PRODUCT MANAGER

User Guide

Product Manager User Guide

[Cosmetri Product Manager v.5.4.3 | Last updated: 22nd December 2023]

To download the latest version of this document:

https://kb.cosmetri.com/cosmetri-product-manager-user-guide/

Contents

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
- Initial advice on migration of your data
- Upgrading, billing and payment

For all technical support issues, please initiate a support ticket by sending an email to support@cosmetri.com. This creates a support ticket, and your request will be routed to a member of the Cosmetri support team. You'll receive a confirmation email and support ticket ID. You can view the status of your ticket and communicate with the Cosmetri until the issue is resolved.

For multiple issues we request that you submit one issue per email so that we can manage each case and respond accordingly. We aim to respond to all requests within one working day. If our support team need to speak with you or request you to share screens, you will be offered a link to schedule a short online meeting.

Remote training

Cosmetri training may be scheduled if you have available training credits. These credits may be available as part of your initial plan and can also be purchased here**.** Training sessions are 45-minutes in duration and are normally conducted using Zoom.

If you prefer to receive your training by us sending you a video recording or by providing responses via email, the time taken will also be deducted from your available training credits.

Depending on your needs, your training may need to be split into multiple 45-minute sessions. A recommended training schedule will be provided and a Cosmetri trainer allocated who is best able to support you. Each training module will be assigned a unique ID which you must enter when scheduling the training.

Please do not use the provided scheduling links to book training sessions without a valid ID and without first requesting a training using the following training request form.

https://www.cosmetri.com/training-and-custom-support/

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

Minimum System Requirements

There's no need to download or install any software on your computer to use Cosmetri. 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/
- **Microsoft Edge**
  Download: https://www.microsoft.com/en-us/windows/microsoft-edge
- **Mozilla Firefox**
  Download: https://www.mozilla.org/en-US/firefox/
- **Safari** (Mac only)
  Download: https://developer.apple.com/safari/download/

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

For optimal performance we recommend the use of ADSL/ broadband or 3G+ internet connection speeds for mobile connection. Keep in mind, the performance of Product Manager may vary depending on the amount of data requested via your browser. For example, generating a detailed report or a PIF takes 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 laptop, 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 or try a browser without them.

For details of current system requirements see the following:

https://www.cosmetri.com/system-requirements/

Getting Started: Account Setup

View a training video on this topic:

Login as admin, company info and logo, base currency, local time	view video
Invoice details, update payment, verify tax ID, payment history, change plan, unsubscribe	view video
Security, backup, restore, Twitter, maintenance, system requirements, IP blocking, technical support, training, user guides, updates, change log	view video
Login, role of administrator, dashboard, tasks and notes, test schedule, user menu, product, formula, quick links, raw material	view video

Introduction

Welcome to Cosmetri! We want you to get the best possible start in using the software. Once you're confident with using the main features of the application, you'll be able to begin using some of the more advanced capabilities of the software. This guide is intended to support you all the way - from your first steps to tools and tips for professional users. But let's focus on the basics first!

Users and User Seats

Signing up for the first time to Product Manager or Cosmetri GMP will require **two** user accounts – a restricted-access **admin user** and a first **standard user**.

Admin users

An **admin user** has restricted access to the application's main settings, plan options, billing any payment pages. **This user does not have access to the main modules of the application.** We recommend adopting a strict policy in your company, whereby users are firstly requested to contact the appointed admin if they experience any problems with accessing their Cosmetri account or to request any changes to the account settings.

If your company is subscribed to **both** the Cosmetri GMP and Product Manager, the **same** admin user is used for accessing both applications.

Standard users

To access the main features of the software, you will require at least one **standard user**. The same user can be granted access to both Product Manager and Cosmetri GMP. You will require an available **user seat** in **each** application.

If you also have access to an admin user account, please be sure to logout of any user before attempting to login to the other. **Only one concurrent user session is permitted**.

Check that your admin has set any required permissions for your standard user. Permissions are set differently between Cosmetri GMP and Product Manager – details can be found in the appropriate user guide section.

User account settings

Under 'My Profile' in the user menu (top right), the logged in user can update the following data and access certain user account functions:

- First and last name
- Email address
- Telephone

- Profile photo
- Update password
- Reset all help panels

Account activation (new users)

Upon activation of the account, you will be required to click on a link in an activation email to set a password and to be logged into the **standard user** account. The admin account can be activated by clicking on the activation link in an email that is sent to the admin's email address.

Connecting via SSO

Single sign-on (SSO) is an authentication scheme that allows a user to log in with a single ID to any of several related, yet independent, software systems. If your organization requires SSO please contact Cosmetri support for further details.

Login and user access

For security reasons and to ensure traceability in your account, **multiple logins by different people using the same Cosmetri account are not permitted**. Any attempt to login when a user session is already open will require using the 'Force Logout' function, thus ending any current open user session and causing possible loss of data since their last save action was performed.

Some networks are configured to dynamically switch the IP address being broadcasted. For security reasons, connecting to a Cosmetri application requires maintaining the same IP address during a user session. If the IP address is automatically switched, the user will be logged out of Cosmetri. This issue is easily fixed – please contact Cosmetri Support for instructions on how to configure your network accordingly.

Note: If you wish to have this security feature deactivated for your Cosmetri account, please contact support.

Subscribe additional user seats

An admin user of your Cosmetri account can subscribe additional user seats. Click under the 'plan' option for the respective application (user menu, top right). Under 'Additional User Seats' select the required amount of user seats and follow the guidance on the page.

Subscription period is **annual**, tied in with your main plan subscription renewal date. The first year's subscription will be pro-rated according to the time remaining on your plan's current subscription period. Thereafter you will be automatically billed on the renewal date for the full annual renewal of your plan and additional user seats renewals.

Add new user

If a user seat is available in the application, you may add a new user under 'Add new user'. The user will receive an email and activation link to set their password and login. First Name, Last Name, Username and Email are required. Once the user is activated, you may grant them access to both Product Manager and Cosmetri GMP, provided you are subscribed and there is an available user seat in each.

Note: Immediately after adding the new user, we recommend setting any access permissions.

Reset password

Under the tab "Users & Seats" an admin user can edit a user's details and reset their password by clicking on the edit icon in the user list 'Actions' column.

Clicking on 'Reset Password' will immediately log the user out of Cosmetri and prevent them logging in with the same password. If you wish to prevent the user from resetting their own password, **you must also change the email address associated with the account**! If you require to permanently block the user's access, you are advised instead to deactivate the user.

Payment and Billing

If you are already subscribed to a Cosmetri GMP or Product Manager plan, the admin user will be able to access a 'Billing' page in the user menu (top right). You will then see the following tabs available:

Payment details

Use this tab to update the payment method used for paying for your subscription renewals or when you add a new service. In the first step, please enter the **ZIP/postcode**, **country,** and any **company VAT number**. These details are also used for your invoice details and are required for validating your tax status.

Click on 'Proceed' to be directed to the Stripe secure payment gateway to complete your payment details. Your payment details are encrypted and transmitted securely to our PCI-compliant Stripe.com payment gateway. Your payment details are not stored on Cosmetri servers.

After clicking 'Save' please keep your browser open and wait for the page to be updated. This may take up to 30 seconds.

Invoice details

Under 'Invoice Details', enter your company's address in the fields provided. **If you pay online using a credit card** and need to change your **ZIP/postcode**, **country** or **company VAT number**, you will be required to re-enter your payment details under 'Payment Details'. This is because the payment system requires verification of your company's location and tax status, and the aforementioned details are matched against the details used for your payment method.

Any changes made will be applied to your **next** transaction. Invoices that have already been issued cannot be updated.

Payment history

In this tab you can access your Cosmetri invoices (as .pdf files) and view your payment history. Click on the button provided to be directed to our secure invoicing service Quaderno. The first time you access this service you will need to set up a password to verify and connect your account. Please keep the password that you chose stored safely.

Cancel subscription

Cancellation is possible to the end of the current billing period, ensuring that your subscription will not be renewed on the renewal date. Refunds are not provided for remaining time on your current subscription. Click on an available button to select the subscription and to cancel to the end of the current billing cycle.

If you wish to have your data deleted immediately, please contact Cosmetri support.

Getting Started: Product Manager Data

Introduction

This section of the user guide describes how to manage data in your Cosmetri account, including:

- Demo data used for trialing the software
- Managing your data when switching from a trial period to a subscribed plan
- Importing data
- Companies
- Raw materials
- Products and formulas
- Advisory lists

Note:
For guidance on importing any available shared data such as demo test groups and formulas published by Cosmetri for training purposes, see the 'Import Shared Data' section of the user guide. Product Manager also includes a feature to enable you to publish data for import by another designated Cosmetri accounts (see 'Publish and Share Data'). This feature requires upgrading your account to service provider status and assigning publishing rights. Please apply to Cosmetri for further information.

As a new user of Cosmetri, you may have data that you wish to migrate or upload to your account, such as .csv or .xls files. You may use the import tools available in product Manager to upload your own data, as described in this section of the guide.

For more complex requirements, please contact Cosmetri support. We can provide you with a free initial consultation to examine samples of your source data and advise you on the optimal strategy for importing or migrating your existing data. Please note, that any custom data import or migration work is subject to an additional fee or must have been offered as an included service in your Professional plan.

You can submit a data import request by completing the following questionnaire: https://kb.cosmetri.com/custom-data-import/

Demo Data and Trial Period

While trialing Cosmetri you may request demo data to be included in your account. This enables easier and faster learning of the software. You may also import certain demo data under 'Import Data/Shared Data' - see the 'Import Shared Data' section of the user guide.

For trial periods, this same account will be used if you should later decide to upgrade to a paid plan. **You are given the option to delete all data once you end the trial period – please contact Cosmetri support for assistance. If you have added any data you wish to keep, a full deletion of only the demo data is not possible**. It is recommended therefore to only enter temporary data during the trial period until such time that you wish to begin entering real data that you intend to retain in your account.

Data Import

You can import the following types of data:

- Companies
- Raw materials
- Products and formulas
- Advisory lists

Your source data must be prepared in a format that can be imported. Sample import files are available for guidance in preparing import-ready files.

Note: If you have questions about importing your data, please submit a data import questionnaire by completing the following questionnaire: https://kb.cosmetri.com/custom-data-import/

Before preparing your data for import it is recommended to familiarize yourself with the respective feature in Product Manager to understand the data that can be imported and how this is mapped to the various fields available in the application.

Due to dependencies of item types, it is recommended to upload your data in the following sequence:

- Companies
- Raw materials
- Products and formulas

This will enable raw materials to be correctly associated with suppliers. The raw materials in your formulas can also be linked by trade name and/or part code to the respective raw material already present in your Cosmetri account.

Note:
If you experience problems with importing your data and have verified that the file structure is as described in this section of the guide, please turn off your browser add-ons, as they can influence performance.

Data import: companies

View a training video on this topic:

Importing company data	view video

Access this import tool under the menu item 'Import Data/Companies'.

File structure:

An import template file can be downloaded here.

