw material’s ‘Information’ tab under ‘Properties’. This will enable you to search and filter your raw materials by property. These properties are also exported with the safety assessment data (service provider users only).

Properties that you create in these settings will then appear as checkboxes in the raw materials ‘Information’ tab, enabling you to select which of these are applicable to each raw material. If these are common to all batches of the same raw material, set these at the parent-level and clicking on ‘Save’ will give you the option to update these properties to all associated batches.

In the raw materials list, you can select any combination of the properties from a list. The selection can also be used in conjunction with any other search criteria that you apply.
**Prepare Raw Materials for Production**

The following steps are required if you intend to use Product Manager’s manufacturing or development batch features.

**Setting the Density Value**

If you intend to use the Product Manager manufacturing or development batch features and you measure any of your raw materials ‘by volume’ (e.g. for liquids), it is important that a density (or specific gravity) value is entered. This will enable Product Manager to correctly calculate the amount required for production in both weight and volume, for each of the raw materials in your production formula.

**TIP:**

*We recommend that wherever possible you set your raw materials to be measured ‘by weight’, thus not requiring a density value.*

To enter the density value for the raw material, use the following field in the ‘Information’ tab.
Important: it should normally not be necessary to change the density value from batch to batch of the same raw material. The density value of the raw material parent or batch currently associated with the formula is used for conversion of volume to weights (L to kg) when dispensing a production order.

The density value should ideally be obtained from your Supplier and may also be included in any specification sheet accompanying the batch that you received. You can also verify the density by accurately weighing exactly 1 liter of your raw material. If it weighs for example 1.142 Kg, enter the density value as ‘1.142’.

If you prefer to use ‘by volume’ for measuring and dispensing any of your raw materials batches, selecting this will also offer you the option to enter a ‘drops per g’ value, as shown below.

![Dropper Icon]

The value is only required if you intend to enter your formula composition by weight/volume and your recipe includes measurements in drops. For further information, see the ‘Getting Started’ guide under ‘Working with %w/w Values in your Formula’.

**CLONING BATCHES**

Using the clone function in Product Manager, adding new batches of your raw material is easy and fast. To clone a raw material, simply click on the following button in the raw material view for the raw material that you want to clone.

![Clone Button]

The first time you clone the parent raw material, you will then be required to enter the Supplier and batch data for the newly cloned first batch. **Batch-related fields including inventory and batch ID are not available in the raw material parent.**

The following fields are therefore required before you can save the new batch:

Supplier

Supplier batch no.

Expiry date (or check the ‘No expiry’ checkbox, if none is required)

Entering data required for each cloned raw material batch.
If you are using Product Manager for management of your raw material inventory, you also need to enter the amount of inventory associated with the new batch. See ‘Inventory’ in the later section of this guide (p.38).

**TIP:**
Cloning a raw material batch will clone all data and documents except the Supplier and batch information. For compliance and batch traceability, it is important that you update any required data and documents for the new batch. For example, if the batch requires a different SDS document, replace this in the ‘Documents’ tab.

You can select whether to clone any raw material batch based upon the currently viewed batch, or the parent.
QUALITY ASSURANCE

To be able to dispense raw materials batches for your manufacturing orders, you will also need to configure approval and inventory.

Approval – refers to whether a raw material batch must have the status ‘Approved’ before it is made available for dispensing a manufacturing order.

For full details of QA management for raw materials, see p.218.

At raw material batch level, you can select the ‘Auto-approve’ checkbox to set the batch to be available for manufacture, without any tests requiring to be passed and without it having ‘Approved’ status. To use this option, click on the following checkbox.

Alternatively, you can disable approval in your Administrator global settings, so that all raw materials batches are auto approved and immediately available for manufacture. Select ‘Global Settings’ in the user menu (top right) and then select ‘Default Settings’. Change the following switch to ‘OFF’ and then click on ‘Save’ to save your settings.

Click on ‘Save’ to save your global settings.

INVENTORY

Inventory must also be set up correctly so that you can dispense your raw materials for each manufacturing order or development batch.

First, check in the raw material’s ‘Information’ tab, that the ‘Unit of measurement’ is correctly set according to weight or volume. This value must be the same for all the batches belonging to the same parent.

Next, simply enter an inventory amount in the following field to represent the exact amount of current inventory that exists for that raw material batch.

Once an inventory amount has been entered for the first time, the field is then locked. This ensures accurate inventory deductions if a production order is dispensed while another user is editing this page. To adjust inventory once the ‘Available inventory’ field is locked, use the ‘Adjust inventory’ field to enter the amount to adjust and click on ‘Update’.

In the above example, 10 kg is added to the ‘Available inventory’ value, resulting a value of 45 kg. To deduct an amount, enter a negative value such as -10.000 and click on ‘Update’.

You can set a ‘Low inventory level’ which will then display an alert in your raw materials list, if this threshold is reached:

**TIP:** Enter your inventory levels prior to commencing to use the Product Manager manufacturing module. Once you enter the current inventory levels, ensure that any inventory taken from the raw material batch that is not auto deducted during dispense of the manufacturing order is also deducted in Product Manager, otherwise your inventory levels will be inaccurate.
If you wish to use the manufacturing module without tracking inventory, you can **disable inventory control in your Administrator global settings**. Select ‘Global Settings’ in the user menu (top right) and then select ‘Default Settings’. Change the following ‘Inventory control’ switch to ‘OFF’ and then after confirming ‘OK’, click on ‘Save’ to save your settings.

![Inventory Control](image)

**TIPS ON MANAGING RAW MATERIALS**

Product Manager makes it easy to manage your raw materials and their batches. Click in the Raw Materials/List menu item to view the list.

![Raw Materials](image)

A search field enables searching according to Trade Name. You can use this search in conjunction with any combination of the following filters to sort the list:

- Supplier
- Manufacturer
- Category

Further advanced filtering is possible by selecting any properties that you have set in the global settings.
Filter batches according to inventory and expiry date

If you have many products and use Product Manager for manufacturing and batch traceability, your list of raw material batches can grow quite large. For compliance and traceability purposes, it is important that you keep older batches in your account. You may therefore wish to hide these if they are expired and/or have no inventory.

In the raw materials list, use either of the following checkboxes to filter the list accordingly:

- Hide expired batches
- Hide batches without inventory

Note – only raw material batches will be hidden from the list view, not their parents.

Hiding expired batches is based upon the expiry data set in the batch’s ‘Information’ tab. If the date is older than the current date, the batch will be hidden. Batches which are due to expire within the period set in your global settings (under ‘Inventory Control’) will still be listed and flagged accordingly, unless they have expired.

<table>
<thead>
<tr>
<th>ID</th>
<th>Batch Size</th>
<th>Expiry Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>496.000 L</td>
<td>08/07/2017</td>
<td>Approved</td>
</tr>
<tr>
<td>2</td>
<td>10.000 L</td>
<td>31/07/2017</td>
<td>Quarantined</td>
</tr>
<tr>
<td>3</td>
<td>50.000 L</td>
<td>31/05/2017</td>
<td>Quarantined</td>
</tr>
</tbody>
</table>

Global setting for determining when expiry alerts will be displayed:
Expired raw materials are easily identified in the raw materials list by the additional 'Expired' badge.

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>29/11/2016</td>
<td>Expired, Approved</td>
</tr>
<tr>
<td>08/07/2017</td>
<td>Approved</td>
</tr>
</tbody>
</table>

In the raw material level, you can use the same filters to determine which batches of the open raw material are viewed in the 'Open at batch' list:

<table>
<thead>
<tr>
<th>Parent</th>
<th>Quarantined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo Supplier D</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TIP:
When using the 'Hide batches without inventory' option in the raw material view, creating a new batch of the raw material will cause that batch to be hidden from the list, unless you either change the setting or immediately add inventory prior to clicking on 'Save'.

VIEW RAW MATERIALS BY ‘WHERE USED’

In the raw materials list view, click in the 'Actions' column to view a list of all products/formulas using that raw material, including the %w/w concentration. This action is available at parent-level and checks for associations for all batches of that parent.
MANAGING SUPPLIER/MANUFACTURER RELATIONSHIPS

Each batch of a raw material or packaging item needs to be associated with a company as the Supplier and Manufacturer.

Under the main menu ‘Companies’ you can view a list of all companies you have created. Each company’s details include a setting for ‘is Supplier’, ‘is Manufacturer’ and ‘is Customer’.
Use the free text search to search your companies based on ‘Name’ or ‘ID’.
You can filter the list based on the company type as well using a combination of the designated checkboxes.

Note – once raw material or packaging item batches are associated, these associations must be disassociated before these checkboxes can be unchecked.
Depending on these settings, each company may have a clickable icon in the ‘Supplier’ and/or ‘Manufacturer’ column, enabling a list of associations to be displayed:

Only companies without any associations have a ‘Delete’ icon displayed in the ‘Actions’ column, enabling deletion of that company record.
Click in either the ‘Supplier’ or ‘Manufacturer’ column to show the respective items associated with the company for that role.
This view enables association of any selected items with a different company. For example, if viewing all associations as ‘Manufacturer’, you can select the required items to change association and then select the target Company from the ‘Select Manufacturer’ menu. Click in the first checkbox of the list to select all items. Only companies which are set to act as Manufacturer or Supplier will be available for selection. Once a company is selected, click on ‘Move Selected’ to perform the action.

Important! Proceed with caution when re-associating raw material and packaging item batches. Problems with compliance and traceability can otherwise result.

**Export Raw Material Data**

You can export raw materials and their batches to .csv format, based on the current search and filter settings applied. To filter your raw materials list, please refer to the previous section. The only data not exported is the raw material’s composition. Any documents uploaded to the ‘Documents’ tab will be listed by document type, indicating which documents are present. e.g. ‘MSDS; COA1’.

The raw material export function is useful for simple, asynchronous integration of batch data and inventory levels with any ERM or accounting application that allows .csv data import.

Since certain fields in your data may contain commas, these fields are enclosed in quotation marks “” to retain the integrity of the data structure in the .csv file. Cells containing lists, such as the example provided for documents use the semi-colon to separate the values.
Select the preferred export option and click on 'Export' to generate the .csv file, which will be downloaded by your browser.

**Export options:**

**Parents only (all data)**
Only the raw material parent data will be exported. All batches are ignored.

**Parents and batches (all data)**
All data for the parents and their batches will be exported.

**Parent only – total inventory, all batches (simplified)**
This option is useful for obtaining total inventory available for a parent and all associated batches. The unit of measurement (kg or L) will be taken from the parent and all inventory values for associated batches assumed to be in the same unit. This export options offers the following additional controls:

- Exclude batches with expiry date before [31 Dec 2020]
- Exclude batches which are not 'Approved' status

This provides more accurate calculation of available inventory, based upon expiry date of each batch and the approval status.

Click on 'Export' to export the data, which will be downloaded by your browser as a .csv file.

**PACKAGING**

**INTRODUCTION**

Note: please first read the Getting Started Guide before you proceed with the steps explained in this document.

By following the steps, you will be able to:

- create packaging item parents
- create packaging item batches and manage inventory
- build packaging sets and associate these with your products
- use the 'pack-out' tab of a production order to assign packaging inventory
- include packaging costs in a formula's costs simulator.
If you are familiar with the process of managing raw materials batches, many of the principles for managing your packaging items and batches are the same. Your packaging materials can be saved as batches, each having their own inventory level and unique supplier batch information and documents. You can also clone an existing packaging batch and apply test groups.

To access the packaging features of Product Manager, click on the ‘Packaging’ menu item.

Packaging is managed using the following two tabs:
Packaging Items (see below)
Packaging Sets (see p.55)

**IMPORT DEMO DATA**

You can import demo packaging sets into your Product Manager account to quickly learn how these can be configured. You can also import these as part of a demo product/formula. For details see from p.309.

**PACKAGING ITEMS**

Like raw materials, you first create a packaging parent item, entering as much generic information as possible, and then clone it to create your first batch of that item (see p.52). Create packaging item parents for each item required for creating your packaging sets – everything from labels, inner and outer packaging, containers, wrapping, caps, inserts, etc.

**TIP:**

You can also quickly create different parents of a packaging item by cloning a parent item as a new parent and then making any adjustments to the new version. This can be useful for items which are similar, such as labels or containers of different sizes. Create the first parent with the generic information and then use the ‘clone to new parent’ function form the ‘Actions’ column of the packaging items list.
In the packaging items list, once a packaging set (see from p.55) is associated with an item, the current batch of the item can be identified by the presence of the packaging set IDs in that row:

As well as describing the packaging item by trade name, supplier, manufacturer, inventory level, etc., you can also enter details for the type of packaging, upload documents and apply QA steps by adding one or more test groups to the QA tab (see p.51).

To create a new packaging item parent, click on the ‘Add New’ button in the ‘Packaging Items’ tab:

Each packaging item parent/batch has four tabs as follows:

1. Information
2. Costs
3. Documents
4. Quality Assurance
Use this tab to enter the main information required for the packaging item:

**Trade name** – enter any trade name used for the packaging item. Be as descriptive as possible to enable easy identification when building your packaging sets (see p.55), e.g. ‘Avery Label 70.0mm x 42.3mm’

**Part code/ID** – enter any unique code you use to identify this packaging item. This is not the same as the supplier batch no and is normally the same code used for all batches of the same parent.

**Custom ID** – enable a custom ID for Packaging Items on the Global Admin settings Custom Settings tab. You can optionally set the field required and add a custom label.

Once the field is enabled, it is accessible on the ‘Information’ tab, and the Packaging Items list view. You can also filter the packaging items based on the custom id using the main search box.

**Packaging unit** – this setting determines the units that are used to describe your packaging item’s inventory. If the item is for example, a glass jar or a lid, select ‘1 item/unit’. If your packaging item is measured by weight or any other unit of measurement, such as m for length (e.g. for ribbon), select ‘other’ and in the adjacent field, enter a unit of measurement, such as ‘g’, ‘cm’ or ‘sq.cm’.

**TIP:**
If you select ‘other’, enter a unit size and measurement value to describe your inventory. Once you create packaging sets, you can then enter a quantity for each of these packaging item inventory units, needed to package one unit of your product. For example, if you use wrapping paper you could select ‘other’ and then enter ‘x10 sq.cm’ as representing a single inventory unit. If you then require 15 sq.cm to wrap the product, select ‘1.5’ for the quantity of this item required.

**Packaging type** – select one of the items from the list to describe the packaging item or select ‘Other’ and type in a brief descriptor, such as ‘Label’ or ‘Filler’ or any other information you wish to enter in this field when describing the type of packaging item.
If you select ‘Pressurized spray container’, the following additional fields will be displayed, requiring input or selection:

<table>
<thead>
<tr>
<th>Packaging type [?]</th>
<th>Pressurized spray container</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments [?]</td>
<td></td>
</tr>
<tr>
<td>Type of aerosol dispenser [?]</td>
<td>Metal aerosol dispenser</td>
</tr>
<tr>
<td>Spray / foam aerosol [?]</td>
<td>Foam</td>
</tr>
<tr>
<td>Flammability classification [?]</td>
<td>highly flammable</td>
</tr>
<tr>
<td>Aerosol capacity [?]</td>
<td>350 ml</td>
</tr>
<tr>
<td>Material [?]</td>
<td>Aluminium</td>
</tr>
<tr>
<td>Comments [?]</td>
<td></td>
</tr>
</tbody>
</table>

**Supplier** – select from any suppliers you have created under the main menu item ‘Companies’. This is optional when creating the parent, but any selected company will be cloned to each batch, thus enabling faster batch creation, should the supplier for the batch remains the same.

**Manufacturer** – as per the supplier, but selection of a company that has the status ‘Manufacturer’.

**DOCUMENTS**

This tab enables you to manage any documents you wish to store for each packaging item. In the packaging item’s ‘Documents’ tab, select from either ‘CUST’, ‘PACK’, ‘SPEC’ or ‘TST1’ doc types to upload any documents specific to the packaging item batch.
CUST
Use for any other documents that do not belong with any of the available doc types.

PACK
Documents that contain artwork, photos and any further description of your product’s packaging and containers.

SPEC
Documents such as technical data and specification.

TEST
Any test-related documents such as test results, test procedures or lab reports.

Note: If you require any packaging documents to be included in the product dossier/PIF, these must be uploaded to the product’s ‘Docs’ tab as document type PACK.

QUALITY ASSURANCE
Click on the tab ‘Quality Assurance’ to manage tests for the packaging item batch:

To manage quality assurance for packaging items, activate the following global setting in the Administrator user account under ‘Global Settings / Default Settings’:

Approval
Select if approval is required before manufacture and pack-out:

- Raw materials batches [?]
  - On

- Packaging items batches [?]
  - On
MANAGING PACKAGING ITEM BATCHES

Once you have created a parent for your packaging item and entered all the information as required, you can easily and quickly create batches. To create your first batch, open the parent and click on ‘Clone to Batch’.

The parent data and any documents will be copied to a new record and you will be prompted to enter the required batch-level data, as follows:

**Supplier batch no.** – this is the unique code used by your Supplier to identify that batch. Usually, this code will be included in the sales receipt and on the packaging and delivery slip.

**Expire date** – click to select an expiry date or check the ‘No expiry’ checkbox if the packaging item does not require any expiry date.

Click at the top on the ‘Month’ to easily jump to a month and again on the year to view by year:

**Auto-approve** - If you have configured your global settings to require approval for packaging items (see next section), check this checkbox if you wish to override this, making the packaging item batch available for pack-out without requiring any tests to be passed. The packaging item will then be automatically assigned the status ‘Approved.’
Click on 'Save' to save your new batch!

Once you have batches for your packaging item, open any batch to clone this using either of the following buttons. Data and documents will be copied to the new batch, either using the currently open batch, or the parent:

To select a different batch, or open the parent, use the following menu. You can check either of the checkboxes above this to hide batches that have expired or have no inventory. This is useful if you have many batches and wish to only view current batches:

These same checkboxes are also available in the main packaging items list.

**Packaging Inventory**

If you use the production features of Product Manager, efficient management of your packaging inventory is possible. Once you have built your packaging sets, at the pack-out stage of the manufacturing order or development batch, you only need to enter the number of containers (units) filled for each associated packaging set. Product Manager will then deduct all required inventory from the available inventory pool for each required packaging item. A detailed packaging dispense list will be generated. This section of the guide explains how to configure your packaging items and packaging sets correctly for effective management of packing inventory.
Product Manager uses the ‘first in, first out (FIFO)’ principle for managing your packaging inventory. Inventory will be taken from the oldest available batch first, according to any expiry dates. If no expiry date exists, inventory will be taken according to the order in which the packaging item batches were added, starting with the oldest batch.

**Packaging unit** – if your packaging item’s inventory is recorded and dispensed in individual units, such as a bottle, cap, label etc., select ‘1 item/unit’ as the packaging unit.

If you select ‘other’, enter the unit of measurement that you require when creating your packaging sets. If for example, you use parcel tape for the outer packaging, enter e.g. ‘m’ as the unit of measurement.

Note, that the Packaging Unit must be identical between the parent and its batches. If you update a parent packaging item’s unit, all the batches will also automatically be updated.

You can then enter the ‘Total available inventory’ for the length of parcel tape available for the entire batch. If for example, you have purchased 10 rolls of 50m, enter 500 as the ‘Total available inventory’. When you create your packaging sets, you will then add the required amount of parcel tape in m for the packaging set (see p. 55).

Once an inventory amount has been entered for the first time, the field is then locked. This ensures accurate inventory deductions if a production order is packed out while another user is editing this page. To adjust inventory once the ‘Available inventory’ field is locked, use the ‘Adjust inventory’ field to enter the amount to adjust and click on ‘Update’.

In the above example, 10,000 m are added to the ‘Available inventory’ value, resulting a value of 500,000 m. To deduct an amount, enter a negative value such as -10,000 and click on ‘Update’.

**Do not track inventory** – select this checkbox you do not wish to track inventory for the packaging item batch. This will make the packaging item batch always available for pack-out and ignores any inventory level. Checking this checkbox will hide all inventory fields below.
**Total available inventory** – when you first create the new batch, enter the current amount of inventory. Make sure this is consistent with the ‘Packaging unit’ you selected. If you use ‘1 item/unit’ just add the total number of individual units available for that batch. For example, if you purchased a box of 200x 50ml bottles, enter ‘200’ as the total available inventory for the batch. If you selected ‘other’ enter the number of units corresponding to this quantity or amount. For example, in the view shown below, our unit of inventory is ‘x10g’. If the new batch is 3kg then enter ‘300’ as the total available inventory, since this represents 300 individual units of 10g.

**Add inventory** – use this field to add an amount to the ‘Total available inventory’ and click on ‘Add’. You can also enter a negative value such as ‘-50’ which will deduct 50 from the ‘Total available inventory’. This is useful for example after stock taking, to correct and deviations in stock, or if you know that stock has been taken from a batch that was not deducted automatically during the pack-out stage of a manufacturing order.

**Packaging Sets**

A **packaging set** is built from **packaging item parents**. In the packaging items list, you can view the packaging sets which are associated with any item and click to open:

| 5,000 | PS0015, PS0016, PS0018 | Quarantined |  |
|-------|------------------------|-------------|
| 4,001 |                        | Quarantined |  |

You can then easily associate each unit size of your product, such as a 100ml, 250ml and 500ml with a packaging set. By doing so, inventory control of packaging, pack-out of your production order and calculation of packaging costs are accurately and effectively managed.

A clone feature enables easy duplication of a packaging set, enabling you to create variations e.g. for each container/pack size. You can also create ‘template’ packaging sets enabling efficient management and clone these to customize them for use with specific products.

Once correctly setup and associated with each unit size, packaging sets enable:

1. fast pack-out of your production order (manufacturing or development batches)
2. correct deduction of all required packaging inventory for your pack-out
3. inclusion of packaging costs in your formula’s cost calculations
4. management of compliance and traceability

To create and manage packaging sets, click on the ‘Packaging Sets’ tab under the menu item ‘Packaging’.

In the packaging sets list, the ‘Product’ column displays which products are associated with the packaging set. Click on a link to open the product.

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Product</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS0007</td>
<td>Packaging Set 1</td>
<td>Sensitive Skin Massage or Body Gel Aloe Gel SBIx</td>
<td></td>
</tr>
</tbody>
</table>

A typical packaging set will look like the following example:
Each packaging set has its own unique **ID**, beginning with ‘PS’, i.e. PS0001, PS0002, etc. and a **Title** to help identify the set.

In the **Cost** column, the value displayed is the total of all associated packaging costs. Each cost is taken from the **most recent batch added**.

Enter an optional **production cost** for assembly of a single packaging set.

If a cost for any packaging item is missing, the calculation of the packaging set cost will assume the cost to be ‘0.00’ rather than showing an error. If a cost is missing, click on the **Add** link to enter cost data. Check carefully that all costs are entered for your packaging items.

**ADD PACKAGING SET**

To create a new packaging set, click on ‘Add New’ in the ‘Packaging Sets’ tab:
Enter a **title** for the packaging set which will make it easy to identify when associating with your different product unit sizes – for example, ‘Nourishing Skin Cream | 250ml’

<table>
<thead>
<tr>
<th>ID [?]</th>
<th>PS0016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title * [?]</td>
<td>Nourishing Skin Cream</td>
</tr>
</tbody>
</table>

Select a packaging item parent from the list, to associate with the packaging set. You can filter the list based on Trade Name or Part Code/ID.

Enter a ‘Quantity’ - you can also add a value such as ‘0.5’ – for example, if your inventory unit of measurement for packaging tape is ‘1m’ and your packaging set only requires 50 cm of tape.

![Image of packaging set with 'Add More' button]

Click on ‘Add More’ to add a further packaging item to the packaging set and repeat the process until all items are added.
You may enter optional assembly instructions for the packaging set. This information will be included in the packaging dispense list. The text may be formatted using the text editor.

Below the assembly instructions field, you can also enter any comments for the packaging set. This information is not included in any reports.

Click on ‘Save’ to save the packaging set.

**Dispense Packaging Set**

The packaging set can be dispensed by entering the number of complete packaging units to dispense and clicking on the ‘Manual Dispense’ button.

A popup panel will be displayed. If any packaging item batches associated with the packaging set have insufficient inventory or are expired, the affected items will be listed.

*Easy ABC Plastic Inserts (Type 2) | No inventory available*

Open each packaging item to add a new batch with inventory.

If packaging items require approval (as set by the Admin the global settings), each batch must be set to ‘Approved’. Warning will be displayed for any items where approval is blocking the dispense.

*OrigIPack Cellulose Packaging Filler | No batches approved*
If inventory warnings are displayed, you may still proceed to generate a packaging dispense list, but without deducting inventory. In this version of the dispense list, only the parent items of each packaging item will be displayed, with the required no. of units for each.

Once all inventory is available for dispense, the ‘Dispense with Inventory’ button is available. This button will deduct all required inventory and generate a detailed packaging dispense list.

Inventory is deducted on a 'first in, first out' (FIFO) principle based on any expiry date set for the packaging item batch. If batches are set to ‘no expiry’ the oldest batch is determined by the order in which batches were added in Product Manager. Therefore, if inventory is available in the first batch added, it is deducted before any subsequently added batch.

**Associating Packaging Sets with Unit Sizes**

With packaging sets properly configured you can now associate these with your product’s unit sizes, so that you can:

i). pack-out your manufactured orders

ii). calculate packaging costs along with your formula’s raw materials’ costs

Open the product and click on the ‘Unit Sizes’ tab:
For each unit size that you have configured for your product, select a packaging set from the 'Associate with Packaging Set' column:

![Select packaging set]

Click on 'Save' to save your changes.

Note: If a unit size is associated with any packed-out manufacturing order, it cannot be deleted, or the size or SKU edited. You may however select a different packaging set association. New unit sizes may also be added for the product.

Click in the ‘Actions’ column to open a selected packaging set:

![Associate with Packaging Set]

**Export Packaging Data**

You can export packaging item data and their batches to .csv format, based on the current search and filter settings applied. Any documents uploaded to the 'Documents' tab will be listed by document type, indicating which documents are present.

The export function is useful for simple, asynchronous integration of packaging item batch data and inventory levels with any ERM or accounting application that allows .csv data import.

Since certain fields in your data may contain commas, these fields are enclosed in quotation marks " to retain the integrity of the data structure in the .csv file. Cells containing lists, such as the example provided for documents use the semi-colon to separate the values.
Select the preferred export option and click on ‘Export’ to generate the .csv file, which will be downloaded by your browser.

Export options:

**Parents only (all data)**
Only the packaging item parent data will be exported. All batches are ignored.

**Parents and batches (all data)**
All data for the parents and their batches will be exported.

**Batches only (all data)**
Only batches are exported with parents ignored.

**Parent only – total inventory, all batches (simplified)**
This option is useful for obtaining total inventory available for a parent and all associated batches. The unit of measurement will be taken from the parent and all inventory values for associated batches assumed to be in the same unit. This export options offers the following additional controls:

- Exclude batches with expiry date before [31 Dec 2020]
- Exclude batches which are not ‘Approved’ status

This provides more accurate calculation of available inventory, based upon expiry date of each batch and the approval status.

Click on ‘Export’ to export the data, which will be downloaded by your browser as a .csv file.

Note – Please see the section on packaging MRP (p.168) for reporting of packaging inventory for future planned production.

**Pack-Out of Manufacturing Order**

Once a manufacturing order has the status ‘Approved’, it can be packed-out in the ‘Pack-Out’ tab of the manufacturing order:
The packaging sets associated with each unit size will be selected according to the default associations you set in the product’s ‘Unit Sizes’ tab. Alternatively, if you assigned packaging sets and units be filled when adding the manufacturing order, these same associations will be displayed by default in the Pack-Out tab. Prior to executing the pack-out, you may also manually select any packaging set to associate with each unit size.

Note: If the ‘Packaging Sets’ and ‘No. of Units’ fields are disabled, the manufacturing order must be first set to the status ‘Approved’ in the ‘Approve’ tab.

In the ‘No. of Units’ column, enter the number of units of each size that were filled. The ‘Remaining’ amount of bulk product is deducted accordingly. If required, the ‘Actual yield’ can be adjusted at the end.

In the ‘No. of Units’ fields, if you enter a number such as ‘10.500000’, packaging inventory for an entire unit will be deducted. In this case, inventory for 11 complete packaging sets will be deducted from the available inventory.

Before the pack-out has been executed, the following buttons are active. Use the ‘Packaging Quick Dispense List’ to generate a simplified dispense list (PDF) of required packaging items, listing each packaging item parent and number of required units. No inventory is deducted, and the manufacturing order status remains as ‘Approved’.

If you wish to execute the pack-out and set the manufacturing order to the status ‘Packed-Out’ without deducting packaging inventory, click on ‘Pack-Out | Ignore Packaging Sets’.

Click on ‘Pack-Out’ to perform the full pack-out, with inventory deducted. Click on ‘Confirm’ to proceed.
Product Manager now checks that the required packaging inventory is available. If any packaging item batches associated with the packaging set have insufficient inventory or are expired, the affected items will be listed.

**Easy ABC Plastic Inserts (Type 2) | No inventory available**

Open each packaging item to add a new batch with inventory.

**TIP:**
Right-click on a packaging item link to open in a new browser tab. You can then make any corrections, such as adding a new packaging item batch, or approving adjusting inventory levels for an existing batch. Return the previous tab to then close the pop-up and click the 'Pack Out' button again.

If packaging items require approval (as set by the Admin the global settings), each batch must be set to ‘Approved’. Warning will be displayed for any items where approval is blocking the dispense.

**Origipack Cellulose Packaging Filler | No batches approved**

Once any inventory warnings have been resolved and you click on [Confirm] all packaging inventory will be deducted. This step cannot be reversed!

In the 'Pack-Out' tab, a detailed packaging dispense list can now be generated (PDF). This includes a total of each packaging item as well as from which batch you should dispense, as well as separately itemized inventory listings for each packaging set.
You may now complete the manufacturing order by clicking on 'Release' to confirm that a final inspection of the filled and packed-out product has been satisfactorily completed.
COMPLIANCE

INTRODUCTION

Cosmetri Product Manager includes powerful yet easy-to-use tools and the regulatory data for achieving compliance of your cosmetics and personal care products. In this section of the guide we’ll cover:

- compliance settings
- regulatory data
- managing formula compliance
- Ingredients Watch
- Ingredient advisory lists
- Perfume allergens

Please also refer to further chapters of this guide for other compliance-related features, such as product labels management, Compliance Checker, batch traceability and product dossier/PIF generation.

COMPLIANCE SETTINGS

Compliance settings can be accessed by the Administrator in the Product Manager Settings.

For all new account from v4 upwards, the following compliance zones are already created in your settings:

- ASEAN
- Canada
- China
- EU
- GCC
- Mercosur

Regulatory data for any of the above compliance zones requires an active subscription. All Product Manager plans include EU CosIng data by default, with current plans allowing for one additional zone to be selected. To receive access to all available compliance data requires subscription to the Compliance Pack. Details can be found on the following webpage:

https://www.cosmetri.com/cosmetics-compliance-regulatory-software/

Check the current status of subscription for any compliance zone by checking in the ‘Subscription Status’ column:
Click on ‘Add Custom Compliance Zone’ to create a custom compliance zone to enable manual lookup (by setting ‘bookmark’ URLs) of regulatory data and compliance management.

In Product Manager, compliance zones can be associated with advisory lists (under ‘Ingredients/Advisory Lists’). This enables you to extend compliance management by building your own lists and alerts for ingredients when checking compliance.

Click in the ‘Actions’ column to activate or edit a compliance zone. **If a currently active compliance zone is already associated with a formula it cannot be deactivated.**

Enter up to 5 URLs as reference sources for compliance checks for each compliance zone.

<table>
<thead>
<tr>
<th>Compliance zone * [?]</th>
<th>USA (FDA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status * [?]</td>
<td>Active</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Custom URL</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.fda.gov/Cosmetics/GuidanceRegulation/LawsRegulations/ucm127406.htm#prohibited">http://www.fda.gov/Cosmetics/GuidanceRegulation/LawsRegulations/ucm127406.htm#prohibited</a></td>
<td>FDA Prohibited</td>
</tr>
</tbody>
</table>

If regulatory data is available for a country or zone, the source is shown in the ‘Regulatory Authority / Data Source’ column.
Check the 'Default' checkbox to associate the compliance zone with all formulas. In the adjacent 'Primary Compliance' column, you may select one primary compliance zone. All formulas will by default be opened at this active compliance zone.

### REGULATORY DATA

All currently available Product Manager plans include EU CosIng data, plus one of the following available compliance countries/zones:

- **ASEAN** Cosmetic Committee (ACC) (Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam. Observer – Papua New Guinea)
- **Canada** - Health Canada, List of Prohibited and Restricted Ingredients
- **China** - Chinese Food and Drug Administration (CFDA)
- **Mercosur** (Argentina, Brazil, Paraguay, Venezuela, Bolivia and Uruguay and associate members: Chile, Peru, Colombia, Ecuador, Guiana and Suriname)
- **USA** (FDA) eCFR Title 21 inc. California Prop 65 and FDA Inactive Ingredients Database

Including the 28 countries of the European Union plus Iceland, Norway and Liechtenstein and the countries associated with the above regulatory frameworks means that Product Manager can be used for checking compliance of your products in 50+ countries, representing approximately 65% of world GDP. In addition, several countries either base their regulations largely upon the EC Regulation 1223/2009 and FDA or abide to Mutual Recognition Agreements (MRA).
Product Manager integrates with the official regulatory data sources, such as the Chinese IECIC or US FDA. Compliance data is updated quarterly, or sooner. EU CosIng data is updated daily.

The Product Manager Compliance Package includes all currently available compliance data. Check the Cosmetri website for further details.

**DISCLAIMER**

Use of any data provided in Product Manager, including compliance/regulatory data, chemical properties, GHS and other chemical safety data assumes acceptance of Cosmetri’s terms of use. You can access these terms under the following link:

[https://www.cosmetri.com/terms/](https://www.cosmetri.com/terms/)

Specifically, please refer to the following sections:

(3) *The Cosmetri service is not intended to replace the professional services offered by a certified safety assessor, cosmetic formulator or specialized laboratory service, or to validate the compliance of cosmetic products with any legal regulations.*

(4) *As well as EU CosIng regulatory data provided as default with all Product Manager plans, additional regulatory data may be provided. The regulatory data provided is supplied as information only, upon the condition that the person receiving it will make their own determination prior to use.*

Cosmetri GmbH will in no event accept responsibility for damages of any nature whatsoever resulting from the use of or reliance upon the compliance/regulatory data provided. You are advised to verify the data as provided in Product Manager with the original source and to seek any clarification directly with the responsible agency. Cosmetri cannot and does not check this third-party data for accuracy.

**MANAGE FORMULA COMPLIANCE**

Once your formula is complete, use the Formula 'Compliance' tab to view the ingredients breakdown and to manage compliance for any zones you have configured (in 'Global Settings', when logged in as the Administrator). The minimum and maximum percentage weight (%w/w) of each ingredient is calculated and displayed with separate calculations of any perfume/fragrance allergens and additional colors. For compliance purposes you will require to check the maximum possible concentration (Max. %w/w) value.

<table>
<thead>
<tr>
<th>Ingredient</th>
<th>CAS No.</th>
<th>Min. %w/w</th>
<th>Max. %w/w</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERFUME ALLERGENS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANISE ALCOHOL</td>
<td>105-13-5</td>
<td>10.0000000%</td>
<td>10.0000000%</td>
</tr>
<tr>
<td>BENZYL ALCOHOL</td>
<td>100-51-6</td>
<td>5.0000000%</td>
<td>5.0000000%</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>15.0000000%</strong></td>
<td><strong>15.0000000%</strong></td>
</tr>
</tbody>
</table>

For checking if any Ingredients Watch or Advisory List alerts for the formula, please refer to the relevant section of this chapter for details.
ASSOCIATE COMPLIANCE ZONES WITH FORMULA

Check in the select menu that all required compliance zones are associated with the formula. To add any non-default compliance zones to the formula, select them in the following menu and then click on 'Update Compliance Zones':

Select the active compliance zone using the following menu:

CHECK SCCS OPINIONS

The SCCS addresses questions in relation to the safety, allergenic properties, and impact on consumer health, of products and ingredients such as toys, textiles, clothing, cosmetics, personal care products, domestic products such as detergents, and consumer services such as tattooing. Although this independent scientific committee provides advice specifically to the European Commission, the advice is intended to enable risk managers to take the adequate and required actions in order to guarantee consumer protection. Therefore, if any SCCS information is associated with an ingredient this is accessible in the 'References' column. Click on an icon to open the info panel and to download and view any associated documents.
### CHECK OTHER REFERENCES

If you have added any bookmark URLs for the select compliance zone (see Compliance Settings), you can conduct additional research for the ingredient by clicking in the ‘Reference’ column to view the website.

<table>
<thead>
<tr>
<th>References</th>
<th>Regulations</th>
<th>Approve</th>
<th>Compliance Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfume Allergens</td>
<td><img src="image" alt="Warning" /></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCCS Opinions</td>
<td><img src="image" alt="Warning" /></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### CHECK REGULATIONS

Check in the ‘Regulatory’ column for any regulatory alerts for that selected compliance zone. In some cases, more than one alert may be displayed – for example when the ingredient exists in multiple annexes (e.g. for EU, Mercosur and ASEAN compliance zones). Data will only be displayed if you have an active subscription. Rollover a warning icon to view a summary, as per the following examples:

Example of a regulated ingredient, displayed with an orange icon:
Example of a banned ingredient, displayed with a red icon:

Example of a regulated ingredient, displayed with an orange icon:

Some compliance lists may be ‘white lists’ (e.g. China IECIC), requiring that the ingredient is approved and listed. Therefore, an unlisted ingredient in this case means ‘not approved’, but is not displayed as ‘banned’ red, since technically this is not the case. **Using an unlisted ingredient in any compliance zone is not advised.**
If you are subscribed to USA regulatory data, this includes California Prop 65 data which will be displayed as a separate alert.

Subscription to USA compliance zone also includes data from the FDA Inactive Ingredients Database (IID). This data is intended for food and drug products but has been included as additional information to assist when researching an ingredient. The data is filtered by ‘route’ (as topical or oral) and ‘dosage form’ as follows:

Route = TOPICAL + ‘Dosage form’ is either:
LOTION, OINTMENT, CREAM, AEROSOL, SOLUTION, SHAMPOO, GEL, SUSPENSION

Route = ORAL + ‘Dosage form’ is either:
SOLUTION, CONCENTRATE, LIQUID, SUSPENSION, EMULSION

Any regulations specific to US FDA eCFR Title 21 are displayed above the IID information.
BENZYL ALCOHOL

CAS: 100-51-6

US FDA Inactive Ingredients Database (IID)

The following data from the Food and Drug Administration’s (FDA’s) Inactive Ingredient Database (IID) is for drug products. For cosmetics products it is therefore intended for additional guidance and research only.

<table>
<thead>
<tr>
<th>US INCI</th>
<th>Route</th>
<th>Dosage Form</th>
<th>Maximum Potency per unit dose</th>
</tr>
</thead>
<tbody>
<tr>
<td>BENZYL ALCOHOL</td>
<td>ORAL</td>
<td>SOLUTION</td>
<td>50mg/1 ml</td>
</tr>
<tr>
<td>BENZYL ALCOHOL</td>
<td>ORAL</td>
<td>SUSPENSION</td>
<td>52.35mg/5mL</td>
</tr>
<tr>
<td>BENZYL ALCOHOL</td>
<td>TOPICAL</td>
<td>CREAM</td>
<td>1%w/v</td>
</tr>
<tr>
<td>BENZYL ALCOHOL</td>
<td>TOPICAL</td>
<td>GEL</td>
<td>2%w/w</td>
</tr>
<tr>
<td>BENZYL ALCOHOL</td>
<td>TOPICAL</td>
<td>LOTION</td>
<td>1.3%w/w</td>
</tr>
<tr>
<td>BENZYL ALCOHOL</td>
<td>TOPICAL</td>
<td>LOZENGES</td>
<td>0%w/w</td>
</tr>
</tbody>
</table>

Note that for US FDA, if an ingredient has IID information available it is displayed as 'regulated' with an orange alert, even if there is no US FDA eCFR Title 21 reference.

Click on an alert to view the associated regulatory data for all alerts for the ingredient:
Check the information carefully as it applies to your product formula. If you consider the ingredient to be compliant at the concentration level it exists in the formula and for any restrictions reported, check the corresponding checkbox in the 'Approve' column:

Repeat the process for all ingredients for the currently selected compliance zone and then click on 'Update' to save the approval settings:
Remember to always click on 'Update' for the compliance 'Approval' checkboxes before switching to a different compliance zone! Do not however click on the main 'Save' button, since this will reset any previous approval of the main formula composition.

You can view/edit 'Compliance Notes' for an ingredient in the formula, helpful for resolving compliance issues. These notes are common to all associated compliance zones for the formula.

**CHECK AND APPROVE REGULATIONS FOR ALL COMPLIANCE ZONES**

To achieve harmonized compliance for the formula, repeat the steps described in the previous section of this chapter by selecting each compliance zone associated with the formula:
Remember to always click on 'Update' for the compliance 'Approval' checkboxes before switching to a different compliance zone! Do not however click on the main 'Save' button, since this will reset any previous approval of the main formula composition.

If any associated compliance zone does not have all checkboxes checked (approved) for all ingredients in the formula, the Compliance Checker will warn you by generating a task, accessible in the Formula/Tasks tab:

### INGREDIENTS WATCH

Ingredients Watch monitors your product data and advises on any updates by the respective regulatory authority made during the selected time frame, to ingredient's in your formulas. **This requires subscription to the relevant regulatory compliance data.** For EU compliance, Ingredients Watch does not advise of changes to any SCCS Opinions.
Reported changes do not imply that an associated formula is no longer compliant. In many cases the ingredient may have been updated to correct any previous errors (such as incorrect INCI or IUPAC) or to append existing data.

Click on the following link to set your preferred reporting period or go to ‘Ingredients Watch’ in the ‘My Profile (Product Manager)’ in the user menu (top right). Note that the reporting period selected may not be covered by the data available in Product Manager, as shown in the following example. Notifications are only displayed for compliance zones where you are subscribed to the regulatory data.

Current reporting period: **past 190 days** (24 Jun 2019)

The Ingredients Watch reporting period is limited for the following subscribed compliance zones:

- **US (FDA)** | monitoring since 10 Sep 2019, last updated by authority 29 Jul 2019
- **California** | monitoring since 10 Sep 2019, last updated by authority 28 Jun 2019

Set your preferred reporting period, either by no. of days past from today’s date, or from a specified start date by using the calendar date selector. Click on ‘Save’ to apply the changes and then return to the Ingredients Watch page to check for any alerts.

Ingredients listed in the Ingredients Watch page are those that have been updated for any subscribed regulatory compliance zone (including EU CosIng as default) for the selected timeframe.

All regulatory alerts are displayed for the ingredient.
Use the compliance filter to filter the list of ingredients by compliance zone. If ‘EU’ is selected, any ingredient listed in EU CosIng will be displayed, even if there is no regulation associated with it.

Note that alerts do not imply that all filtered ingredients in the Ingredients Watch list have been updated only for the selected compliance zone. The update may have been made in one or more of the regulations associated with the ingredient – or the ingredient may have been added to a new list or annex. It is therefore important that you check all associated regulations to determine if the change has any impact on the compliance of your formula.

For any reported ingredient, check in the ‘Raw Materials’ and ‘Formulas’ columns to see the number of affected items. Click on a link to view a detailed list and the %w/w of the ingredient present.

Once you have investigated an ingredient alert, you may check the associated ‘Approval’ checkbox. A date/time stamp and your user details will be recorded. Hide all approved alerts by checking the ‘Hide approved’ checkbox.
Ingredients Watch alerts are also displayed in the Products List for any formulas. Rollover an alert to view which ingredient is reported and click to view the ingredient in the Ingredients Watch page.

<table>
<thead>
<tr>
<th>Status / Tasks</th>
<th>Ingredients Watch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>Approved (77%)</td>
</tr>
</tbody>
</table>

**INGREDIENT ADVISORY LISTS**

This feature enables you to create your own policies for what ingredients should or should not appear in a formula, such as for parabens, nano-ingredients, halal, vegan, etc.

Create custom advisory lists of ingredients, optionally associated with compliance zones and/or Customer Groups.

**CREATE AND MANAGE ADVISORY LIST**
Click on the edit icon under ‘Actions’ to edit an existing advisory list, or on ‘Add New’ to create a new list. Use the clone tool to clone an advisory list. To add an ingredient to an advisory list, search the ingredients database e.g. by INCI, IUPAC or CAS no and select the ingredient from any matches found. Click on ‘Add’ and always click on ‘Save’ to save any changes to the advisory list.

For each ingredient added to the advisory list you can perform the following actions:

- Remove from advisory list
- Enter a note (can be viewed when checking the formula’s compliance)
- Save the ingredient as a raw material
- List raw materials using the ingredient
- List formulas using the ingredient
- Check any available chemical properties, safety and GHS data

Once you have built the advisory list, you can optionally associate it with any customers and/or compliance zones, or any combination of the two. Or leave the ‘All’ checkboxes checked to associate the advisory list with all formulas.

In the following example, alerts in the advisory list will only be displayed if the ingredient exists in formulas associated the customer ‘Beauty Solutions’ and where the formula is associated with the compliance zone ASEAN or Canada.

**CHECK ADVISORY LIST WARNINGS FOR A FORMULA**
Warnings will be displayed in the formula’s ‘Compliance’ tab, if an ingredient in an associated list is present. Click on an alert icon in the ‘Advisory’ column to view any restrictions.

Click on an alert to view any notes entered for the ingredient in the advisory list. This enables you to view regulatory warnings and any of your own advisory list information for each ingredient in the formula. Based on this, you can then determine if the ingredient should be approved in the formula for the selected compliance zone.

Click on the ‘Edit’ button to open a pop-up window, where you can modify the associations between the ingredient and one or more existing advisory lists, as well as update the notes.

To add the ingredient to an existing advisory list, select from the drop-down menu, optionally add a note, and save the form. You can simply remove the association by clicking on the ‘x’ icon next to the name of the advisory list. If you cannot access this pop-up, please check your department settings with your admin user.
COMPLIANCE REPORTING

Detailed compliance status reports can be generated for any selection of products. Click on the menu item ‘Products/Compliance Report’.

Note: Please refer to our disclaimer at the beginning of this chapter and also in the Cosmetri GmbH terms. In particular, the compliance reporting tool should not replace the requirement for checking each formula’s compliance in detail in the ‘Compliance’ tab of the formula and for a qualified person to determine the compliance of any formula.

Select the required compliance zones to be reported.

Note: reporting of any regulatory statuses for your products/formulas will require subscription to the regulatory data for the selected compliance zone. For details see from p.68.

If you only require compliance status reporting for production mode formulas, check the following box:
Select the required products to include in the report. If you have customer groups, you can filter the products by group, or select 'all'. For any filtered list of products click in the left column to add the required products to the right column. You can also use the buttons above the lists to bulk add or remove all products between lists.

The Compliance Report page will automatically update according to the current selections and filters.

The report will list product and formula versions, with each associated compliance zone/country and the compliance status according to the following:

**Banned**
Whether any ingredient is banned that is associate with the formula.

**Restricted**
Regulated or restricted ingredients.

**Unlisted**
Ingredients that are not listed for that compliance zone.

**Approved**
The status of the approval checkboxes is displayed for each compliance zone. For example, 18/19 indicates that from the 19 ingredients in the formula, 18 have been manually checked as approved.

**Advisory**
Ingredients that are in any associated advisory list. For further details see from p.80.

**Ingredients Watch**
Ingredients reported by Ingredients Watch for the reporting period set by the user. For further details see from p.77.

**Compliance Checker**
The percentage completion score, as calculated by Compliance Checker. Reporting requires activation of Compliance Checker for the formula. For details see the [Getting Started Guide](#).
QA Status
The approval status of the formula.

Export Data
You can export the currently displayed report data in .pdf, .xls or .csv file formats. If more than 25 products are being reported, the report will be generated, and an email sent to the address associated with your user account. You must be logged into Cosmetri before clicking on the link in the email to download the report.

Perfume Allergens
This section of the guide explains the recommended best practice for managing perfume allergens in your raw materials (e.g. perfumes and essential oils), including the use of the INCI Parfum and advice on the declaration of allergens and ‘Parfum’ (or ‘Fragrance’) on the label of ingredients. Perfume allergens should normally be entered at the raw material level (e.g. a perfume or essential oil), and not directly to your formula composition.

This section explains how to setup your raw materials correctly, so that perfume allergen concentrations are accurately calculated. It also explains how your formula’s INCI breakdown is calculated as the basis for determining the label of ingredients. We will also cover how to manage ingredients such as Benzyl Alcohol, which are recognized as perfume allergens but can also be used for other functions.

Handling of perfume allergens in Product Manager is based upon the logic required for complying with Article 19 (g) of Regulation (EC) N° 1223/2009. If you require compliance for countries or markets outside of the European Union, we recommend that you still follow the guidelines in this document. You must however seek professional approval of your label of ingredients (such as from a qualified safety assessor) for each regulatory framework, before printing your product labels.

The current list of perfume allergens included in Annex III of CosIng are kept updated by Cosmetri to reflect any changes in the regulations. If you require compliance outside of the EU and need to declare perfume allergens that are not included in the list, please contact Cosmetri support.

Article 19 (g) of Regulation (EC) N° 1223/2009 states:
Perfume and aromatic compositions and their raw materials shall be referred to by the terms ‘parfum’ or ‘aroma’. Moreover, the presence of substances, the mention of which is
required under the column ‘Other’ in Annex III, shall be indicated in the list of ingredients in addition to the terms parfum or aroma.

NOTE: The exact interpretation and application of Regulation (EC) N° 1223/2009 and regulations for other countries or markets can vary between companies. Product Manager uses a logic based around Regulation (EC) N° 1223/2009, as described in this guide and is the outcome of detailed and extensive consultations with cosmetic safety experts. It is important that you agree clear company policies which are approved by your safety assessor or other qualified professional.

**SETTING THE PRODUCT TYPE OF EXPOSURE**

Currently there are 26 perfume allergens that in the EU must be declared on your label of ingredients, if above 0.001% (leave-on products) or 0.01% (rinse-off products). It is therefore important that you set the type of exposure correctly so that Product Manager can calculate which allergens must be declared on your labels. Set the product type of exposure in the product level ‘Info’ tab:

![Exposure Type Selection](image)

Click on 'Save' to save your changes.

**RAW MATERIALS – PERFUMES AND FRAGRANCES**

A fragrance or perfume that you use in your formula must be correctly setup as a raw material in Product Manager, before adding this to your formula. Many perfume houses do not disclose the exact composition of their perfume/fragrance. In this case, the INCI Parfum should be added to the raw material composition.

Usually this will be added at 100 %w/w concentration. Any perfume allergens MUST additionally be added at the correct concentrations. **It is not important that the total for the raw material composition is > 100%**.

Example of perfume raw material composition, with Parfum entered at 100 %w/w:

![Perfume Table](image)

To enter Parfum, just type the first few letters of the INCI and then select this as shown below:
Enter the required function(s) for Parfum by ticking any boxes in the ‘Functions’ column, e.g. deodorant, masking and/or perfuming.

To enter the perfume allergens, click on the ‘Perfume Allergens’ button in the raw material’s ‘Composition’ tab:

Enter a min. %w/w and max. %w/w value for each perfume allergen and tick the box to the right for each allergen you wish to add to the raw material’s composition:

<table>
<thead>
<tr>
<th>Min.</th>
<th>Max.</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.1000000</td>
<td>0.2000000</td>
</tr>
<tr>
<td>3.4500000</td>
<td>4.0500000</td>
</tr>
<tr>
<td>0.000000</td>
<td>0.000000</td>
</tr>
<tr>
<td>0.000000</td>
<td>0.000000</td>
</tr>
<tr>
<td>0.000000</td>
<td>0.000000</td>
</tr>
<tr>
<td>0.000000</td>
<td>0.000000</td>
</tr>
</tbody>
</table>

If you know the exact percentage concentration, enter the same value in both the ‘Min’ and ‘Max’ fields, or enter a range e.g. Min. 0.1000000 and Max. 0.2000000. These values are usually obtainable from your Supplier/manufacturer, such as in the certificate of analysis (CoA).

Click on ‘Add Perfume Allergens’ to add the allergens.

In the raw material’s composition, you will see that each perfume allergen has been automatically assigned the function ‘PERFUMING’.
Click on ‘Save’ in the raw material’s Composition tab to save the changes!

There is a further way to add perfume allergens to a raw material’s composition. In the ‘Composition’ tab, type in the INCI string, such as the example shown below for Benzyl Alcohol. Select the version with ‘(Perfume Allergen)’ after the INCI.

RAW MATERIALS – ESSENTIAL OILS

Follow the guidelines above for ‘Raw Materials – Fragrances’ for how to add perfume allergens.

The essential oil must be added as that INCI in your raw material’s composition, as well as any perfume allergens present within that oil. **Parfum** is therefore **not entered as in ingredient for essential oils**. Below is an example of Angelica Oil, with two perfume allergens added (Limonene and Linalool), as well as the main oil @100%.

Note: It does not matter that the total for the composition >100%.

Click on ‘Save’ in the raw material’s Composition tab to save the changes!

ADDING RAW MATERIALS TO THE FORMULA

In this example, we will demonstrate how to add the perfume and essential oil to our demo formula. **This is not a real formula and is used for demonstration purposes only!**

Firstly, create the product and set the correct ‘Type of Exposure’. Add the new formula (click ‘Save’ to save it before proceeding), and in the ‘Specification/Formula Composition’ tab, in
the ‘Select from existing raw materials’ box, type the first letters of the trade name to locate the Angelica Oil we created in the section ‘Raw Materials – Essential Oils’ (p.88):

![Image]

The function ‘PERFUMING’ is automatically added. Enter any further function(s) you may require which describe the function(s) of the essential oil in the formula. Enter a %w/w value and click on ‘Add’.

<table>
<thead>
<tr>
<th>Function</th>
<th>%w/w</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERFUMING</td>
<td>95.000000</td>
</tr>
</tbody>
</table>

Repeat the same step above, this time adding the Demo Perfume as described, @5%w/w concentration. Our total formula concentration is now exactly 100%.

Click on ‘Save’ to save your changes.

Expand the raw materials view as follows to display the composition of each raw material:

<table>
<thead>
<tr>
<th>Trade Name</th>
<th>Composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angelica Essential Oil</td>
<td>ANGELICA ARCHANGELICA ROOT OIL (100.000000% - 100.000000%)</td>
</tr>
<tr>
<td></td>
<td>LIMONENE (18.000000% - 18.000000%)</td>
</tr>
<tr>
<td></td>
<td>LINALOOL (0.300000% - 0.300000%)</td>
</tr>
<tr>
<td>Demo Perfume</td>
<td>BENZYL ALCOHOL (0.0050000% - 0.0100000%)</td>
</tr>
<tr>
<td></td>
<td>ALPHA-FORMETHYL IONONE (0.1000000% - 0.2000000%)</td>
</tr>
<tr>
<td></td>
<td>AMYL CINNAMAL (0.1000000% - 0.2000000%)</td>
</tr>
<tr>
<td></td>
<td>PARFUM (100.000000% - 100.0000000%)</td>
</tr>
</tbody>
</table>

In the ‘Compliance’ tab, you can view the ingredient breakdown for the formula:
The perfume allergens are listed in the top section, showing each allergen’s concentration range, as well as a total of all allergens. If the same allergen exists in more than one raw material, Product Manager adds the concentrations together.

The main ingredients in the formula are then listed below, in this case Angelica Archangelica Root Oil and Parfum.

**TIP:**

It is normal that the total sum of main ingredients in your formula, e.g. as shown in the ‘Compliance’ tab ‘Max. %w/w’ column, does not equal 100%. This is because any multi-ingredient raw materials with a composition entered in Min. %w/w and Max. %w/w ranges will result in these ranges reflected in the calculated aggregate of each ingredient in the formula. For compliance purposes, it is important to use the Max. %w/w value when checking if the ingredient is within any specified maximum allowed concentration.

**THE ‘BENZYL ALCOHOL’ CASE - multi-function perfume allergens**

In some cases, a perfume allergen also exists as the same chemical in Product Manager but can be added as a separate ingredient. An example is Benzyl Alcohol, which exists as three separate ingredients – one in the main inventory, one as a preservative and one in the perfume allergens list. This same logic is used in CosIng.

For example, in the main ingredients inventory in Product Manager, type a search for ‘Benzyl Alcohol’ and you will see the following result:
In the ‘Function’ column, you can click on a link to access the perfume allergen and preservative versions, while the main inventory version with solvent and viscosity controlling functions, is the version displayed.

Product Manager recognizes any of these three instances of Benzyl Alcohol and adds the %w/w concentration of each instance so that the combined total can be used for determining how Benzyl Alcohol is declared on your label of ingredients.

Let’s change our demo formula as created in the previous section by adding Benzyl Alcohol as a preservative @5% w/w. Firstly, we have lowered the %w/w of Angelica Root Oil to 90% so that our formula will still total 100%.

Now type in Benzyl Alcohol in the INCI search field in the ‘Specification/Formula Composition’ tab and select the preservative version, as follows:

The function ‘PRESERVATIVE’ is automatically added. Enter ‘5’ for the %w/w and click on ‘Add’ to add the ingredient:

Click on ‘Save’ to save the changes.

In the ‘Compliance’ tab, let’s check the ingredients breakdown and perfume allergen concentrations:
We can see that Benzyl Alcohol added directly to the formula as a main ingredient (preservative version) @5 %w/w is shown in the main list and that this concentration has been added to the instance of Benzyl Alcohol appearing as a perfume allergen in the Demo Perfume raw material we created (0.0050000 – 0.0100000 %w/w x 90%), resulting in a combined total of 5.002500 – 5.0005000 %w/w). Even if the formula would ONLY contain Benzyl Alcohol as a preservative, it would still be treated as a perfume allergen, due to this group of three versions of the same chemical being linked in Product Manager at the INCI level.

**CHECK ALLERGENS IN LABEL OF INGREDIENTS**

In the ‘Labels’ tab of the formula level, you can view the label of ingredients, with perfume allergens declared according to the logic required for Regulation (EC) N° 1223/2009. A regulated perfume allergen must be displayed on the label of ingredients when its concentration exceeds 0.001% in leave-on products or 0.01% in rinse-off products. Product Manager uses the Max. %w/w value to determine if the perfume allergen must be included on the label. For our demonstration formula used in the guide, the following ingredients are to be shown on the label, with the product type set as ‘rinse-off’:

Two of the perfume allergens (Amyl Cinnamal and Alpha-Isomethyl Ionone) are not declared, because their concentration levels are 0.01% or below. Note how Benzyl Alcohol only appears once, since the preservative and perfume allergen versions are added together (see p.90).

If we change the product type to ‘leave-on’ in the Product ‘Info’ tab, the label of ingredients appears as follows:
Any ingredients with a concentration < 1% are shown in lighter blue. Drag and drop these to rearrange them in your preferred order.

Click on ‘Save’ to save the order.

You can make any further changes to the list of ingredients by using the various settings in the formula’s ‘Labels’ tab. For example, to change ‘Parfum’ to ‘Fragrance’ use the following option:

View of label of ingredients:

IMPORTANT! Your label of ingredients must be approved by your safety assessor as part of any required safety assessment.

MANAGING PRODUCT BATCHES – MONITOR ALLERGEN CONCENTRATIONS

Perfumes/fragrances and essential oils often vary in their exact perfume allergen concentrations from batch to batch. The actual level of these in your manufactured product batches can therefore vary, even leading to a requirement to declare an allergen on your label that was previously below the required threshold. Using Product Manager’s manufacturing orders to manage your product batches, you can easily monitor the actual
concentrations of each allergen in each batch of your product and ensure that you stay compliant.

In the raw material containing the perfume allergens, switch the ‘Lock composition for all batches’ to ‘off’:

![Apricot Kernel Oil (PARENT)](image)

This will enable you to adjust the exact perfume allergens for each batch, based upon the information received with the batch, from your Supplier.

Note: if the raw material batch is already associated with a manufacturing order, you will not be able to change the composition. If a raw material is only associated with a development batch, the composition is not locked.

**TIP:**
*For raw materials that do not contain perfume allergens, we recommend for compliance purposes, that you keep this switch in the 'on' position to avoid accidentally changing the composition of the raw material between batches.*

When you dispense the raw material batches for your manufacturing orders, the production mode formula used for manufacture will be updated automatically to reflect the selected batches, even if you select from multiple batches of the same raw material.

Selecting from multiple batches during dispense of the manufacturing order:

![Formula Table](image)

Open the production-mode formula after dispensing the manufacturing order. Click on the ‘Compliance’ tab to view the current perfume allergen concentration levels for your formula, based on the selected raw materials batches used for dispense.
You can also check in the ‘Labels’ tab of the formula to view which perfume allergens must currently be declared, based upon the EU regulations:

Ingredients

**TIP:**
For ‘borderline’ perfume allergens which are not declared on your label, but would be required if say, they were increased by 25% in their concentration in the raw material(s), we recommend setting a ‘Done’ type test which is associated with each batch of your product (in the Manufacturing order), to remind you to check that the allergen has not exceeded the threshold.

**Certificate of Analysis (CoA)**

This section describes how to configure and generate a Certificate of Analysis (CoA) for an item. This requires that at least one CoA Test Group has first been configured. For details see from p.208.

A CoA can be generated for the following item types:

- Raw Materials (in QA tab)
- Packaging Items (in QA tab)
- Development Batches (R&D formula samples) (in Approve tab)
- Manufacturing Orders (in Approve tab)

It is possible to build different CoA templates as Test Groups, but only one CoA Test Group may be selected for any item. If the CoA Test Group is selected as the default for that item, creating a new item will pre-load the Test Group, ready for configuration. Or manually select the Test Group, using the same method as for selection of standard Test Groups.
In the configuration panel, select the Date Due, Test Operator and enter any other required data, such as any ranges for laboratory type tests.

In the three formattable text fields. Any default content entered in the Test Group will be displayed and can be further edited for the item. Final changes to these fields can also be performed when entering the test results.

Click on 'Save' to save the configuration.

Once the CoA Test Group has been configured, test results are entered in the same way as other tests. In the test results panel, the three text fields will also be displayed. Enter or change any of the data in these fields, exactly required in the generated CoA. This may include entering any identifiers in the header area, such as a batch no or part code, if not auto-
generated by Product Manager. The footer area may be used for entering the final printed name of any signee(s) and the date.

**Generate CoA**

With the test data successfully entered and any content finalized in the three special text fields, click on ‘Export CoA’ to export the CoA.

Open the downloaded .zip folder, within which the CoA will be available in three file formats: .pdf, .xlsx and .doc. Unzip (or drag-and-drop) the files from the zip archive to a destination on your local drive. The files can then be opened.
CHECKLISTS (STANDARD)

INTRODUCTION

Checklists enable efficient project management of ‘to-dos’ for an item. This type of checklist is currently available for Projects and (see p.3) and Products (see p224). For QA type checklists for quality management of formulas, raw materials and packaging items, see from p.193.

ADD CHECKLIST

For Projects click on the ‘Checklist’ tab to manage the checklist for an item:

For Products click on the ‘Approve’ tab to manage the checklist for an item:

Click on ‘Add Checklist’ to create a new checklist. Enter a title for the checklist and click on ‘Save’ to start building the checklist.

To add a new checklist item, enter a description for the item and click on the ‘Add Item’ button to add. Repeat this action for all required checklist items.
MANAGE CHECKLIST

Click in the ‘Done’ column to mark an item as completed. The checklist status bar will display the current level of completion.

Enter an optional comment for any checklist item. Click outside of the comments window to save the comments.

Delete any checklist item using the ‘delete’ icon in the ‘Actions’ column.
Drag-and-drop an item from the ‘Done’ or ‘Actions’ column to rearrange the order of the items in the checklist.

To view a log for a checklist item, click on the ‘Change log’ action.

**CHECKLIST TASKS**

Click on ‘Add’ to create a task associated with the item and to create the task. Only one task per item can be created. For details of managing tasks in Product Manager see from p.245.
The task summary is displayed in the Task’ column for the checklist item. Two additional actions are now displayed in the ‘Actions’ column ‘Open task’ and ‘Notes and reminders’.

Once the task is added, it will appear in the assignee’s task list. Clicking on the link in the ‘Association’ column will open the checklist and highlight the associated checklist task.
CHECKLIST TEMPLATES

To save a checklist as a template check the following box:

Once any checklist is saved as a template, select any template from the list to clone the checklist items to a new checklist.

All items in the new list will be unchecked. Any comments entered in the checklist upon which the template is based will be cleared in the new version.

Note: A logged-in user may only be able to select a checklist templates that they are authorized to view. For example, in the 'Projects' level a project must be assigned to a customer group that the user is permitted to access. For further details of customer groups, see from p.312.

PRODUCT LABELS

INTRODUCTION

Product Manager simplifies the management of the information that you need to include on the product labels. This is especially useful for generating a label dossier to send to your label designer, or for approval by your safety assessor. You can change your selections and information entered in the 'Labels' tab and export multiple versions of the label data for different requirements, such as for different countries and pack sizes.

IMPORTANT

You are responsible for all data entered and generated for inclusion on the product labels. This information must be approved by a qualified professional, to ensure compliance.

All required content is accessible in the 'Formula/Labels' tab, enabling easy review, editing and export of the labels data.

Features include:
Calculation of perfume allergens required to be declared
- Set additional shades and color ingredients that the product may contain
- Customize the display of the list of ingredients
- Edit product/formula data fields, direct from the ‘Formula/Labels’ tab
- Determine how ingredients with exactly 1.0000000 %w/w should be displayed
- Ingredient-level edit of common name and US INCI
- Add additional content and instructions
- Check list of all items required for labels
- Export all labels data report to .xls, .pdf and .doc
- Exported data includes additional files and uploaded graphics

Correct use of the labels features described in this section assumes that you have first entered all required product and formula data correctly and that the formula composition is complete. If you require support with these steps, please refer to the Getting Started Guide.

Click on the ‘Formula/Labels’ tab to access the features described in this guide:

The tab is organized in sections, each of which is covered in this guide. Certain data may have been entered in other pages or tabs of Product Manager but is required for the product label. These fields can also be edited directly from the ‘Labels’ tab by clicking on the ‘edit’ link:

This will open a popup to edit the information, thus enabling you to stay in the ‘Labels’ tab:
IMPORTANT

Editing any product or formula data directly from the ‘Labels’ tab may affect compliance. If a user should not be allowed to edit product or formula data, please use the ‘Departments’ settings to also prevent editing of data in this tab.

We recommend that you use the Compliance Checker to ensure that all compliance data and documents are entered for the product. This will ensure that the majority of the information required for the product label is already present.

To supplement the data displayed in the ‘Labels’ tab, for each section you may enter additional information. The text may be formatted using the WYSIWYG editor:

Note: If you enter any links, you can use CTRL + click to open these in a new tab of your web browser. MS Edge user, please use CTRL + double-click.

Text can also be copy/pasted into the editor directly from a Word file, retaining any existing formatting. Once you have copied the data from Word to the clipboard, use the following button to paste:
Each item in the 'Labels' tab has a checkbox to the left. Use these to select which information you wish to export to the label's checklist.

To save these checkbox preferences and any additional data you enter in the 'Labels' tab, always click on the 'Save' button!

**PRODUCT NAME, DESCRIPTION**

In this section, you can confirm or edit the product name, product type, brief description of the product and any additional information to identify the product, that you wish to include on the label.
CONTACT DETAILS, ORIGIN

These details are derived from the ‘Product/Contact Details’ tab. The country of origin can be selected from the following country select menu, set for the main manufacturer of the product.

Changing this setting does not change the country associated with the manufacturer. For certain compliance regions/countries, contact details for the responsible person (R.P.) must be stated on the product label. Check any of the data that you wish to include on the product label:

Enter any additional information or comments regarding contact details and check the checkbox to include this in the exported product label data.

LIST OF INGREDIENTS

Once you have entered the formula composition, Product Manager calculates the list of ingredients to be displayed on the label of ingredients, in order of %w/w concentration. In the ‘Labels’ tab, you can optimize how these ingredients are displayed, with a range of options to suit the label design and compliance requirements.

Default view of label of ingredients:

Ingredients which are ≥ 1.0000000 %w/w are displayed in dark blue, in order of concentration and are fixed in position in the list. Ingredients which are < 1.0000000 %w/w are displayed in light blue. You may click and drag these to reposition them in your preferred order.
For EU compliance, we advise that you leave the list of any colorants at the default position at the end of the list, as stipulated in the regulations.

There are various options described below, enabling you to optimize how the label of ingredients is displayed. Changing these options will automatically update the view.

**Perfume Allergens**

Any perfume allergens correctly entered in the formula composition will be calculated and declared on the product label.

The guide also explains how to manage fragrances and essential oils in the product formula. Please ensure that the formula is setup correctly so that the features in the ‘Labels’ tab can be used to optimize the product label and declarations of any perfume allergens and parfum/fragrance.