Each company must be defined as a separate row, with different columns available for mapping required data to specific company fields in Product Manager.

Available data fields and columns:

Company ID (required field)
Company Name (required field)
First Name

Last Name

Address 1

Address 2

Town/City

County/District

Postcode/ZIP

Country

Company Email

Company Tel.

Sales Email

Sales Tel.

Website

First Name (GMP)

Last Name (GMP)

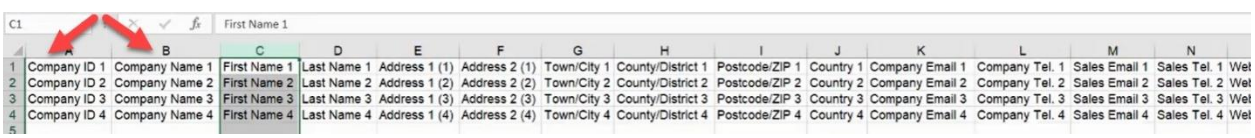
Tel. (GMP)

Email (GMP)

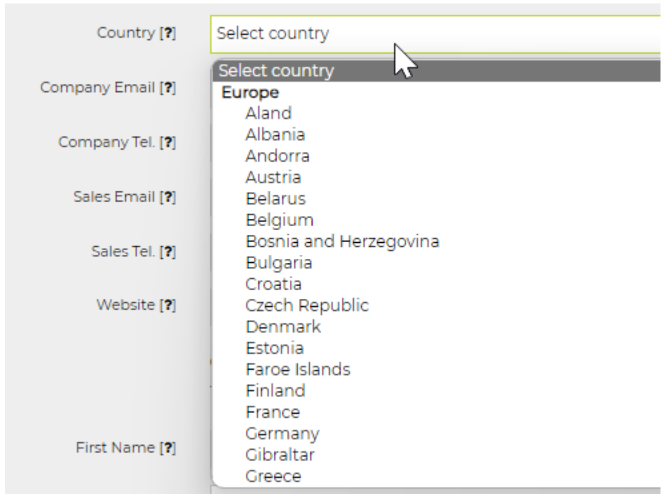
Required fields:

Company ID (column A)

Company Name (column B)

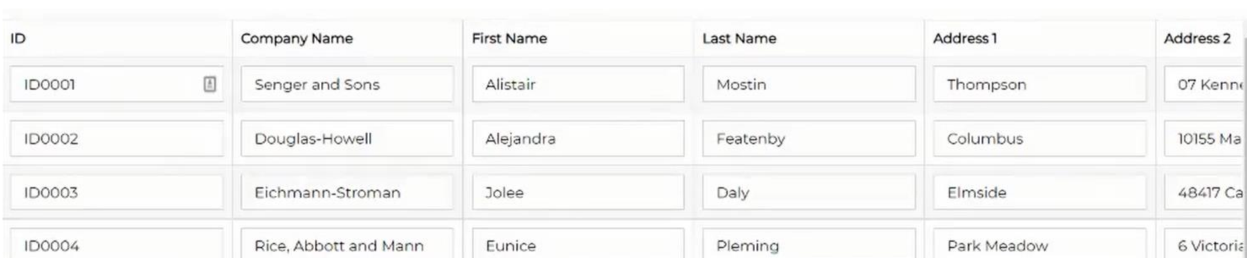


For the 'Countries' field, any value must <u>exactly match</u> with the countries defined in the following field in Product Manager:



The email address fields 'Company Email', 'Sales Email' and 'Email (GMP)' must contain a valid email address format. The fields 'Company Tel.', 'Sales Tel.' and 'Tel. (GMP)' must contain a valid telephone number format. If any field is not valid, an error will be displayed during import. You will be able to correct any invalid data prior to proceeding.

View of pre-import page where company data can still be edited prior to finalizing the import:



ID	Company Name	First Name	Last Name	Address 1	Address 2
ID0001	Senger and Sons	Alistair	Mostin	Thompson	07 Kenn
ID0002	Douglas-Howell	Alejandra	Featenby	Columbus	10155 Ma
ID0003	Eichmann-Stroman	Jolee	Daly	Elmside	48417 Ca
ID0004	Rice, Abbott and Mann	Eunice	Pleming	Park Meadow	6 Victori

Upload a source file that has a maximum of <u>300 rows</u>. If you have a larger source file, you can split it into multiple files

Steps to import the data:

<u>Note</u>:
Turn off your browser add-ons, as they can influence performance. You must also close your import source file before attempting to upload it, otherwise an error will occur.

- Under 'Import Data/Companies' upload an .xls, .xlsx or .csv file with your data, using the format as shown in the demo file.

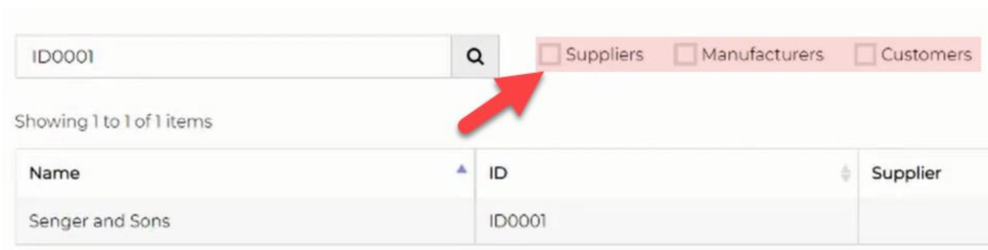
- Click on 'Proceed to Next Step'.
- Make any final adjustments to the data fields for each company.
- Click on 'Import Companies' to import. Do not close your browser until the process has completed.
- Check under the menu item 'Companies' that your companies have been imported (see note below) and make any further changes to the imported company records in Product Manager.

Post-import it is also possible to use the same import method to update existing companies in your Product Manager account. The company records are matched by the company ID.

Your imported company records will initially not be set as either 'Supplier', 'Manufacturer' or 'Customer' type records. Additional columns may be used in the import file as follows:

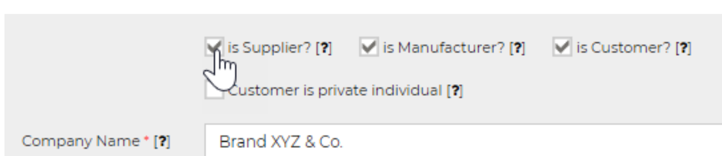
Is supplier?
Is manufacturer?
Is customer?

If a '1' is entered in any column for the company record, the following corresponding checkbox will be checked, and the company record set as that type:



If you do not use the above columns to set the company record during import, please check after importing your data, that for each company record you set the required type.

Setting a company record to assign required company type(s):



Data import: raw materials

View a training video on this topic:

Importing raw materials	view video

Access this import tool under the menu item 'Import Data/Raw Materials'.

Use this tool to import multiple raw materials as a .xls, .xlsx or .csv file. Only parent raw materials can be imported. Batches of each parent can be easily added directly in Product Manager. For further information see the 'Raw Materials' section of the guide.

Upload a source file that has a maximum of 500 rows. If you have a larger source file, please split it into multiple files.

Note:
It is recommended to first import any companies (see the previous section 'Data import: companies'). You can then import your raw materials using the company ID for either the supplier and/or manufacturer. Import of the raw materials will then set the correct association of the raw material with the company and auto-update the company type to 'manufacturer' and/or 'supplier'.

File structure

An import template file can be downloaded here.

Raw materials are imported in flat-file format. Multiple rows can be used to define the different chemicals/ingredients in the raw material composition. The 'Trade Name' field in column A is required and should be identical for any rows which pertain to the same raw material.

You may also import raw materials one per row, either defining a single ingredient in the raw material or leave columns E-H empty and enter the composition later.

Use the 'INCI Name' to enter the EU INCI name (not US INCI) and CAS No. At least one value from these must be present in the import file for each ingredient in the raw material composition. Use the exact official INCI name as published in common databases and lists, such as EC CosIng. You may enter the CAS number with or without hyphens.

Enter the 'Min. %w/w' and 'Exact/Max. %w/w' values as numeric value. If you know the exact concentrations for each INCI in the composition, only enter a value in the 'Exact/Max. %w/w' field and leave the 'Min. %w/w' field empty. For example, if you only enter 100.0000000 in the 'Exact/Max. %w/w' field, the following would be set in that raw material 'Composition' tab:

Ingredient	CAS No.	Enter exact	Min. %w/w	Exact/Max. %w/w
ABALONE EXTRACT		✓	100.0000000	100.0000000
				100.0000000%

Available data fields and columns:

- **Trade Name** (required)
- Part code/ID
- Supplier ID
- Manufacturer ID
- INCI Name
- CAS No.
- Min. %w/w
- Exact/Max. %w/w*

* If an INCI or CAS No. value exists for the ingredient then the 'Exact/Max. %w/w' value is required.

View of import template. The raw material with trade name 'raw material 1' has six ingredients:

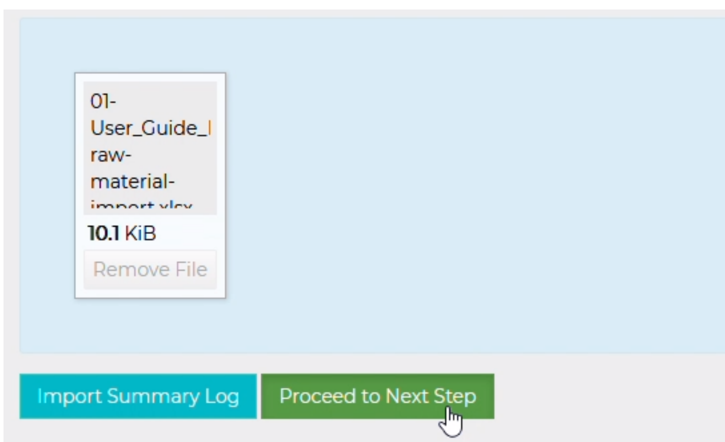
	A	B	C	D	E	F	G	H
1	Trade Name*	Part code / ID	Supplier ID	Manufacturer ID	INCI Name	CAS No	Min %w/w	Exact/Max %w/w
2	raw material 1	123	951623	159487	ingred 1	7732-18-5	25.000	50.000
3	raw material 1	123	951623	159487	ingred 2	57-55-6	25.000	50.000
4	raw material 1	123	951623	159487	ingred 3	90063-94-8	5.000	10.000
5	raw material 1	123	951623	159487	ingred 4	24634-61-5	0.500	0.500
6	raw material 1	123	951623	159487	ingred 5	532-32-1	0.500	0.500
7	raw material 1	123	951623	159487	ingred 6	65-85-0	0.500	0.500
8	raw material 2	456	852147		ingred 1	7732-18-5		
9	raw material 2	456	852147		ingred 2	57-55-6		
10	raw material 2	456	852147		ingred 7	110-44-1		

Steps required for importing multiple, multi-ingredient raw materials:

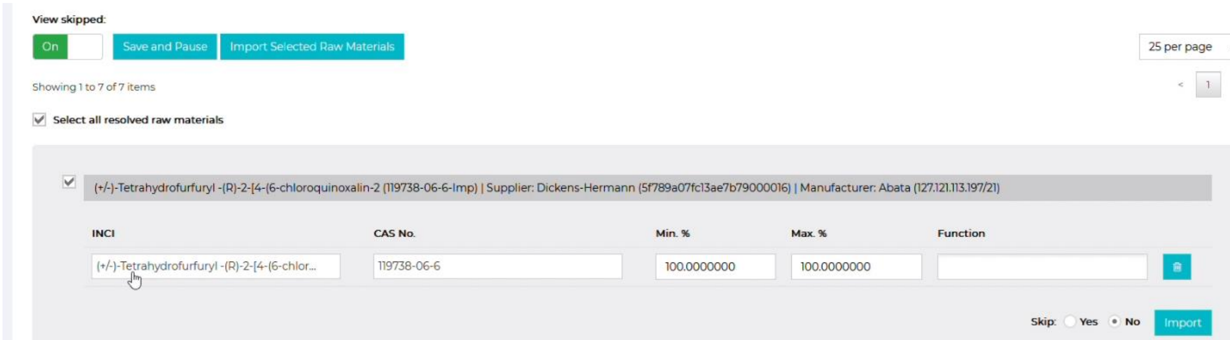
Note:
Turn off your browser add-ons, as they can influence performance. You must also close your import source file before attempting to upload it, otherwise an error will occur.