**Colors/Shades**

Certain compliance regions/countries (e.g. EU) allow the declaration of any additional colors/shades that the product may be available in and listing of the additional color ingredients on the same label. Using Product Manager, you can create a single formula version and enter the additional colors/shades for the product. Alternatively, you may clone the formula to create a separate version for each color/shade.

**Note:**

If you are using the Product Manager manufacturing feature, we recommend creating a unique formula version for each color/shade of the product. This will enable full batch traceability, allow you to dispense the exact color ingredient(s) at the required amounts for each product batch and ensure correct management of your raw materials inventory.
To maintain a **single formula version** for multiple colors/shades, first enter the formula composition including any color ingredient(s) required for a **single** named color/shade. In the Formula/Info tab, enter the name of this main color/shade in the following field, describing the color/shade of the **main** formula composition.

![Color/Shade field with Silver-Grey entered](image)

To add/edit any additional colors/shades, use the following settings in the Labels tab. The same settings are also available when editing the formula's composition in the Formula Composition tab:

![Colors/Shades table](image)

For each additional color/shade associated with this formula, you must enter a **color/shade name**, select at least one **color ingredient** and a corresponding **maximum %w/w**.

Click in the field to view a list of all available colorants, or enter a string to locate a color by its color name (e.g. ‘Black’, ‘Blue’ etc.) or by its color index, such as CI 20470, CI 61585, etc.
You may add multiple color ingredients to any shade. Enter the %w/w for each of these. Click on ‘Add New’ to enter a further color/shade.

Click on ‘Update Colors/Shades’ to save your changes.

Each additional color ingredient added, as well as any ingredient in the formula with the sole function of ‘COSMETIC COLORANT’ assigned, is added to the last position of the label of ingredients, as follows:

![Image of color ingredients]

Select any colors/shades that you wish to include in the exported label report, by checking the associated checkbox. Any selected color/shade will indicate in the report, which color/shade version of the product the label is intended for.

**NOTE:**

Any additional colors/shades will be included in the product’s dossier/PIF reports, even if the checkboxes are not selected.

If your formula includes a main color/shade with the color ingredient(s) included in the main formula composition, you must add a color/shade label in the Formula/Info tab to name this color/shade:

![Image of color ingredient label]

In the Label tab, you can then select this color/shade for inclusion in the label’s report/dossier:

![Image of color ingredient selection]

In the Formula Specification/Compliance tab, the additional color ingredients are listed separately, along with any regulatory data.
Newly added colors/shades will require that you manually confirm compliance of these, by checking each checkbox in the 'Compliance' column. Click on 'Update' to apply.

Exporting a product dossier/PIF for the formula will also include a list of the additional colors/shades that are associated with the formula. The ingredient list will also include the additional color ingredients, listed separately to the main formula composition.

**Colors/Shades**

*Color/shade (pigment included in formula composition):* Rose

*Other colors/shades associated with this formula:*

<table>
<thead>
<tr>
<th>Color/Shade</th>
<th>CI</th>
<th>Max. %w/w</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>Black Cl 20470</td>
<td>0.0003000</td>
</tr>
<tr>
<td>Orange</td>
<td>Yellow Cl 11680</td>
<td>0.0003000</td>
</tr>
</tbody>
</table>

**EDIT INGREDIENTS DATA**

In the ‘Labels’ tab, all ingredients in the formula are displayed in a list. Click on an ingredient name to open the ingredient.
Depending on your preferences for displaying the label of ingredients, you can edit or add any US INCI names as well as common name for an ingredient.

Click on 'Save' to save any changes and to close the ingredient window.

**OTHER SETTINGS**

The following options are available to determine how the label of ingredients is displayed:

**Parfum/Fragrance:**

You can add PARFUM to a raw material or formula to denote a carrier in a fragrance that does not require declaration of its constituent ingredients. If PARFUM is therefore included in the label of ingredients, you can use the following setting to change this to FRAGRANCE, in line with e.g. US regulations.

**Display of INCIs:**

Use the following checkbox if you wish to convert the default display from UPPERCASE to Title Case:

View of label with the above checkbox selected:
**INCI Format:**

Use the following setting to select the format for displaying the list of ingredients:

**NOTE:**

See the previous section for editing an ingredient’s US INCI and common name. You can optionally use the common name field for customizing what information will appear when selecting a label format that includes this data, such as entering the ingredient name in a different language. Whatever you enter will be displayed in parentheses after the INCI name.

If a US INCI or common name is missing when selecting a format that includes these fields, the default INCI will be displayed instead.

Display options:

![Display options screenshot]

The default view is ‘INCI only’, e.g.

**Aqua, Prunus Amygdalus Dulcis**

If a common name is missing and you select an option including displaying this information, the INCI will displayed on its own without any empty () after.

The following settings determine how ingredients with exactly 1.0000000% w/w concentration are displayed in the product label:

![Ordering options screenshot]

By default, these ingredients are displayed in the fixed position in alphabetical order, designated by the dark blue badges and cannot be re-ordered:
Selecting the second option, will enable these ingredients to be re-arranged along with the other ingredients which are < 1%w/w concentration in the formula:

**Finalize List of Ingredients**

Once you have selected your preferred options for the display of the list of ingredients, click on 'Copy to Clipboard' to copy/paste the current list view into the notes field below this button.

You may further edit the list, including using basic text formatting such as *italics*, **bold**, etc. Remember to click on 'Save' to save your changes.

Select the checkbox to the left of this field to include this final ingredients list in the exported labels report/dossier.

**Shelf Life, BBE**

You can select options for how details of the product’s shelf life and any 'Best Before End' data are displayed, as well as select related symbols to be used on the label. The options available are determined by the values you have entered in the Formula/Info tab for product’s shelf life. Check first that this information is correct before generating the product label.
If the shelf life of the product is set as <30 months, you will have the following options available in the Labels tab:

Click on the 'Best before end' checkbox to activate the fields to the right of this where you can optionally set a month and year as well as enter any further comment for the label designer.

If you wish to use the hourglass symbol on the product label, select this so that a high-resolution version of the graphic is included in the data you export:

If the product’s shelf life is set to ≥30 months, you will instead be offered the option to select a period after opening (PAO) symbol, which includes the months value that you entered:
You can also add any further comments or information pertaining to the shelf life/PAO of the product. Check the adjacent checkbox to include this in the exported label data.

**Net Content/SKUs**

In the product’s ‘Unit Sizes’ tab you can set the different pack sizes that the product is available in, as well as any associated SKU. You can update this data directly from the ‘Labels’ tab, by clicking on the ‘edit unit sizes’ link in this section.
Select any checkboxes for information that you wish to include in the product label.

Check the following option if you also wish to include the average fill system symbol on the label:

**Warnings, Statements and Declarations**

In this section, any declarations that you have made for the product or formula regarding the safety, efficacy or use of the product are displayed, with the option to enter additional information or instructions for export with your labels data. This information includes:

- Warning if the product is not suitable for children under the age of three years
Any reported serious undesirable effects (SUEs)
- Non-animal testing statement

For each of the above you can enter additional information or instructions in the adjacent comments field. Select the comments using the checkbox if you wish to export the information.

You may select any documents of the type LABL, uploaded to the Formula/Docs tab, for inclusion in the exported data. Maximum file size is 2Mb. Click on a document title to download the document. If the document is a graphic file (.jpg, .png or .gif) it will open in your browser in a new tab. Select any documents here that contain instructions or information required on your product label that have not been included in the 'Label's tab.

View of documents list, for available files of type LABL:

**ADDITIONAL GRAPHICS**

In this section you can select additional graphics that you wish to include on the product label and export these with your labels data.

Select the following option if you wish to include the standard symbol for recycling on your label:

You can enter additional information or instructions in the adjacent comments field. Select the comments using the checkbox if you wish to export the information.
In this section you may also select any documents of the type LABL, uploaded to the Formula/Docs tab, for inclusion in the exported data. Maximum file size is 2Mb. Click on a document title to download the document. If the document is a graphic file (.jpg, .png or .gif) it will open in your browser in a new tab.

View of documents list, for available files of type LABL:

You can use this option to send your label designer any additional required graphic files. Since these may exceed the 2Mb upload limit in Product Manager, you can use the following additional comments field to list any larger files that will be submitted separately.

**Batch no.**

The batch no. will need to be displayed on your product’s label. This is usually over-printed on your generic label design, as you print labels for each product batch. Use the comments field in this section to include any instructions or information to describe how the batch no. should be displayed:
**EXPORT LABELS DATA**

Click on the following button to export your labels data, according to the selections you made in each section of the ‘Labels’ tab, as described in this guide.

![Export Label Data](image)

A .zip file will be downloaded by your browser. Double-click to unzip the file and move the folder to a destination on your hard drive. Within the folder, all required files are included, along with the labels data in .xls, .doc and .pdf formats.

View of example Labels report:
You can change your selections and information entered in the ‘Labels’ tab and export multiple versions of the label data for different requirements, such as for different countries and pack sizes.

View of example labels dossier folder:


**INTRODUCTION**

Product Manager provides useful tools for calculating and optimizing the costs and profit margins for your products, including the following features:

- calculate production costs, including raw materials and packaging
- calculate costs per unit, such as for a 50ml or 250ml pack size
- set and optimize target raw material costs, per Kg/L
- set and optimize profit margins based on distributor and retail price
- warnings if costs are outside any set target range
- set arrays or price points for raw material and packaging costs
- enter materials costs in any currency
- conversion of materials costs to base currency using live exchange rates
- compare costs for different production amounts
- fast cost optimization at R&D stage
- BoM/costings generation for any production volume
- side-by-side comparison of costs for different formula versions
- monitor cost fluctuations from batch to batch of your product
- export all data to spreadsheet format

**SETTING DEFAULT CURRENCY**

All cost calculations are performed in the default base currency that you can set in the Global Settings when logged in as the Administrator. By default, this is set to EUR (€) for new accounts.

**IMPORTANT:** Changing the base currency will cause all raw material and packaging costs entered for this currency to be updated based on the new base currency, using the current exchange rate.
Raw material and packaging costs may be entered in different currencies. Calculations of formula costs, BoM etc. will convert any materials costs entered in a different currency to your base currency at the current exchange rate.

**ENTER COSTS FOR RAW MATERIALS**

Entering costs for raw materials and packaging items are identical. Raw material costs are based on the price per kg or L, determined by the setting in the raw material's 'Information' tab:

![Unit of measurement](image)

Packaging item cost are entered based upon the ‘Packaging unit’ set in the packaging item’s ‘Information’ tab:

![Packaging unit](image)

If the first option is selected, the value entered will refer to the cost of one item, such as a bottle or cap. Select ‘other’ to choose a different unit of measurement, such as m, m² or ‘US oz’.

**SELECT CURRENCY**

You may enter your raw material or packaging costs in any available currency. By default, all materials are set to the base currency you selected in the Global Settings. To enter the costs in a different currency, select the required currency from the list.

![Select currency](image)

If any costs have already been entered for the item, these will be converted from the previous currency to the newly selected currency at the current exchange rate. You can edit these costs according to the actual amount you paid for that batch of the item in the chosen currency. The current exchange rate is applied when performing product cost calculations in Product Manager, with each non-base currency cost calculated at the current value in the base currency.
ENTERING COSTS

In its simplest form, you set a price per unit of the item (e.g. per L, per kg, per m², etc.), with the same cost applied, regardless of the quantity purchased. For example, to enter a cost of €0.03 per L, enter the following settings:

| Cost | $0.03 | per L | to | L | End |

It is important to use the range from 0.00 and in the ‘to’ field to check the ‘End’ box. This will ensure that for any amount purchased, a cost will always be available.

PARENTS AND BATCHES

You can set different costs for each batch of your material or packaging item, even entering them in different currencies. If you wish to apply the same costs to all associated batches, edit the parent version and then choose ‘Update All Batches’ upon saving the data.

SETTING COST ARRAYS OR PRICE POINTS

You can set arrays or price points for raw materials and packaging items - required for factoring in the savings possible when purchasing in larger amounts from a supplier.

Since packaging item costs are required for showing the packaging set costs for each unit size of your product but is not related to the amount of product manufactured, setting cost arrays for packaging items is not a requirement for any calculations made in Product Manager. You may however wish to enter these costs as an array for your own reference.

An array enables bands of amounts purchased to be set, with a cost per each band if the required amount to be purchased falls within the range set. For example, the following view shows a cost of €21.89 per kg for amounts purchased between 0 and 5 L, €20.90 per kg for 5.01 – 10 kg, etc with the cost dropping to €18.91 per kg for any amount above 20.01 L.

| Cost | $21.89 | per kg | to | 5.00 kg |
| Cost | $20.90 | per kg | 5.01 to 10.00 kg |
| Cost | $19.90 | per kg | 10.01 to 20.00 kg |
| Cost | $18.91 | per kg | 20.01 to End kg |

To build an array, enter the first range, such as follows:
Click on ‘Add New’ to enter the next row. The start value of the range will be auto entered as 5.01, based on the ‘to’ value in the previous row:

For each row, you need to enter a cost per unit in the first field and a ‘to’ amount to define the range. **Always complete the array by checking the ‘End’ check box for the final row of the array.**

Click on ‘Save’ to save your changes!

**ADDITIONAL COST FIELDS**

Enter an optional additional cost per unit in the following field:

Additional cost e.g. for shipping, per L [?]: $0.64

This cost will be added to the cost per item, L or kg. For example, if 1 L of a raw material costs €10.00 and an additional cost of €0.64, the total cost will be calculated based on €10.64 per L. This is useful for applying additional costs on a per item/unit basis, such as for shipping costs based on weight/volume, handling and storage costs, etc.

You can enter a second additional cost as a percentage of the total cost, using the following field:

Additional cost as % of total cost [?]: 20.00%

This field is useful for entering additional costs to account for currency exchange losses, banking fees, or any other charges which are applied to the total value of the raw materials, rather than their per kg/L cost.

If we use the same example of 20L of a raw material required, at a cost of €10.00 per L, using only this additional cost field we will have:

\[(20 \times 10) + (20 \times 10 \times 0.2) = 240.00\]

Note that this additional percentage cost field is only applied to cost calculations for total costs. In the bill of materials (BoM) the min, avg. and max. cost per kg/L for each raw
material does not include this additional percentage. However, it is factored into the calculation of the ‘Total Cost’, as per the following example.

Additional cost per kg/L: €0.10
Maximum cost per kg/L in array: €5.00 + €0.10 = €5.10
Amount required for production: 10kg (requires purchase at maximum cost)
Additional % cost, applied to base cost per kg/L: 10%
Total cost per 10kg = (10 * 5.00) + (10 * 0.10) + (10 * 5.00 * 0.10) = €56.00

View of BoM calculation showing costs per kg/L of a raw material and the ‘Total Cost’, including any additional % cost based on total cost:

<table>
<thead>
<tr>
<th>Amt</th>
<th>Min. Cost, per kg/L</th>
<th>Avg. Cost, per kg/L</th>
<th>Max. Cost, per kg/L</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.000 kg</td>
<td>€3.10</td>
<td>€4.10</td>
<td>€5.10</td>
<td>€56.00</td>
</tr>
</tbody>
</table>

If you require any additional cost for a raw material to be included in the BoM per kg/L values, is recommended to include this in the first additional costs field, entered as an amount per kg/L.

If you use both additional cost fields, the additional costs are applied separately and not sequentially. For example, if we have set an additional cost of €0.64 per L in the first field and 20% in the second field, we get:

(20 * 10) + (20 * 0.64) + (20 * 10 * 0.2) = 252.80

**ENTER COSTS FOR PACKAGING ITEMS**

**GLOBAL SETTINGS**

In the Global Settings under ‘Default Settings’ you can choose how you want the packaging item’s cost to be determined, if an array exists for any packaging item associated with a packaging set:

Packaging

If you have entered arrays for your packaging item costs, set which cost should be used for calculating packaging set costs:

- Lowest
- Average
- Highest
Lowest – the lowest cost in the array will be used.
Average – the average cost will be calculated and used.
Highest – the highest cost in the array will be used.

By default, ‘Average’ is selected.

**Batch Versions**

If multiple batches of a packaging item exist, the packaging set will use the most recently added packaging item batch. Any expiry date set for the packaging item is ignored. If you wish to keep your packaging set costs up to date, it is therefore recommended that you ensure that at least this batch has the current costs entered.

In the ‘Packaging/Packaging Sets’ tab, you can view the total cost of the packaging set, including any additional production cost e.g. for the cost of assembly of the packaging set.

Note – if a packaging item cost is missing, the calculated total cost for the packaging set will be displayed, ignoring the missing cost. If a cost is missing for any packaging item in the packaging set, this is indicated by a clickable link. Open the link to view the item(s) requiring a cost to be entered:

<table>
<thead>
<tr>
<th>Associated Packaging Items</th>
<th>Quantity</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avery Label 70 mm x 42.3 mm</td>
<td>1 item/unit</td>
<td>1</td>
</tr>
<tr>
<td>Airless Pump Dispenser, White Plastic with Clear PP Ove...</td>
<td>0.5</td>
<td>$0.97</td>
</tr>
<tr>
<td>Cardboard Recycled 175 g/m²</td>
<td>0.25</td>
<td>$0.01</td>
</tr>
<tr>
<td>Cardboard Recycled 250 g/m²</td>
<td>1</td>
<td>$0.03</td>
</tr>
<tr>
<td>Sellotape</td>
<td>m</td>
<td>1.25</td>
</tr>
<tr>
<td>Avery Label 70 mm x 42.3 mm</td>
<td>1</td>
<td>$0.22</td>
</tr>
<tr>
<td>Cardboard box type B (outer packaging) (Cloned)</td>
<td>1 item...</td>
<td>1</td>
</tr>
</tbody>
</table>
**PACKAGING PRODUCTION COSTS**

In the packaging set edit view, you can enter a production cost in your base currency, for assembling the packaging set:

Packaging production costs, per set field:

| Packaging production costs, per set | $ 0.50 |

**SET TARGET RAW BULK PRODUCT COSTS**

In the product 'Requirements' tab, you can enter target bulk costs per kg/L of your product, entered in your base currency. This should include the **cost of your raw materials and production costs** for manufacturing your bulk product. This is often useful to define at the beginning of R&D, to achieve your target profit margins.

| Bulk product cost target (raw materials + production costs) | $ 5.00 to $ 15.00 per L |

**EXAMPLE:**

Additional cost per kg/L: €0.10

Maximum cost per kg/L in array: €5.00 + €0.10 = €5.10

Amount required for production: 10kg (requires purchase at maximum cost)

Additional % cost, applied to base cost per kg/L: 10%

Total cost per 10kg = (10 * 5.00) + (10 * 0.10) + (10 * 5.00 * 0.10) = €56.00

Total cost per 1kg = 56.00 / 10 = 5.60

Target costs €5.00 - €10.00 per kg

Difference = €-0.60 to €4.40 i.e. within range

**SET DISTRIBUTOR AND RETAIL PRICES**

In the Product's 'Requirements' and 'Unit Sizes' tab, you can enter an average Distributor and Retail price for each unit size of the product entered, entered in your default/base currency.
This enables calculation of the amount of profit/loss based on your costs, as well as the percentage profit margin, as described in the following section.

**PERFORM PRODUCT COST CALCULATIONS**

Located in the Formula/Cost tab, Product Manager’s formula costs calculator enables you to view accurate costs for your product, including itemized costs for your Bill of Materials (BoM), based on any required manufacture amount, as well as the cost of raw materials, production and packaging per each unit size of your product, such as for a 50ml, 250ml and 500ml bottle.

Note – the raw materials costs are taken from the ‘Cost’ tab of each raw material batch currently associated with the formula, as selected in the ‘Formula Composition’ tab:

Check that your required raw material batches are correctly associated with the formula before performing cost calculations. For further information on how to monitor and calculate costs from batch to batch of your product, see p.133.

In the formula view, click on the ‘Cost’ tab:

**PRODUCTION COSTS**

Enter an optional additional cost per kg/L of your product, entered in your base currency. This value should be entered if you wish to include your production costs.

**INCLUDE PACKAGING COSTS IN FORMULA COSTS**

With packaging sets correctly configured and costs entered for your packaging items, you can with a single-click, include packaging costs in your product cost calculations.

Check the 'Include packaging sets costs' checkbox, before entering a required amount to manufacture in kg or L.
RUN COST CALCULATOR

Click on 'Calculate' to run the cost calculator.

Product Manager will then calculate your product’s costs and display the results below. Click on ‘Save’ to save the values you enter in the ‘Cost’ tab.

SUMMARY OF COSTS

A summary of your costs is displayed, below the ‘Calculate’ button:

The total cost of raw materials, including any production costs you entered per kg/L are displayed, based on the total manufacture amount. This is also displayed as a cost per kg/L of bulk product.

The target bulk product costs are also displayed, as set in the Product/Requirements tab (see p.127). Note – if you have entered an additional cost for production on a per kg/L basis, your target costs must include production.
BILL OF MATERIALS (BOM)

A BoM is generated, showing the amount in weight and volume of each raw material required, and the cost of these.

<table>
<thead>
<tr>
<th>Raw Material</th>
<th>Part Code/ID</th>
<th>Supplier</th>
<th>Batch</th>
<th>Amount</th>
<th>Min. Cost, per kg/L</th>
<th>Avg. Cost, per kg/L</th>
<th>Max. Cost, per kg/L</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.5000000 kg (2500.0000 g)</td>
<td>€ 4.01</td>
<td>€ 4.50</td>
<td>€ 5.00</td>
<td>€ 12.50</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.376376 L (2157.2943 ml)</td>
<td>€ 52.12</td>
<td>€ 65.12</td>
<td>€ 68.12</td>
<td>€ 161.87</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.4000000 kg (2400.0000 g)</td>
<td>€ 48.12</td>
<td>€ 51.78</td>
<td>€ 55.45</td>
<td>€ 128.23</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.2653061 L (2255.3061 ml)</td>
<td>€ 16.04</td>
<td>€ 19.52</td>
<td>€ 23.00</td>
<td>€ 52.10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.0000000 kg (2000.0000 g)</td>
<td>€ 25.80</td>
<td>€ 27.90</td>
<td>€ 30.00</td>
<td>€ 60.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>74.0000000 L (74000000 ml)</td>
<td>€ 0.06</td>
<td>€ 0.07</td>
<td>€ 0.07</td>
<td>€ 4.44</td>
</tr>
</tbody>
</table>

Additional cost: $121.00
Total: $1630.14

If you have entered cost arrays for your raw material costs, the cost per kg/L used is taken from the range associated with the amount required. For example, if 2 L of the raw material is required and the cost array is as follows, the cost of $232.09 per L is used, because this applies to amounts purchased between 0.00 and 2.50 L. A total materials cost for the raw material in the BoM is therefore $464.18.

Additional cost e.g. for shipping, per L (€) | 0.00 | 0.00
Cost | 232.09 | per L
Cost | 214.42 | per L

This enables you to enter different target production amounts in the ‘Required amount to manufacture’ field and compare the costs. You can export different versions or scenarios in .xls format – see ‘Export Costings Data’ (p.132).
RAW MATERIALS COSTS

If any costs are missing, clicking on the ‘Calculate’ button will trigger an alert.

The alert will display the raw materials with missing costs and the amount of the raw material required for the production amount entered. Make sure therefore, that you enter costs for each of the raw material batches, in your formula if you wish to use this feature and that any array includes a cost per kg/L for the amount required.

COSTS PER UNIT SIZE

For each unit size, the raw materials costs (including production) and packaging costs will be displayed, with the ‘Total’ showing the combined cost these:

<table>
<thead>
<tr>
<th>SKU</th>
<th>Unit Size</th>
<th>Raw Materials/ inc. Production</th>
<th>Distributor Profit/ % Margin</th>
<th>Retail Profit/ % Margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>FD0001</td>
<td>50 ml</td>
<td>$0.27</td>
<td>$11.73 (97.72%)</td>
<td>$15.73 (98.29%)</td>
</tr>
<tr>
<td>FD0002</td>
<td>100 ml</td>
<td>$0.55</td>
<td>$15.45 (96.58%)</td>
<td>$17.45 (96.96%)</td>
</tr>
<tr>
<td>FD0003</td>
<td>250 ml</td>
<td>$1.37</td>
<td>$18.63 (93.15%)</td>
<td>$24.63 (94.73%)</td>
</tr>
</tbody>
</table>

If you entered a Distributor and Retail price (see ‘Set Distributor and retail prices’, p.127) per each unit size, the amount of profit/loss will be displayed in the default/base currency as well as the percentage margin.
COMPARE FORMULA COSTS SIDE BY SIDE

If you have other formulas associated with the same product, you can select up to three further formula versions to display these side-by-side for easy unit cost comparisons.

Any additional selected formulas will be included in the exported costs data.

EXPORT COSTINGS DATA

You can export your costs data using the following button in the Formula/Cost tab:

The .xls file will be generated and downloaded by your web browser and can be opened to view all data in spreadsheet view.
**MONITOR AND CONTROL COSTS**

If you use Product Manager’s manufacturing features, your production-mode formula will be locked and auto-updated to be associated with the current raw material batches dispensed for manufacturing. Any changes in costs entered between batches of raw materials and packaging items will therefore be reflected in your calculated product costs.

If you enter any raw material or packaging costs in a different currency to your base currency, fluctuations in currency exchange rates will also affect a product’s calculated costs.

This makes it possible to monitor changes in a product’s costs and profitability across time and between batches of your product. This can be achieved by exporting the costs data from the Formula/Cost tab, as explained in the previous section ‘Export Costings Data’ (p.132) and saving the exported .xls files on your local drive.

A good use of Product Manager’s testing/QA features is to add a test group to the formula’s ‘QA’ tab to define any target ranges for costs, profit margins etc. Set each test to have configurable parameters, if you want to define the values that should be entered upon which the cost calculations will be performed.

You can build a test ‘costs’ group with the various tests required to be met during R&D for optimizing cost and profit margins. These can be setup for your different unit sizes or create generic tests and set the unit size as a configurable parameter.

**MANUFACTURING**

**INTRODUCTION**

Product Manager’s manufacturing module is designed for cosmetics and personal care businesses requiring a powerful, yet easy-to-use manufacturing software. This enables integration with compliance management and advanced batch traceability.

For the purposes of this section of the guide we will ignore the ‘Configure Tests’ tab where you can add test groups for testing and standard operating procedures. For support with setting up quality assurance for manufacturing orders, see the section ‘QA: Manufacturing Orders’ from p.220 of the guide.

**MANUFACTURING GLOBAL SETTINGS**

Before we start, check that you are able to see the ‘Manufacturing Orders’ menu items in the left-hand menu when logged in to Product Manager.
If you cannot see the menu, you can enable the manufacturing module in your Administrator global settings. Select ‘Global Settings’ in the user menu (top right) and then select ‘Default Settings’. Change the following switch to ‘On’ and then click on ‘Save’ to save your settings:

![Production switch](image)

In addition to the manufacturing order IDs set by Product Manager, each order will be associated with your unique product batch number. Set if you want to use custom or auto-generated product batch numbers when using the manufacturing module. To start the auto-generated sequence at a specific number or to use a special format, first set the switch to ‘Custom’.

![Product batch numbers switch](image)

Next, enter the product batch number for the first or next manufacturing order manually and save the order. For example, with the setting on ‘Custom’, create your manufacturing order and enter e.g. ‘ABC0001’ as the product batch number.

![Product batch no.](image)

Now change the global setting to ‘Auto’, save the settings, and create your next manufacturing order. The product batch is automatically set as ABC0002.

![Product batch no.](image)

Future manufacturing orders will then continue the numbering sequence automatically.
In addition to the manufacturing order ID set by Product Manager and the product batch no. described above, it is possible to enable a third ID, sometimes required if you wish to associate your manufacturing records in Product Manager with another application. This setting can be found on the Custom Settings tab, under the Integration Option section. To enable the field, set the ‘Manufacturing Custom ID’ switch to ‘On’.

You can customize the label used for this field by entering a value in the 'Field label' box (maximum 25 characters). Select ‘Yes’ or ‘No’ to set if the ID should be a required field when creating a manufacturing order.

View of custom ID field in the manufacturing order:

If enabled, the custom ID field is also displayed in the list view for manufacturing orders.

**SET A DENSITY VALUE FOR YOUR PRODUCT**

The Product Manager manufacturing module calculates the required amount of your product to be manufactured by weight. If you have set your product to be measured by volume (e.g. for oils or creams), **you must enter an accurate density value** (or specific gravity), so that the correct dispense amounts in weight (kg) can be calculated.

To set whether your product is measured by weight or volume, use the following setting in the ‘Product/Info’ tab:
To set the density or specific gravity value for a product measured by volume, open the production mode formula at the ‘Method’ tab and enter a value in the following field. Click on ‘Save’ to save your data.

If your product is measured by weight you will not need to enter a density value as this will be automatically set to the default value of 1.00.

**TIP:**

For a simple method to calculate this yourself, measure exactly 1 L of your finished product and then weigh it in kg. If for example, 1 L weighs 0.986 kg, then your density value is 0.986 g/ml.

Note – during the setup of each manufacturing order (see ‘Setup Manufacturing Order’) you can also edit the product’s density value.

**ENTER THE METHOD OF MANUFACTURE**

On the formula’s ‘Method’ tab you can enter and maintain the instructions used for manufacturing your product. These instructions are required for your product information files (PIFs), batch protocols and batch tickets.

You can enter a separate method for producing Development Batches (see p.154) on the ‘Development Batches’ sub-tab. These instructions will not affect your product information files (PIFs) and batch protocols.
IMPORTANT! Make sure that you have first entered your formula in the Specification/Formula Composition tab.

Your method of production is entered as a series of stages or phases, consisting of the following fields:

Stage ID:
Select a stage number from the select menu. Clicking on the ‘Sort’ button will then re-order the stages/phases in ascending numerical order.

Stage Title:
Enter a short title for ease of identification of the stage/phase.

Raw Materials:
Use this field to optionally associate the stage/phase with any raw materials in the formula. Click in the field to select one or more of the raw materials in your formula:

- Glycerine (Organic) (2.400%)
- Cocoa Butter (Organic) (2.400%)
- Shea Butter (Organic) (1.200%)
- Hazelnut Oil (3.200%)
- Emulsifier VF (2.000%)

These associations will also be shown in the Formula Composition, enabling two-way synchronization of the data between these tabs. If you wish to associate the same raw material with more than one stage, e.g. Aqua @10% at stage 1, @20% at stage 2, etc. you must first add each of these raw materials separately in the Formula Composition.
Details:
This is where you enter the detailed manufacturing instructions for the associated phase. Drag the bottom right corner of the text field if you require more space. The text entered in these fields can be formatted.

If you need to refer to a raw material in these instructions, you can use the following tool to select a raw material and copy the trade name to the clipboard. Use Ctrl + V (or Command + V for Mac) to paste the text into your text at the point where you have placed the mouse cursor:

Remember to click on 'Save' to save your data!

**MANUFACTURING COLOR PRODUCTS**

For ease of management of products with different colors/shades, Product Manager allows for the addition of further colors/shades associated with a single formula.

To manufacture color products, each color/shade of your product must exist as a unique formula, with the color raw material(s) entered in the main formula composition. This will enable accurate traceability of the manufactured product batches and associated colors/shades as well as correct calculations of raw material inventory and details included in each batch protocol.

If you have a multi-color/shade formula and intend to create manufacturing orders for manufacture of the product in the different shades, follow these steps to create unique formula versions for each color/shade:
1. Clone the original formula to a new version
2. Enter the name of the color/shade in the Color/shade field in the 'Info' tab
3. In the formula composition, delete all additional colors/shades
4. In the formula composition, make sure that only the raw material(s) required for that single color/shade are entered and at the correct %w/w.
5. Ensure that the raw material(s) entered in (4) have approved batches and inventory.
6. Approve the formula in the QA tab.
7. Set formula to production-mode.

You can now proceed to create manufacturing orders, by selecting the formula version for that color/shade that you intend to manufacture, as described in the following section.

**SETUP THE MANUFACTURING ORDER**

In the left-hand menu, under ‘Production’, select ‘Manufacturing Orders’.

Click on ‘Add New’:

A new manufacturing order will be created with an auto-generated order number in the sequence M00001, M00002, etc. The product batch no. in the example below is auto-generated. If you prefer to enter product batch numbers manually, make sure that the following global default setting is selected:
You can also configure the global settings to enable a third manufacturing ID field, required for example to associate each manufacturing order with records generated using a third-party accounting, ERP or MRP application. For further details see ‘Manufacturing global settings’, from page 133.

**TIP:**
If you wish to set your own custom format for auto-generated product batch numbers, enter and save the first manufacturing order’s batch number manually and then after saving the manufacturing order, set the above-described global setting to ‘Auto’. For example, if you manually set your first order’s product batch number to PB00001 the next auto-generated batch numbers will be PB00002, PB00003, etc.

Now select the product and any associated production formula that will be used for the manufacturing order:

**Note:** if no formulas are available, you must first set the formula to production status by opening the formula and clicking on the following button:

The formula must also have the approval status ‘Approved’.
Enter the amount of finished (bulk) product required. This can be calculated by clicking on the checkbox shown below and entering the required number of units for each available SKU (as set in the product’s ‘Unit Sizes’ tab). Confirm that each unit size is associated with the correct packaging set. This will enable MRP reporting for packaging materials (see p.170).

The total required amount of bulk product will then be calculated and displayed in the following field, which is locked from editing:

Alternatively, you can leave the checkbox unchecked and ignore entering unit size filling requirements and instead directly enter an amount of finished bulk product required.
You can set an **expected yield %** which represents the amount of finished bulk product that you estimate will be achieved, accounting for the inevitable losses that tend to occur during the manufacturing process. In the above example, an expected yield of 97% has been entered, meaning that to achieve a target of 25 L of finished bulk product, you will need to manufacture 25.773 L (24.098 kg) to achieve this final amount. Click in the ‘Actions’ column to edit the expected yield value.

**Note:** The expected yield % can also be set in formula’s ‘Method’ tab. Editing the value directly from the manufacturing order will update this value.

**Note:** If the product is measured by volume (L), it is very important that you set the correct density (g/ml) for your product so that Product Manager can accurately calculate weights.

Enter any **additional instructions** for the production team, that you wish to be included in the **batch ticket**.

The batch ticket is a PDF document generated once you create the manufacturing order, including the manufacturing instructions as entered in the formula’s ‘Method’ tab. For further information see ‘Entering the Method of Manufacture’ p.136 Make sure that you keep this information up-to-date. The version used for each manufacturing order is saved with the batch protocol.

If you entered the amount for the manufacturing order in unit sizes to be filled, the related information is also added to the batch ticket.