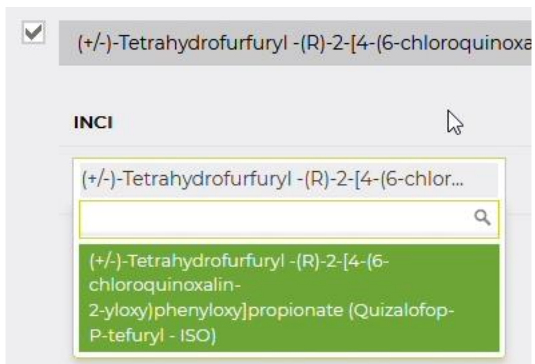
'Import Data/Raw Materials', drag and drop or click to locate an importable source file, using the required format and file type, as described.

Click on 'Proceed to Next Step'.

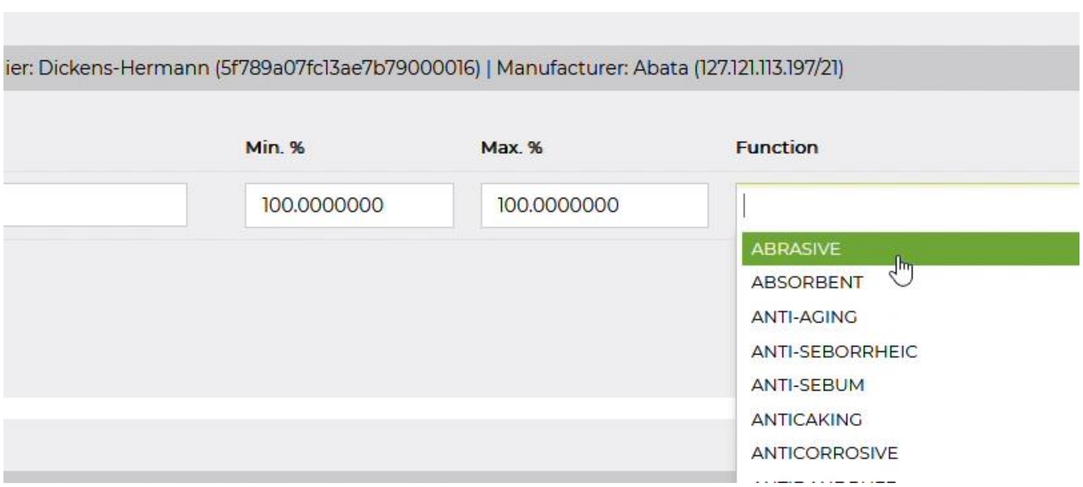


Check any ingredients by clicking in any 'INCI' field to select the required ingredient.

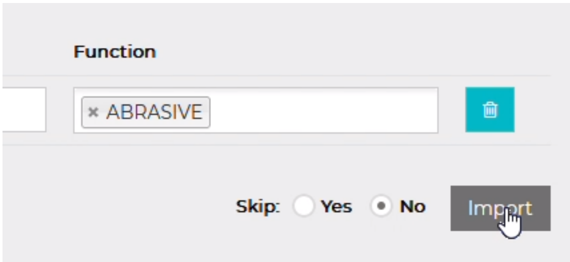




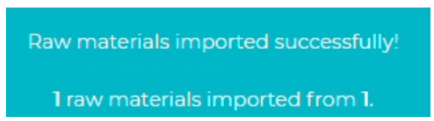
You can also edit any ingredient's 'Min. %w/w' and 'Exact/Max %w/w' values as well as adjust the function(s):



You can import the raw materials one, by one by clicking on the 'Import' button associated with each raw material:

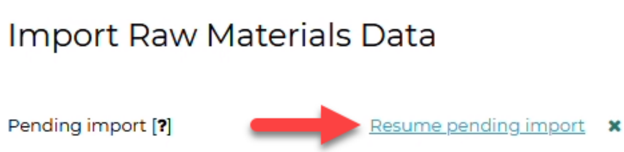


A success message will be displayed, and the imported raw material will be removed from the import list.

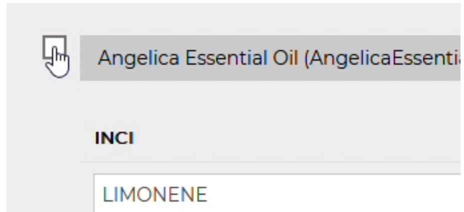


Optionally click on 'Save and Pause' to save your changes, enabling you to return to the import task at a later time.

Under 'Import Data/Raw Materials', click on the following link to resume the import:



Uncheck the following checkbox for any raw materials that you do not want to import. Checking this checkbox to include the raw material in the import requires that all data is present.



You can also skip importing any raw material using the 'Skip' option which will uncheck the aforementioned checkbox. Skipped raw materials are hidden from the import list and can be viewed or hidden using the following toggle:

Click on 'Import Selected Raw Materials' to import the selected raw materials. A summary of the raw materials to be imported and skipped is displayed. Click on 'Proceed' to confirm the action. Do not close your browser until the process has completed.

Resolved raw materials

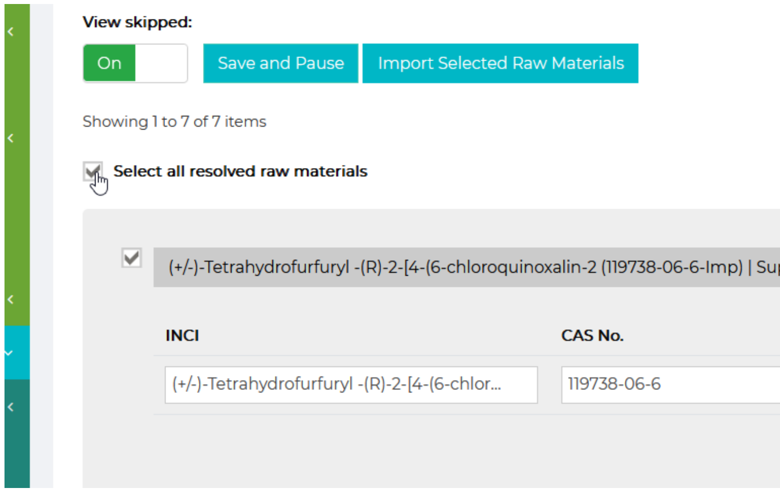
Only resolved raw materials may be imported. A raw material is considered as resolved if it:

- has no ingredients in the composition

or

- all ingredients in the composition are matched and at least the 'Exact/Max %w/w' value exists.

Once a raw material's issues are resolved, the 'resolved' checkbox is auto checked for the raw material and it may be imported. The following checkbox can be used to select all resolved raw materials and import these.



Note: If raw materials are listed across multiple pages, all raw materials are selected in all pages

This makes it possible to import your raw materials in stages by resolving any issues, importing the resolved items and then returning later to the import to further resolve the remaining ones.

Data import: single formula

View a training video on this topic:

Importing a single formula to a product	view video

Access this import tool under the menu item 'Import Data/Formulas (Single)'.

Use this tool to import a single formula as a .xls, .xlsx or .csv file.

The raw materials in the formula must already exist in your Product Manager account and are identified primarily by the 'Trade Name' field. Including a 'Part Code/ID' in the import file is also helpful for mapping the raw material. You must therefore first import or manually add your raw materials to Product Manager.

A product must also exist in your Product Manager account which must be selected to upload the formula to.

File structure

An import template file can be downloaded here.

View of import template.

	A	B	C	D
1	**Raw material Trade Name***	**Raw material Part Code/ID**	**Raw material %w/w***	**Raw material Stage**
2	RM Trade Name 1	PARTCODE1	30.000	1
3	RM Trade Name 2	PARTCODE2	40.000	2
4	RM Trade Name 3		30.000	3

Available data fields and columns:

- Raw material **Trade Name** (required)
- Raw material **Part Code/ID**
- Raw material **%w/w**
- Raw material **Stage**

If the **Part Code** does not exist, the **Trade Name** must exactly match with the raw material in your Product Manager account. If the Part Code already exists for a raw material in your Product Manager account, the raw material is ignored and cannot be imported.

%w/w values can be entered to a maximum accuracy of seven i.e., 0.0000001%w/w

Steps required for importing a single formula:

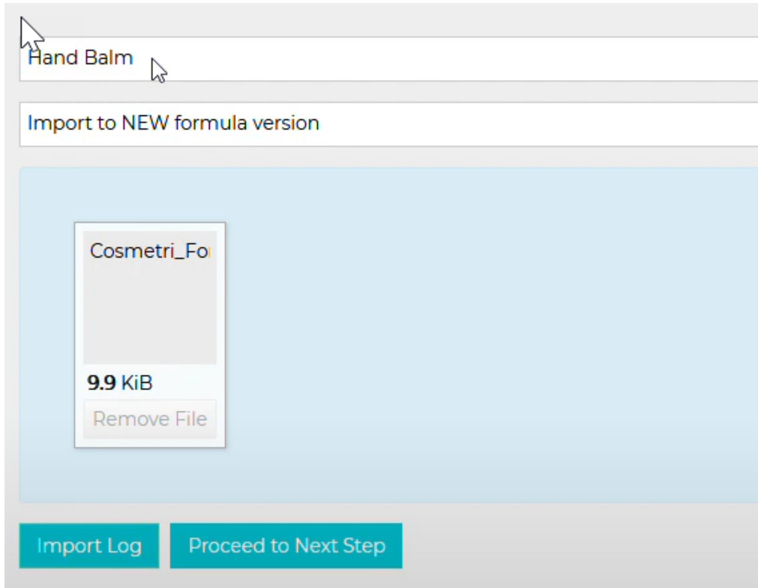
Note:
Turn off your browser add-ons, as they can influence performance. You must also close your import source file before attempting to upload it, otherwise an error will occur.