If you have also uploaded any documents of the doc type MANU to the formula’s ‘Docs’ tab these will also be included along with the batch ticket. If you update this document, the batch protocol for the manufacturing order will include the version that was current at the time of the manufacturing order creation.
Check that the details you have entered for the manufacturing order are correct and then click on ‘Save’ to save the order.

Select the menu item Manufacturing Orders / List and you will now see the new manufacturing order listed at the top, with the status ‘Pending’.

**DOWNLOAD BATCH TICKET**

Notice in the above example, that in the ‘Batch Ticket’ column you can download a batch ticket in PDF format. Click on any other icons in the same cell to open any of the ‘MANU’ type documents. Verify that the information in the batch ticket and any accompanying documents are correct. Your production team can now access these documents for manufacturing the order.

Click in the ‘Actions’ column to open and edit the manufacturing order.

Or click on the order ID link:

```
M00224     2755467
```

**DELETING A MANUFACTURING ORDER**

For traceability reasons, only manufacturing orders with the status ‘Pending’ or ‘Dispensed’ can be deleted.

If an order has already been dispensed, deletion of the order will trigger the following prompt to determine what should happen to the raw material inventory allocated to the order:
**TIP:**

Unless the inventory has been destroyed and will not be returned to the available pool, choose 'Delete and Return to Inventory', otherwise your inventory levels will no longer be accurate.

---

**Dispensing the Manufacturing Order**

For the purposes of this section of the guide we will ignore the 'Configure Tests' tab and proceed straight to 'Dispense'.

If you have read and understood the 'Raw Materials' section of this guide (from p.22), you should have been able to setup your raw materials batches so that approved batches with inventory are now available for dispensing for the manufacturing order. Alternatively, you may have chosen to disable inventory control and approval of raw materials in your Administrator account’s global settings. This will then allow you to dispense from all available raw materials batches.
**TIP:**

Even if you are not using Product Manager to manage your raw materials inventory or for quality assurance, it is important for batch traceability that you still execute the Dispense stage of your manufacturing order. Dispensing the raw materials for each order will ensure that your formula is auto updated to the current raw material batch associations and that an accurate batch protocol for each manufacturing order can be generated.

Since your formula concentrations should be entered in %w/w, Product Manager uses weights as the basis for all calculations of required inventory. If any raw materials are measured by volume (L), the density value (g/ml) set for the raw material is used to calculate the weight. Display of volumes is to simplify the dispensing stage if you prefer to measure out and dispense your raw material by volume instead of by weight.

In the 'Dispense' tab, you can use the following button to verify that all required raw material inventory is available for the dispense, before proceeding.

The combined sum of available inventory for all approved raw material batches associated with the same parent will be calculated. If any raw material has insufficient inventory available, you will see a warning, showing the amount currently available, how much is required for the dispense and the deficit.

<table>
<thead>
<tr>
<th>Raw Material</th>
<th>Required</th>
<th>Available</th>
<th>Deficit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requanol</td>
<td>0.2030400 kg</td>
<td>0.0540000 kg</td>
<td>-0.1490400 kg</td>
</tr>
</tbody>
</table>

Once you have verified that sufficient raw materials inventory are present, you can now proceed with dispensing the manufacturing order.

In the 'Use' column, click 'Add' to enter the amount required to dispense from each available raw material batch.
You can also enter a custom amount in the field and enter amounts in multiple available batches, for example when you need to take remaining inventory from an older batch but require further inventory from a newer batch. **Product Manager will automatically update your formula to include all batches and at the percentages, based upon the amounts dispensed from each batch.**

**TIP:**

You do not need to enter amounts. If for example you require 0.2727300 L from a batch, click 'Add' next to the field and the application will automatically enter the required amount of 0.2727300. If the full amount is not available for a batch, clicking 'Add' will deduct the remaining available inventory with the balance required then needing to be added from a different batch.

Assign inventory for each raw material. The total in the top row of the 'Total' column will be 0.0000000, indicating that all required inventory has been assigned.

If a value in the 'Total' column is still required to be assigned, this will be displayed in red, as shown in the example above.

To dispense from multiple batches of a raw material, enter the amount you wish to dispense from each. Any remaining amount required will be auto updated in the 'Total' column.

Add any special instructions that you wish to include in the dispense list. Click on 'Update' to save any changes.

Once you have assigned all required inventory you can now dispense the order by clicking on the 'Dispense' button.
Once the manufacturing order has been set to Dispensed, all fields in the order’s ‘Info’ tab will be disabled from further editing, except for the following fields:

- Custom ID
- Date due
- Additional instructions
- Comments

**Dispense List**

Once dispensed, you’ll be able to open a dispense list in PDF format, including a list of all required inventory to be dispensed, with the raw material batch number, amount to be dispensed and any special dispensing instructions. This checklist should be used by your dispensing staff to ensure that the correct inventory is dispensed for the manufacturing order.

If you do not require a full dispense list including raw materials batches, you can download a ‘Quick Dispense List’ at any time. This document lists the exact amount of each raw material required to be dispensed but does not include batches.

The dispense list document is also included in the batch protocol, downloadable once the manufacturing order has been set to the status ‘manufactured’.

**Reverse Dispense**

If the manufacturing order has the status ‘Dispensed’ you can undo the dispense by using the following ‘Reverse Dispense button:

Using this action will return all assigned inventory to the available stock for each raw material. If you have assigned inventory to multiple batches of any raw material, the inventory will be correctly re-assigned to each respective batch.

Performing a return to inventory will set the manufacturing order’s status back to ‘Pending’.

**Dispensing Labels**

To generate a dispensing label for any raw material batch, first select the batch from the ‘Download’ label column.
Under ‘Dispensing labels’, select the required label format from the standard Hermes and Avery label templates and click on ‘Download’ to generate a PDF label that you can print using your label printing software:

**BACKUP/RESTORE PRODUCTION FORMULA**

The composition of the production-mode formula used for manufacturing is locked once you first dispense a manufacturing order. Each time a manufacturing order is dispensed, the composition is auto-updated to the current raw material batches selected. This is an important function enabling the integration of manufacturing with the Product Manager Compliance Checker and the maintenance of traceability from batch to batch of your product.

It is therefore important that a backup is made of the original production-mode formula, with the option to restore to this version. Upon first-time dispense of your formula for a manufacturing order, Product Manager will automatically make a backup of your formula’s composition, enabling a restore to be executed. You will also be prompted to optionally clone the entire formula to a new version:
Click on ‘Clone and Proceed’ to create a full backup of the formula, including all data and documents. You may not need to back up your formula every time you create a new manufacturing order. If you do, we recommend that you routinely check your production mode formula and routinely delete any backups that you do not require.

The cloned version of your production mode formula will be saved in draft mode and labelled, as shown in the following example:

<table>
<thead>
<tr>
<th></th>
<th>1.05</th>
<th></th>
<th>Production</th>
<th>Approved 0210</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>1.07</td>
<td>Backup of 1.06</td>
<td>Draft</td>
<td>Pending</td>
</tr>
</tbody>
</table>

If you do not create a backup using this method, Product Manager will only back up the composition tab of your production-mode formula. This means that performing a restore will only update the data in the ‘Composition’ tab to the original version. **All other data and documents will be left unchanged.**

To restore the composition of the **production-mode** formula, open the formula and click on ‘Restore Composition’.

If you wish to perform a clone of the formula at any time, open the product list and click on the ‘clone’ icon in the ‘Actions’ column:

You can also clone the formula by opening it and clicking on the ‘Clone Formula’ button:
**TIP:**

Restoring a production-mode composition will not affect past manufacturing orders based on this formula. During the period between performing a restore and dispensing your next manufacturing order, all raw material batch associations in the formula composition will have been reset to the original state, immediately prior to dispense of the first manufacturing order. Your Compliance Checker tasks will be updated, and you will need to re-generate your PIF/product dossier.

Using this manual method of cloning any formula does not automatically create the formula label 'Backup of x.x'. It is recommended after performing the clone to open the cloned formula in the 'Info' tab and add a label to help you identify this version:

<table>
<thead>
<tr>
<th>Reference</th>
<th>123.457</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Clone of 1.02</td>
</tr>
</tbody>
</table>

**MANAGE ORDER STATUSES**

Manufacturing order statuses are either assigned automatically at certain stages of the manufacturing process or are set manually. The status of each order is displayed in the 'Status' column of the manufacturing orders list as follows:

<table>
<thead>
<tr>
<th>Status</th>
<th>Batch Ticket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Packed-Out</td>
<td></td>
</tr>
<tr>
<td>Manufactured</td>
<td></td>
</tr>
<tr>
<td>Dispensed</td>
<td></td>
</tr>
</tbody>
</table>

In the orders list, you can filter orders by any combinations of statuses:
In the order view, you can also view the status underneath the manufacturing order number:

Order status sequences are as follows:

Only manufacturing orders with the status ‘Pending’ or ‘Dispensed’ may be deleted. For further details of testing and QA for manufacturing orders, see p.220.
**APPROVAL AND BATCH SAMPLE RETENTION**

Once your order has been manufactured, use the ‘Approve’ tab to select the status ‘Manufactured’.

Enter a **date and time** of manufacture and, if the **actual yield** achieved is different from the target yield, enter this amount before clicking on ‘Update’ to save the details.

Before the manufactured order can be packed-out, a further status change is required by first setting the order to ‘Approved’ using the same method as described above. **You will only be able to perform this action if any tests configured for the order have been passed.**

If you retain any samples of the manufactured batch, you can enter these in the ‘Approve’ tab, once the order has been entered as ‘manufactured’.

Enter the amount of the sample retained in g/ml. Select the checkbox ‘Deduct from actual yield’ to subtract this amount from the actual yield entered. Click on ‘Add Sample’ to create the sample. Repeat the process to enter any further samples.

Each retained sample is assigned a unique ID by Product Manager. They are listed in the order’s ‘Approve’ tab and in the manufacturing orders list. Click on a sample ID link to open the sample, where you can configure QA, such as scheduling stability tests for the sample.
Further details can be found in the aforementioned ‘Quality Assurance and Testing’ guide.

**PACK-OUT THE MANUFACTURED ORDER**

Details are included in the section from p.62.

**RELEASE THE ORDER**

The final stage of the manufacturing process is to approve the final filled and packed-out order before it can be released to market. This step is performed in the ‘Pack-Out’ tab by clicking on the ‘Release’ button for any order with the status ‘Packed-Out’.

**DOWNLOAD A BATCH PROTOCOL**

Once a manufacturing order has been set to the status ‘Manufactured’, you can download a batch protocol by clicking on the following icon in the ‘Actions’ column of the manufacturing orders list.

The batch protocol is a complete snapshot of your manufacturing order, including the batch ticket, dispense list and associated raw materials documents (e.g. CoA, SDS) and a report in PDF format. Double-click on the downloaded .zip file to open a folder containing the files and report.
The batch protocol report can be located by looking for the file name that begins with the product’s title, such as:
Nourishing_Skin_Cream-1.01_Batch_Report_123-456-789.pdf

DEVELOPMENT BATCHES (R&D SAMPLES)

INTRODUCTION

The development batches feature of Product Manager enables R&D teams to manage samples produced, with full testing, quality assurance management and traceability. The development batch feature functions in a similar way to manufacturing orders, with the following key differences:

- select any formula (draft or production) with any approval status
- full control of which raw materials to dispense, including parents
- enter amounts required in g/ml for small sample quantities produced
- dispense using raw materials with ‘sample batch’ status only
- ignore inventory option during dispense
- optional, simplified pack-out stage
This section of the guide covers the functions specific to development batches. For further details, please refer to the section on manufacturing orders (see from p.133).

**ENTER METHOD OF PRODUCTION**

You can configure a unique method for Development Batches on the Formula 'Method' tab. 'Development Batches' sub-tab. By default, the method configured on the 'Method / 3.1 Manufacturing Orders' tab is used for development batches as well.

You can add the same parameters to your development production method as for the manufacturing method:

- Stage ID
- Stage Title
- Raw Materials
- Details
- Notes

For more information on these fields see p136. The development method stages are not associated with the Formula / 2.1 Specification tab.

Check the 'Use this version for development batches (samples) production method' checkbox to automatically use this method when producing development batches based on this Formula. This will affect your dispense list and batch ticket but won't be reflected in the Product Information File (PIF) and in the batch protocol.
Once you the formula used in a development batch, the used method locks.

To add a new method to your formula, clone the formula and add the new method to the cloned formula version to obtain traceability. You can automatically clone your formula when dispensing the development batch by selecting "Clone and Proceed".

**ORDER SEQUENCE AND APPROVAL STATUSES**

Development batches follow a similar sequence and logic as manufacturing orders, with the key differences described in this section.

1. Order setup: status - Pending (order may be deleted)
2. Configure tests: (order may be deleted)
3. Dispense the order: status - Dispensed (Dispense may be reversed or order may be deleted)
4. Produce the development batch: status - Produced (may not be reversed!)
5. Set approval status of order: status - Approved / Rejected / or custom status
6. Pack-out the order (optional): status - Packed-Out
7. Set approval status of packed-out order: Approved / Rejected / or custom status 1-3

A status change log for a development batch order is displayed in the ‘Approve’ tab of the order.

Example view in ‘Approve’ tab of development batch:
If the development batch is also packed-out, once the pack-out has been performed, further approval statuses may be applied. In the approval log of the ‘Pack-Out’ tab, only the approval statuses assigned after pack-out are displayed.

Example view of same development batch, in ‘Pack-Out’ tab:

CUSTOM STATUSES

Up to three custom statuses may be set by the Administrator in the ‘Default settings’ tab of the Product Manager global settings.

1. Approved Packed
   - Require test success
2. Released
   - Require test success
3. Reformulate
   - Require test success

Select the users which are authorized to change the approval status of development batches.
For each custom status, set whether that status may only be selected if all tests in the ‘Approve’ tab have been either passed OK, skipped or set to ‘allow OOS’. Click on ‘Save’ to apply the changes.

In the ‘Users’ field, select any users that are authorized to apply approval statuses to development batches.

Custom approval statuses may only be applied to the development batch order once it has been set to the status ‘Produced’. This means that the first three steps in the order (Pending -> Dispensed -> Produced) – and their associated statuses - cannot be changed.

**DEVELOPMENT BATCH ORDER LIST**

In the ‘Development Batches’ page, you can view a list of all development batch orders and filter the list by status. If an order has not yet been set to ‘Produced’ a batch ticket is generated.

<table>
<thead>
<tr>
<th>Status</th>
<th>Batch Ticket</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dispensed</td>
<td>![PDF icon]</td>
<td>![Actions icon]</td>
</tr>
</tbody>
</table>

Click on a PDF icon in the ‘Batch Ticket’ column to open a batch ticket which your team will require for producing the order. If any documents of the type MANU (Method of Manufacture and Storage) are associated with the formula, these are also available in the ‘Batch Ticket’ column and should be available to the production team, along with the batch ticket.

Once the order has been set to ‘Produced’, the batch ticket and any associated manufacturing documents of the type ‘MANU’ are moved to the batch protocol folder, which can be downloaded from the ‘Actions’ column:

<table>
<thead>
<tr>
<th>Released</th>
</tr>
</thead>
</table>

From the development batches list, orders with the status ‘Pending’ or ‘Dispensed’ may be deleted by clicking on the delete icon in the ‘Actions’ column. If an order has already been dispensed, you will be prompted to select whether any dispensed inventory should be returned.
ADD NEW DEVELOPMENT BATCH ORDER

To add a new development batch order, open the ‘Development Batches’ page under the menu item Production/Development Batches and click on ‘Add New’.

Select any available product and formula version to create a development batch order. Unlike manufacturing orders, you may select any formula that exists in your Product Manager account, provided you are authorized to access the associated product. If you have customer groups configured, first select a group and then select a product.

Select any formula associated with the product:

Enter the amount required. The unit of measurement is set in the product level, either by volume (L/ml) or by weight (kg/g). You may enter the amount required using either field:
Select the date due for the production of the order:

Use the ‘Additional instructions’ box to enter any details specific to the production of the batch that will be included in the batch ticket. All other details are included in the formula’s ‘Method’ tab as well as any document(s) of the type MANU (‘Method of Manufacture and Storage’) uploaded to the formula.

Enter the order details below and click on ‘Save’ to create the development batch order.

**LOCKED FORMULA COMPOSITION**

Once you dispense the first development batch order for any formula, the formula’s composition will be locked from editing. The raw material batch associations in the formula’s composition will be updated automatically, each time you dispense a new batch. Locking of the formula composition is required for traceability and ensuring the integrity of past orders based on the formula.

**TIP:**

It is good practice during R&D to create different formula versions for each change you make to a formula composition. Once you produce a sample (development batch) based on a formula version, clone that formula to a new version to apply any changes and produce any required sample based on the new formula version. This will ensure that a full and accurate history of all formula versions and associated samples are saved in your Product Manager account. If tests were run on a previous formula version that are not required to be
In case you wish to retain a copy of the original formula, upon dispense of each
development batch order, Product Manager will prompt you to optionally clone the entire
formula to a new version:

Click on ‘Clone and Proceed’ to create a full backup of the formula, including all data and
documents.

The cloned version of your production mode formula will be saved in draft mode with the
status ‘Pending’ and labelled, as shown in the following example:

Note: Unlike manufacturing orders, formulas that are only used for development batches do
not have an auto backup and restore function. We therefore recommend that you use the
clone function periodically to maintain backups of your formula.

**LOCKED RAW MATERIAL ‘UNIT OF MEASUREMENTS’**

Once you dispense the first development batch order for any formula, the used raw
materials' 'Unit of Measurement' will be locked from editing.

Locking of the raw materials’ unit of measurement is required for traceability and for
inventory management.

In order to change the unit of measurement of a raw material that is used in a development
batch, you need to add it as a new raw material.
**CONFIGURE TESTS**

Select a test group to apply to the development batch order. If a test group is associated by default with development batches QA, it will already be selected below. Select any additional test group and click on 'Configure' to configure.

Available test groups in the development batch order’s ‘Configure’ tab are those that have the following association (see under Tests/QA/Test Groups’).

- Development Batches (R&D Samples)
- Default

Printing of development batch sample labels and entering of test results are performed in the ‘Approve’ tab.

Once a development batch order has been dispensed, tests in this tab can no longer be configured.

**DISPENSE**

Select options for raw material batches and any inventory for producing the development batch.

Select any approval statuses to filter the raw materials available for dispense. If you select more than one approval status, raw materials that match any one of the statuses will be displayed.

The development batches feature provides the flexibility to choose from raw material parents only, batches only or parents or batches.
Select ‘parents only’ to ignore inventory and batches. If either option that includes batches is selected, all batches will be displayed for each raw material. You may then set the batch filters to determine which batches are listed and available for dispense.

For R&D purposes, you may have set raw material batches to the status ‘sample only’, enabling you to list only these raw materials as available for dispense.

Click on ‘Check Dispense’ button to confirm if raw materials are available for the dispense, based on any selections, as described above.

Any raw materials listed as unavailable may either not have the required approval status, or there is a problem with the batch, such as insufficient inventory.

If raw material batches are to be dispensed, you have the option to ignore inventory for each or all batches.

Click in the ‘Ignore Inventory’ checkbox in the column header to ignore inventory for all batches. If multiple batches are available for any raw material, the first batch listed will be selected.

If inventory for a batch is to be ignored, the required amount will be auto entered in the inventory field but will not be deducted from the available inventory for that raw material batch.
If there are any special instructions to be included in your dispense list, you can enter these in the space provided.

Once all raw materials are available for dispense, you may proceed with the dispense. If the 'Dispense' button is not active, check that all raw materials have been allocated.

To reverse the dispense and re-assign the status ‘Pending’ to the development batch order, click on ‘Reverse Dispense’. Reversal of the dispense is only possible while the order is in ‘Dispensed’ status. **Reversing the dispense will return any assigned inventory to the available stock.** If you do not require inventory to be returned – for example, when the dispensed materials were spoiled – you will need to delete the order from the ‘Actions’ column of the order list:
**DISPENSING LABELS**

Select a raw material/batch to generate a dispensing label as PDF which can be printed in a variety of standard Herma and Avery sizes.

Under ‘Dispensing labels’, select the required label format from the standard Hermes and Avery label templates and click on ‘Download’ to generate a PDF label that you can print using your label printing software:

**DISPENSE LIST**

Once dispensed, you'll be able to open a dispense list in PDF format, including a list of all required inventory to be dispensed, with the raw material batch number, amount to be dispensed and any special dispensing instructions. This document is also included in the batch protocol, once the development batch order has been set to the status 'Produced'.

If you do not require a full dispense list including raw materials batches, you can download a 'Quick Dispense List' at any time. This document lists the exact amount of each raw material required to be dispensed but does not include batch-level data.

**APPROVE**

Once your order has been produced, you must first set the order's status to 'Produced' and enter the date of production before you can approve the order or assign any custom status. You may also optionally update the 'Actual yield' value. Click on 'Update' to update the order status.
Enter test results for any tests that were configured in the 'Configure Tests' tab. Use the 'Actions' column to configure or enter results for a test. You can also upload documents to a test's results and download the test results as a .zip file, containing the test data in .xls format, a full PDF report and any documents that were uploaded to the test.

Select one or more test groups and then click on 'Export Test Results' to download a complete report, or 'Remove Test Group(s)' to remove the tests from the QA tab.

Once an order has been set as 'Produced' you may optionally proceed to the 'Pack-Out' tab if you wish to include any packaging set(s) in your development batch samples. Or select a further/final approval status in the 'Approve' tab.

**PACK-OUT**

Pack-out may only be performed once the development batch has been produced. Pack-out is optional for development batches and can be used if R&D samples are to be developed along with sample packaging. Select any available packaging set and enter the number of units filled and packed.

<table>
<thead>
<tr>
<th>Packaging Sets</th>
<th>No. of Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS0015 Nourishing Skin Cream 50ml</td>
<td>2.0000000</td>
</tr>
</tbody>
</table>

Click 'Add Row' to select a further packaging set. Before performing the pack-out, select whether packaging inventory should be deducted, in which case sufficient inventory must be available for each packaging item in the packaging set, otherwise a warning will be displayed.

Click 'Pack Out' to proceed. This step cannot be undone!
Assign any further approval status to the packed-out development batch.

**DEVELOPMENT BATCH PROTOCOLS**

Batch protocols are required for maintaining batch traceability and are available to download from the development batch orders list, once an order has reached the stage ‘Produced’.

These files are downloadable in .zip format and include all raw material test data, SDS and CoA documents, batch ticket, dispense lists (raw materials and packaging) and a detailed PDF report describing the development batch. The file can be downloaded from the ‘Actions’ column once an order has been produced.

**MATERIAL REQUIREMENTS PLANNING (MRP)**

**INTRODUCTION**

Product Manager includes tools for managing your materials inventory based on future production requirements. This section describes the features and tools available under the Production/MRP menu item in Product Manager. Other advanced materials and inventory management features are described in the sections of this guide covering raw materials (see p.22) and packaging (see p.46).
**SETTING UP PRODUCT MANAGER FOR MRP**

To utilize the MRP features of Product Manager, you’ll need to first schedule manufacturing orders (see p.133) and/or development batch orders (see p.154) with the status ‘Pending’. These orders represent scheduled production requirements. Set the ‘amount required’ and ‘date due’ for each order, enabling accurate materials requirements planning for any stated timeframe. Please refer to the respective section of this guide for details of how to create production orders.

View of a pending manufacturing order:

<table>
<thead>
<tr>
<th>Order No.</th>
<th>Batch No.</th>
<th>SAP ID</th>
<th>Date Due</th>
<th>Date Manufactured</th>
<th>Product</th>
<th>Formula</th>
<th>Retained Samples</th>
<th>Amt Required</th>
<th>Actual Yield</th>
<th>Status</th>
<th>Batch Ticket</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>M00139</td>
<td>3423425423</td>
<td></td>
<td>21 May 2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**RAW MATERIALS MRP**

This feature enables accurate planning of raw materials inventory required for your scheduled production, showing the required inventory for each raw material, the amount available and the amount required to be purchased to fulfill all planned production orders. Various export options, including .csv enable integration with third-party applications.

To generate the report, firstly select the required products. Click ‘all’ to select all. If you have any customer groups configured, you can also select products per customer. For any list of products displayed, click on a product in the left column to add, or in the right column to remove. Options also exist for selecting or deselecting all.

Select whether the report should include manufacturing orders, development batch orders, or both. Select ‘include sample raw materials’ if any inventory associated with sample raw materials should be included.
Select from which raw material batches any available inventory should be calculated. By default, the ‘Approved’ status is selected, so that inventory is only counted from approved batches. Remove all statuses to count inventory for all batches, regardless of approval status, or add any combination of approval statuses.

Select the required reporting timeframe, based on the ‘Date due’ for each pending manufacturing order. Select ‘all’ to include all pending orders or enter a start and end date using the calendar selection.

Click on the ‘Show only required’ checkbox if you only require reporting of raw materials inventory where there is a shortfall.

VIEW REPORT

Based on the report criteria you have set, a list of all raw materials will be displayed, listed by trade name and part code/ID. Each order associated with the raw material is listed, along with the required amount.

Under the ‘Inventory’ column of the report, the ‘Total Amt’ displays the total required amount of the raw material for all listed orders. The ‘Available’ value is the amount of inventory currently held, and the ‘Required’ value shows the difference i.e. the minimum amount that must be purchased.
Once you have confirmed that the data displayed in the report view covers your requirements, you can export the data in csv, xls or pdf file formats. Select ‘show totals only’ for a simplified report version where individual orders are omitted and only the totals for each raw material are included. The ‘list by order’ option will generate a full report.

For integration with other applications, we recommended using the csv version and selecting the ‘show totals only’ export option. This will provide you with a csv data structure as per the following example:

<table>
<thead>
<tr>
<th>Trade Name</th>
<th>Part Code/ID</th>
<th>Total Amount</th>
<th>Available</th>
<th>Required</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABIES ALBA LEAF OIL</td>
<td>90028-76-5</td>
<td>108.6418667</td>
<td>112.4692</td>
<td>5.7</td>
<td>L</td>
</tr>
<tr>
<td>ABIES ALBA LEAF WAX</td>
<td>90028-76-5</td>
<td>24.44444</td>
<td>915.556</td>
<td>2.9</td>
<td>kg</td>
</tr>
<tr>
<td>Almond Oil (Organic)</td>
<td>OILS80</td>
<td>10</td>
<td>0</td>
<td>10</td>
<td>L</td>
</tr>
<tr>
<td>Avocado Oil Refined</td>
<td>OIL686</td>
<td>0.45</td>
<td>0</td>
<td>0.45</td>
<td>L</td>
</tr>
<tr>
<td>Calendula Flower Oil</td>
<td>8001-21-6</td>
<td>2.1439296</td>
<td>0</td>
<td>2.14393</td>
<td>L</td>
</tr>
<tr>
<td>Cetyl alcohol 30/70</td>
<td>36653-82-4</td>
<td>2.382144</td>
<td>0</td>
<td>2.382144</td>
<td>L</td>
</tr>
</tbody>
</table>

Note: You will need to remove the lines preceding the main data in the csv, which includes a report summary.

**Packaging MRP**

Reporting of required packaging materials inventory for planned manufacturing orders functions almost identically to raw materials MRP (see from p.168). Click on the menu item ‘Production/MRP’ and then on the ‘Packaging’ tab to access this feature:
Use this tab to generate a report of all required packaging materials for planned manufacturing orders.

Note: MRP packaging reporting does not include development batch orders.

**SETUP OF THE ‘PENDING’ MANUFACTURING ORDERS**

First create manufacturing orders with the status ‘Pending’, entering the no. of units of associated packaging sets to be filled for each order and the date due. These orders represent your future production requirements. If this method of entering the manufacturing order requirements is not used, MRP packaging reporting for an order will not be possible.

If a pending manufacturing order has a required packaging set entered as partially filled e.g. 10.5 units of a 1L container, the required packaging sets will be rounded up to 11 total packaging sets required.

In the above example of a manufacturing order, each unit size is associated with a packaging set. The number of units required for each is entered. Set the required date of manufacture and then save the order.

**SELECT REPORTING REQUIREMENTS**

In the ‘Packaging’ MRP tab, select the required products. Click ‘all’ to select all. If you have any customer groups configured, you can also select products per customer. For any list of products displayed, click on a product in the left column to add, or in the right column to remove.
Select which approval statuses for packaging item batches should be included in the MRP report.

Select the required reporting timeframe, based on the ‘Date due’ for each pending manufacturing order. Select ‘all’ to include all pending orders or enter a start and end date using the calendar selection.

Click on the ‘Show only required’ checkbox if you only require reporting of packaging inventory where there is a shortfall.

**EXPORT PACKAGING MRP DATA**

Once you have confirmed that the data displayed in the report view covers your requirements, you can export the data in csv, xls or pdf file formats.

Select ‘show totals only’ for a simplified report version where individual orders are omitted and only the totals for each packaging item are included. The ‘list by order’ option will generate a full report.
For integration with other applications, we recommended using the csv version and selecting the ‘show totals only’ export option.

**Production Reports**

This feature is available under the menu item Production/Production Reports.

Generate a production report for any selected products across a required timeframe, based on the date of manufacture of each production or development batch order. The report includes orders which have been produced/manufactured but does not include any rejected orders. A summary of each product (total yield and units filled) as well as details of each order can be exported in csv, pdf or xls file formats.

Select the products to be include in the production report. If you use customer groups, these can also be filtered and selected by group:

Select the reporting period for the production report by selecting a start and end date or select ‘all’ to cover all production. These dates are based on the **date of manufacture** set for each order.
**Export Production Data**

A summary of each product (total amount manufactured, and units filled) as well as details of each order can be exported in csv, pdf or xls file formats. If any of the export buttons are not active, no data exists based upon the current product selection and/or time frame.
QA & Testing

Introduction

Note: please first read the Getting Started Guide before you proceed with the steps explained in this document.

By following the steps in this guide, you will be able to:

1. create tests
2. build checklists for quality management (see from p.193 in this section of the guide)
3. create test groups, including stability tests
4. configure tests
5. print barcoded sample labels
6. enter test results and export test data
7. perform repeat tests for any existing test
8. manage quality assurance for the following workflows:
   a. raw materials
   b. packaging items
   c. manufacturing orders
   d. formulas
   e. retained samples (from manufactured product batches)
   f. development batches (R&D samples)

Import Demo Data

You can import demo test groups and tests into your Product Manager account to quickly learn how these can be configured for a variety of uses – from laboratory testing to repeat test schedules and stability/challenge type tests. You can also import these test groups and further adapt them for your own use.

Basic Principles of Testing

You can use Product Manager to easily create tests and test groups that can be associated with any one of six workflow areas where quality assurance (QA) is required. If these are correctly setup and adhered to, tighter integration with compliance and good manufacturing practices (GMP) will be achieved, ensuring that fewer mistakes are made, while improving workflow efficiency and providing traceability of user actions and approval status changes.
You can create tests that can be configured for the following areas of your workflow:

1. raw materials
2. packaging items
3. manufacturing orders
4. formulas
5. retained samples
6. development batches (R&D samples)

This section of the guide describes how to create tests which can be associated with one or more test groups. Stability-type test groups can also be built.

Note: For building QA checklists, see from p.193 in this section of the guide.

Test groups can be associated with any of the above described workflow areas. Each test is configured for use for an item (such as manufacturing order or raw material batch), requiring it to be passed (or confirmed as ‘done’) before approval can be set.

**User Permissions for Testing and QA**

In the Global Settings/Departments, the Administrator can set the following settings for any department:

Use the ‘Assign/edit tests for other test operators’ to restrict or allow the logged in user’s access to other test operators’ tests in the Test Schedule and QA tabs. If ‘Deny’ is selected, the logged in user will be set as the default test operator when configuring a test. They will not be able to assign a different user as the test operator and will not be able to open or delete any tests not assigned to them.

These settings can be applied in addition to access permissions for the individual QA tabs for formulas, raw materials, etc.
TESTS

The first step is to create tests. Tests function like templates, enabling you to enter generic instructions so that this information will always be included with each instance of the test, thus saving you time and ensuring consistency of standards and procedures. Once a test is applied to a specific instance (such as a raw material batch or formula), any further required test parameters and specific information are added during the test configuration (see p.185).

Note: For building and managing QA checklist tests, see from p.193 in this section of the guide. The information in the following sub-sections apply to all other test-types.

Once a test has been applied to any item’s QA in your Product Manager account, it can no longer be edited. To make changes, first clone the test and apply the changes to the new version.

One or more tests must be associated with a test group before they can be applied (see p.182). In the ‘Tests’ tab, the ‘Where Used’ column shows the number of items for each workflow area where that test is applied.

Click on a link to open a list of the items associated with that test.

In the ‘Result’ column you can see the result for each test. If ‘Configure’ is shown, click in the ‘Items’ column to open the item to complete the configuration (see p.185).
CREATE A TEST

To create a test, select ‘Add New’ under the menu ‘Tests/QA’.

A Test ID will be automatically assigned. You then need to complete the following fields:

**TIP:**
Enter only generic information that applies to all instances of this test. At the configuration stage, you will be able to enter any specific data required for conducting the test. This section of the guide also explains how to create tests with editable parameters, which can be selected/entered at the configuration stage.

**Analysis** – enter the test title by describing briefly what kind of analysis should be performed.

**Test result type** – select from one of the following options:

i.) **Checklist** - build checklists for quality management, such as for SoP and WI routines that must be adhered to. See from p.193 in this section of the guide.

ii.) **Numeric** – the test requires a laboratory or other value that must fall within a specified minimum and maximum range, as defined at the configuration stage. Selection of this test type requires completion of the fields ‘Value measured’ and ‘Precision’ (see below). An example of this test type would be a pH test for testing if your product batch falls within an acceptable pH range.

iii.) **Pass/Fail** – select this option for tests that do not require any values to be entered. An example would be a test to check for visible signs of damage to a received raw material from your Supplier.

iv.) **Done** – tests of this type require the operator to check a checkbox to indicate that a required action has been performed. This test provides the flexibility to create single tasks that are integrated into the QA. If you have multiple task requiring confirmation of their completion, it is recommended to use the Checklist type test - see from p.193 in this section of the guide.

**Testing period** - set whether the test should be performed only **once**, or if a test schedule should be used for **multiple** tests.
Setting a schedule

If you select ‘multiple’ for the ‘Testing period’, you can click on the ‘Schedule’ button to set the test schedule intervals. This is useful for tests such as stability tests (see p.200), enabling you to set the number of days between tests.

The first test will be assumed to be performed on the first test date, as entered when the test is configured. Further tests dates will then be auto-calculated, based on the date of the first test to be performed in the schedule.