Under Products/New add a product to upload the formula to.

Under 'Import Data/Formulas (Single)', select the product.

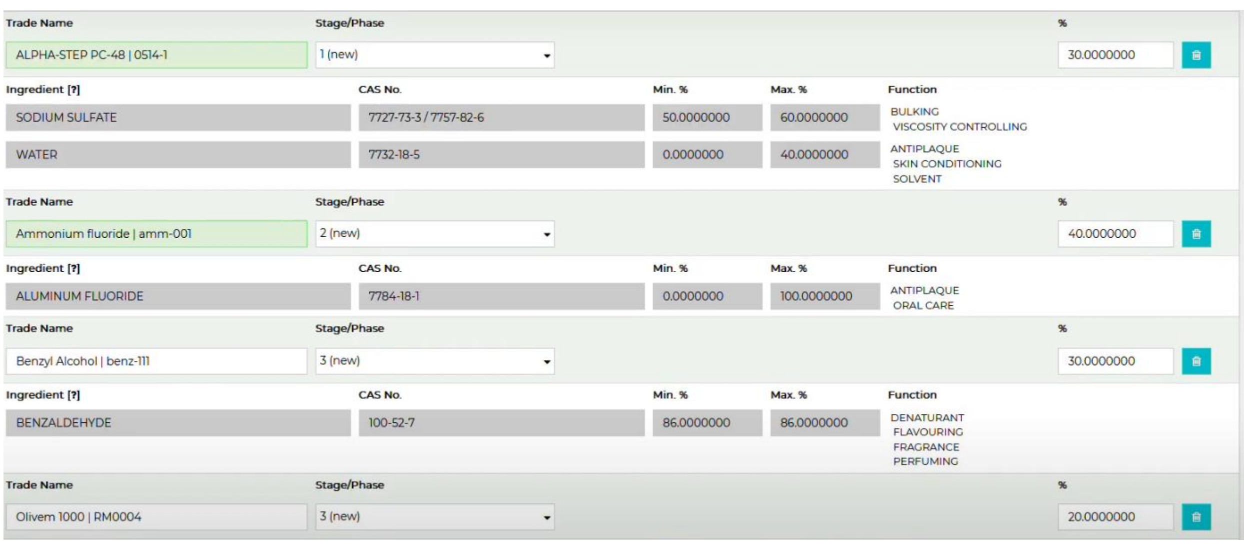
Select whether the formula should be added as a new version or replace an existing version.

Drag the import file to the file upload zone or click in the zone to browse and select a file from your hard drive.



Click on ‘Proceed to Next Step’

You will now see a pre-import screen with the formula mapped data:



For each raw material in the formula, you can click in the green ‘Trade Name’ field. If different batches exist, you may select a different batch to associate with the formula. Or type in the field to search for by trade name for a different raw material.

Make any other adjustments to the 'Stage/Phase' and '%w/w' fields for the raw materials in the formula.

Click on 'Add Formula' to import the formula. Upon successful import, the formula will be opened where you can verify the data.

Data import: products and formulas

View a training video on this topic:

Importing multiple products and formulas	view video

This import tool enables you to import multiple products and formulas in one action. Prior to using this tool, you must import or enter all raw materials associated with the imported formulas. For guidance see the earlier section 'Data import: raw materials'.

You may import new products and formulas or import a formula to an existing product in your Product Manager account. If a formula is uploaded to an existing product, it will be assigned the next available formula version number.

File structure

Use this tool to import multiple raw materials as a .xls, .xlsx or .csv file.

Click on 'Download Demo Import File' to access this template file which you can use to practice importing data and as the basis for populating with your own source data. A flat file format is used, meaning that you can use multiple rows per product/formula, as explained below.

Available data fields to import:

- Product Title (required)
- Product Reference
- Customer Group (only if used) (required, if in use)
- Product Type Level 1 (required)

- Product Type Level 2
- Product Type Level 3
- Other description
- Product Type of Exposure (required)
- Formula reference (required)
- Raw material Trade Name (required)
- Raw material Part Code/ID
- Raw material %w/w (required)
- Raw material Stage

View of import template file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Product Title*	Product Reference	Customer Group* (only if used)	Product Type Level 1*	Product Type Level 2	Product Type Level 3	Other description	Product Type of Exposure*	Formula reference*	Raw material Trade Name*	Raw material Part Code/ID	Raw material %w/w*	Raw material Stage
2	Shampoo	Shampoo-ref	1			30014		1	Formula-ref001	Benzolin	benz-part001	30.0000001	1
3	Shampoo	Shampoo-ref	1			30014		1	Formula-ref001	Water	water-part001	40.0000000	2
4	Shampoo	Shampoo-ref	1			30014		1	Formula-ref001	Benzil alcohol	alc-part001	29.9999999	3
5	Cream	Cream-ref	2		20011			2	Formula-ref004	Benzolin	benz-part004	30.0000001	4
6	Cream	Cream-ref	2		20011			2	Formula-ref004	Benzolin	benz-part001	30.0000001	3
7	Cream	Cream-ref	2		20011			2	Formula-ref004	Water	water-part001	40.0000000	4
8	Cream	Cream-ref	2		20011			2	Formula-ref004	Benzil alcohol	alc-part001	29.9999999	2
9	Cream	Cream-ref	2		20011			2	Formula-ref004	Benzolin	benz-part004	30.000001	1
10	Shampoo	Shampoo-ref	1	10001				1	Formula-ref002	Benzolin	benz-part001	30.0000001	1
11	Shampoo	Shampoo-ref	1	10001				1	Formula-ref002	Water	water-part001	40.0000000	2
12	Shampoo	Shampoo-ref	1	10001				1	Formula-ref002	Benzil alcohol	alc-part001	29.9999999	3

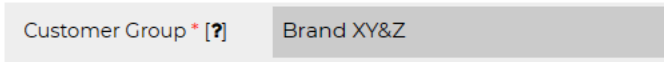
Each row can be used to define a raw material in the formula.

If you only require uploading products without any associated formulas, these are the columns A thru G in the template file. Formula-related fields are present in columns H thru M.

Raw materials are identified by their 'Raw material Trade Name' (column J in the template file) which is a required field for each raw material in the formula. We recommend also entering a Part Code/ID using the field 'Raw material Part Code/ID' which will enable better matching of the import data with your already present raw materials.

Customer Groups:

If you use the customer groups feature in Product Manager this field is required since every product must be associated with a group. This field is displayed in the product's '1.Info' tab:



Click on ‘Export Customer Groups’ to obtain a list of your customer groups and their IDs. Add the correct IDs to each product in your source file.

Product Types:

The product type is required for each imported product, at least for the level 1 selection and is displayed in the product’s ‘1.Info’ tab:

Click on ‘Export Product Types’ to obtain a list of product types and their IDs. Click on the tab ‘all mappings’ to view a complete list.

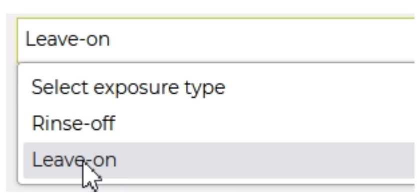
	A	B	C	D	E
1	Product Type Id	Relation ID	Product Level Type	Product Type Title	Product Import Id
2	1		1	Skin products	10001
3	58		1	Hair and scalp products	10002
4	79		1	Nail and cuticle product:	10003
5	96		1	Oral hygiene products	10004
6	109		1	Other	10005
7	2	1	2	Skin care products	20001

Select a product type from the list. You can see whether this is a level 1,2 or 3 level in column C. Use the value in the ‘Product import id’ column (E).

<u>Note</u>: You can enter only a level 2, or 3 ID for the product and the import wizard will automatically select the associated level 1 and level 2 categories to which it belongs.

Type of Exposure:

This is a required field for each product and is displayed in the product’s ‘1.Info’ tab:



Use one of the following IDs:

Rinse-off: 1

Leave-on: 2

Steps required for importing multiple products and formulas:

Access the import tool under 'Import Data/Formulas (Multiple)' formula to.

<u>Note</u>:

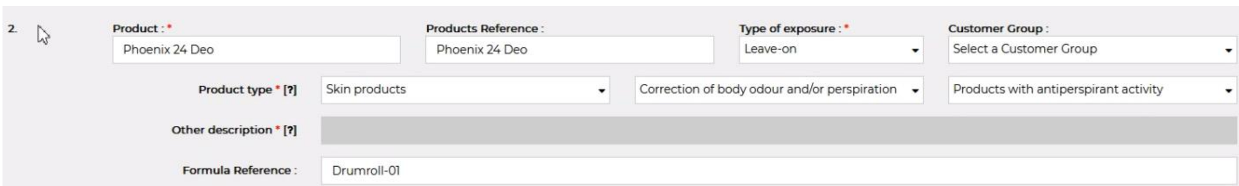
Turn off your browser add-ons, as they can influence performance. You must also close your import source file before attempting to upload it, otherwise an error will occur.

Drag your source file to the upload area or click in the blue area to browse and select the file from your computer.

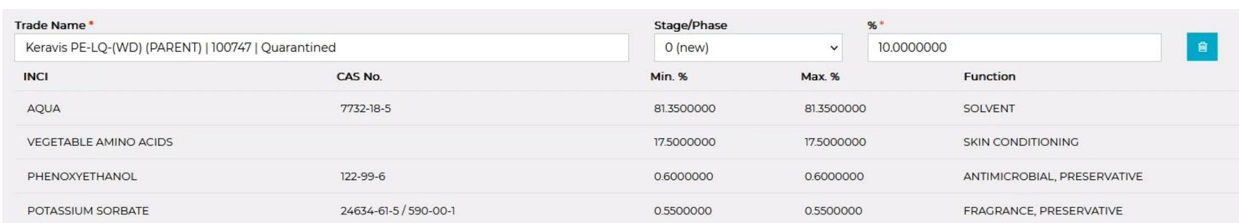
Click on 'Proceed to Next Step'. Depending on the volume of data being uploaded, you may need to wait. Please do not close your browser while the process is running.

The import wizard will then be displayed, with each product and formula listed. You can use this page to make any adjustments to the data as well as add any required data that was not present in the source file. The end of each formula is recognizable by the total %w/w value, which should be 100.0000000:

View of product-level data in import wizard:



View of formula-level raw material data in import wizard:



Edit any of the data in the editable fields and then click on 'Import Data' to proceed. If any formula's composition is not exactly 100.0000000 %w/w a warning is displayed:

Check the newly imported data in Product Manager once the import has completed. Return to the import tool under 'Import Data/Formulas (Multiple)' and click on 'Import Log' to view a log of all product and formula import actions.

Note: You can save your changes in the import wizard and return to complete the import at a later time.

Data import: advisory lists

View a training video on this topic:

Importing ingredients to an advisory list	view video

Access this import tool under the menu item 'Ingredients/Advisory Lists'.