For each test, enter the ‘Interval after initial test’ and then select the time period i.e. ‘Days’, ‘Weeks’ or ‘Months’.

For example, if you set intervals of 1 day, 1 week, 2 weeks and 1 month and set the first test date during the configuration stage to 1st June 2018, subsequent tests will be scheduled as follows.

1. 2nd June 2018 (start + 1 day)
2. 8th June 2018 (start + 7 days)
3. 15th June 2018 (start + 14 days)
4. 1st July 2018 (start + 30 days)

Click on ‘Add’ to add the test to the test schedule and ‘Save’ to save the schedule.

**Test parameters** – Use this space to stipulate any parameters for the test that should be used when entering the test results and to further define how the test should be performed.

**Are parameters configurable?** Use the following setting to determine whether at the configuration stage, the parameters are editable. The default value ‘Yes’ provides flexibility to stipulate variable technical data that must be followed by the operator when performing the test. It also enables easy copy/paste of selected product or formula values into the parameters field, as explained later in this section.

For example, use this setting to create a viscosity test. Enter the generic instructions for the test in the 'Test method' field and use the 'Test parameters' field to specify the spindle size and speed. Select the setting ‘Yes’ to make this editable during configuration of the test, enabling you to set the exact spindle and speed specifications for the test. If your test is to be performed at scheduled intervals, you can optionally set different parameters for each test instance.

To save time, enter any generic text in the 'Test parameters' field so that you do not need to re-type this during configuration.

**EXAMPLE:**
Enter the following test parameter in the **test setup**:

Spindle speed: 00,000 – 00,000 Tbar XX Initial: 0,000 – 0,000 Tbar XX

At test configuration, the editable parameters can then be finalized by simply adding the correct values, highlighted below in **bold**:

Spindle speed: **45,000 – 55,000** Tbar **TA** Initial: **15,000 – 20,000** Tbar **TB**

**Test method** – describe in detail any **generic** instructions for how the test must be performed. Use the **Test parameters** field to allow setting of instructions or technical parameters that can be editable at the configuration stage.

**Custom statuses** – you may add up to custom 10 statuses, which may be selected when entering the test’s results. This can be useful for example, when managing stability tests (see p.200).
In the ‘ID’ field, enter two alphanumeric characters, such as 01, AA, or A1. In the ‘Description’ field, enter a description of up to 20 characters. Click ‘Add’ to enter the custom status and remember to click ‘Save’ to save the data.

For ease of reference, the ID and description will be displayed as a key beneath the test results.

Example of key associated with test results:

<table>
<thead>
<tr>
<th>50°C</th>
<th>Aspect T0047</th>
<th>OK</th>
<th>Failed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Color T0048</td>
<td>OK</td>
<td>OK</td>
<td></td>
</tr>
<tr>
<td>Smell T0049</td>
<td>OK</td>
<td>OK</td>
<td></td>
</tr>
<tr>
<td>pH T0050</td>
<td>OK</td>
<td>OK</td>
<td></td>
</tr>
</tbody>
</table>

CR = Creaming | T5 = Oil droplets | OS = Oil separation | NH = Not homogenous | SD = Sediments

Note: It is not necessary to create the statuses ‘OK’, ‘Failed’, ‘OOS’ or ‘skipped’ since these are default values used by Product Manager.

**Value measured** – only required for numeric test type. Enter the value that must be measured, such as °C, pH or g/ml.

**Precision** – only required for numeric test type. Determines how accurate the entered results may be. For example, select ‘0’ if the result should be entered as a whole number, or ‘4’ if the accuracy can be entered to a precision of four decimal places e.g. 1.1234

**Minimum sample size** – optional field to enter a minimum required sample size for conducting the test on a sample.

**Sample unit** – only required if a value has been entered in the ‘Minimum sample size’ field. Use this to determine the unit of measurement referred to, such as fl oz or g.

**Test results require comment** – select ‘Yes’ if the test operator must enter a comment in the test results.

**Comments for operator** – use this optional field for any additional instructions or comments intended for the test operator.
TIP: During the configuration of the test for each instance it is used, you can still delete any tests from the schedule.

EDITING/DELETING TESTS

If a test has been configured for use with any item, in the test view the fields will be disabled, preventing editing.

Example of a locked test:

![Locked Test Example](image)

CLONE A TEST

Use the following action to clone an existing test to a new version. This can be useful if you need to create a range of tests based upon a generic ‘template’ version that you first create, or for updating a test as a new version, where the original is locked from editing due to being associated with an item.

The new test will be auto-assigned the next available test ID in the sequence T0001, T0002, etc.

Remember to correctly assign the new test version to a new or unassigned test group.

TEST GROUPS

Use the following tab under the main menu item ‘Tests/QA’ to create and manage your test groups:
Only test groups can be assigned to your QA workflow. If you only wish to use a single test it must still be added to a test group.

To create a test group, click on ‘Add New’ in the ‘Test Groups’ tab. A test group ID will be automatically assigned.

Enter a short title for the test group.

Included tests - select the tests that you want to include with the test group. Click in the adjacent field to view a list of available tests and click on any test to add it. Repeat until you have added all tests that are to be associated with the test group.

Note: a test may be associated with more than one test group.

Association – select which of the following areas of your QA workflow you wish to apply the test group to.
Once you have selected a QA workflow by checking one of the checkboxes in the left column, selecting the ‘Default’ checkbox means that for any new item created, the associated tests will be pre-selected ready for configuring in that item’s QA tab. If the default checkbox is unchecked, the test group will be available for manual selection, but will not be pre-loaded.

**Note:** Test groups set to be selected by default will only be applied to newly created items (such as raw material batches, formulas, etc.). The QA for existing items in your account will not be affected. You may however open an existing item’s QA and manually select that test group.

**Comments** – enter any comments for the test group. These are not included in the test information visible to the test operator or in any test reports or exported data.

Click on ‘Save’ to save the test group.

**EDITING/DELETING TEST GROUPS**

Like tests, test groups that are already in use are locked. The only change you may make to a locked test group is the association of the test group with the QA workflows. Any test groups that are already associated with an item will not be affected by this change.

View of a locked test group:
If you need to make other changes to a test group, first clone it and apply the required changes to the new version:

**Configuring Tests**

Test groups that have been set as ‘default’ for a workflow area will be pre-loaded in an item’s QA, for each new item you create, or clone.

**Note:** For building and managing QA checklist tests, see from p.193 in this section of the guide. The information in the following sub-sections apply to all other test-types.

To manually add a test group to an item’s QA, select it as follows and click on the ‘Add’ button to configure the test(s).

A configuration panel will open with all tests in the group displayed, ready for configuration. The data you need to enter will depend on the test type. All tests require setting a **date due** and assignment of a **test operator**. Some tests may require further configuration.
For fast configuration of multiple tests, you can use the following settings to assign a Due date and test operator to all tests in the group. Click in the left field to select a date when the test (or ‘Start Date’ of the first test in a schedule) is due.

Note – if you do not see other test operators available for selection when configuring tests, you may have a single-user account, or your Administrator may have restricted your permissions via the ‘Departments’ settings. In either case, you will be assigned by default as the test operator.

TIP: Click in the date field to access the date picker. To navigate to the required month or year, click in the calendar header to toggle between views:

If any test has a schedule, the assigned ‘Due date’ will be the start date of the first test, upon which all scheduled repeat tests are based. All tests in the schedule will then be auto calculated based on this date. Once these dates are configured for the first time, they may not be changed!

TIP: You can use the ‘Apply to all Tests’ function to firstly set the date and operator for all tests and then adjust any individual tests that require different settings.
If a test group is set to be associated **by default** with a QA workflow area, any new item created will have the test group pre-loaded in the QA, from where you can select to configure either an individual test, or the entire test group.

To configure an entire test group enables use of the 'quick configuration' tool to apply a start date and test operator to all tests, as well as using the 'fill down' tool for tests in a schedule (see below). You must enter all required data for each test in the test group before saving a closing the test panel is possible.

**Note** – If a test in a test group has already had results entered, it cannot be further configured.

**SET IF TEST BLOCKS APPROVAL**

During configuration of each test, use the following setting to determine whether the test must be completed for selection of 'Approved' to be possible for that item.

![Checkbox to prevent approval in QA until test is completed and passed OK](image)

**Note:** For QA checklist tests the above option is not available. Whether a checklist item blocks approval is set in the checklist test - see from p.193 in this section of the guide.

By default, the checkboxes are checked and the test will prevent approval of the item unless it is passed OK, skipped or 'allow OOS'. If a test should not block the approval, uncheck the checkbox. This will make it possible to enter the test result for that test later, after initial approval of the item.

**TEST PARAMETERS**

If the test parameters are set to 'configurable' for a test applied to a formula, manufacturing order or retained sample, you can edit or enter the details in the parameters column when configuring the test for that item.

For convenience, a menu exists above the parameters field, with some key values that you may have entered for the product and its formula. This enables quick copy/paste of a selected value into the parameters field, enabling configuration of many tests without requiring look-up of a value elsewhere.
In the above example, the calculated relative daily exposure value for a formula is selected in the test configuration.

Example of calculated relative daily exposure value, in the formula’s ‘Safety’ tab.

Once selected, click on ‘Add’ to add this value to the parameters field below.

You can add further values, which are inserted at the top of the data in the parameters field.

If the test type is ‘numeric’, as shown in the example below, you need to enter the Min., Target and Max. values to define the acceptable range within which the result of the test must fall if the test is to be passed successfully.
Fill-Down Feature For Repeat Tests

For repeat tests in a schedule, the fill-down action enables fast configuration of each test. Enter the data for the first instance of the test series, including the operator. Click on the 'Fill down data' button to copy the data in the first test to other tests in the same test schedule.

Note, that for scheduled tests, the auto-calculated ‘Date due’ is preserved for each test. After configuring these dates may not be changed! To reset the entire schedule, remove the test group from the QA and add it again.

Click on ‘Save’ to complete the configuration of the test(s).

Any configured test is now available for entering the test results and the assigned operator will see the test as 'Queued' in their Test Schedule, viewable on their dashboard and from the 'Test Schedule' tab under the main menu item ‘Tests’.

Configure Default Tests

If a test group is set as default for a QA workflow, every new item created will have those tests loaded in the QA tab, queued for configuration.

The tests in the test group will be listed automatically in the item’s QA tab, automatically preventing approval of the item unless those tests or checks have been completed successfully.

Configuration of the default tests in the group is the same as described above. Click on the Configure Group link of the first test in the group to open the test group configuration panel or click in the ‘Actions’ column to configure a single test.
**REMOVE TESTS**

You can remove individual tests that have been applied to an item, by using the delete icon in the ‘Actions’ column.

To remove an entire test group from an item, click on the checkbox in left column, next to the first test in the group.

Once selected, the following ‘Remove Test Group(s)’ button will become activated.

Note – this action only removes the association of the selected group from the item’s QA. The test group and its tests will not be deleted from your account.
**Auto-change QA Status of Item**

In the QA tab of an item, following settings enable the item’s QA to be auto-changed on a certain date to a selected status, if all tests are not passed.

![QA status settings](image)

**Note:** the auto change of QA statuses feature is only available in the QA for the following item types:

- Raw materials
- Packaging items
- Formulas

One case where this setting can be useful is at the formula level, to set a timeout period after which the formula must be reviewed or updated, otherwise it is retired and withdrawn from production.

Another example use for this setting is an approved raw material batch where the availability for dispense can be set to ensure that it has adequate shelf life remaining. For this case, the following steps will be required:

1. Add a test of type ‘Done’ (single checkbox) to the QA. That test could be given the title for example ‘Re-approve raw material batch’
2. Click to configure the test and set the **due date** of the test to the **date when the item’s approval should be auto-changed**.
3. Confirm the selection of the **test operator**
4. Uncheck the following checkbox so that it does not block approval of the raw material batch.
5. Save the configuration.
6. In the QA tab of the raw material batch, check the following checkbox:

![Checkbox for QA test completion](image)

7. Select a required approval status that should be applied once that date arrives. It is recommended to select a custom status (set by your admin), such as 'Re-approval required'.

![Status selection](image)

8. Click on 'Save' to apply.

Assuming that the current status of the raw material batch is 'Approved' and we set that on 1 June 2022, at 24:00 local time (as the day ends) the status will be switched to 'Re-approval required', if that test (or any other test in the QA) is not passed OK/skipped or 'allow OOS' on that day.
TIP:
Set up a custom task associated with the item directly on the item’s QA tab by clicking on “Add Custom Task”. The item will be automatically associated with the task.

In this way it will be possible to update the test’s status on that day while in the status ‘due’ to avoid the trigger of a QA status change at 24:00 on that day. It is also recommended to routinely check for items with a specific status that was auto-changed (e.g., ‘Re-approval required’) to ensure that these items can be reset to ‘Approved’ if required.

QA CHECKLISTS

Tests of the type ‘checklist’ can be created, enabling fast implementation of checklists that are integral to quality management of an item. This is useful for example, for standard operating procedures in the lab or production areas, ensuring that no step is forgotten and providing full traceability of required user actions.

Unlike standard checklists (see from p.98) such as for Projects, QA checklists have the following capabilities:

- Incomplete checks can block approval of an item
- Set one-time instance, or repeat on schedule

ADD TEST OF TYPE ‘CHECKLIST’

Under the menu item ‘Tests’ click on ‘Add New’. Under ‘Analysis’ enter a title for the checklist:

```
Analysis  
```

Received raw materials

Select the test type ‘Checklist’.
Select which of the following options apply. These determine whether the checklist when applied to an item’s QA, can have checklist items added or deleted. Leave both options unchecked to build a fixed checklist.

To manage the checklist items, click on the following button:

Under ‘Item’ enter a description for a checklist item and click ‘Add:

For each checklist item added, set whether a comment must be entered by the test operator before it can be checked off. Select ‘Required for Approval’ if the checklist item should block approval in the QA if it is not checked by the operator.

Note: There may be other checklist items or tests in an item’s QA that also block approval. Repeat the procedure to add all checklist items and then click on ‘Save’ to return to the test.
Add any optional comments for the operator:

Click on 'Save' in the test to save the new test.

**CONFIGURE CHECKLIST SCHEDULES**

QA checklists can be set to repeat on a schedule. This is useful for routine procedures such as maintenance or cleaning schedules.

In the ‘Manage Checklist Items’ view, the following options are available for setting the checklist to auto-repeat on a required schedule:

Select whether the checklist should be a single instance (no schedule) or set to repeat on a schedule. If all required checks are not passed for that instance of the checklist, the item’s status will revert to the default status once the due date expires.

The default option is ‘None (single instance of checklist)’ and the checklist does not work on a schedule. To run the checklist, select a required interval such as ‘Daily’ or ‘Weekly’, or set any required interval in days.

**ADD CHECKLIST TO TEST GROUP**
Under Tests/QA /Test Groups, add the Checklist test to any new or existing test group. Test groups that are already in use may not be edited. If adding a new test group, enter a title for the group.

You may add other tests to the same test group, if required. Select which item type the test group should be associated with. Select ‘Default’ if the test group should be pre-loaded in the item’s QA when first added.

Add any optional comments and click on ‘Save’ to save the test group.

**CONFIGURE CHECKLIST IN ITEM’S QA**

If the test group that includes the checklist is set by default to be loaded with all new items of that type, the checklist test will already be displayed in any item’s QA that was added after the test group was created. Or manually select the test group in the required item’s QA tab and click ‘Add’, as follows:

Complete the configuration by selecting a ‘Date due’ and a test operator, who is responsible for quality management of the item.

**MANAGE CHECKLIST IN QA**

Once configured, a user with rights to access the item’s QA may click on ‘Manage Checklist’ to manage the checklist:
Click in the ‘Done’ column to mark an item as completed and enter any comment. Click outside of the comments window to save the comments.

Depending on the test options set (see p.193), it may be possible to perform the following actions:

1. Delete a checklist item
2. Add a checklist item

Use the 'Actions' column to delete a checklist item (if allowed) and to view a change log.
Click on the drag icon or on any checklist item row to rearrange the order of the checklist items.

Click on 'Back to QA' to return to the item’s QA tab.

**MANAGE CHECKLIST IN QA – SCHEDULED CHECKLISTS**

If a checklist has been set to repeat on a schedule (see p.195), in the manage checklists view in the item’s QA tab, the currently active checklist is always displayed by default. The status of the currently active checklist determines whether that item’s QA status may be set to ‘Approved’. If all required checklist items are checked off as ‘Done’ and no other tests are blocking approval, the ‘Approved’ status is selectable. This makes it possible for a previous checklist instance to be incomplete, but no longer block approval.

To view previous checklists in the schedule, click in the ‘View historical’ field to open a scrollable calendar view. Any dates where a past checklist is associated will be available for selection:

![Calendar view](image)

**Note**: Checklists set to a schedule may be configured for Manufacturing and Development Sample orders, but only one instance will be applied, and any schedule ignored.

At midnight 0:00 on the day that a new checklist is scheduled, the new checklist instance will be displayed in the Manage Checklist view, ready for input.

**Note**: In the global settings, the admin user may set a local time based on +/- hours compared to UTC time. This ensures that checklists are generated at midnight 0:00 based on your local time. For further details on setting a local time, see the Getting Started guide.

If the previous instance of the checklist had checklist items that were required and had not been completed at that time, the item’s QA status will now be auto set to the default status, even if all other tests in the QA are not blocking approval.
The auto status changes are as follows:

- **Formula**: Approved → Pending
- **Retained Samples**: Approved → Pending
- **Raw Material**: Approved → Quarantined
- **Packaging Item**: Approved → Quarantined

**Note:** Applying scheduled checklist items can therefore affect availability of items for selection. For example, if a checklist times-out without the required checks confirmed, a raw material batch that was previously approved will be set to ‘Quarantined’ and no longer available for dispense in a Manufacturing Order. Similarly, an approved, production-mode formula will be set to ‘Pending’ status and will not be available for selection for manufacturing.

For the period that the checklist is currently active (e.g., for one day, one week, etc.), the status of this checklist determines whether the item can be set to approved. If the item’s status was ‘Approved’ at the time that the new checklist was generated, it will remain approved for the duration that the checklist is active. If all required checklist items are checked during the active period, once the next checklist is generated approval will remain unchanged.

**MANAGE CHECKLIST IN QA – EXPORT CHECKLISTS**

If a checklist is associated with the QA for an item, click on ‘Export Checklist Tests’ to export the checklist data to .pdf and .xlsx formats.

If multiple checklists are associated with the QA, these will be combined in the same files.
You can also export a single QA checklist as .xls or .pdf. Click on the ‘Export test results’ icon in the ‘Actions’ column for the required checklist test item.

<table>
<thead>
<tr>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>[2/5] Due</td>
<td>🔎</td>
</tr>
</tbody>
</table>

If you only require a test result status for the checklist, select the test group to which the checklist test belongs and then click on the following button:

In the exported test results, the checklist status will be displayed as e.g. [5/7] meaning that 5 from 7 checks were checked as ‘Done’.

**Stability Test Groups**

Stability test groups enable easy overview and fast configuration of tests that are repeated on a schedule, such as preservative challenge tests. They are displayed in a single view, making it easy for the test operator to see when a test is due and the status of all tests in the group. This overview of the test data can also be exported to PDF and XLS in a similar format. All tests belonging to the stability test groups can also be managed in the same way as normal tests by accessing the test groups and tests from the main list in the item’s QA tab.

<table>
<thead>
<tr>
<th>Start</th>
<th>1 Day</th>
<th>2 Days</th>
<th>3 Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>28 Feb 2018</td>
<td>1 Mar 2018</td>
<td>3 Mar 2018</td>
<td>5 Mar 2018</td>
</tr>
<tr>
<td>OK</td>
<td>OK</td>
<td>Ed</td>
<td></td>
</tr>
<tr>
<td>2.80 pH</td>
<td>2.90 pH</td>
<td>3.10 pH</td>
<td></td>
</tr>
</tbody>
</table>

Stability test groups can be applied to the following QA workflows:
Stability test groups are composed of test **groups** and thus act as a kind of ‘super test group’. Let’s build an example stability test group using the following tests and apply it to a retained sample.

**Prepare the Tests**

To build the above stability test group, we require 4 tests – Aspect, Color, Smell and pH. For information on setting up tests, see p.177. Each of the tests needs to have the ’Testing period’ set to ’Multiple’ and the required schedule configured. For the above example, all tests are scheduled to be repeated after 1 week, 2 weeks, 3 weeks and 4 weeks.

Example schedule for test ‘Aspect’:
Remember for each test, to add any custom statuses required, enabling these to be selected in addition to the results entered for the test.

**BUILD TEST GROUPS**

We now need to build 4 test groups, each consisting of the 4 tests – Aspect, Color, Smell and pH. For information on setting up test groups, see p.182. Create a new test group called ‘RT’ and add the 4 tests. It is not necessary to check the ‘Associations’ checkboxes, unless you also wish to also use this test group as a standalone test group, as well as part of the stability test group.

Example ‘RT’ test group:

You can now clone the ‘RT’ test group three times and rename each test group 7°C, 40°C and 50°C.

Cloning the ‘RT’ test group:

**BUILD STABILITY TEST GROUP**

In the tab ‘Test Groups’, click on ‘Add Stability Test Group’.
Enter a title for the stability test group and in 'Included tests/test groups', click in the field to select the 4 test groups that you created in step 2.

Under ‘Association’, check any workflow areas to associate with the stability test. In this case we will select ‘Retained Samples’.

**CONFIGURE STABILITY TEST GROUP**

Open a retained sample and from the 'Select test group' select the stability test group and click on 'Add' to open the configuration panel. For information on configuring tests, see p.185.

To save the stability test group, you must configure at least one test in the group. Click on one of the following icons in the configuration panel to configure the tests.
For fast configuration of all tests in the stability group, you can set a start date and assign the test operator and then click on ‘Apply to all Tests’.

Now that a start date is set for the first test in each schedule, the intervals for the repeat tests are auto calculated and populated in the configuration panel. For each series of tests, use the ‘fill down’ function to quickly populate all related tests with the configuration details you enter for the first test in the schedule.

**ENTER STABILITY TEST DATA**

Once you have configured at least one stability test group for the item’s QA, click on the ‘Stability Tests’ button.
Each test group is listed vertically. Along the horizontal axis the schedule is displayed in ‘Days’. If tests in the test groups do not have the same schedule, some cells may be blank to show that for that test, no test falls on that date.

The test intervals are calculated and displayed in days, based upon the date of the first test, which is represented by the ‘Start’ column. Tests which are pending results are shown by a clickable link and the date the test is due.

<table>
<thead>
<tr>
<th>Color Stab Group</th>
<th>Start</th>
<th>1 Day</th>
<th>2 Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>pH STAB 1 T0031</td>
<td>27 Apr 2018</td>
<td>28 Apr 2018</td>
<td></td>
</tr>
<tr>
<td>pH STAB 2 T0032</td>
<td>27 Apr 2018</td>
<td>28 Apr 2018</td>
<td>29 Apr 2018</td>
</tr>
<tr>
<td>pH STAB 3 T0033</td>
<td>27 Apr 2018</td>
<td>28 Apr 2018</td>
<td>29 Apr 2018</td>
</tr>
</tbody>
</table>

If a test is due in the future, results may not be entered and only the date is displayed, without a link.

Click on a link to enter the results for a test. Click ‘Back to QA’ to return from the stability test view to the item’s QA page or tab.

Note: Once you have entered test results in the stability overview, if you wish to adjust these results, you will need to open that test from the main list in the QA and click in the ‘Actions’ column for the test you wish to edit the results.

**UPLOAD DOCUMENTS TO STABILITY TEST RESULTS**

To upload a document to the stability test result, make a note of the ‘Test ID’, ‘Test Group ID’ and ‘Date Due’ and use the ‘Back to QA’ button to return to the item’s QA. Locate that test in the test list and upload the document from there.
**Export Stability Test Data**

Stability test data can be exported in the same way as all other tests. For more information, see p.212. You may also export the stability test data as a simplified overview format, by clicking on the following 'Export Stability Tests' button.

Note: The data in this format is only intended as an overview, showing the abbreviated results for each test at each interval in the test schedule. Detailed results such as numeric values, parameters and operator comments are not included. If this information is required, it is recommended that you also export the full test data to supplement this overview, as described from p.212.

*Example view of stability test data in PDF format, including numerical results and custom results codes:*

Example stability test group report (without detailed results):
Example view of stability test data in XLS format:

<table>
<thead>
<tr>
<th>TG0030</th>
<th>Stability Test Group Demo</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Start</td>
</tr>
<tr>
<td><strong>RT</strong></td>
<td></td>
</tr>
<tr>
<td>Aspect T0047</td>
<td>OK</td>
</tr>
<tr>
<td>Color T0048</td>
<td>OK</td>
</tr>
<tr>
<td>Smell T0049</td>
<td>OK</td>
</tr>
<tr>
<td>pH T0050</td>
<td>OK</td>
</tr>
<tr>
<td><strong>7°C</strong></td>
<td></td>
</tr>
<tr>
<td>Aspect T0047</td>
<td>OK</td>
</tr>
<tr>
<td>Color T0048</td>
<td>OK</td>
</tr>
<tr>
<td>Smell T0049</td>
<td>OK</td>
</tr>
<tr>
<td>pH T0050</td>
<td>OK</td>
</tr>
<tr>
<td><strong>40°C</strong></td>
<td></td>
</tr>
<tr>
<td>Aspect T0047</td>
<td>OK</td>
</tr>
<tr>
<td>Color T0048</td>
<td>OK</td>
</tr>
<tr>
<td>Smell T0049</td>
<td>OK</td>
</tr>
<tr>
<td>pH T0050</td>
<td>OK</td>
</tr>
<tr>
<td><strong>50°C</strong></td>
<td></td>
</tr>
<tr>
<td>Aspect T0047</td>
<td>OK</td>
</tr>
<tr>
<td>Color T0048</td>
<td>OK</td>
</tr>
<tr>
<td>Smell T0049</td>
<td>OK</td>
</tr>
<tr>
<td>pH T0050</td>
<td>OK</td>
</tr>
</tbody>
</table>

CR = Creaming | TS = Oil droplets | OS = Oil separation | NH = Not homogenous | SD = Sediments
This section described how to build a Test Group for generating CoA documents. For details on how to generate a CoA for any item, see from p.95.

The Test Group “CoA” can be built to create a Certificate of Analysis (CoA). Click on the following button to build a new CoA Test Group:

Add the tests or analyses required, in the order they should appear in the CoA. In the 'Header Details' enter any default text that should appear in the first section of the CoA, before the test data. In the 'Special Instructions' (e.g., storage instructions) and 'Additional Information' (e.g., legal disclaimer) fields, enter any default text. The content in all three of these fields can be further edited in the item's QA prior to generating the CoA.

In the CoA Test Group, these default texts can be formatted using the text editor, including entering simple table layouts – useful for example, for creating a template for a signature section in the footer of the CoA report.

Select which item types should be associated with this CoA Group. Only one CoA test group may be selected as default for any item type. If this option is not available, open the CoA Test Group that is set to default for any item type, uncheck that option and it will be then available to assign to a different CoA Test Group.
Click on ‘Save’ to save the CoA Test Group.
For details on how to generate a CoA for any item, see from p.95.

**TEST SCHEDULE**

When logged into Product Manager you can view a list of any tests that you are assigned to as an operator, that are either ‘pending’ or ‘due’. You can access the Test Schedule in two ways:

**DASHBOARD**

In your dashboard view, you’ll find the Test Schedule by scrolling down the page:

<table>
<thead>
<tr>
<th>Date due</th>
<th>Operator</th>
<th>Test ID</th>
<th>Item</th>
<th>Analysis</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
</table>

**TEST MENU**

Click on the main menu item ‘Tests/QA’ and then on the ‘Test Schedule’ tab.

**SEARCH**

Use the search box to search for a scheduled test, per the item it is associated with, such as:

- trade name or Supplier batch no. (for raw materials or packaging item batches).
- product name or formula version (for formulas)
manufacturing order no. (for manufacturing order tests)

SORT BY TEST ASSOCIATION
Use the column sort icon to the sort the list per the type of association, i.e.

<table>
<thead>
<tr>
<th>Test ID</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>T0002</td>
<td>Raw Material</td>
</tr>
</tbody>
</table>

SORT BY DUE DATE
Use the following column sort icon to sort the list in order of due date, either in ascending or descending order.

Date Due | Operator
---------|------------
31 Dec 2022 | Emma Jane O'Neil

In the 'Actions' column, click on the following icon to enter the test results for that test.

To configure the test, click on the following:

Use the following icon to open the test at the associated QA tab, where you have the option to upload documents to the test or enter test results for the entire group of tests.
**PRINT BARCODED SAMPLE LABELS**

If any test group requires the taking of sample, sample labels can be easily printed in a variety of standard Avery and Herma label formats. Use these labels for clearly identifying the sample in its container and the test group to be applied.

Each test group has an automatically generated **sample ID** following the sequence S00001, S00002, etc. This means that for each instance of a test group applied to an QA workflow area (such a raw material batch or formula version), has a unique sample ID. Therefore, sample group ID S00001 may exist in **both** manufacturing and retained sample QAs but will only be present once in any one QA workflow.

To generate a sample label, click on **one** checkbox to select the required test group.

Note – if you select more than one checkbox, the label cannot be generated.

In the ‘Select label format’ menu, select the required label format and then click on ‘Download’.

![Label generation interface](image-url)
Your sample label will be generated as a PDF to the exact document dimensions selected. This file should be opened within your browser (or default PDF reader). If your browser is configured otherwise, check in the browser’s downloads list and your default download folder for the PDF file.

**ENTER TEST RESULTS AND EXPORT TEST DATA**

*Note:* for managing QA checklists, see from p. 193.

To enter a single test result, click in the ‘Actions’ column on the following icon for any test:

![Actions Icon](image)

To enter results for multiple tests, click on the following button above the tests panel.

![Exported Selected Test Group(s) Data](image)  ![Test Results](image)

Enter the date that the test was performed. You may only select a date that is today’s date or in the past.

Before you can save a test’s results you will be prompted for any required information or action, depending on the test type. For numeric tests, enter the result in the ‘Result’ column.
If the value falls between the Min. and Max. values configured for the test, the test will automatically be passed and labelled 'OK'.

<table>
<thead>
<tr>
<th>Min.</th>
<th>Target</th>
<th>Max.</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.8</td>
<td>1.0</td>
<td>1.1</td>
<td>g/ml</td>
</tr>
</tbody>
</table>

If a test has custom statuses available, you may select from available statuses.

Any selected statuses will be shown in conjunction with the result 'OK' or 'Failed', as well as 'OOS' for 'out of specification' or a hyphen '-' if the test was skipped.

For numeric type tests, the test operator may override an out of specification (OOS) result by checking the 'Accept OOS' checkbox, resulting in the test being passed.

If a test should be skipped, the operator must check the 'Skip' checkbox. The test will not be passed but will be ignored during the QA process when approval is dependent upon all associated tests being passed successfully.

**Upload Documents to Test Results**

You can upload documents to any test’s results by clicking on the ‘Upload document(s)’ icon in the ‘Actions’ column of the tests list, in the QA for an item.
This function can be useful for example, for uploading test results received from a laboratory or for photographs or other evidence required as part of the test procedure.

Click on the above icon to open a document upload panel. Drag and drop one or more documents to the upload zone or click to select the file(s) on your hard drive using your file browser. The maximum allowed file size is 2Mb.

Click on 'Upload' to upload the document.

Once uploaded you will see the documents associated with the test results when viewing the test results panel.
EXTRACT RESULTS
In the same ‘Actions’ column, you can also export a test’s results.

To export all results for one or more test groups, first select the test group(s):

If at least one test group is selected, the following ‘Export Test Results’ button will be activated which you can then click to generate the test result report.

Results will be exported as a .zip file, with the results generated as a .XLS and .PDF file. Any documents uploaded to the test’s results will also be included in the zipped folder.
QA STATUSES

The following default QA statuses can be selected for these types of items:

- **Raw materials** (for details, see p.218)
  - Quarantined
  - Approved
  - Rejected
  - Destruct

- **Packaging items** (for details, see p.218)
  - Quarantined
  - Approved
  - Rejected
  - Destruct

- **Retained samples** (see p.224)
  - Pending
  - Approved
  - OOS
  - Recall
  - Retest due

- **Formulas** (see p.226)
  - Pending
  - Approved
• **Projects** (see p.232)
  
  - Open
  - Approved
  - Closed

**Manufacturing orders** (product batches) and **development batches** (R&D samples) have default statuses that are auto-assigned, as each stage of the production process is reached. For details of QA statuses, please see p.220 and p.154 respectively.

In each type of item, the status ‘Approved’ performs a special role. For example, only formulas with ‘Approved’ status can be set to production mode or selected for manufacturing. Raw material batches must be set to ‘Approved’ to be available for dispense.

**CUSTOM QA STATUSES**

If you are logged in as the Administrator for your Cosmetri account, you can set custom statuses in the ‘Global Settings’, under ‘Custom QA Statuses’, for formulas, raw materials, retained samples and packaging items.

```
Raw Materials
1. Return to supplier
2. R&D version
```

Enter a text label for up to three custom statuses for each item type. Each status has a default color for the badge that is displayed once that status is selected.

![Return to supplier](image)

The custom approval statuses for projects is found in the section below.
You may update a text label for a status that you have created, but if the status is used for any item in your account, you cannot leave the label blank, otherwise the following error will be displayed.

1. [Custom status is in use and cannot be blank, Please enter a value.]

**QA: RAW MATERIALS AND PACKAGING ITEMS**

**SETUP OF TEST GROUPS**

You can set any test group, including stability testing (see p.200), to be selectable for a raw material batch by selecting the following setting for the test group.

Check the ‘Default’ checkbox to apply the test group automatically to all new raw material batches. All tests associated with the test group will then appear in the ‘Quality Assurance’ tab of the new raw material batch, ready for configuring.

Check as the Administrator under ‘Global Settings’ under ‘Default Settings’. If you require approval of raw materials and packaging item batches before they can be used for manufacturing and pack-out of a manufacturing order, set the switch to ‘ON’ and then click on ‘Save’ to save the settings.
To manage QA for a raw material batch, open the batch and click on the ‘Quality Assurance’ tab.

If the raw material batch was created after you set up any default test group, the test(s) belonging to that test group(s) will be displayed in this tab, ready for configuration.

The status of the raw material batch will be ‘Quarantined’, since tests associated with the batch have not yet been passed. The various statuses are shown in the following menu, with the ‘Approved’ status unavailable for selection, until all tests have been passed.

**Batch Labels**

If you require a raw material batch label for any test group, select the required test group and then select the target label format, as shown below.