This import tool enables you to easily and quickly create lists of ingredients/chemicals that should or should not appear in your formulas. For further information see the 'Ingredient Advisory Lists' section of the guide.

File structure

An import template file can be downloaded here.

View of import template

	A	B	C	D	E
1	**INCI**	**US INCI**	**CAS**	**EINECS**	**Notes**
2	BUTYLPARABEN		94-26-8		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. 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.
3	CALCIUM PARABEN		69959-44-0		
4	ETHYLPARABEN		120-47-8		
5	HEXAMIDINE DIPARABEN		93841-83-9		
6	HEXAMIDINE PARABEN				

Available data fields and columns:

You may import a .xls or .xlsx file, requiring the following column headers in this order:

INCI

US INCI

CAS

EINECS

Notes

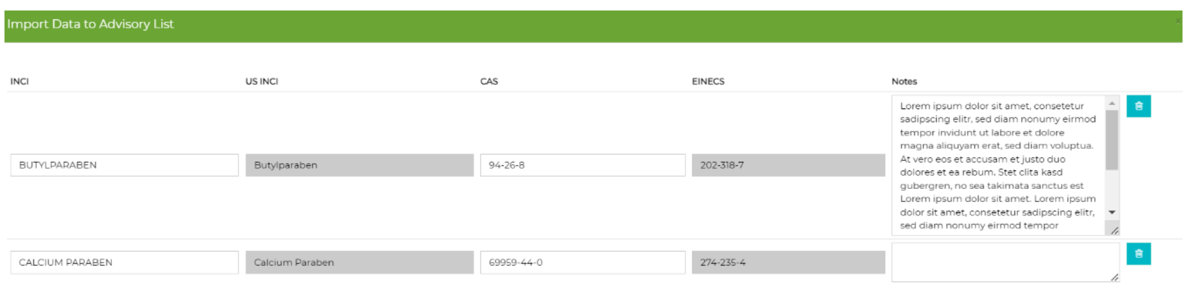
It is recommended to split the source file into files of max. 250 rows each.

Steps to import the data:

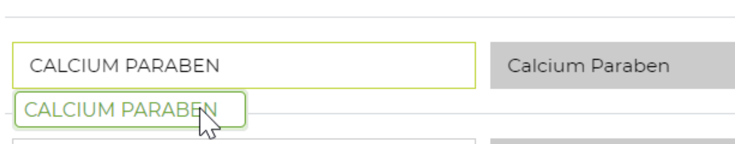
Note:
Turn off your browser add-ons, as they can influence performance. You must also close your import source file before attempting to upload it, otherwise an error will occur.

- Open an existing advisory list or create a new list.
- Click on 'Choose File'.
- Select the required import file.
- Click on 'Proceed'.
- Each ingredient in the import file must be mapped to its corresponding ingredient in the Cosmetri ingredients database.

  View of pre-import screen:



- If any ingredients could not be automatically mapped, these will be displayed in the pre-import screen. Click in a field for each ingredient to search and select the correct ingredient to be mapped to.



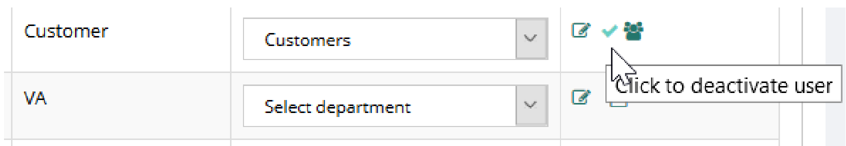
- Once all ingredients are mapped, click on 'Import Data' to complete the import. Do not close your browser until the process has completed. Optionally, you can click on 'Save and Pause' if you would like to resume adding raw materials later. Within the advisory list a 'Resume Import' button is available to return to the import view.

- Check in the advisory list, that your imported ingredients are correctly imported. Make any required adjustments to the advisory list configuration.to ensure that you will see the advice for ingredients when checking your formula compliance.
- Click on 'Save' to save the ingredients imported to the advisory list!

Getting Started: Manage Product Manager Users

Deactivate Product Manager User

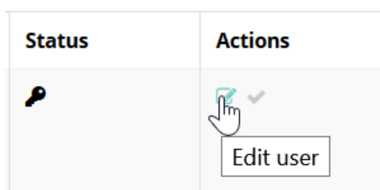
To permanently deactivate a user account and therefore release a user seat – for example when a member of staff leaves your company - click on the following icon in the Actions column:



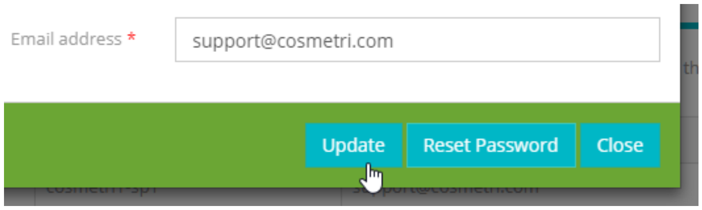
Deactivating a user is permanent! All data and user logs for that user will be retained in your Cosmetri account, ensuring traceability and retention of historical data. Click on 'Permanently Deactivate User' to confirm.

Once a user account has been permanently deactivated, the number of available user seats will be increased, enabling you to add one further user.

You can edit a user's details and reset their password by clicking on the following icon:



This function is useful for example, if you wish to block access to a user or reset their password. Enter an email address that only you as Administrator have access to and click on 'Update'. You can then use the 'Reset Password' button to receive an email at that address with a password reset link.



Product Manager User Types

As well as the standard user type described above, other user types exist. Each of these user types also requires a user seat.

Full details are provided in the relevant section of the user guide.

Customer

If you provide services to different customers, you may grant them access to Product Manager and set the permissions for which areas of the software they can access. For example, a customer user may be provided access to add or collaborate on their project/market briefs, or to view their products and formulas.

Customer type users have the following features:

- They cannot see other customer users when using the software
- They are associated with a customer group, ensuring that they can only access their own products
- Associate a company record with the customer user

Service provider

A service provider user has a special Service Provider account provided by Cosmetri. They can submit a request to your admin user to have this account connected to your account. You may revoke this permission at any time.

Service provider type users have the following features:

- Service provider may publish data for import into your account
- Submit a request to a company to apply as a service provider user
- Associate a company record with the customer user

Virtual assistant

A virtual or remote assistant account is ideal for providing to people you outsource work to that is performed in your Cosmetri account, such as data entry or uploading documents.

Virtual assistant type users have the following features:

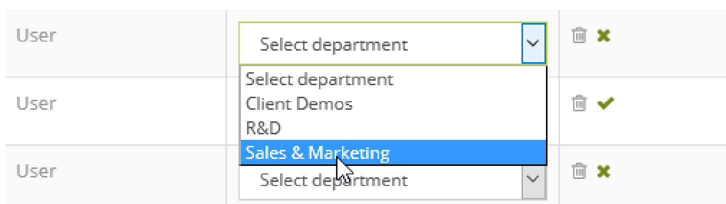
- Set monthly hours limit
- Track and report time in their work log

Departments

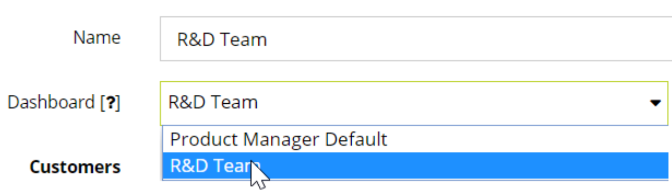
You can configure departments to control which pages, tabs and functions can be accessed by users, as well as setting whether data is view-only or editable. Click on the 'Departments' global settings tab and on 'Add New' to create your first department.

Select 'View/edit', 'Hide' or 'View only' to determine which pages and tabs of the software are accessible to a user who is assigned to that department. Enter a title for the departments and click on 'Save' to save your changes.

Under 'Users', you can assign each user to any available department as follows:



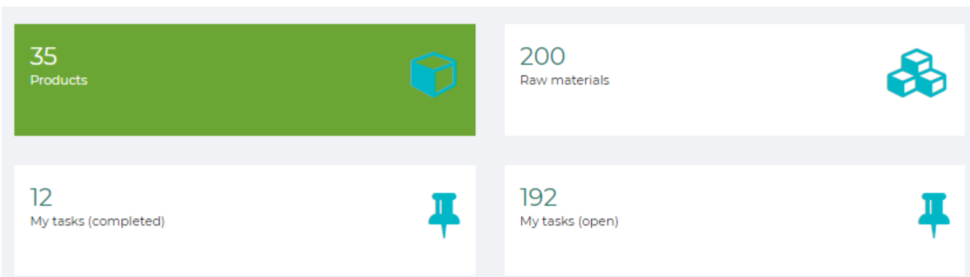
If you have set any custom dashboards, you can select any dashboard to associate with the department.



Note: It is recommended before providing a user access, that you use a test account to login and test the department settings and to verify that the required permissions have been applied.

Dashboard

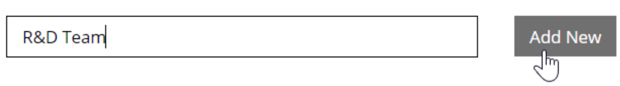
In the admin settings under the tab 'Dashboard' you can create customized dashboards and associate any dashboard with a department. Customized dashboards enable the logged-in user to view up to 12 dashboard panels most relevant to their role and be able to click on a panel to open the associated page or tab.



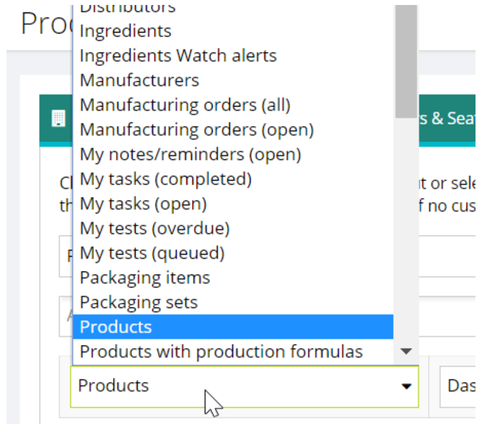
Note: If the logged in user does not have permission to view an item type associated with a panel, they will be restricted accordingly and see a count of the items they are allowed to view.

If a custom dashboard is not associated with a department, the logged in user will see a default dashboard layout, which is not editable.

Enter a name for the dashboard panel and click 'Add New' to create a new dashboard layout or select an existing layout to edit.



The maximum no. of dashboard panels is 12 (3 rows x 4 panels). The first row of four panels will be displayed. For each panel position, click to select from an available panel.



If a panel has already been selected for a panel position, it will not be available for selection in the list. Click on 'Save' to save the dashboard.

Select any existing department so that any user associated with the department will see that dashboard layout. If a department is already associated with a dashboard, unset the association first by selecting the dashboard. The association can also be changed from the 'Departments' tab.

Getting Started: Product Manager Settings

Introduction

This section of the guide covers the basics for configuring Product Manager. **To access the settings, you will need to be logged in as an admin user of your Cosmetri account and select 'Product Manager'.**

<u>**Note**</u>: Please also refer to the relevant section of this user guide for related default settings and the section on managing users and seats.