A QA label can also be printed. This label enables you to clearly identify received raw material batches and their current QA status. Select the required label format and click on ‘Download’ to generate the label in PDF format.
QA: MANUFACTURING ORDERS

Note: Before following the steps in this section, please refer to the Manufacturing section of this guide for an explanation of how to create and manage manufacturing orders.

SETUP OF TEST GROUPS

You can set any test group, to be selectable for manufacturing orders by selecting the following setting for the test group.

![Checkbox options](image)

Note: For stability test groups (see p.200), the above ‘Manufacturing’ option is not available. Select instead ‘Retained Samples’ and enter your retained samples in the ‘Approve’ tab of the manufacturing order.

Check the ‘Default’ checkbox to apply the test group automatically to all new manufacturing orders. All tests associated with the test group will then appear in the ‘Configure Tests’ tab of the manufacturing order, ready for configuring.

Note: Applying the default association for the test group will not affect existing manufacturing orders. To apply a test group to an existing manufacturing order with the status ‘Pending’, manually select the test group from the ‘Configure’ tab and then click on ‘Add’ to configure the tests in the selected test group.

![Test group selection](image)

Quality assurance for manufacturing orders is managed through a logical sequence of statuses that are applied at each stage of the manufacturing process, as shown in the following diagram:
Setting an order to the status ‘Rejected’ cannot be reversed!
The status of each manufacturing order is displayed in the orders list, in the ‘Status’ column.

<table>
<thead>
<tr>
<th>Amt Required</th>
<th>Actual Yield</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.000 kg</td>
<td>15.5 kg</td>
<td>Approved</td>
</tr>
<tr>
<td>500.000 kg</td>
<td>500.000 kg</td>
<td>Manufactured</td>
</tr>
<tr>
<td>100.000 L</td>
<td>100.06 L</td>
<td>Manufactured</td>
</tr>
<tr>
<td>150.000 L</td>
<td></td>
<td>Pending</td>
</tr>
<tr>
<td>20.000 L</td>
<td>20.000 L</td>
<td>Released</td>
</tr>
</tbody>
</table>

Each status change is logged in the ‘Approve’ tab, along with the user ID and date/time.
**PENDING**

The status is auto-assigned when the order is first created. This is the only status during which an order can still be deleted from the manufacturing orders list. There are no options for manually assigning other statuses to this order.

**DISPENSED**

The status is auto-assigned once the order has been dispensed. At this stage, the order can only be set to ‘Rejected’ or ‘Manufactured’ from the ‘Approve’ tab. It is also possible to use the ‘Return Selected to Inventory’ function in the ‘Pack-Out’ tab to undo the dispense and return the order to the status ‘Pending’.

The status ‘Approve’ cannot be selected until the order has been set to ‘Manufactured’.

**MANUFACTURED**

The status is manually assigned in the ‘Approve’ tab once an order has the status ‘Dispensed’ (see above). To assign this status, enter the date and time of manufacture and the actual yield that was achieved. Click on ‘Update’ to apply the status change.
An order with the status ‘Manufactured’ may be set to ‘Approved’ or ‘Rejected’.

**TIP:**
You can update the actual yield value later using the same setting, or in the ‘Pack-Out’ tab, for example after you have filled your containers.

**APPROVED**

The status ‘Approved’ is manually assigned in the ‘Approve’ tab once an order has the status ‘Manufactured’. **Manufacturing orders must have been approved before they can be packed-out and released.** Approved orders may only be set to the status ‘Rejected’.

Manufacturing orders can only be set to the status ‘Approved’ once any configured tests displayed in the ‘Approve’ tab of the order have been passed. If a test has been marked in the test results as ‘Skip’ or ‘accept out of specification (OOS)’ the test is deemed as passed and a green ‘OK’ symbol will be displayed:

<table>
<thead>
<tr>
<th>Analysis</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-process contamination</td>
<td>OK</td>
<td></td>
</tr>
<tr>
<td>In-process anomalies</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>

**PACKED-OUT**

This status is auto-assigned once the order has been packed in the ‘Pack-Out’ tab. Packed-out orders may be assigned two possible statuses – i). ‘Rejected’ (from the ‘Approve’ tab, or ii). ‘Released’ (from the ‘Pack-Out’ tab).

**RELEASED**

This status is manually assigned once the order has the status ‘Packed-Out’ and is the final approval stage of the QA process. This status is assigned by clicking on the ‘Release’ button in the ‘Pack-Out’ tab, as follows:
Once a manufacturing order is set to 'Released', no further status changes are possible.

**QA: RETAINED SAMPLES**

If you use Product Manager’s manufacturing features to enter your manufacturing orders and manage your product batches, you can create retained samples which have their own QA applied, such as for stability testing (see p.200). You can apply tests to samples of the bulk product, as well as test the stability of the product batch in its packaging.

Any number of retained samples may be associated with a manufacturing order. To enter a retained sample, the order must have been set to ‘Manufactured’, or a later approval stage. Enter the amount of the sample retained in g/ml and check ‘Deduct from actual yield’ to subtract this amount from the amount available for pack-out.

Click on ‘Add Sample’ to create the sample. To open a retained sample, click on a sample ID either in the ‘Approve’ tab of the manufacturing order or in the orders list.

Test groups associated with ‘Retained Samples’ QA workflow are available to select for retained samples.
Note: For stability test groups (see p.200) for testing samples of your manufactured product batches, select ‘Retained Samples’.

QA for retained samples functions similarly to other QA workflows, with one key difference: it is possible to set the status to ‘Approved’ provided all tests due up to the current date have been passed ‘OK’. Once a test is due, the status will automatically be reset to ‘Pending’ until all tests up to today’s date have been successfully passed. Until then, selection of the status ‘Approved’ will not be possible.

**APPROVAL STATUSES**

The following default approval statuses are available for retained samples.

- **Pending**
- **Approved**
- **OOS**
- **Recall**
- **RETEST DUE**

In the Global Settings, up to three further custom statuses can also be set.

Retained Samples

1. Resample

Each status change is logged:

<table>
<thead>
<tr>
<th>Date</th>
<th>Confirmed by</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/10/2017</td>
<td>Emma J. O'Neil</td>
<td>Approved</td>
</tr>
</tbody>
</table>

If a product/formula is selected in the quick links menu, under ‘Tests’ you can open the QA tab for any retained samples that have tests associated with them for manufactured
batches of that selected product. The number of tests is displayed in brackets after the sample ID.

QA: FORMULAS

Quality assurance and testing can be applied to your formulas - useful for R&D. Each of your formulas can have two levels of status applied:

1. Formula mode: either 'Draft' or 'Production'

   By default, all new or cloned formulas are set to 'Draft' mode. To set a formula to 'Production' mode, open the formula and click on the 'Set to Production Mode' button:

   ![Set to Production Mode button]

   The purpose of the 'Production' mode is as follows:

   i). auto-activation of the Compliance Checker
   ii). only 'Production' mode formulas may be selected for manufacturing
   iii). a product information file (PIF) may be generated.

2. QA status

   Both 'Draft' and 'Production' mode formulas may have either of the following QA statuses applied: 'Pending', 'Rejected', 'Discontinued' and 'Approved'.

To set a formula to ‘Approved’ status, any associated tests must be passed. Only production formulas with the status ‘Approved’ are available for manufacturing.

You can manage quality assurance for your formulas using the ‘QA’ tab within the formula view.

### PENDING

This is the default status of the formula, when first created or cloned from an existing formula version.

### REJECTED

This status can be useful for R&D and for compliance management.

### DISCONTINUED

Use this status to indicate that a formula is no longer in use – for example, for a production mode formula that is no longer used for manufacture.

### APPROVED

This status can be useful for R&D and for compliance management. If tests are associated with the formula, they must be passed before this status can be selected. Only production mode formulas with the status ‘Approved’ may be selected for manufacturing.

**Setup of Test Groups**

You can set any test group, including stability testing (see p.200) to be selectable for a formula by selecting the following setting for the test group:

![Setting Test Group](image)

Check the ‘Default’ checkbox to apply the test group automatically to all new formulas. All tests associated with the test group will then appear in the ‘QA’ tab of the formula, ready for configuring.

**Note:** Applying the default association for the test group will not affect existing formulas.

To apply a test group to an existing formula, manually select the test group from the ‘QA’ tab and then click on ‘Add’ to configure the tests:
**STATUS DISPLAY AND USER STATUS CHANGE LOG**

The status of each formula is displayed in the product list, in the ‘Status / Tasks’ column. Click on the [+1 next to a product title, to view the formula data and statuses:

![Formula status change log](image)

Each QA status change is logged in the formula’s ‘QA’ tab, along with the user ID and date/time:

**FORMULA COMPOSITION APPROVAL**

A further level of QA is applied at formula-level and is found in the formula’s ‘Formula Composition’ tab, as a sub-tab of ‘Specification’:
The checkbox located below the formula’s composition is used for confirming the accuracy of the data entered for the formula, such as the raw materials and their assigned functions as well as %w/w percentage concentration by weight values.

Each time the formula’s ‘Save’ button is activated in the ‘Composition’ tab, the checkbox will be unchecked, requiring confirmation. If the checkbox remains unchecked, an associated task will be displayed in the ‘Tasks’ tab, prompting the user to confirm the accuracy of the formula composition.

Click on the ‘Confirm’ button to save the confirmation:

A user confirmation log is stored, allowing you to view a history of when each confirmation was actioned and by whom. Click on ‘View user confirmation log’ to open this panel:
TIP:
If the formula is used for manufacturing, once any manufacturing order has been dispensed, the formula composition can no longer be changed. If you need to make changes to the formula’s composition, you will need to clone the existing formula and apply any required changes. You are advised to check with your safety assessor as to whether the changes constitute a re-formulation, which may have consequences for the compliance of your formula.

QA: Products

The quality management of the Product are managed in the product’s ‘Approve’ tab. However, testing and quality assurance should be conducted for any required formula associated with the product, under the Formula’s ‘QA’ tab. Product approval is normally reserved for final approval of the product with its approved formula and all associated items – such as the raw materials, packaging components and packaging sets. Approval at the product level enables the complete set of items to be approved and locked from editing.

Product Approval Status

By default, products have no approval statuses associated. Products cannot be associated with QA tests.

TIP:
In the ‘Master Formula’ section on the Product ‘Approve’ tab you can find an overview of all your formulas associated with your product. You can see the ‘Mode’ and ‘Status’ for each formula, that can help you decide the approval level of the product.

Default statuses are the following:
You can configure further custom product approval statuses in the Global Admin Settings 'Custom Settings' tab, when logged in as the Admin user.
Click on the 'Log' action to show history approval data.

Use the following checkboxes to lock the product tabs from editing. These settings restrict editing, even if the logged in user has rights to do so, as set in the Department Settings. Click on the 'Update Lock Settings' button to apply the selected 'Product approval status' and locked product tab settings.

**Master Formula**

In the Master Formula section, you can select any one formula associated with the product as a ‘Master’ formula. Click on ‘Set Master Formula’ to apply the selection. Optionally, you can open each of the formulas by clicking on the version number.
A ‘Master’ formula has the following properties:

- You can activate the Compliance Checker and export the Dossier/PIF regardless of the mode or status.
- The formula is marked as ‘Master’ across the application for easier identification.
- ‘Master’ Formula cannot be deleted.

You can also lock the ‘Master’ formula tabs to prevent from editing. These settings overwrite the Department Settings and are valid for all users.

If you are using the Manufacturing module, it is not recommended to lock the Formula ‘Method’ tab. You may still need update the expected yield and density values and production instructions on this tab, upon which the Manufacturing Orders and Development Batches batch tickets.

**QA: Projects**

A project’s approval status is set in the ‘Approve’ tab of the project. Testing and quality assurance should be conducted for each product/formula associated with the project.
When all associated products are approved and the project is complete, the project can be set to 'Closed' or to another custom status that you set (see p.216).

Only authorized users may change a project's status or assign products to a project. To authorize users, the Administrator must access the 'Projects' section of the 'Global Settings / Default Settings'. Click in the 'Users' field to select the users you wish to provide authorization.

The default status for new projects is 'Open'. Once the project details have been agreed and the project is ready to proceed, an authorized user can set the project to 'Approved' in the 'Approve' tab.

Each status change is logged:
Once a project is set to ‘Approved’, the authorized user can select any products to associate with the project, by clicking in the following field:

Only products associated with the project’s customer group will be available for selection. A product may only be associated with one project. If a product is already associated with a project, it must first be de-associated from the other project.

Select the product(s) and then click on ‘Save’.

Once a product is selected and associated with the project, the authorized user can optionally clone the project data to the product’s ‘Requirements’ tab.

This is often the stage at which a company would then create a custom task associated with the project and instruct the head of R&D to check and further refine the requirements in the product-level and proceed with developing the product formula(s).

**QA: DEVELOPMENT SAMPLES**

Please refer to the section from p.155 for details of managing order statuses, testing and QA for development batches.
SAFETY ASSESSMENT CALCULATIONS

INTRODUCTION

Product Manager includes a safety assessments feature, enabling you to:

- manage toxicological and safety data at ingredient and raw material level
- enter safety data for the product and formula
- auto-calculate SED and MoS values
- export all data required for inclusion in your safety reports/assessments

IMPORTANT

Use of cosmetri’s safety assessment features does not discharge you of any legal requirement to provide a safety assessment from a qualified cosmetic safety assessor. Please check with the relevant regulatory body for the country or region regarding your legal and regulatory obligations.

In this guide, we assume that you have entered an accurate formula composition, which is a prerequisite for entering your safety data and generating the safety assessment. If you require support with entering your formula, please see the Getting Started Guide (PDF).

FORMULA SAFETY TAB

Under formula ‘Specification’, you can access a ‘Safety’ tab where safety data can be managed:
This tab is divided into two parts:

1. Product/formula safety data
2. Ingredient safety data

**PRODUCT/FORMULA SAFETY DATA**

In the top section of the 'Safety' tab, you can enter and manage the key data for your product/formula, as follows:

**PAO (Period After Opening)**

Shelf-life of product after opening (in months). This is the same value that can also be edited in the 'Formula/Info' tab. Click on the pencil icon to edit this.

**Type of exposure**

Type of exposure of product, either ‘Leave-on’ or ‘Rinse Off’. This is the same value that can also be edited in the 'Product/Information' tab. Click on the pencil icon to edit this.

**pH**

Enter a pH for the product. You can also enter a range.

**Dry matter content**

Enter the dry matter content as a percentage value.

**Viscosity**

Enter the viscosity of the product, including the unit of measurement used. You can also enter a range, e.g. 18,000 - 20,000 cps.

**Microbial control**

Enter the microbial control value for the product, in cfu/g.

**Density**

Enter the density of the product, in g/ml. This is the same value that can also be edited in the 'Formula/Method' tab. Click on the pencil icon to edit this. If the product is measured by **weight**, the default density of 1.000 g/ml will be displayed, and the value cannot be edited.

**Appearance and odor**

Enter any safety notes pertaining to the appearance and odor of the finished product. Drag the bottom-right corner of the field to expand.

**Calculated relative daily exposure**
Enter the calculated relative daily exposure of the product in mg/kg bw/day. Click on 'Show SCCS Notes / Guidance' next to this field to display a reference of SCCS values for typical product types. This value is used to calculate the Systemic Exposure Dose (SED) value, which therefore influences the calculated Margin of Safety (MoS) value.

**Estimated daily amount applied**

This is the total amount in grams, estimated to be applied in a 24-hour period. It is used to calculate (based on %w/w) the estimated amount applied, per each ingredient. Use the adjacent button to access some typical exposure levels recommended by the SCCS for different product types.

**Safety assessment notes (published with safety report)**

Enter any safety assessment notes for the product (published with safety report). Drag the bottom-right corner of the field to expand.

**Comments (not published with safety report):**

Use this field to keep any notes that you do not wish to be included in the safety report, such as instructions to other team members, notes or reminders.

Remember to click on 'Save' to save your data!

---

**INGREDIENT SAFETY DATA**

In the lower section of the Safety tab, you can manage the safety data for each ingredient in the formula. You only need to enter data in Product Manager once for any ingredient, so the
next time you use the same ingredient in another formula, the required safety data will already be present.

Ingredient vs Raw Material Safety Data

In most cases, you will enter safety data at the ingredient level. The ‘Safety’ tab lists a breakdown of your formula’s ingredients, including aggregating the %w/w of ingredients present in multi-chemical raw materials.

To access the ingredient data (chemical properties, GHS, safety and toxicity) for an ingredient listed in the ‘Safety’ tab, click on ingredient name:

AQUA

SODIUM LAURETH SULFATE

SODIUM CHLORIDE

This opens the ingredient panel. The full details of this panel are now described in the section ‘Ingredient-Level Data’.

Using this window, you can view and/or edit the following ingredient safety data required for safety calculations and typical values required for safety assessments:

LD₅₀

Lethal dose (LD₅₀) is the amount of an ingested substance that kills 50 percent of a test sample. It is expressed in mg or g /kg of body weight. Enter this value including the unit of measurement, e.g. 12600 mg/kg

NO(A)EL

NO(A)EL stands for ‘no-observed adverse effect level’ and is a value measured in mg/kg bw/day required for calculating the Margin of Safety (MoS). It is determined or proposed by qualified personnel (pharmacologist, toxicologist) depending on the study, drug indications and its pharmacological therapeutics side/adverse effects. NO(A)EL could be defined as ‘the highest experimental point that is without adverse effect.’

Dermal absorption

This value is required for calculation of the SED (Systemic Exposure Dosage) and therefore also for the MoS value. Dermal (percutaneous, skin) absorption is a global term that describes the transport of chemicals from the outer surface of the skin both into the skin and into the systemic circulation. This figure is expressed as a percentage. If you do not know this value and wish to assume the ‘worst case scenario’, enter 100 in the field to represent 100% i.e. total percutaneous absorption of the ingredient.

Ingredient notes

Keep comprehensive notes for the ingredient:
Ingredient data/notes

- Molar mass: 288.38 g/mol
- Density: 1.05 g/cm³
- Abbreviations: SLES
- PubChem CID: 23665884

On 28 Jun 2018 12:37 UTC Emma Smith, My Company Ltd wrote:

**Key data SLES**

Formula: CH3(CH2)10CH2(OCH2CH2)nOSO3Na
Molar mass: 288.38 g/mol
Density: 1.05 g/cm³
Abbreviations: SLES
PubChem CID: 23665884

On 28 Jun 2018 12:34 UTC Emma Smith, My Company Ltd wrote:

**SLES notes (1)**

Production
SLES is prepared by ethoxylation of dodecyl alcohol. The resulting ethoxylate is converted to a half ester of sulfuric acid, which is neutralized by conversion to the sod... [*]
Safety notes

Use this field to enter any safety notes for the ingredient that you require in your exported safety report XLS, including impurities and any other relevant data. Drag the bottom-right corner of the text field to expand the window.

Remember to click on ‘Save’ to save your data!

SUMMARY & SAFETY CALCULATIONS

Having confirmed that your ingredient safety data (see Ingredient Safety Data) is correct for all ingredients in the formula, you can view a complete list of each ingredient and key safety data, including the following:

<table>
<thead>
<tr>
<th>Ingredient Safety Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ingredient</td>
</tr>
<tr>
<td>PERFUME OIL, ALCOHOL</td>
</tr>
<tr>
<td>AHA</td>
</tr>
<tr>
<td>WATER, DEIONIZED</td>
</tr>
<tr>
<td>MACADAMIA TERNIFLORA OIL</td>
</tr>
</tbody>
</table>

Ingredient
The INCI (International Nomenclature of Cosmetic Ingredients) name of the ingredient, as taken from CosIng.

CAS No.
Chemical Abstracts Service (CAS) number associated with the ingredient, as taken from CosIng.

Min. and Max. %w/w
Calculated by Product Manager, these are the same values present in the ingredient breakdown displayed in the ‘Specification/Compliance’ tab and required for calculation of the SED (Systemic Exposure Dosage).

Function
Displays the functions performed by the ingredient in the formula, as set in the ‘Specification/Composition’ tab. If functions have been set at the raw material level (for multi-chemical raw materials), these are automatically included with each ingredient.

CLP
Displays any CLP restriction codes entered at ingredient level.
Max. Daily Amt (g)
Calculation for each ingredient in the formula, the maximum daily amount (in grams) applied.

Amount of substance applied each day (g) = max. %w/w of ingredient \* estimated daily amount of product applied (g) /100

LD$_{50}$$\text{LD}_{50}$
Lethal dose value (LD$_{50}$) as mg/kg or mg/kg/bw, entered at ingredient level.

NO(A)EL
No-observed adverse effect level (NO(A)EL) in mg/kg bw/day, entered at ingredient level.

Systemic Exposure Dosage (SED)
The SED value is calculated using the following SCCS approved formula:

\[
\text{SED} = \frac{A \times C \times \text{DA}_p}{100}
\]

With:
- SED (mg/kg bw/day) = Systemic Exposure Dosage
- A (mg/kg bw/day) = Estimated daily exposure to a cosmetic product per kg body weight, based upon the amount applied and the frequency of application; see the calculated relative daily exposure levels for different cosmetic product types in Table 3
- C (%) = the Concentration of the ingredient under study in the finished cosmetic product on the application site
- DA$_p$ (%) = Dermal Absorption expressed as a percentage of the test dose assumed to be applied in real-life conditions

Margin of Safety (MoS)
The MoS is calculated as follows:

\[
\text{MoS} = \frac{\text{NO(A)EL}}{\text{SED}}
\]

If the value is <100 this will be displayed in red in the table:

<table>
<thead>
<tr>
<th>NO(A)EL</th>
<th>SED</th>
<th>MoS</th>
</tr>
</thead>
<tbody>
<tr>
<td>180</td>
<td>3.38664</td>
<td>53.15002</td>
</tr>
<tr>
<td>2500</td>
<td>2.79388</td>
<td>894.81295</td>
</tr>
<tr>
<td>150</td>
<td>0.52312</td>
<td>-</td>
</tr>
<tr>
<td>150</td>
<td>0.83300</td>
<td>180.07203</td>
</tr>
<tr>
<td>150</td>
<td>0.27156</td>
<td>552.36412</td>
</tr>
<tr>
<td>150</td>
<td>0.07330</td>
<td>2046.38472</td>
</tr>
</tbody>
</table>
RAW MATERIAL SAFETY DATA

If your formula includes multi-chemical raw materials, you may wish to include safety notes such as data on any impurities, associated with the raw material rather than its individual ingredients. These notes will be included in the exported safety data (see 'Export Safety Assessment Data'). In the 'Formula/Composition' tab, click on any raw material trade name to open the raw material at the 'Information' tab and enter the notes in the following field:

<table>
<thead>
<tr>
<th>Safety assessment notes [?]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.</td>
</tr>
<tr>
<td>Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.</td>
</tr>
</tbody>
</table>

EXPORT SAFETY ASSESSMENT DATA

Once all safety data has been entered and confirmed, you can export the entire data to a .xls (Microsoft Excel) file, for inclusion in your safety assessment. This enables you to copy/paste the required data into a template of your choice for achieving the final required layout of the document.

To export the data, click on the following button in the 'Formula/Safety' tab:

```
  5.73  0.00333  703.50475
  600  0.38984  1539.09296
```

The exported .xls file will be downloaded by your browser. Depending on your settings, you may be prompted to open or save the file. Choosing 'open' will launch the default application used for opening .xls files (such as Microsoft Excel).
Once opened, you may need to expand the width of some of the columns in the .xls spreadsheet to view the safety data:

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>PRODUCT</td>
<td>Make-up Remover</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>1</td>
<td>Formula Version</td>
<td>1.01</td>
<td>2.01</td>
<td>RD Stage 1</td>
<td>3.01</td>
</tr>
<tr>
<td>4</td>
<td>Exported By</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Date Exported</td>
<td>11/11/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>PAO</td>
<td>30 Months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>TYPE OF EXPOSURE</td>
<td>Rinse-off</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>pH</td>
<td>4.5.1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>DRY MATTER CONTENT</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>VISCOSITY</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>MICROBIAL CONTROL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>DENSITY</td>
<td>0.970 g/ml</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>APPEARANCE</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>CALCULATED</td>
<td>8.33 mg/kg bw/day</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>SAFETY ASSESSMENT NOTES</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click in a cell to view the full data in the display field, as follows:
To use the exported data in your safety reports, select any single cell or range or cells and copy the data to your clipboard. To Copy in Windows using the shortcut Command-C (copy), hold down Command, press C, then release both keys. Mac menus and keyboards often use symbols for certain keys, including the modifier keys: Command ⌘

**OTHER SAFETY-RELATED TEST DATA**

Along with the exported safety data (see ‘Export Safety Assessment Data’), any safety-related tests that you have performed such as challenge tests, can be exported for inclusion in your safety reports. Typically, these will be tests that have been applied to the formula (in the ‘Formula/QA’ tab) and for each raw material, in the ‘Quality Assurance’ tab. For detailed instructions on how to work with tests and quality control, see p.175 of this guide.

Once you have setup test groups, configured and entered your test results correctly, you can export your test data either as a single export, bundling all test data (including any attached documents) or by exporting each individual test or test group’s results.

To export test results in the QA tab, for example of the formula, first click in the first column to select the test group data you wish to export:

<table>
<thead>
<tr>
<th>Appearance: Clear liquid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Value: 4.0 maximum</td>
</tr>
<tr>
<td>Peroxide Value: 4.0 max</td>
</tr>
<tr>
<td>Specific Gravity: 1.0</td>
</tr>
<tr>
<td>Cloud Point: 4.0</td>
</tr>
<tr>
<td>Pour Point: 4.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
</tr>
</thead>
<tbody>
<tr>
<td>AQUA (150,000%) - 10%</td>
<td>Organic</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eirmod tempor</td>
<td>etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.25 Argan Oil</td>
<td>Organic</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eirmod tempor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.88 Apricot Kernel Extract</td>
<td>Organic</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eirmod tempor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.64 Argan Kernel Extract</td>
<td>Organic</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eirmod tempor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.04 Dehydroacetic Acid</td>
<td>Organic</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eirmod tempor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.68 Sucrose Laurate</td>
<td>Organic</td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eirmod tempor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Now click on the following button:

![Button Image]

To export individual test data, click in the ‘Actions’ column for the test:

<table>
<thead>
<tr>
<th>Analysis</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signs of damage to outer packaging</td>
<td>OK</td>
<td>![Actions Icon]</td>
</tr>
</tbody>
</table>

The downloaded .zip file will include a test report in both .xls and .pdf format and includes any documents uploaded to the test results.

## TASKS MANAGEMENT

### INTRODUCTION

Product Manager includes task management features which are integrated with compliance workflow for managing your cosmetics and personal care products. There are two types of task:

1. Compliance Checker (Auto) Tasks
2. These tasks are auto generated by Product Manager once you set a formula to production status or manually activate the Product Manager Compliance Checker. This type of task is always associated with a specific action that is required, such as entering a value in a field, or uploading a missing compliance document. Compliance Checker tasks cannot be deleted.

For an introduction in managing compliance tasks, see the Getting Started Guide.

3. Custom Tasks

4. You can create custom tasks in Product Manager, optionally assigning this task to a specific item, such as a project, checklist, product, raw material or manufacturing order. Custom tasks can be configured with a range of options – see p.252. A custom task associated with a product formula can also be included in the Compliance Checker tasks lists, which affects your product’s overall percentage completion score.

NOTES/REMINDERS

Set yourself a reminder or send a note or reminder to another user. A user can then reply, enabling threaded conversations. Each note/reminder must be associated with a task (custom or Compliance Checker), ensuring that communication stays on topic. Once a task is closed, the notes and reminders are also closed.

USER PERMISSIONS

Log in as the Administrator to set department permissions in the global settings, to determine which logged in users may view tasks for other users and to completely hide all tasks from users associated with the department.

An additional department setting hides all tasks in the formula’s ‘Tasks’ tab:

DASHBOARD AND TASKS LIST

Upon login to Product Manager you will see your dashboard, where you can view your tasks and notes/reminders.

Click on the following icon in the header, to return to your dashboard:
Or click on the top, main menu item:

Under the following tab on the dashboard you can view your notes/reminders:

Click on ‘Tasks’ to view tasks. By default, the tasks assigned to you will be displayed. Use the following setting to filter the tasks list by showing Compliance Checker or custom tasks, or both.

To view tasks associated with a specific product, use the ‘Select product’ setting.
This will display tasks associated with the product, as well as any tasks associated with any specific item associated with the product when the task was created.

You can filter the tasks list by Type of task association:

EXAMPLE:

When creating a custom task, if you optionally selected ‘Sensitive Skin Massage or Body Oil’ and the formula 1.02, you can then drill-down to select one of the ingredients associated with the formula, such as ‘SANDALWOOD OIL’. The task association will be displayed as follows:

Sensitive Skin Massage or Body Oil / 1.02 / SANDALWOOD OIL | 198-345/5

The task will be displayed in the list when filtering by the type ‘Ingredient’ and also when selecting the product ‘Sensitive Skin Massage or Body Oil’.

Use the following setting to view tasks assigned to a different user:
**TIP:**
The list filters can be used in combination, for example to display all custom tasks for a specific product assigned to a selected user.

**MY TASKS LIST**
You can also access the 'My Tasks' list from the main user menu, top right:

- **Add Custom Task**
- **Emma J. Smith**

- **My Profile**
- **My Tasks**
- **Plan**
- **Billing**
- **Global Settings**

**FORMULA TASKS TAB**
In the formula view, click on 'Tasks' to view any Compliance Checker or custom tasks associated with the currently selected product/formula.

**VIEW/HIDE COMPLETED TASKS**
For both Compliance Checker and custom tasks, you can use the following button to hide tasks that are set to 'Completed':
**COMPLIANCE CHECKER TASKS**

You can activate the *Compliance Checker* to auto-generate compliance tasks for a product and formula by one of the following methods:

i. **set a draft mode formula to **production mode**

   ![Set to Production Mode](image)

   ![Clone Formula](image)

   ![New](image)

   ![Delete](image)

ii. **check the ‘Activate Compliance Checker’ checkbox in the formula’s ‘Tasks’ tab**

   ![Activate Compliance Checker](image)

iii. **In the Products list, for any formula with **draft status**, click on the following icon in the ‘Actions’ column:**

   ![Draft](image)

   ![Pending](image)

   ![Compliance Checker](image)

iv. **On the Product / 7. Approve tab, for the selected ‘MASTER’ Formula:**

   ![Generate PIF/Dossier](image)

   ![Dossier/PIF Export](image)

   ![PIF Export (ASEAN)](image)
By default, these tasks will be assigned to the **logged in user** who activates the *Compliance Checker*.

*Auto-generated Compliance Checker* tasks can have the status **Pending** or **Complete**.

<table>
<thead>
<tr>
<th>Date Due</th>
<th>Task Owner</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Elaine Johnson</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Elaine Johnson</td>
<td>Completed</td>
<td></td>
</tr>
</tbody>
</table>

Set a **Due Date** by clicking in that column, if you wish to prioritize certain tasks, enabling you to sort tasks in the task list view according to date. You may not set a due date for a task that is in the past, based on the current date.
TIP:
Click on the month at the top to toggle the calendar by month or year view, for fast setting of dates:

Compliance Checker tasks cannot be deleted. They can however be hidden from the tasks list by filtering the list to hide completed tasks, once the action associated with that task has been successfully performed.

CUSTOM TASKS – PRODUCTS/FORMULAS

Custom tasks can be set for almost any type of task that you require in a typical workflow when managing cosmetics or personal care products. Create a custom task as follows:

i. Top right, next to the user menu:

ii. In the Dashboard Tasks list:
iii. In the formula’s ‘Tasks’ tab. Using this button will pre-select the active product/formula to be associated with the new task:

**CUSTOM TASKS STATUSES**

You can create up to three custom task statuses. To configure these, you need to login as the Administrator and under ‘Global Settings’, scroll down to ‘Custom Task Statuses’.

**TIP:**
After clicking ‘Save’ refresh your browser to make these new task statuses available. Just hit the control (Ctrl) and F5 button at the same time (Windows). Or, if you are using a Mac - Apple+R or Cmd+R.
Once set, these custom task statuses will be made available when working with custom tasks, as shown below:

**CREATE A CUSTOM TASK**

1. Click on ‘Add Custom Task’
2. Next to ‘Task’, enter a task title or short instruction
3. Select a **status** for the task
4. Enter a **due date**
5. Assign the task to a **user** (assignee)

**SET AN ASSOCIATION**

You can optionally associate the custom task with a **product** and associated **formula**. Once a formula is selected, further options will be displayed, enabling you to associate the task with a specific item associated with that selected product formula. You can associate a custom task with one of the following types of item:

- Raw material parent or batch
- Ingredient
- Manufacturing order
- Packaging set
- Packaging item parent or batch
- Test group, applied to the formula QA tab
Test, applied to the formula QA tab
- Document uploaded to either the product, formula or raw material

Click on the following checkbox:

If you select a product, a further list will appear below with the associated formula versions:

To drill-down to a third level, select one item from the third list which appears once you have selected a formula version:
If the item you wish to select is in a long list, you can enter a string at the top of that selection menu to filter the list. Click on an item in the filtered list to select it.

If you select an association and want to change this, click on ‘Reset Task Association’

Click on ‘Save’ to save the new custom task.

**INCLUDE CUSTOM TASK IN COMPLIANCE CHECKER**

A custom task that has been associated with a product and formula can also be included as a ‘Compliance task’. The task will be displayed in the Formula/Tasks tab when viewing Compliance Checker tasks, as well as in the Custom Tasks list:

Custom tasks that are set to be included in the *Compliance Checker* will be included in the calculation of the overall percentage completion score:
To set a custom task to be included in the Compliance Checker, first select the product and formula association and then click on the following checkbox:

TIP: Familiarize yourself with the auto-generated Compliance Checker tasks so that you do not create a custom ‘compliance’ task related to the same issue. If you do, your Compliance Checker score will count that same issue twice and adversely affect the product’s score.

EDITING A CUSTOM TASK

In the Task or Notes/Reminders list on your dashboard, a custom task can be viewed/edited by clicking on the following icon in the ‘Actions’ column:

DELETE A CUSTOM TASK

Use the following action to delete the task and its associated notes/reminders:
CUSTOM TASKS – OTHER ITEMS

Custom tasks can be set for specific items directly from the page where these are listed. Creating a task in this way *will not associate the task with a product or formula*. These items are:

- Projects
- Companies
- Manufacturing Orders
- Raw Materials

For checklists, a custom task can also be associated with any checklist item. See from p.98 for details.

Let’s take the example of a project. Click in the Projects/ List Projects main menu and then on the following ‘Add Custom Task’ button.