Setting Base (Default) Currency

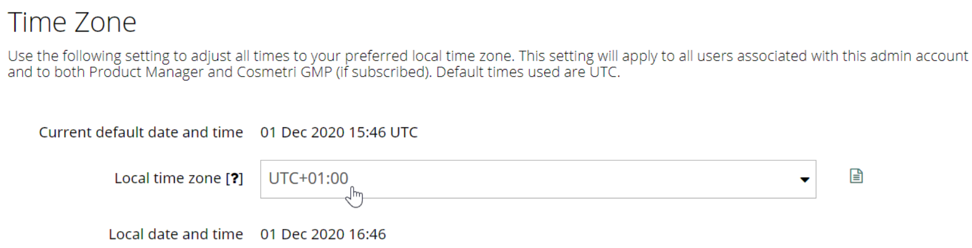
All cost calculations are performed in the default base currency that you can set. Raw material and packaging costs may be entered in different currencies. Calculations of formula costs, BoM etc. will convert any materials costs entered in a different currency to your base currency at the current exchange rate.

Changing the base currency setting 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. It is therefore recommended to set this option prior to entering and managing costs in Product Manager.

Local Time Zone

You can set the local time under the 'Default Settings' tab. If your company is subscribed to both Cosmetri GMP and Product Manager, the **same** time zone is used for **both** applications.

Select from the drop-down list your time zone compared to UTC. You can cross-check the current time displayed with your local time.



Click on 'Save' to apply the change.

Compliance Settings

The 'Compliance' tab of the global settings enables you to configure which compliance zones are available for selection for your formulas, as well as the default zones that should be associated with every formula you add. Details of available compliance data and options can be found on the following web page:

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

All plans include EU and US FDA regulatory data by default.

Additional compliance zones for manual checking of compliance for your formulas can be configured. Click in the 'Actions' column to edit an existing compliance zone, or on 'Add Custom Compliance Zone' to create a new zone.

You can enter a maximum of five custom URLs for each compliance zone as bookmarks for conducting further regulatory research. When checking the compliance of your formula in Product Manager, you'll be able to click to open these links in your browser.

To set a compliance zone as default so that it is associated with all formulas, click in the 'Default' column once you have saved your compliance zone.

Custom Settings

In the 'Custom Settings' tab you can add custom statuses, properties, and custom fields for various item types as well as set advanced quality management rules.

You can add up to six custom statuses for each of the following item types:

- Raw Materials
- Packaging Items
- Formulas
- Retained Samples
- Development Batches
- Projects
- Tasks

Default and custom statuses can also have further permissions and QA-related rules associated with them. Please refer to the 'QA & Testing' section of the guide for full details.

You can add custom tags for the following items:

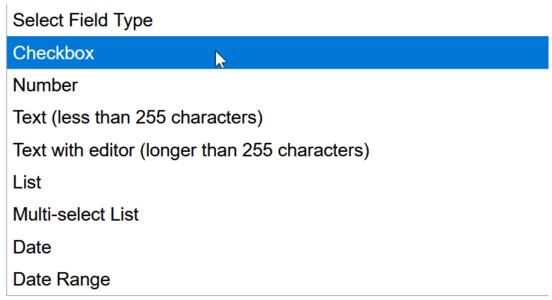
- Raw Materials
- Ingredients

Under the 'Integration Options' section you can find further controls on how the Part Code/ID should behave for raw materials and packaging items to enable stricter rules for batch management or allow it to be populated via an integrated third-party application.

You can also activate the article number field, so that it functions as a unique identifier for an item. The article number can be activated for products, formulas, raw materials and packaging items. The field can be optionally set to be required to be unique across all items to provide an even stricter rule on how the field should function.

Both the 'Part Code/ID' and the 'Article Number' are searchable on the related item's list view's main search box.

Under the "Custom Fields" section you can configure up to ten custom fields for products, formulas, raw materials and packaging items. You can select the field type, add a hint, and set the fields to be required and/or unique (if the field type allows).


Select Field Type
Checkbox
Number
Text (less than 255 characters)
Text with editor (longer than 255 characters)
List
Multi-select List
Date
Date Range

Getting Started: First Steps

View a training video on this topic:

Ingredients, search, advanced search, regulatory information, actions, ingredient data (INCI, common name and custom name fields, chemical properties, adding data, default data)	view video
Raw materials, difference between raw materials and ingredients, search, advanced search	view video
Adding raw materials, information, cost, documents, composition, and QA tabs	view video
Adding products, required fields, contact details, unit sizes, documents, approve	view video
How to add a formula, formula composition, adding raw materials or ingredients to formula, %w/w's, adding by amount	view video
Formula stage/phase, formula costs, functions, export formula specification	view video

Compliance, compliance zones, ingredients watch, advisory list, SCCS opinions	view video

Introduction

Follow the simple steps described in this section to create your first product and compliant formula, upload any required documents and generate a PIF/product dossier. Once you've followed this process a few times you'll become familiar with using Product Manager and can then refer to other sections of the guide to start using more advanced features.

1. Add Product

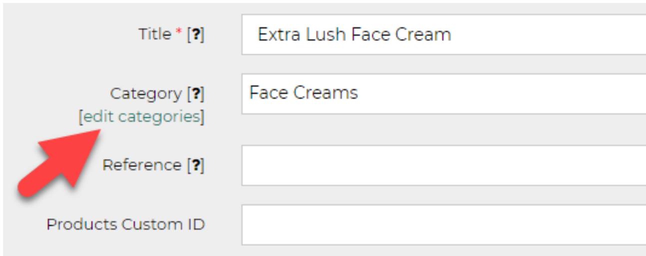
The product is the 'parent' for all associated formulas. A formula can only belong to one product. All information entered at the product-level is applicable to each formula added to that product. You may also perform the following actions:

- Clone (copy) a product and all formulas to a new product
- Clone (copy) a selected formula to a different product
- Clone (copy) a selected formula to the same product
- Merge selected formulas to a new formula

Before you create a formula, you must first add the product to which it will be associated. Go to 'Products/New'. To begin with you only need to enter or select data for the following fields in the first tab '1. Info':

- Title
- Customer group (if configured)
- Product type
- Type of exposure

Note: It can be helpful to create categories to organize your products. These same categories are also used for managing your projects (market briefs). Click on 'edit categories' to add or manage categories or access the page from 'Products/Categories' or 'Projects/Categories'.



Then assign the product to the required category.

If you have already configured customer groups for your products, you will need to assign every new product to a customer group. **If you have not yet configured customer groups, your products will be visible to all users associated with your account.**

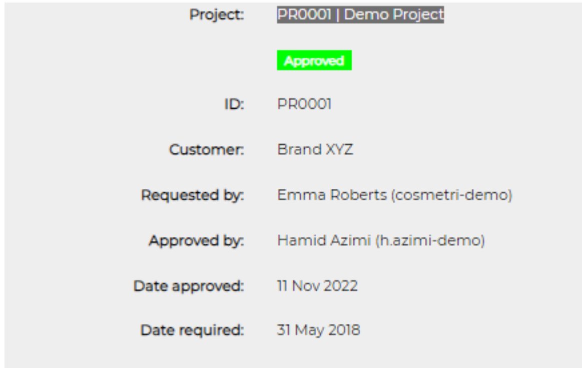
Click 'Save' to add the product.

In the product level there are further tabs for adding data, as follows:

Requirements

In this tab the user enters the information that serves as the objectives for the product development. Normally this data would therefore be finalized in this tab before the formulation process commences.

Data and images from an associated project (market brief) can be cloned to this tab. Using this method, you can refine and add further technical data while retaining the original approved market brief. In the header area of the tab, you can view any associated project summary and click to open the project.



Contact details

In this tab you enter the contact details for the following:

Registered owner

Enter the product owner details. If this is the same as the company details associated with the Cosmetri account, check the box to use these.

Manufacturer

Enter the manufacturer of the product. If you manage products that are manufactured by different companies, you can select a product to use the same company details. If the manufacturer is the same as the company details associated with the Cosmetri account, check the box to use these.

Responsible person

For certain markets such as EU, UK and USA (with the introduction of the MoCRA), a responsible person (RP) must be designated for each product sold in the marketplace. Enter that person's full name in the field provided. If the person is the registered owner of the product, select the first option. This serves as a declaration that the person does not need to provide written consent to act in the role of responsible person. Choose the second option if the person is not the product owner. In this case, a signed consent document of type RPCF should be uploaded to the product's documents tab.

Packaging

Enter a description of the packaging materials used for packaging the product. Detailed packaging information is entered under 'Packaging' in the main menu, by building packaging sets associated with the product (see also below for 'Unit Sizes').

Unit sizes

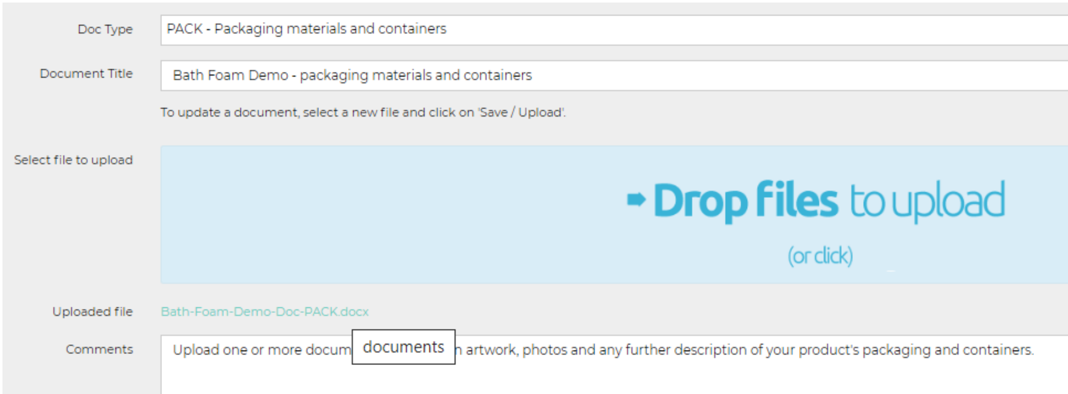
In this tab, enter the different pack sizes that the product is sold in, along with the SKUs. If you have built packaging sets, select which set to associate with each unit size.

You may enter a target distributor and retail price. This data is used for cost simulations (in the 'Formula/Costs' tab) to calculate the profitability of your product per unit size.