Enter the task details and select the project you wish the task to be associated with.
Once you save the task, it will appear in that assignee’s tasks list under ‘Custom Tasks’. They’ll be able to see the association and can click on this link to open the associated project.

As with other tasks, it is now possible to create task notes/reminders and include any other users in a threaded discussion, related to that task – see next section for details.
Task Notes / Reminders

Each task (Compliance Checker or custom) can have any number of notes/reminders associated with it. These can be assigned to different users of your Product Manager account, making it easy to communicate with your colleagues, clients and Service Providers and conduct threaded conversations which are associated with a specific task.

In the Tasks lists on your dashboard and in ‘My Tasks’ (accessible from the main user menu, top right), you can easily see who created the task (the ‘Assignor’) and address any note to them.

<table>
<thead>
<tr>
<th>Date Created</th>
<th>Date Due</th>
<th>Assignor</th>
<th>Assignee</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>24 Apr 2018</td>
<td>24 Apr 2018</td>
<td>Emma J. O’Neil</td>
<td>Frank Rogers</td>
<td>Urgent</td>
<td></td>
</tr>
</tbody>
</table>

The status of a note/reminder is displayed on your dashboard, under ‘My Notes/Reminders’ with the status that is assigned to the associated task:

IMPORTANT! If a custom task associated with any notes/reminders is deleted, all associated notes/reminders will also be deleted.

Open the Note/Reminder

To view the note/reminder and any associated thread, click on the following icon:

You will then see a view similar to the following, with your note/reminder displayed.
To view other notes/reminders in the thread, click on the pencil icon next to that item:

On 11/08/2016 13:33 Elaine wrote:
Please Upload the necessary document for this raw material.

**REPLY TO THE NOTE/REMINDER**

To add a new note/reminder to the thread and assign this to any user, click on the following icon:

Enter your note/reminder in the 'Note' field. Drag the bottom right corner of the text box if you require more space:
Select a user from the 'Remind the following user' list, then click on 'Save'. The user will now see this note/reminder on their dashboard, in 'My Notes/Reminders', with the status that is currently associated with its task and the date when the note/reminder was created.

**ADD NOTE/REMINDER FROM TASK**

In the tasks list you can add a new note/reminder and view the entire thread by clicking on the following icon in the 'Actions' column:
PUBLISH SHARED DATA

INTRODUCTION

Note: please first read the Product Manager Getting Started Guide before you proceed with the more detailed steps explained in this document.

Product Manager enables secure sharing of data between Cosmetri accounts. Data is published by a user (publisher) and then available for import by the Administrator of an account with permission to import that data, as set by the publisher. Publishers can also release updates to published data, available for import by any authorized user.

The following types of data can be published and imported:

- Raw materials (see p.277)
- Products and formulas (see p.281)
- Packaging sets and their packaging items (p.285)
- Test groups and tests (see p.294)

PUBLISHING DATA

INTRODUCTION

Product Manager provides a secure method to share data with other Cosmetri users. As a publisher, you can use Product Manager for the following cases:

SERVICE PROVIDERS – build products/formulas, raw materials, Test Groups and packaging sets and publish them for import by a client or client group. A consultant for example, could develop standardized tests, QA and SoPs or work instruction checklists or steps (as tests groups) which each client uses in their Cosmetri account. Once imported, these can be further customized by the Service Provider by logging into the client’s account from the Service Provider account. A professional formulator or contract manufacturer can develop formulations for a client and then publish these for import as part of the agreed deliverables for the project, even providing ‘PIF ready’ product data with all required compliance documents. The client can then access the data from their own Cosmetri account for product lifecycle management (PLM), manufacturing, batch traceability and compliance maintenance.

TEACHERS – can publish teaching material such as products/formulas for a student group, enabling publication to the entire group. The teacher can also enable peer-to-peer data sharing within the group, useful for collaborative projects, interactive learning and sharing research findings. Group members can also publish data for import by the teacher, for example when submitting assignments in the form of formulations, Test Groups etc. This assignment material can also include any documents associated with the published data, such as example safety assessments uploaded to the formula, course handouts, test papers, etc.
MANUFACTURERS/SUPPLIERS – can publish their raw material and packaging information. They may also publish free formulations which showcase innovative uses for their raw materials. A special invitation-only group for high-value Customers can provides these Customers with access to exclusive material. Raw material costs may be published as well as links to further information on product pages of the Supplier’s own website.

If you intend to publish data with different levels of confidentiality, the source data – such as products/formulas, or raw materials need to be maintained as separate versions. It is therefore recommended to store these items in separate categories in your Product Manager account, or tagged accordingly, for ease of management. For example, your NDA-protected raw materials can be assigned a property such as ‘NDA protected’ and ‘Non-NDA protected’. In the ‘NDA protected’ versions, you enter the exact composition of each raw material, whereas the ‘Non-NDA protected’ versions use frame formulations with differing Min. and Max. %w/w values. Since any documents you associate with an item are also published, you can also manage these different versions and determine the type of information that is published in the associated documents.

Only accounts with publishing rights can publish data for import by other accounts. Users with rights to publish are either:

- **Service provider accounts** (please contact Cosmetri support for details)

or:
- **Cosmetri user** (Administrator) belonging to a publishing group, with group publishing rights (see p.268)

Security and Privacy

Data that you publish is transmitted securely to the Cosmetri publishing database. Only users that you authorize will be able to import an item that you publish. For security reasons, data is never published directly to any Cosmetri account. Import of any data requires that the user manually selects an item they wish to import and confirms their agreement to the Third-Party data import terms, before they may proceed.

A publisher will have access to the following menu:
Published data may include any documents associated with the item as well as comments/notes. Depending on the type of data being published, options are available during publish, to set which data is published – for example, comments and raw material costs. Additional publishing comments and a photo (raw materials and packaging items) may also be published with the item.

**LEGAL**

Before you can publish any data via Product Manager you will be required to confirm your acceptance of the legal terms. Please be sure that you and anyone authorized to use your Cosmetri account are familiar with and agree with the following:

I agree not to publish data that:

- is false, inaccurate, misleading, or fraudulent
- is harmful, threatening, abusive, harassing, tortious, defamatory, vulgar, obscene, libelous, invasive of another’s privacy, hateful, or racially, ethnically, or otherwise objectionable
- contains malicious software or code, software viruses or any other computer code, files or programs designed to interrupt, destroy or limit the functionality of any computer software or hardware
- may manipulate identifiers by disguising the origin of any content published via Product Manager, or
- I do not have a right to make available under any law, contract or other legal relationship or that infringes on the rights of any third party.

**PUBLISHER PROFILE**

As a publisher, your company profile will be published, providing users with access to information about your business. For security reasons, your main company (Administrator) details and identity use the data associated with your Cosmetri account and cannot be changed. This is the data entered in the ‘Administrator’ tab of your global settings, which can be edited by the Administrator of your account.

Note – If you are granted publishing rights by the Group Administrator of one of the groups you belong to, you can also create a publisher profile.

Any user with rights to import data from you will see a link to access further information about the publisher, as per the following example:
It is also possible to supplement this information with a description of your company. To create or edit your publisher profile description, select the following menu item:

Enter your description to a max. of 1,000 characters in plain text format. Click on ‘Save’ to apply your changes.
**Publish Mode – Private/Group**

Data in Product Manager may be published in the following modes:

**Private**

Enter one or more Cosmetri Administrator usernames who will be able to see your data available for import. This requires that you know the exact username of the *Administrator user* for that account. Depending upon your browser, use the tab or enter/return key to enter multiple usernames:

![Select type of data to publish](Raw materials)

Select *publish mode*?

Private

Enter administrator username, use TAB/ENTER to enter multiple usernames:

![Private mode](emmadmin1X emmadmin2X)

Select *item(s) to publish*?

**Group**

Publishers may apply to have one or more groups created by Cosmetri support. This is useful for example, for teachers who wish to share data with student groups, or Service Providers publishing data to a group of clients.

Publishing groups are also useful for managing different levels of access to your data – for example, a group of clients authorized to import NDA-protected raw materials or formula data while the non-NDA group are only able to import data from you that is non-confidential.

See the following section ‘Groups’ (p.268) for detailed instructions on managing and publishing to groups.

**Updating Users/Groups**

Once you have published an item in private or group mode, you can edit the users/groups who are authorized to import any item by selecting the item in ‘My Published Data’ and clicking on the following action:

![Edit users/groups](Actions)
Click on the ‘x’ to remove and existing user/group from the list or click in the box to select further users/groups. If your item is published in **group mode**, you will only be able to select from groups that are associated with your account. If the item is published in **private mode**, you must know the Administrator username of the Cosmetri account that you wish to grant access. Sub-users of an account will not be recognized.

---

**TIP:**

An item that has been imported by a user will remain in their account, even if you remove that user. They will still be able to access any future updates for that item that you publish.

---

**GROUPS**

A group must be created for you by Cosmetri support ([support@cosmetri.com](mailto:support@cosmetri.com)). Please request whether the group should be **public** or **private**:

Private groups:

Members of the group clicking on the group profile cannot see a list of members of that group.

Public groups:

Members of the group can view a list of names and email addresses for all members of the group. This type of group is recommended for enabling peer-to-peer data sharing, where group members are allowed to interact. If you use this type of group, please be sure that you have obtained permission from all group members to disclose their details the entire group.

**Publish to Group**

Data is published by selecting the **publish mode** ‘Group’ and then selecting one or more groups, as follows:
Manage Group Settings

If you have been assigned a group by Cosmetri and are logged in as the Administrator for your account, under ‘Product Manager Settings’ (user menu, top right), you can manage your groups under the tab ‘Publishing Groups’.

Select the group you wish to edit, as follows:

<table>
<thead>
<tr>
<th>Users</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>c)</td>
<td>Edit group</td>
</tr>
</tbody>
</table>

At the top of the page the group name and details as set by Cosmetri support will be displayed.

You can also set the following options for each group:

**Logo**

Click on the cloud upload icon to select a .jpg, .gif or .png file on your local drive as a graphic or logo for identifying the group. The maximum allowed dimension (height or width) of the graphic is 350px. If the source file is larger, it will be scaled down to 350px in the largest dimension, with the original aspect ratio maintained. If it is smaller, it will be displayed at the original size.
Email
Enter an optional email address for contacting the group. This may be different from the group owner/Administrator email, which is set by Cosmetri staff when creating the group for you.

Facebook
If your group has a Facebook page, enter the URL here. This must be the URL of the Facebook page such as https://facebook.com/cosmetri. URL requires http:// or https://

Twitter
If your group has a Twitter page, enter the URL here. This must be the URL of the Twitter page such as https://twitter.com/cosmetri. URL requires http:// or https://

URL
Enter any optional URL in this field. URL requires http:// or https://

Telephone
Enter an optional telephone number for contacting the Group Administrator.

Group Description
Enter a description for the group. You may use the WYSIWYG editor to format your text.

Group Members
Enter the Administrator usernames of the Cosmetri accounts that will be able to participate in your group. Only Administrator usernames are accepted, and you must enter the exact username (case sensitive). Any data published to that group will then be visible for import by all members of the group.

Depending on the browser type, use the tab or enter/return key to enter multiple usernames:
Publishing Rights

Under this setting you can select which users of the group have publishing rights for the group. A group member with publishing rights will be able to access the ‘Publish Data’ menu and can publish to either the entire group or to individual members of the group.

Note – only Administrator users belonging to the group will be able to access the publishing menu. If those users have multiple (sub) users associated with their account, these users will not see the Publishing menu. Members granted publishing rights will only be able to publish to members of the same group. They will therefore require access to the group members’ Administrator usernames. This is possible by clicking on the group name for any public group, as follows:

<table>
<thead>
<tr>
<th>Packaging Items</th>
<th>Group - cosmetri GmbH (Private)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raw Material</td>
<td>Group - cosmetri GmbH (Private)</td>
</tr>
</tbody>
</table>

To set the publishing rights for the group, select one of the following options:

- Group Administrator only:
  Only the Group Administrator can publish data to the group.

- All:
  All members of the group can publish to the entire group or to any individual member of the group, including the Group Administrator.

- Selected:
  Only selected members of the group can publish to the entire group or to any individual member of the group, including the Group Administrator. To select members, click in the field to view a list of the group members and click to add.
PUBLISHING UPDATES

You can publish updates of your data as different versions. Under ‘Import Data/Shared Data/My Imports’, users who have already imported an item will see the current version that they imported and any available update.

Each time you publish an update, the current data and documents for that item are published. To publish an updated version of an item, go to Publish Data / ‘My Published Data’ and click on the following action:

A popup will open enabling you to enter any version comments as well as update the main comment and any link URL:
View of data when importing by user:

<table>
<thead>
<tr>
<th>Vitamin A Palmitate</th>
<th>Raw Material</th>
<th>Private</th>
<th>Aromatic ID</th>
<th>24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Retinyl palmitate, or vitamin A palmitate, is the ester of retinol and palmitic acid, with formula C₃₀H₄₄O₂. An alternate spelling, retinol palmitate, which violates the -yl organic chemical naming.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Version Comments</td>
<td># Updated SDS, v.1.098 # Costs updated - status 17/07/2017 # Additional information in info tab added</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on ‘Publish Update’ to complete the step.

Versioning

Each item is published using a versioning sequence 1.01, 1.02, 1.03, etc. The first version of an item published in 1.01. When you publish an updated version of an existing published item, it will assume the version number 1.02. This makes it easy for the user to identify the version.
they are using and the currently available version, as well as the changes available if they choose to update that item.

You can enter any comments for the version – for example to update a version changelog.

Except for test and Test Groups, the user will be able to identify imported items when viewing that item as well as the current version, as shown in the following formula example:

![Formula 1.01](image)

**TIP:**

Each version of an item that you publish is a snapshot of the current data and documents for that item at the time the version is published. It is recommended that you use the notes/comments fields in the tabs of that item to keep a clear version history of changes made to the item, so that you can copy/paste these notes to the version comments, informing the user of the version history and what has changed in the current version.

**Updating Publish Settings for Published Items**

In addition to publishing new versions of an item, you can also change an item’s publish settings.

Go to ‘My Published Data’

Search for the item that you want to edit.

In the ‘Actions’ column, click on ‘Edit item’s publish settings’
Depending on the item type, a popup will open, enabling update of the publish settings for the item. Any changes to these settings will apply to any previous published version which has not yet been imported by a user. To apply the publish settings, a user will need to update/import that item after the changes have been published as an updated version.

For detailed description of how an existing imported item is handled when a user updates to a newer version, please see the relevant section for that item type:

- Raw Materials (see p.280)
- Product/Formulas (see p.284)
- Packaging Items and Packaging Sets (see p.292)
- Tests and Test Groups (see p.298)

**SUPPLIERS AND MANUFACTURERS**

Upon publication of raw materials (including those published as components of a product/formula) and packaging items, a company is required to be associated with a manufacturer, as set in the 'Info' tab:

As the publisher, you can optionally set whether to also show the Supplier company, as set for example for raw materials and packaging items, during publication:
The company information for any company will be published and imported into the user’s account, including all company contact details. It is therefore important that you enter the details for the company that you wish to publish, exactly as you wish them to appear in the user’s account, once imported.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Schülke Inc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>SM18765</td>
</tr>
<tr>
<td>Is Supplier?</td>
<td>☑</td>
</tr>
<tr>
<td>Address 1</td>
<td>30 Two Bridges Road</td>
</tr>
<tr>
<td>Address 2</td>
<td>Suite 225</td>
</tr>
<tr>
<td>Town/City</td>
<td>Fairfield</td>
</tr>
<tr>
<td>County/District</td>
<td>New Jersey</td>
</tr>
<tr>
<td>Postcode/ZIP</td>
<td>07004</td>
</tr>
<tr>
<td>Country</td>
<td>United States of America</td>
</tr>
<tr>
<td>Company Email</td>
<td></td>
</tr>
<tr>
<td>Company Tel.</td>
<td>+1 888 267 4220</td>
</tr>
<tr>
<td>Sales Email</td>
<td></td>
</tr>
<tr>
<td>Sales Tel.</td>
<td>+1 888 267 4220</td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.schulke-us.com/">http://www.schulke-us.com/</a></td>
</tr>
</tbody>
</table>
The first item that an item is imported from a publisher, the company record is also imported to the user’s account. Subsequent items which use the same company record for either Supplier or manufacturer in your account will be associated with the same corresponding company record in the user’s account i.e. they will not be imported as duplicates. However, if a user imports an item from a different publisher for the same company, a separate company record will be imported.

**Publish: Raw Materials**

Note: Please refer to p.22 of this guide for detailed instructions on managing raw materials. Raw materials can be published, including data and documents. Any notes or comments are not published. Only parent versions of raw materials are published.

Information that you provide when publishing raw materials will be displayed in a ‘Publisher Info’ tab, providing the user with additional information about the item and its publisher.

Costs information can also be published in the ‘Costs’ tab, as well as a link to any sales page, for example with your latest prices and ordering information.

Note – raw materials are also published as components of a product/formula (see p.281). The same options apply as described in this section, with each raw material’s publish setting configurable at the publish stage.

**Steps to Publish Raw Materials**

Under ‘Publish Data’, select ‘Raw Materials’ as the type of data:

Select the publish mode and users/groups (see p.267)
Under **item(s) to publish**, select the raw materials that you wish to publish to the selected mode and users/groups.

Note: Only parent raw materials with an associated manufacturer are available for publish. This ensures that the user importing the raw material can correctly identify the item – see p.277.

You can select multiple items:

![Select item(s) to publish](image)

Click on 'Proceed' to go to the next step.

The selected raw materials are now displayed, with some additional publishing settings available.

<table>
<thead>
<tr>
<th>Item</th>
<th>Company</th>
<th>URL</th>
<th>Comment</th>
<th>UploadedMeta</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bergamot Oil Organic</td>
<td>Manufacturer: Aromatics Ltd (HADD) Supplier: House selected</td>
<td><a href="http://example.com">URL</a></td>
<td>[Show] for file selected.</td>
<td></td>
<td><img src="save" alt="Save" /> <img src="view" alt="View" /> <img src="delete" alt="Delete" /></td>
</tr>
<tr>
<td>TOCOPHEROL</td>
<td>Manufacturer: Casey Co. (CSP) Supplier: House selected</td>
<td><a href="http://example.com">URL</a></td>
<td>[Show] for file selected.</td>
<td></td>
<td><img src="save" alt="Save" /> <img src="view" alt="View" /> <img src="delete" alt="Delete" /></td>
</tr>
</tbody>
</table>

Click on the item in the 'Item' column to open the item in a new browser tab, to edit it. As you edit these settings you may click on 'Save' to save all data and return to the 'Publish Data' page later to continue where you left off.

**Company**

The Manufacturer and Supplier associations for each parent raw material are displayed. Check the 'Do not publish Supplier details' if you prefer not to disclose the Supplier company associated with your raw material parent. For further information about managing Suppliers and manufacturers, see p.277.

**URL**

Enter a URL to provide the user with additional information about the raw material, such as a product page on your website or the manufacturer’s own site. The URL must begin with http:// or https://
If the URL includes costs for the raw material, check the checkbox. If checked, a button will be included in the raw material’s ‘Costs’ tab, enabling the user to click directly to the webpage.

Check the ‘Do not display costs’ checkbox if you prefer not to publish any costs in the ‘Costs’ tab of the raw material parent.

**TIP:**

Enter a sales page URL and check both checkboxes if you prefer to maintain your own costs data under the URL provided, rather than the user seeing static costs prices entered in the ‘Costs’ tab. The user can then choose to look-up and update this live data in their version, for example for enabling costs simulations at formula level.

**Comment**

Enter a comment to describe the raw material, making it easier for the user to select which raw materials to import. You may enter a maximum of 500 characters.
Upload Photo

In this column, you can click to select a file to upload as a photo to represent the raw material. This will be displayed in the ‘Publisher Info’ tab of the parent raw material, once imported by user.

The maximum allowed height of the graphic is 350px. If the source file is larger, it will be resized to 350px height, with the original aspect ratio maintained. If it is smaller, it will be displayed at the original size.

Once you have entered the publishing information and options for each selected raw material, click on ‘Publish’ button:

You will be required to confirm your acceptance of the terms of use for third-party publishing (see p.265). Once you confirm, the ‘I Agree – Proceed’ button will be activated. Click this to complete the publication.

Published raw materials are now viewable in ‘My Published Data’, where you can change the publishing settings for any item as well as publish updated versions (see p.272).

Versioning and Updates - Raw Materials

If a user chooses to update a single raw material to a newer version that you publish, the following conditions will apply:

If raw material composition of both versions is identical:
Parent version will be over-written, causing any subsequent changes made to the raw material data and documents to be overwritten. User is warned of this before they can proceed.

If raw material composition of both versions is non-identical and batches have been created by the user:

User can only import the raw material as a new parent, thus eliminating the risk of affecting compliance.

If raw material composition of both versions is non-identical and no batches exist:

Parent version will be over-written, causing any subsequent changes made to the raw material data and documents to be overwritten. User is warned of this before they can proceed.

If any raw materials are associated with production-mode formulas, updates will not be shown. If the user ignores any available updates, upon updating the product/formula, the existing imported raw material version in their account will be retained.

**Publish: Products and Formulas**

A product and a selected formula version may be published, along with the associated raw materials (parents). Notes/comments in the main tabs of the product and formula level can be optionally published. A note is published with the identity ‘Publisher’ as the note’s author i.e. the identity of the user who wrote the note in the source product/formula is not published.

All formulas are imported in draft-mode with the default approval status ‘Pending’, requiring approval of all QA and compliance type actions by an authorized user logged into the account.

**Product:**

1. Information – all data, except: product category and customer group
2. Contact details – all data, except if checkboxes for ‘use Administrator settings’, in which case the fields will be blank
3. Packaging – all data
4. Unit Sizes- all data
5. Docs – all data and documents, including any document comments
6. Batches (if activated) – no data

**Formula:**

1. Info – all data

2. Specification

*Formula Composition* – all data, except the confirmation checkbox and history

*Compliance* – no data, since this is dependent on the compliance zones configured in the user’s account
Safety – all data, except the ingredient-level safety data and notes

3. Method – all data
4. Labels – all data
5. Docs – all data and documents, including any document comments
6. Cost – no data
7. Tasks – no data
8. QA – no data

**TIP:**
For compliance and traceability reasons, tasks, QA statuses and other compliance-related actions are not published. If you are a Service Provider, we recommend that you first publish the product/formula for import by your client. If it is your responsibility to approve a product/formula, you can then log into the client’s account as the Service Provider and complete the setup by performing such actions. This includes approving the formula and setting to production mode. If you have entered test data in your own version, you can export this and upload to the client’s version when logged in to their account.

Note – raw materials are also published as components of a product/formula. For detailed instructions on publication of raw materials, please see page 277.

**Steps to Publish a Product/Formula**
Under ‘Publish Data’, select ‘Products/formulas’ as the **type of data**:

Select the publish mode and users/groups (see p.267)
Select the product and formula version that you wish to publish. Only one product/formula can be selected.

Click on 'Proceed'.

If any of the raw material parents associated with the formula do not have a manufacturer associated, a popup will prompt you to select a company for each of these. This is because Product Manager only allows publication of raw materials (as parents) that can be identified easily by other users.

For each raw material, click on ‘Select Manufacturer’ and select a company. Once all raw materials have an associated manufacturer, the ‘Update & Proceed’ button will be activated, enabling you to proceed to the next step.

You can now set any publish settings for the product/formula and each of the associated raw material parents.

For the product/formula:

**Notes**

Check the checkbox if you do not wish to publish any notes/comments in the tabs of the product and formula level.

**URL**

Enter the URL of a webpage with further information about the product/formula. You must enter the URL starting with http:// or https://

**Comment**

Enter a comment in plain text, maximum 500 characters. This provides further information for the user when viewing items available to download. You do not need to include data such as number of documents included, document types or number of raw materials, since this summary data is automatically included.
Upload Photo

In this column, you can click to select a file to upload as a photo to represent the product/formula. The maximum allowed height of the graphic is 350px. If the source file is larger, it will be resized to 350px height, with the original aspect ratio maintained. If it is smaller, it will be displayed at the original size.

Once you have entered the publishing information and options for the product/formula and each associated raw material, click on ‘Publish’ button:

You will be required to confirm your acceptance of the terms of use for third-party publishing (see p.265). Once you confirm, the ‘I Agree – Proceed’ button will be activated. Click this to complete the publication.

The published product/formula is now viewable in ‘My Published Data’, where you can change the publishing settings for any item as well as publish updated versions (see p.272).

Versioning and Updates - Products/Formula

For compliance reasons, new versions of a product/formula are always imported as new items, leaving the previously imported version(s) unchanged. Subsequent changes made by the user to an imported product/formula are therefore not lost and the user can choose whether to delete any previous versions, manually update them or keep them alongside the newly imported version.

Import of products/formulas includes importing of the raw materials associated with the formula (as parent versions). If a user imports a product/formula which includes raw materials previously imported from the same publisher, these existing versions are used. No change is made to the raw materials in the user’s account unless the user selects to update any of these raw materials.

If updating a product/formula, you can also select which raw materials you wish to publish new versions for. The user will be prompted upon update to the new product/formula version, if any updates for the associated raw materials are available.

<table>
<thead>
<tr>
<th>Item</th>
<th>Version</th>
<th>Current Version</th>
<th>Version Comments</th>
<th>Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euxyl PE 9010</td>
<td>1.01</td>
<td>1.02</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

I accept the user terms of use for import of third-party data in Cosmetri...
TIP:
Raw materials imported from different publishers are treated as unique raw materials, even if the trade name and composition are the same. In this case, the user will need to select which version they wish to retain and update any imported formulas to use that version before deleting any duplicates that they do not wish to keep.

PUBLISH: PACKAGING SETS AND THEIR PACKAGING ITEMS
A single packaging item may be published, or a complete packaging set, including all associated packaging items. Only the parent of a packaging item is published – any batches are ignored.

Steps to Publish a Packaging Item
Under ‘Publish Data’, select ‘Packaging Item’ as the type of data:

<table>
<thead>
<tr>
<th>Select type of data to publish</th>
<th>Packaging Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select publish mode</td>
<td>Private</td>
</tr>
<tr>
<td>Enter admin username, use TAB/ENTER to enter multiple</td>
<td>emmademo1 X</td>
</tr>
<tr>
<td>Select item(s) to publish</td>
<td></td>
</tr>
</tbody>
</table>

Select the publish mode and users/groups (see p.267)
Select the packaging item(s) that you wish to publish. Multiple items may be selected at this stage:
Click on 'Proceed'.

If any of the packaging item parents associated with the formula do not have a manufacturer associated, a popup will prompt you to select a company for each of these. This is because Product Manager only allows publication of packaging items (as parents) that can be identified easily by other users.

For each packaging item, click on 'Select Manufacturer' and select a company. Once all items have an associated manufacturer, the 'Update & Proceed' button will be activated, enabling you to proceed to the next step.

You can now set any publish settings for the packaging items.

### Item

Click on the link to open the item.

### Company

The Manufacturer and Supplier associated with the packaging item are displayed. Check the 'Do not publish Supplier details' checkbox, if you do not wish to disclose the Supplier. To clearly identify the packaging item, a Manufacturer must be selected and published with the item.

### URL

Enter a URL to provide the user with additional information about the packaging item, such as a product page on your website or the manufacturer’s own site. The URL must begin with http:// or https://
If the URL includes costs for the packaging item, check the checkbox. If checked, a button will be included in the item’s ‘Costs’ tab, enabling the user to click directly to the webpage.

Check the ‘Do not display costs’ checkbox if you prefer not to publish any costs in the ‘Costs’ tab of the packaging item parent.

**TIP:**

Enter a sales page URL and check both checkboxes if you prefer to maintain your own costs data under the URL provided, rather than the user seeing static costs prices entered in the ‘Costs’ tab. The user can then choose to look-up and update this live data in their version, for example for enabling costs simulations of packaging costs in the Formula/Costs tab.

**Comment**

Enter a comment in plain text, maximum 500 characters. This provides further information for the user when viewing items available to download. You do not need to include data such as number of documents included or document types, since this summary data is automatically included.
Upload Photo

In this column, you can click to select a file to upload as a photo to represent the product/formula.

The maximum allowed height of the graphic is 350px. If the source file is larger, it will be resized to 350px height, with the original aspect ratio maintained. If it is smaller, it will be displayed at the original size.

Once you have entered the publishing information and options for the packaging item(s), click on ‘Publish’ button:

You will be required to confirm your acceptance of the terms of use for third-party publishing (see p.265). Once you confirm, the ‘I Agree – Proceed’ button will be activated. Click this to complete the publication.

The published packaging item is now viewable in ‘My Published Data’, where you can change the publishing settings for any item as well as publish updated versions (see p.272).

Steps to Publish a Packaging Set

Select ‘Packaging set’ as the type of data:

Select the required publish mode and, depending on the mode, set which users/groups may import the packaging set, then select a packaging set to publish. Only one packaging set may be selected.
Once selected, click on 'Proceed'.

Enter the publish options for the packaging set:

**Item**
Click on the link to open the item.

**Notes**
Check this checkbox if you do not wish to publish any comments associated with the packaging set:
View of packaging set comments field:

**URL**

Enter an optional URL to provide the user with additional information about the packaging set. The URL must begin with http:// or https://

**Comment**

Enter a comment in plain text, maximum 500 characters. This provides further information for the user when viewing items available to download. You do not need to include data such as number of documents included or document types, since this summary data is automatically included.

Below the packaging set publishing options, each associated packaging item is displayed. Please refer to the previous section of this chapter, for instructions on entering packaging item publishing options.

If a packaging item has previously been published, click on the following action to edit the current publishing settings. If you wish users who have already imported this item to update their version to reflect these changes, you need to publish a new version which they can import.
Packaging Set Costs

If you publish costs for each item in your packaging set, the total cost for the set is shown as follows:

<table>
<thead>
<tr>
<th>Item Name</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luscious Lip Gloss - Cherry</td>
<td>$1.80</td>
</tr>
<tr>
<td>Luscious Lip Gloss - Strawberry</td>
<td>$1.80</td>
</tr>
<tr>
<td>Peppermint Foot Cream</td>
<td>$1.80</td>
</tr>
<tr>
<td>Spearmint Natural Toothpaste</td>
<td>$1.80</td>
</tr>
<tr>
<td>Orange Peel Body Scrub</td>
<td>$1.80</td>
</tr>
<tr>
<td>Nourishing Skin Cream</td>
<td>$1.80</td>
</tr>
<tr>
<td>Hair Sheen Luxus II</td>
<td>$1.80</td>
</tr>
<tr>
<td>Hair Sheen Luxus II TEST</td>
<td>$1.80</td>
</tr>
</tbody>
</table>

This cost may be shown differently in the user’s version, if the following global setting differs to yours:

Packaging

If you have entered arrays for your packaging item costs, set which cost should be used for calculating packaging set costs:

- Lowest
- Average
- Highest

We recommend therefore, that you provide clear instructions as to the optimal setting a user should use, to ensure consistency of packaging set costs, if arrays are used in your packaging item costs. Note that the user’s packaging set costs may also change once they add packaging item batches to the imported parents and enter current prices.

Provided you publish costs for all associated packaging items in the set, the cost data will be imported exactly as per your version. If any cost is not available, the user will see a link in the ‘Packaging Sets’ ‘Costs’ column, indicating that one or more costs are missing. Clicking on the link will display a list of these items:
Versioning and Updates – Packaging Items and Packaging Sets

Packaging Item

Updating a single packaging item in the user’s account will cause the parent version to be overwritten. Any batches added to the parent will not be affected.

Packaging Set

IDs for packaging sets are re-assigned according to the next available ID in the user’s account, e.g. if publisher’s packaging set has ID PS0008 and the user has five packaging sets in their account with the last set having the ID PS0005, the newly imported packaging set will assume the ID PS0006.

When the user selects to import the new packaging set version, they are alerted to any updated version of an associated packaging item and prompted for what action to take:
If they choose to update the packaging item, the existing parent will be over-written. Any changes made by the user since the previous import/update will be lost.

The following example describes how packaging sets and their associated packaging item parents are handled upon first import and subsequent update to a new version released by the publisher.

USER IMPORTS ‘PACKAGING SET A (v.1.01)’. Assigned ID - PS0006
Consists of the following imported packaging item parents:
- Packaging item A
- Packaging item B
- Packaging item C
In the example, the publisher has updated packaging item A, packaging item B has not changed, and packaging item C was deleted. A new packaging item D was added to the packaging set.

USER UPDATES PACKAGING SET A to new available version 1.02:
- Packaging set is imported by user as new set and assumes next available ID e.g. PS0007 and is titled ‘PACKAGING SET A (v.1.02)’
- Packaging item A -> parent of Packaging Item A is updated, link stays to same parent
- Packaging item B -> link stays to same parent and parent is unchanged
- Packaging Item C -> original version remains in user account but is no longer linked to new packaging set version (1.02)
- Packaging Item D -> imported as new parent and is linked to new packaging set version (1.02)
**PUBLISH: TESTS AND TEST GROUPS**

Individual Tests and Test Groups can be published. If a Test Group is published, all associated Tests will be included.

Any QA associations for the Test Group will be published, but for compliance reasons, any ‘Default’ option will be ignored. In the following example, when TG0006 is imported, the user will be able to manually select the Test Group in the QA tab for any raw material batch or formula, but the Test Group will not be pre-loaded upon creation of a new item. To set this, the user must therefore check the Test Group option ‘Default’ after importing it.

### Steps to Publish Tests

Under ‘Publish Data’, select ‘Tests’ as the **type of data**:

---

<table>
<thead>
<tr>
<th>ID (?)</th>
<th>TG0006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Included tests (?)</td>
<td>☒ T0004 Check density (for liquids)</td>
</tr>
<tr>
<td>Association (?)</td>
<td>☒ Raw Material</td>
</tr>
<tr>
<td></td>
<td>☐ Packaging</td>
</tr>
<tr>
<td></td>
<td>☒ Formula</td>
</tr>
<tr>
<td></td>
<td>☐ Manufacturing</td>
</tr>
</tbody>
</table>

---

Select the **publish mode** and users/groups (see p.267)
Under **item(s) to publish**, select the tests that you wish to publish to the selected mode and users/groups.

You can select multiple items:

- T0002 | Container Integrity (glass bottles)
- T0004 | Check density (for liquids)
- T0008 | In-process contamination
- T0009 | In-process anomalies
- T0011 | Trial formula - safety assessor approved compliance (EU)
- T0012 | Trial formula - safety assessor approved compliance (US)
- T0013 | Trial formula challenge testing
- T0014 | Trial Formula - evidence of claims
- T0018 | Trial Formula - evidence of claims

Click on 'Proceed' to go to the next step.

The selected Tests are now displayed, with some additional publishing settings available.

Click on the item in the 'Item' column to edit it (right-click to open in a new browser tab/window). As you edit these settings you may click on 'Save' to save all data and return to the 'Publish Data' page later to continue where you left off.

**Notes**

If the Test has comments to the operator, select whether these comments should be published with the Test.

**URL**

Enter a URL to provide the user with additional information about the Test. The URL must begin with http:// or https://
Once you have entered the publishing information and options for each selected Test, click on the ‘Publish’ button:

You will be required to confirm your acceptance of the terms of use for third-party publishing (see p.265). Once you confirm, the 'I Agree – Proceed' button will be activated. Click this to complete the publication.

**Comment**

Enter a comment to describe the Test, making it easier for the user to select which items to import. You may enter a maximum of 500 characters.

Published Tests are now viewable in 'My Published Data', where you can change the publishing settings for any item as well as publish updated versions (see p.272).

**Steps to Publish a Test Group**

The following steps are required to publish a Test Group. This includes publication of all Tests in the group. Please refer to the previous section for guidance on setting the publishing options for each Test.

Under ‘Publish Data’, select ‘Test groups’ as the **type of data**.
Select the **publish mode** and users/groups (see p.267)

Under **item(s) to publish**, select the Test Group that you wish to publish to the selected mode and users/groups. Only one Test Group may be selected.

Click on 'Proceed' to go to the next step.

The selected Test Group is now displayed, with some additional publishing settings available.

Click on the item in the 'Item' column to edit it (right-click to open in a new browser tab/window). As you edit these settings you may click on 'Save' to save all data and return to the 'Publish Data' page later to continue where you left off.

**Notes**

If the Test Group has any comments, select whether this data should be published with the Test Group.
URL

Enter a URL to provide the user with additional information about the Test Group. The URL must begin with http:// or https://

Comment

Enter a comment to describe the Test Group, making it easier for the user to select which items to import. You may enter a maximum of 500 characters.

Versioning and updates – Test and Test Groups

IDs for Test and Test Groups are re-assigned according to the next available ID in the user’s account, e.g. if a publisher’s Test Group has ID TG0008 and the user has five Test Groups in their account with the last set having the ID TG0005, the newly imported Test Group will assume the ID TG0006.

Any Test or Test Group that has a new version published, will be imported as a new item if that item is already in-use in the user’s account for QA purposes. This includes tests that are waiting for configuration for any item. If the Test or Test Group is not in use, the existing version will be updated. And data entered or changed by the user since the previous import/update will be over-written. If an item is updated rather than a new item generated, the ID of the Test or Test Group will also show the current version, e.g. TG005 (v.1.07).

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>T0019 (v.1.03)</td>
<td>pH</td>
</tr>
<tr>
<td>T0020</td>
<td>In-process contamination</td>
</tr>
<tr>
<td>T0021 (v.1.02)</td>
<td>In-process contamination</td>
</tr>
</tbody>
</table>

As publisher, we recommend that you use the version comments/changelog to inform the user of your recommendations, if they have imported a previous version.
IMPORT SHARED DATA

INTRODUCTION

Product Manager provides a secure method to share data with other Cosmetri users. Ask your Service Provider (such as safety assessor, laboratory or consultant), course teacher or Supplier of raw materials or packaging items to contact Cosmetri support (support@cosmetri.com) to request authorization to publish data using the Cosmetri secure platform.

The following types of data can be published and imported:

- Raw materials (see p.245)
- Products and formulas (see p.247)

Some example user cases for sharing data include:

SERVICE PROVIDERS – build products/formulas, test groups and packaging sets and publish them for import by a client or client group. A consultant for example, could develop standardized tests, QA and SoPs (as test groups) which each client uses in their Cosmetri account. Once imported, these can be further customized by the Service Provider by logging into the client’s account from the Service Provider account. A professional formulator or contract manufacturer can develop formulations for a client and then publish these for import as part of the agreed deliverables for the project, even providing ‘PIF ready’ product data with all required compliance documents. The client can then use access the data from their own Cosmetri account for product lifecycle management, manufacturing, batch traceability and compliance maintenance.

TEACHERS – can publish teaching material such as products/formulas for a student group, enabling one-time publish to the entire group. As Group Administrator, the teacher can also allow peer-to-peer data sharing within the group. Group members can also publish data for import by the teacher, for example when submitting assignments in the form of formulations, test groups etc. This assignment material can also include any documents associated with the published data, such as example safety assessments uploaded to the formula, course handouts, etc.

MANUFACTURERS/SUPPLIERS – can publish their raw material and packaging information. They may also publish free formulations which showcase innovative uses for their raw materials. A special invitation-only group for high-value Customers can provides these Customers with access to exclusive material. Raw material costs may be published as well as links to further information on product pages of their company website.

Note – published data is transmitted securely to the Cosmetri publishing database. Only users that are authorized by the publisher will be able to import a published item. For security reasons, data is never published directly to your Cosmetri account. Import of any data requires that you manually select an item you wish to import and confirm your agreement to the Third-Party data import terms, before you may proceed.
Published data may include any documents associated with the item as well as any comments/notes that the publisher opts to include. Additional publishing comments and a photo can also be published with the item.

**LEGAL**

Before you may import any data via Product Manager you will be required to confirm your acceptance of the terms. Please be sure that you agree with the following:

Third-Party data providers, including Cosmetri GmbH, publishing data via Cosmetri do not warrant that the provision of this data (Third-Party Data) will be uninterrupted, error free, timely, complete or accurate, nor do any of these providers make any warranties as to the results to be obtained from use of the same. You acknowledge that any Third-Party Data does not constitute a recommendation or endorsement by Cosmetri GmbH of the Third Party, or the data published and is provided for informational purposes only. You expressly agree that your use of Third-Party Data is at your own risk. Accordingly, the Third Party will not in any way be liable to you or any other entity for any inaccuracies, errors, omissions, delays, damages, claims, liabilities or losses, regardless of cause, in or arising from the use of the Third-Party Data provided through the Cosmetri software.

**IMPORTING DATA**

To import shared data, click on the following menu item under 'Import Data/Shared Data/Import' and follow the steps described in this section.

Only data that you are authorized to import will be displayed in this page. You can filter the available shared data, for example by **item type** and **publishing mode**. Use the search function combined with any selected filters to narrow your search:

Example filter to view items by publishing mode:
You can also hide items from the list using the checkboxes for each item in the ‘Hide’ column. Use the ‘Show hidden shared data’ checkbox to show the hidden import item(s).

Items available for import can be viewed and sorted according to the following columns:

- Item
- Type
- Mode
- Publisher
- First Published
- Version
- Last Updated

Click on the [+] icon in the left column to expand the view for any item. Depending on the item type, a summary of the published data is displayed along with any comments entered by the publisher.

Example summary for a product/formula:

<table>
<thead>
<tr>
<th>Item</th>
<th>Type</th>
<th>Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange Peel Body Scrub</td>
<td>1.02</td>
<td>Product/Formula</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of raw materials: 15</td>
</tr>
<tr>
<td>Comments included: No</td>
</tr>
<tr>
<td>Product/formula documents: ANIM, CPSR, CUST, EFFI, LABL, MANU, PACK, RPCF, SA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test comment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Version Comments</th>
</tr>
</thead>
</table>

If the publisher has a web page with further information about the published item, click
on the following link in the ‘Actions’ column to open that page in a separate browser tab:

<table>
<thead>
<tr>
<th>Version</th>
<th>Last Updated</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.03</td>
<td>16/06/2017</td>
<td></td>
</tr>
<tr>
<td>1.02</td>
<td>15/06/2017</td>
<td></td>
</tr>
<tr>
<td>1.01</td>
<td>08/06/2017</td>
<td>View web page</td>
</tr>
</tbody>
</table>

If the item is published to a group, in the ‘Mode’ column you can click on the group name link to view information about the group.

If the group is **public**, the other members of the group (name and email address) will be displayed under ‘Group Members’. This type of group is intended for Group Administrators who allow group members to interact and share data with each other, such as study or research groups.

Click on a link to view of member list when viewing ‘public’ group.
If the group is **private**, the members of the group will not be displayed. Contact a group’s Administrator if you require information or support related to a specific group.

Any user with rights to import data from a publisher will see a link in the ‘Publisher’ column, to view further information about the publisher.

---

**Example display of publisher information:**

**Company:** Aromantic Ltd

**Address:**
17, Tytler Street
Forres
Moray
IV36 1EL
United Kingdom

**Tel:** +44 (0)1309 695900

**Web:** [www.aromantic.co.uk](http://www.aromantic.co.uk)

**Publisher Profile:** You can create your own range of organic and natural skin care & hair care products personalised for you, your clients or for selling to the public using natural active ingredients that will get real results in hair, skin and body care for different skin types and conditions. We have all the recipes, articles and educational materials you need to get started. Our unrivalled choice of training courses run by industry professionals can give you all the skills and knowledge you need.
Item type

Shared data available for import can be of the following item types. For detailed instructions, please refer to relevant section:

- Raw materials (see p.245)
- Products and formulas (see p.247)
- Packaging items and packaging sets (see p.249)
- Test and test groups (see p.251)

**UPDATING DATA**

Under ‘Import Data/Shared Data/My Imports’, any item you have already imported will show the current version and any available update. In the ‘Version’ column you can see the current version that you imported and the version available for import. If a new version is available, a label NEW! is also displayed.

<table>
<thead>
<tr>
<th>First Published</th>
<th>Version</th>
<th>Last Updated</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>16/06/2017</td>
<td>1.14</td>
<td>17/06/2017</td>
<td><img src="image" alt="NEW!" /></td>
</tr>
</tbody>
</table>

To only view items with available updates, click on the following checkbox:

![show only new updates](image)

Depending on the type of item, upon updating the item it will be either over-written with the new version, or a separate item will be imported, as described later in this section.

Each item is published using a versioning sequence 1.01, 1.02, 1.03, etc. The first version of an item published in 1.01. This makes it easy for you to identify the version you are using and the currently available version, as well as the changes available in the new version if you choose to import that item.

The publisher can enter comments for the version – for example to update a version history.
Further details of how versioning/updating is applied to different items are provided in the following sections of this guide.

**Suppliers and Manufacturers**

Upon import of raw materials (including those published as components of a product/formula) and packaging items, a company is required to be associated with a manufacturer, as set in the ‘Info’ tab.

The publisher can optionally set whether to also show the Supplier company.

The first item that an item is imported from a publisher, the company record is also imported to your account. Subsequent imported items which use the same company record for either Supplier or manufacturer will be associated with the same corresponding company record i.e. they will not be imported as duplicates. Once the company record has been created it will not be updated.

Note – Under ‘Companies’ you can manage your company records, including merging associated items and deleting any duplicate company records.

**Import: Raw materials**

Raw materials can be imported, including data and documents. Any notes or comments entered by the publisher are **not** published. Only parent versions of raw materials are imported.

Information about the shared raw material is displayed in the ‘Publisher Info’ tab, providing additional information about the item and its publisher.
Costs information can also be published in the ‘Costs’ tab, as well as an optional link to any sales page, for example with latest prices and ordering information.

**TIP:**

Raw materials imported from different publishers are treated as unique raw materials, even if the trade name and composition are the same. In this case, you will need to select which version you wish to retain and update any imported formulas to use that version before deleting any duplicates that you do not wish to keep.
Note – raw materials are also published as components of a product/formula. For detailed instructions on publication of raw materials, please see p.14).

**UPDATING: RAW MATERIALS**

If you choose to update a single raw material to a newer version, the following conditions will apply:

If raw material composition of both versions is identical:

Parent version will be over-written. Any subsequent changes made to the raw material parent data and documents since you imported the item will be overwritten.

If raw material composition of both versions is non-identical and batches have been created by the user:

You may only import the raw material as a new parent, thus eliminating the risk of affecting compliance.

If raw material composition of both versions is non-identical and no batches exist:

Parent version will be over-written, causing any subsequent changes made to the raw material data and documents to be overwritten.

If any raw materials are associated with production-mode formulas, updates will not be shown. If you ignore any available updates, upon updating a product/formula, the existing imported raw material version in your account will be retained.

**IMPORT: PRODUCTS AND FORMULAS**

A product and a selected formula version may be imported, along with the associated raw materials, as parents. Notes/comments in the main tabs of the product and formula level can be optionally published by the publisher. Any notes/comments at raw material level are not published.

All formulas are imported in draft-mode with the default approval status ‘Pending’, requiring approval of all QA and compliance type actions by an authorized user logged into the account.

The following data, if present in the source item, is imported: PRODUCT:

- Information – all data, except product category and customer group
- Contact details – all data, except if checkboxes for ‘use Administrator settings’, in which case the fields will be left blank
- Packaging – all data
- Unit Sizes - all data
- Docs – all data and documents, including any document comments
- Batches (if activated) – no data

**Formula:**
Info – all data
Specification:
Formula Composition – all data, except the confirmation checkbox and history
Compliance – no data, since this is dependent on the compliance zones configured in the user’s account
Safety – all data, except the ingredient-level safety data and notes
Method – all data
Labels – all data
Docs – all data and documents, including any document comments
Cost – no data
Tasks – no data
QA – no data

**Updating: Products/Formulas**

For compliance reasons, new versions of a product/formula are always imported as new items, leaving the previously imported version(s) unchanged. Subsequent changes made to an imported product/formula are therefore not lost and you can choose whether to delete any previous versions, manually update them or keep them alongside the newly imported version.

Import of products/formulas includes importing of the raw materials associated with the formula (as parent versions). If you import a product/formula which includes raw materials previously imported from the same publisher, these existing versions are used. No change is made to the raw materials in your account unless you select to update any of these raw materials.

If updating a product/formula, you will be prompted if any updates for the associated raw materials are available.

<table>
<thead>
<tr>
<th>Item</th>
<th>Version</th>
<th>Current Version</th>
<th>Version Comments</th>
<th>Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euxyl PE 9010</td>
<td>1.01</td>
<td>1.02</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TIP:**
If it is your Service Provider’s responsibility to approve an imported product/formula published by them, you can grant them access to your account to complete the setup. This includes approving the formula and setting to production mode. If your Service Provider has
Import: Packaging Items and Packaging Sets

Individual packaging items may be imported, as well as packaging sets and their associated packaging items. Importing packaging items functions similarly to the import of raw materials. Only the packaging item parent is imported, from which you can create batches. The handling of Suppliers and manufacturers is the same as per raw materials.

Updating: Packaging Items and Packaging Sets

Packaging Item

Updating a single packaging item will cause the parent version to be over-written. Any batches added to the parent will not be affected.

Packaging Set

IDs for packaging sets are re-assigned according to the next available ID in your account, e.g. if publisher’s packaging set has ID PS0008 and your account has five packaging sets, with the last set having the ID PS0005, the newly imported packaging set will assume the ID PS0006.

When you select to import a new packaging set version, you will be alerted to any updated version of an associated packaging item and prompted for what action to take:
If you choose to update the packaging item, the existing parent will be over-written. Any changes made by you, since the previous import/update will be lost.

The following example describes how packaging sets and their associated packaging item parents are handled upon first import and subsequent update to a new version released by the publisher.

USER IMPORTS ‘PACKAGING SET A (v.1.01)’. Assigned ID - PS0006

Consists of the following imported packaging item parents:

Packaging item A Packaging item B Packaging item C

In the example, the publisher has updated packaging item A, packaging item B has not changed, and packaging item C was deleted. A new packaging item D was added to the packaging set.

USER UPDATES PACKAGING SET A to new available version 1.02:

Packaging set is imported by user as new set and assumes next available ID e.g. PS0007 and is titled ‘PACKAGING SET A (v.1.02)”

Packaging item A -> parent of Packaging Item A is updated, link stays to same parent
Packaging item B -> link stays to same parent and parent is unchanged
Packaging Item C -> original version remains in user account but is no longer linked to new packaging set version (1.02)
Packaging Item D -> imported as new parent and is linked to new packaging set version (1.02)
IMPORT: TESTS AND TEST GROUPS

Tests can be imported individually, or as part of an entire test group. Your Service Provider (such as a laboratory or consultant) can for example, create standard test groups for your workflow, which you can import and use.

UPDATING: TESTS AND TEST GROUPS

IDs for Test and Test Groups are re-assigned according to the next available ID in your account, e.g. if a publisher’s Test Group has ID TG0008 and your account has five Test Groups, with the last set having the ID TG0005, the newly imported Test Group will assume the ID TG0006.

Any Test or Test Group that has a new version published, will be imported as a new item if that item is already in-use in the user’s account for QA purposes. This includes tests that are waiting for configuration for any item. If the Test or Test Group is not in use, the existing version will be updated. And data entered or changed by the user since the previous import/update will be over-written. If an item is updated rather than a new item generated, the ID of the Test or Test Group will also show the current version, e.g. TG005 (v.1.07).

<table>
<thead>
<tr>
<th>T0019 (v.1.03)</th>
<th>pH</th>
</tr>
</thead>
<tbody>
<tr>
<td>T0020</td>
<td>In-process contamination</td>
</tr>
<tr>
<td>T0021 (v.1.02)</td>
<td>In-process contamination</td>
</tr>
</tbody>
</table>
CUSTOMERS

INTRODUCTION

Cosmetri’s secure, cloud-based platform offers unparalleled flexibility in collaborating with users within your organization as well as external users, including with your Customers. Customer management is ideal for Service Providers such as contract manufacturers and formulators, offering the following advantages:

- Customers can add, view and edit their own requests using the Projects feature
- faster, more efficient communication with Customer
- secure exchange of data
- manage the progress of a Customer project, from inception to completion
- traceability of all communication and approval stages for the project
- grant Customer optional access to any product-level data
- assign a Customer manager for conducting communication with the Customer.

You can create a user of the type ‘Customer’ in Product Manager. Your plan may restrict the number of user seats available, requiring you to upgrade or add additional user seats. Please check the Getting Started Guide for further details.

A Customer user logged in to your Product Manager account can only communicate with and see selected users in your team. By default, they can never see the details of any other Customer users.

Customer users can easily be identified in Product Manager and are listed in any user list by their name, company and (Customer).

Customer users can be associated with Customer groups and company records of the type ‘Customer’.

To access the Customer-related features, select ‘Customers’ in the main menu:
Note – the above ‘Service Provider Customers’ menu item is only available to authorized Service Provider users.

**MANAGING CUSTOMER RECORDS**

Customers are managed under the menu item ‘Customers’:

Click on ‘Customers’ and ‘Add New’ to create a company record of the type ‘Customer’ which can then be associated with Customer users that you add to your Cosmetri account. By default, the following ‘is Customer’ checkbox is selected. If the Customer is also a Supplier or manufacturer you may be select the relevant options.

Select ‘Customer is private individual’ if you need to enter a First Name and Last Name for the Customer, instead of a company name.

Search your existing customers on the customer list view based on Name or ID.
**CUSTOMER USER TYPES**

Log in as the Administrator of your Cosmetri account so that you can access the ‘Users & Seats’ tab under ‘Global Settings’. Create a new Customer user, by selecting ‘Customer’ as the user type.

Select user type *

- Link to existing Service Provider account? [?]
- Customer Group [?]

<table>
<thead>
<tr>
<th>Standard User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard User</td>
</tr>
<tr>
<td>Service Provider</td>
</tr>
<tr>
<td>Virtual Assistant (VA)</td>
</tr>
</tbody>
</table>

Once created, click on the following icon to manage the users who are able to see that Customer:

![Icon to manage users](image)

Click in the field to select any users that you wish the Customer to see when logged in – for example, when selecting a user to assign a task or note/reminder to. This can be used for example, to assign a Customer manager to that Customer, but prevent other users from interacting with the Customer.
You can select multiple users. By default, all Customer users are not able to see or interact with each other.

If you are using Customer groups to organize your products, while creating the Customer user, you can select any group(s), ensuring that when the Customer logs in, they will only see the products in the associated group(s). For further information on Customer groups, see the Getting Started Guide.

Enter a First Name, Username and Email Address for the Customer.
Select an existing Company to associate with the Customer. Only companies of the type ‘Customer’ are available for selection.

If no such company record exists, click on ‘Add’ to create the record:
Click on ‘Add User’ to create the user. The Customer will automatically receive an email with an activation link to verify their account and securely set their password.

If you prefer to setup the Customer account and login yourself to verify the permissions and other settings, enter an email address that you have access to, so that you can activate the account yourself. Once you are ready to provide the Customer with the login credentials.
you can update the email address and password by clicking on the ‘Edit user/reset password’ icon, as shown below

This will open a view of the Customer user’s settings and data.

**CUSTOMER DEPARTMENT PERMISSIONS**

Use the ‘Departments’ settings to determine which areas of Product Manager your Customer can access, as well as important functions they may perform.

We recommend that you create a ‘Customers’ Department which usually would provide only limited access, such as to the ‘Projects’ feature (see p.317) and perhaps to their products. You can also create custom departments for each Customer for precise control of permissions.

You can configure which content and functionality can be accessed by users associated with any department they are assigned to. Click on the ‘Departments’ Global Settings tab and on ‘Add New’ to create a department.

Select ‘View/edit’ or ‘Hide’ or ‘View only’ to determine which pages and tabs of the Product Manager are accessible to a user who is assigned to that department. Click on ‘Save’ to save your changes.
Under 'Users & Seats', you can now assign each user to a department as follows:

![Department Assignment Example]

Important! You must associate the user with the correct Department to ensure that the access settings are applied, prior to them logging in to Product Manager. It is advisable to temporarily apply a Department setting and Customer group to one of the user accounts you have access to, to check that you have correctly configured the Department. Do this before you assign a new user and login to check that the correct permissions have been applied.

**USER CASE: CUSTOMER PROJECT MANAGEMENT**

One of the most useful Customer management features is enabling a Customer to add, view and edit their own projects - for example, to request a new product or product line. The Customer can enter their requirements and communicate with a Customer manager to clarify the project brief for the R&D team, prior commencing formulation and develop the product samples.

A typical workflow is as follows:

1. Customer logs in to Product Manager as a Customer user and adds a new project.
2. Under 'Concept' they describe their requirements.
3. Customer then adds a custom task for the project, requesting the Customer manager to check the new project.
4. Customer manager communicates with the Customer using the task notes/reminders until the project requirements are clear. Different project statuses, including custom statuses, can be assigned at various stages.
5. Authorized user creates one or more products for association with the project and adds these to the Customer group.
6. Authorized user approves the project and associates this with one or more the products set in step 5.
7. Authorized user may clone the project data to the ‘Requirements’ tab of any associated product.

8. Users can be instructed to further refine the details in each product’s ‘Requirements’ tab, as the basis for R&D, to develop the Customer’s product samples.

9. Authorized user creates a custom task for the head of the R&D team, instructing them to proceed and can communicate with them via that task’s note/reminders.

10. R&D develops samples for Customer. The sample IDs in Product Manager can be selected in the ‘Requirements’ tab for reference.

**Virtual Assistant (VA) Users**

**Introduction**

Virtual Assistants, or VAs, enable you to affordably extend your team and boost the efficiency and productivity of your business. For as little as $3.50 p/h you can hire your own graduate-level assistants, adding them as special VA users to your Cosmetri account. You’ll be able to share data with them securely and control precisely which data they can access and functions they may perform. You can use the task management and team tools in Product Manager to manage your VA’s tasks, communicate with them, share files securely and view activity reports and time sheets.

Here are just some of the many tasks that can be performed by your VA:

- Data entry in Product Manager - such as formulas, Suppliers and raw materials
- Request information from Suppliers e.g. prices, safety and product data
- Tag and upload documents
- Online research

Depending upon the skill-set of the person, your VA may also be able support your business with other tasks, such as:

- Book-keeping
- Customer service and support
- Sales
- Social media posts
- Lead generation
- Email management
- Scheduling
10 Top Tips for Working with Your VA

1. Get to know your VA!
Spend time getting to know your new VA and building a good rapport with them. Find out what specialist skills and experience they may have and what tasks and roles they may be competent in taking on for you and your business.

2. Have a clear plan for the work your VA will undertake
Don’t expect your VA to magically understand what support you need! Discuss the tasks and activities that you require support with and ensure the VA has everything they require to work effectively on these.

3. Communication is key
Schedule regular meetings such as via skype or chat and communicate clearly. How often do you need to check in with each other by email? Who will be the main contact person in your company for your VA and how and when can they be reached?

4. Respect your VAs own schedule and plan accordingly
Your VA will normally work an 8-hour day during office hours in their own time zone, so it’s important that they always have work to do during your absence. To ensure continuity, it’s a good idea to have an agreed ‘back log’ of tasks that the VA can perform if they are awaiting further instructions from you.

5. Support your VA in understanding your business and requirements
Every business is unique. Invest some time to introduce your new VA to your business. What is unique about what you offer and how you operate? Who are your team and how will the VA work with them? What are your aspirations, goals and vision for the business? Welcome your VA into your team and let them know the importance of the work they will perform for your company.

6. Provide adequate supervision and reviews
Every staff member, whether working remotely or in the office, performs best when they experience job satisfaction, are treated in a friendly and fair way and are offered the potential to grow and learn new skills. As your VA becomes more familiar with your business, set up clear reviews, such as every three months. Discuss with them where they could take on new responsibilities or be trained in new skills. Listen to any problems they face in working for you and look for ways to improve, where possible.

7. Be clear about expectations and working practices
Consider providing your VA with a version of any staff manual for your business and request as one of their first tasks, that they familiarize themselves with this. Ask them to agree to and sign an agreement and include any key information, such as termination clause, vacations, handling of secure information and any unacceptable practices. Communicate closely with your VA to establish a clear framework of understanding, to avoid problems later.

8. Be realistic about your commitment to supporting your VAs
Hiring a VA will achieve considerable savings and improve efficiency in your business. Before you hire a VA, we recommend thinking carefully about not only the ongoing financial commitment, but also how you will provide continuous work and effectively manage your
You will need to train your VA at the beginning and keep in regular contact with them, to check the quality of their work and monitor their progress. If you prefer us to train your VA(s) in using Product Manager, click [here](#) for details of our training costs.

**9. Use the Product Manager task manager**

We recommend using Product Manager’s task manager to conduct task-related communication. Make it part of your daily routine to check your Product Manager dashboard for new task updates, note and reminders. Avoid long email conversations which refer to multiple tasks and activities. Stay on topic, using short instructions and comments related to single, actionable tasks.

**10. Share your data and documents securely via Product Manager**

For product and compliance-related documents, we recommend using Product Manager to securely exchange these and to ensure that they are correctly tagged and digitally archived. For other documents, use a cloud-based service such as Google Drive or Dropbox to enable you, your team and the VA to share important files. To share confidential data such as passwords, we recommend using a secure cloud-based password manager. Insist that your VA never stores such data on their local computer, and they keep any device they use secure and protected.

### Recruiting VAs

We recommend using a commission-free online service such as [Outsourcely](#) to find suitable candidates, enabling you to:

- Review their CVs and work history
- Check a candidate’s ratings and references
- View online assessments, such as language proficiency and typing speed
- Shortlist your favorite candidates
- Interview and communicate with candidates
- Pay your VAs directly

Click [here](#) to go to [Outsourcely](#) and start recruiting your VAs.

### Adding a VA user to Product Manager

You can create a special user of the type ‘VA’, enabling the following:

- Set a monthly allocation of hours for each VA
- Show the balance of total remaining hours, based on the time logged by all VAs
- By default, all VAs are unable to access the customer groups for setting permissions for which products a user can access
- VA users cannot access the Team/Virtual Assistants page
- Under Team/Virtual Assistants you can view all VA users and their status
- Each VA user is displayed as a ‘(VA)’ in the task manager and user lists
NOTE: You will need an available user seat in your Product Manager plan. For Starter and Business plan users, you can upgrade to the next plan to increase the available users. Enterprise users can add further users under ‘Plan’, when logged in as the Administrator.

Under Global Settings / Users, if you have users available in your plan, next to ‘Select user type’ select ‘Virtual Assistant (VA)’

Enter a first name, username and email address. The username must be unique, so try a different combination if you receive an alert, that the username you entered is not available. Last name and company name are optional.

Click on ‘Add User’ to create the account. An email will be sent to the email address you entered, requiring activation of the account and the setting of a password.

**TIP:**

*We recommend that you configure the VA account and test it before providing access to your VA. Enter an email address that you have access to so that you can set a password and login. While logged in, you can later update the email address (go to ‘My Profile’, in the user menu) before sending the account details to your VA. This will also give you the opportunity to test any permissions settings to be sure that the VA cannot access any confidential data.*
**SET DEPARTMENT FOR VA USER**

Once the VA user has been added, associate the user with a department to determine which pages, tabs and functions of the software can be accessed by them. If you have already configured a department, select this in the user list for the VA user.

To create a new department, click on the ‘Departments’ Global Settings tab and on ‘Add New’ to create a department.

You can configure which content and functionality can be accessed by users associated with any department they are assigned to.

Select ‘Show’ or ‘Hide’ to determine which pages and tabs of the software are accessible to a user who is assigned to that department. Click on ‘Save’ to save your changes.

Complete the configuration by associating the VA user with the new department, as described previously.

As advised in the previous section, we recommend that you log in to the new VA account and check the departments settings, before providing the VA with the credentials for accessing the new Cosmetri user account.

**SET CLIENTS/BRAND GROUPS FOR VA**

Under Customers/Customer Groups, you can create groups to organize your products, such as by client or brand line. Each user can then be associated with one or more groups to determine which products a user can access when logged in. These settings work in
conjunction with any department you create for the VA, enabling fine control of permissions for the logged in VA user.

If you have already created customer groups, it is necessary to add the new VA user to any groups that you wish them to be able to access, otherwise they will not be able to access any products. You can do so directly while adding the new user, or when editing their user settings, under Global Settings/Users:

```
First Name *          Frankey
Last Name            Rogers
Company*             Majestic Bath Products Inc. | 12345
Customer Groups [X]  ABC
Email address *      support@cosmetri.com
```

**Manage VA Hours**

The Administrator can login and set the monthly hours allocated for each VA user. Go to Global Settings / Users and for the VA user, click on the following action:

```
Allocation
```

```
Monthly Allocation

<table>
<thead>
<tr>
<th>Allocation Month</th>
<th>Allocation Year</th>
<th>Allocation Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec</td>
<td>2017</td>
<td>40</td>
</tr>
</tbody>
</table>
```

By default, the current month and year are selected. You can change this setting to enter an allocation for a future month. After selecting the required month and year, enter the number of hours allocated to the VA under ‘Allocation Hours’. Click on ‘Update’ to apply.
If you wish to enter allocations for multiple months in the future, click on the ‘Add More’ button.

**Monthly Allocation**

<table>
<thead>
<tr>
<th>Allocation Month</th>
<th>Allocation Year</th>
<th>Allocation Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec</td>
<td>2017</td>
<td>40</td>
</tr>
<tr>
<td>Jan</td>
<td>2018</td>
<td>80</td>
</tr>
<tr>
<td>Feb</td>
<td>2018</td>
<td>120</td>
</tr>
</tbody>
</table>

**TIP:**
Enter hourly allocations for future months requires that each month runs consecutively, based on the first month entered, e.g. Dec, Jan, Feb, Mar, etc. If you change the first month, all future months will be changed. Enter ‘0’ for any month that you do not wish to enter an allocation for, rather than leaving it blank.

**CHECK TOTAL VA HOURS FOR CURRENT MONTH**

On the dashboard, the following panel shows the total allocation of VA hours for the current month, for all VAs associated with your Product Manager account. The figure on the left is the number of hours still available and on the right, the total amount of hours allocated. For example, 23.5/80 means that 80 hours were allocated for that month with 23.5 hours remaining and 56.5 hours therefore having been worked by the VA so far in that month. The available hours are calculated according to the hours logged by each VA in their time sheet, as explained in the next section of this guide.

Dashboard summary of VA hours for current month:
On the first day of the month, this view will be auto refreshed to show the current month’s allocation of VA hours.

**VIEW LIST OF VA USERS**

To view a summary of all VA users associated with your Product Manager account, select Team/ Virtual Assistants, or by clicking on the dashboard panel as shown in the previous view.

Each VA user is listed, along with their name, username and status. A summary is also provided of all hourly allocations set by the Administrator.
VA Time Sheet And Activity Reports

If your VA is granted access to your Product Manager account, you can generate detailed reports for any chosen timeframe, showing the hours worked by your VA and the tasks and activities undertaken.

**Time Sheets**

You can request that your VA enters their time sheet details at the end of each working day, or prior to commencing work on the following day. Hours worked are entered by the VA either as custom activities or custom tasks that have been assigned to them using the Product Manager tasks manager. We recommend that you agree beforehand with your VAs, how their working time will be entered into their time sheet and how best to setup the custom activities for your business workflow.

**Custom activities** are ideal for ongoing routine work, that tends not be assigned as individual custom tasks in Product Manager. Examples could include ‘Checking emails’, ‘Online team meetings’ or ‘Book-keeping’. These custom activities can be kept active from week to week. Click on the menu item Team / Time Sheet and then on Add Custom Activity, to configure custom activities.

Note: Custom activities configured in the time sheet are user-specific, so you’ll need to have each VA repeat these same steps in their Product Manager user account.
Decide whether certain custom activities should be kept active from week to week, or when to hide these from the time sheet. You or your VA can set any of these to ‘hide’ as shown in the following view. Note that the custom activity will only be hidden from the current selected week onwards. This ensures that you can view data for previous weeks, during which that activity was active.

**Tasks** - only custom tasks assigned to the VA will be visible in their time sheet. Auto-generated tasks generated by the Compliance Checker are not included. If you wish to have your VA enter time spent on these tasks, we recommend that you create a custom activity such as ‘Compliance checker tasks’. If you require more descriptive activities for your reports, use a title such as ‘Compliance checker tasks – Lux II Skin Cream’.

**Activity Reports**

Under the menu item Team / Activity Reports, you can view a summary of your VAs activities and generate detailed time sheet and activity reports.

At the top of the page, you can select the VA from the ‘Select user’ menu and view a summary of their tasks and hours, to date.
To generate a detailed report, now select the required time frame:

**Detailed time sheet** – click on the button to the right of the date selector to generate a time sheet report for the currently selected user.

**Activity report** – you can also select from the following options to generate an activity report:

- Custom activity (in time sheet)
- Custom tasks assigned
- Custom tasks completed
- Tests
- Quality assurance
- Documents uploaded

These reports will show details of:
- Custom activities – as setup in the time sheets by your VA.
- Custom tasks assigned to the VA
- Custom tasks completed
- Tests – assigned to the user as an operator, and test data entered
- Quality assurance
- Documents uploaded
To find out more and to receive a free software trial and demonstration, visit www.cosmetri.com

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