L	ml	SKU	Distributor Price	Retail Price	Associate with Packaging Set	Order	
0.05	50	FD0001	$ 12.00	$ 16.00	PS0004 Bath Foa...	0	
0.1	100	FD0002	$ 16.00	$ 18.00	PS0005 Bath Foam...	1	
0.25	250	FD0003	$ 20.00	$ 26.00	PS0006 Bath Foam...	2	
1	1000	FD0004	$ 30.00	$ 46.00	PS0006 Bath Foam...	3	

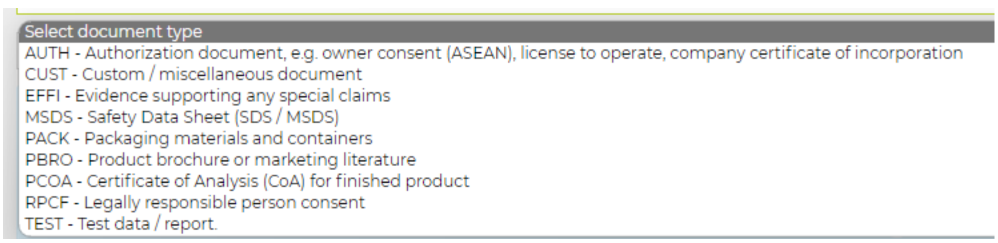
Docs

Use this tab to upload documents. Click in the blue file upload area to browse to a file or click and drag a file from your device's hard drive to the zone. Most standard file types are supported. If the file is not allowed (e.g., filename contains illegal characters, it too large or filetype is not supported) you will receive an error message. Correct the problem and then repeat the process.



Maximum file size is 5Mb.

To upload the file, select the required document type. In the product-level, these are as follows:



Enter an optional document title and comments and click on Save/Upload to upload the document.

Once uploaded, the document will be listed in the tab. You can click in 'Actions' to edit or delete the document. To update the version of a document, click to edit and select a new file to upload. This will over-write the previous file version uploaded, retaining any title, comments and selected document type.

Approve

Use this tab to:

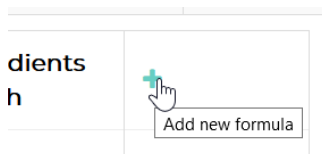
- Select a master formula
- Set the product's approval status
- Generate a PIF/dossier, based on the selected master formula

- Lock any associated data, based on the selected master formula

For further details please see the 'QA/Products' section of the user guide.

2. Add Formula

You can add your first formula by clicking on the 'Add Formula' button from the product view, for the product that you just added, or go to 'Products/List', expand the created product by clicking on the '[+]' sign, and click on the 'Add new formula' icon:



In the first tab of the formula, no fields are required, and you can immediately save the formula. Enter any optional information in the 'Reference' and other fields to help you identify the formula.

Manage formula versions

Formula version numbers are automatically assigned by Product Manager in the sequence 1.01, 1.02, 1.03 etc. It's good practice to keep your different versions and clone the current one before making further changes until you set a formula to production mode, which will be used for compliance, generating your product's dossier/PIF and for creating manufacturing orders.

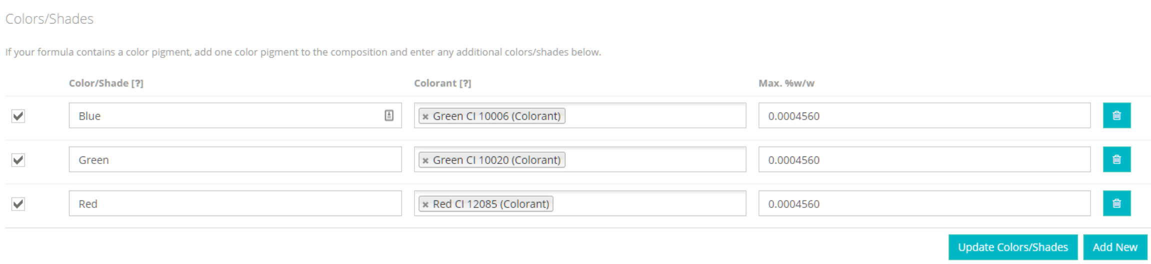
You must click once on 'Save' to save your formula before you can open other tabs in the formula view.

Manage colors/shades

For products available in different colors or shades, you can enter a main color/shade for the formula in the following field in the 'Info' tab of the formula:

You enter the color pigments for that shade into the main formula composition. To generate separate formula versions for each color/shade, use the clone formula function to create a copy of the first formula. Then update the colors/pigments used in the cloned formula and rename the 'Color/Shade' label.

Alternatively, you can build a single formula version and use the following fields to add each color/shade for the formula. Under 'Colorant' you may select multiple colorants and mix different pigments by entering the %w/w values that each appear in.



Formulate using percentage weights (%w/w)

Note: If you are familiar with working with percentage weights in formulas and when entering the composition of raw materials (e.g., mixtures), you can skip this section.

It is important that you understand the principles of entering %w/w concentrations in your formula's composition. This is the industry standard method for formulation of cosmetic products.

In percentage solutions, the weight of a solute is expressed as a percentage of the total solution in weight. By **solute** we mean, a raw material that is used in your formula, whereas **solution** refers to the total resultant mixture of your product.

The %w/w formula is expressed as follows:

$$\frac{weight}{weight}\% = \frac{weight\ of\ solute}{weight\ of\ solution} \times 100$$

Note that 'weight' refers to mass (i.e., as measured on scales).

If a raw material in your formula is a liquid and measured by volume, you must know the mass of this, which requires a density value.

Note: It is recommended where possible to select 'by weight' as the unit of measurement used for raw materials, since this will not require any density/specific gravity value to be entered.

Let's take an example:

An oil in your formula has a density of 0.900 g/ml. If the total mass of your solution is 100 g, you first need to know the mass of the oil. If you were making 100 g of your product and add 50 ml of the oil during manufacture, this will be 50 x 0.9 g/ml = 45 g. Therefore, in 100g of your product's solution, 45 g of this will be your oil, meaning that it has a %w/w of 45.0000000.

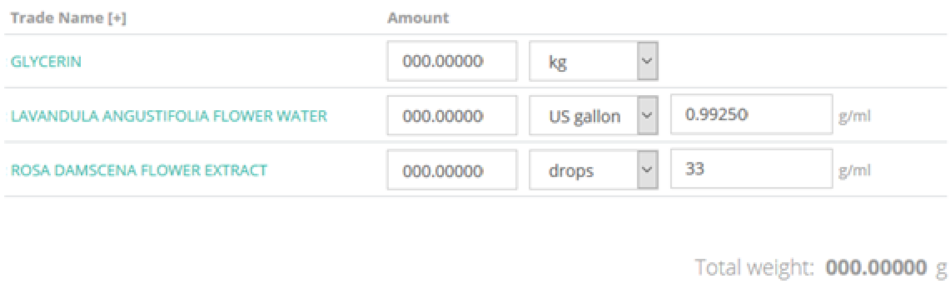
Using %w/w is the simplest form of entering a formula's composition because by using weights consistently throughout the formulation, the total mass of the solution is always equal to the sum of the mass of each of the solutes. In other words, if you add 45.000 g of a solute dissolved in 55.000 g of solvent, you will have a resulting solute concentration of 45.0000000 % and an exact mass of 100.0000000 g.

Formulate using amounts

If you do not know the %w/w values, Product Manager can calculate these for you by converting from amounts. If any of your raw materials are measured by volume or drops, you will need the **density / specific gravity** or **drops per g** of each of these, so that these volumes can be converted to weight.

Firstly, add the raw materials to your composition as explained in the earlier step. Instead of entering the %w/w values, click 'Update Formula' to save the composition and then click on the button 'Enter Amounts by Volume/Weight'.

This will open a popup with the raw materials listed, as shown in the example view below:



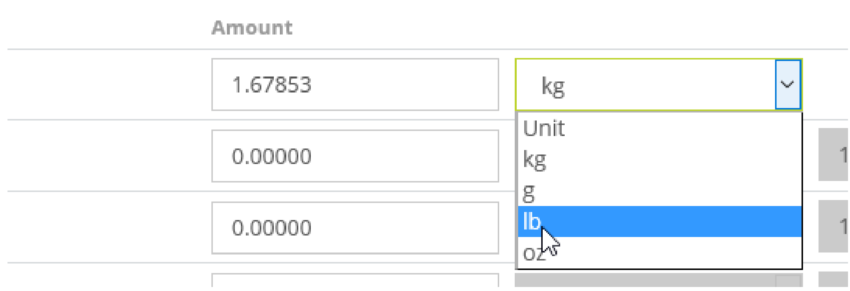
Depending on whether the raw material is measured by **volume**, or **weight** (as set in the raw material 'Information' tab), you can select the unit that you wish to enter your amounts, as follows:

By volume:

- L
- ml
- US gallon
- US liquid quart
- US liquid pint
- US fluid ounce
- drops

By weight:

- kg
- lb.
- oz



<u>Note</u>: If a raw material is measured by volume, check carefully that the density or drops per g value is accurate, otherwise the resultant %w/w calculations will be wrong. If the default density of 1.000 is used, a warning will be displayed

Enter the amount in the 'Amount' column for each raw material. As you enter these values, you will see the 'Total weight' value automatically increment. If you know the total weight of the composition, use this value to double-check that the weights are consistent with the calculated value.

Once you have entered all amounts and verified that any density and drops per g values are correct, click on the 'Update Formula %w/w' button to close the popup.

You will now see that your formula composition has the %w/w values entered for each raw material.

Enter formula composition

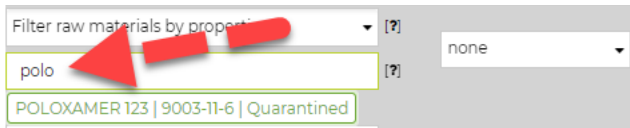
Now we are ready to build your formula's composition. **Depending upon how complex your formula is, this part should take anywhere from 2-10 minutes to complete**, assuming that you already have the formula composition to hand and have any multi-ingredient raw materials already entered or imported.

For each raw material in your formula, you'll need to know either the **INCI** or **CAS no.**, the **function(s)** performed and the **% concentration by weight** (%w/w) or the **amounts** (in volume, weight and/or drops). If you require support in how to formulate using %w/w values, see the later in this section.

<u>Note:</u> In this step, we explain how to add single ingredients or existing raw materials to your formula composition. If you have any multi-ingredient raw materials (e.g., mixtures), you'll need to create or import these first. Please refer to section of the guide for managing raw materials.

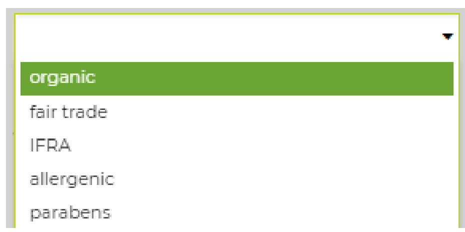
Add existing raw material to composition (including mixtures)

If you already have a raw material added or imported into your Product Manager account and want to add this to the formula's composition, you can use the following field to search by trade name or part code.



Type in a string to find matches and click on any match to select it.

If you use properties to tag your raw materials, use the box above this field to select any tags you narrow your matches. This makes it possible to limit your formulation to only allow e.g., 'vegan' and 'organic' raw materials to be added.

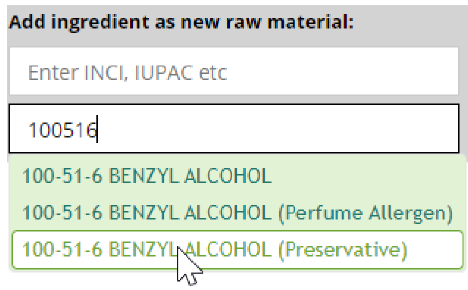


Add single-ingredient raw material directly to formula composition

Go to the Formula's 'Specification' tab and open the sub-tab 'Formula Composition'. To add each raw material to your formula composition, let's first add a single-ingredient raw material that we have not used before by entering part of an **INCI name**, **color index** (CI) or glossary name (for preservatives or UV filters).

Note: If you enter a color index use the format e.g., 'CI 10006' (include the space after 'CI').

Let's add 'Benzyl Alcohol' by typing it in the following field.



There are three matches, because this ingredient appears in Cosmetri the main ingredients list as well as in the EU CosIng perfume allergens list (annex III) and preservatives list (annex V). If you intend to use the ingredient in your formula as e.g., a preservative, we recommend choosing the one listed as 'Benzyl Alcohol (Preservative)'. This will automatically add the function 'PRESERVATIVE'.

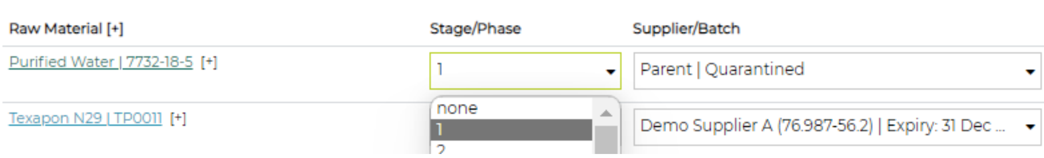
Perfume/fragrance allergens should normally be added to the raw material composition (in the 'Composition' tab) and not directly to your formula.

You can also add an ingredient by entering a CAS no. e.g., '100-51-6'. You can ignore any hyphens and for example, also enter '100516'. Click to select the required ingredient from any available matches.

Formulate by phase/stages

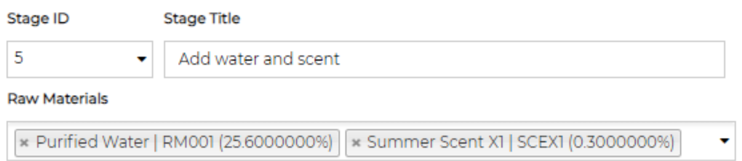
You can optionally associate each raw material with a **stage** (or phase) in the 'Stage' column. This makes it possible for example, to add Aqua @10% at stage 1, @20% at stage 2, etc.

Select the stage you wish to associate with the raw material, as shown below.



After saving the formula composition, the raw materials will then be sorted in ascending order by stage ID, with the raw materials associated with each stage listed in order of concentration.

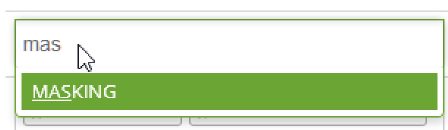
The stages you associate with each raw material will be updated in the formula's 'Method/Manufacturing method' tab. If you prefer, once you have added the raw materials to your formula composition, you can associate them with any stages under 'Method/Manufacturing Method', allowing two-way synchronization of the data in these two tabs.



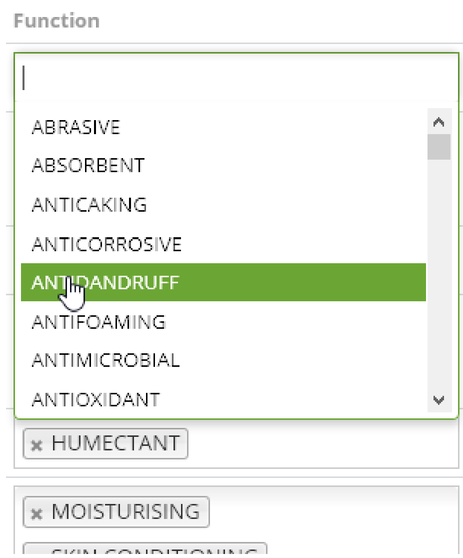
Select raw material functions

Select any combination of **functions** for the raw material added to the formula.

Click in the 'Functions' field and scroll down the list or type any letters to quickly find and select from matches, e.g., typing 'sk' will jump to the following 'Masking' function available for selection.



Click to select a function from the list:

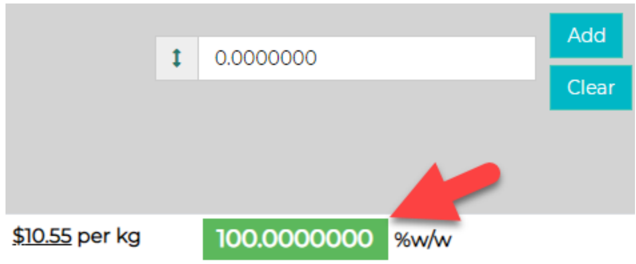


Repeat the above step to add any further functions.

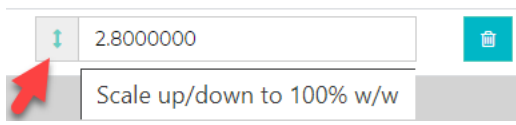
Enter the **%w/w** amount for the raw material. Product Manager allows an accuracy of seven decimal points i.e., 0.0000001 %w/w, enabling micro-amounts of ingredients such as for color pigments to be calculated. **You do not need to enter your ingredients to this level of accuracy.** Just type the amount e.g., '34.5' and click outside of the field. The amount will then be automatically adjusted to 34.5000000.

Once you click on 'Add' the ingredient is saved as a raw material in your account and can now be found in your raw materials list. The first version of the raw material is saved as a 'parent' to which you can later optionally add batches. You'll later be able to add properties to this raw material parent such as a trade name, manufacturer and supplier information, as well as any required regulatory data and documents.

The completed formula should total exactly 100.0000000 %w/w as shown in the following location:

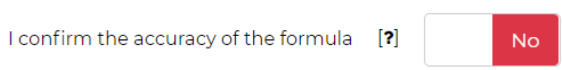


If the total < 100.0000000 %w/w the total in the above view will be displayed with a black background. If the total > 100.0000000 %w/w the total is displayed with a red background. In either case check your formula. You can use the following icon to adjust any raw material concentration automatically so that the formula total = 100.0000000 %w/w.

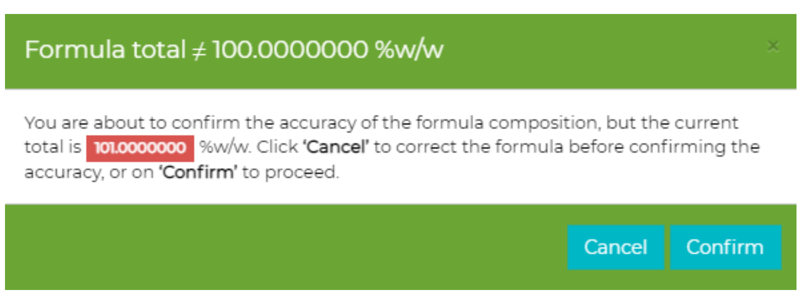


Confirm formula

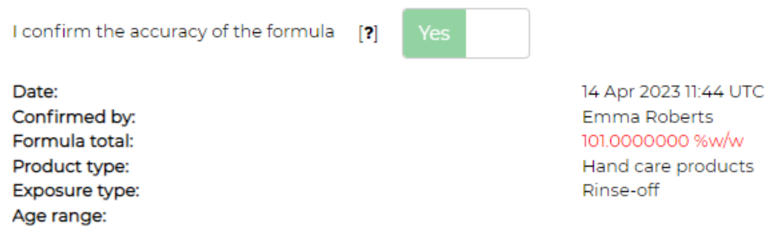
As a safeguard, the accuracy of your formula composition must be confirmed each time you update the composition, otherwise the Compliance Checker (see below) will generate a task requiring this action:



If the formula total does no equal exactly 100.0000000 %w/w, you will be warned before confirming.



An approval log shows all such actions applied to the formula composition by any user.



Compare formulas

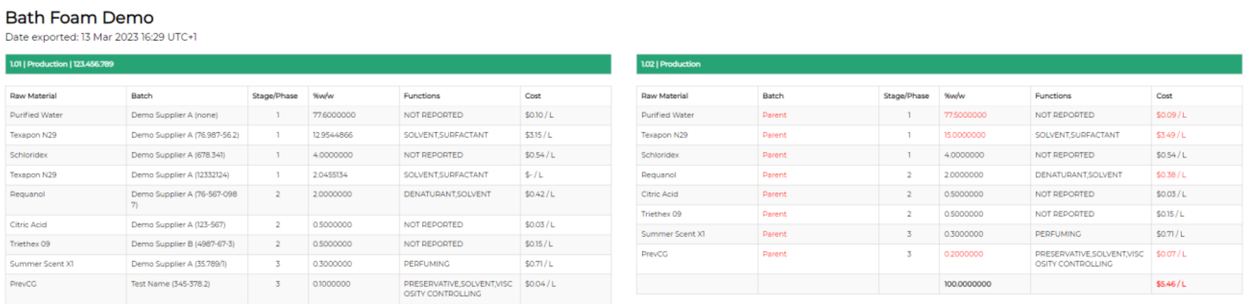
Compare formulas belonging to the same product using the Product Manager's formula comparison tools. You can access the formula comparison feature on the formula specification page, under the 'Formula Comparison' sub-tab.

Comparison: side-by-side

With the side-by-side comparison tool you can select different formulas belonging to the same product and compare the differences. You can click on the 'Add Row' button to add further pairs of formulas to be compared in left and right-hand views.

Click on the 'Compare' button to generate a report where the basic properties of the formulas are listed, and you can compare them.

The report consists of two views - raw materials and ingredients. The differences between the formula selected on the right and on the left are highlighted with red.



Bath Foam Demo

Date exported: 13 Mar 2023 16:29 UTC+1

1.01 | Production | 123.456.789

Raw Material	Batch	Stage/Phase	%w/w	Functions	Cost
Purified Water	Demo Supplier A (none)	1	77.6000000	NOT REPORTED	$0.10 / L
Texapon N29	Demo Supplier A (76.987-56.2)	1	12.9544866	SOLVENT,SURFACTANT	$3.15 / L
Schloridex	Demo Supplier A (678.341)	1	4.0000000	NOT REPORTED	$0.54 / L
Texapon N29	Demo Supplier A (12332124)	1	2.0455134	SOLVENT,SURFACTANT	$- / L
Requanol	Demo Supplier A (76-567-098 7)	2	2.0000000	DENATURANT,SOLVENT	$0.42 / L
Citric Acid	Demo Supplier A (123-567)	2	0.5000000	NOT REPORTED	$0.03 / L
Triethex 09	Demo Supplier B (4987-67-3)	2	0.5000000	NOT REPORTED	$0.15 / L
Summer Scent X1	Demo Supplier A (35.789/1)	3	0.3000000	PERFUMING	$0.71 / L
PrevCG	Test Name (345-378.2)	3	0.1000000	PRESERVATIVE,SOLVENT,VISCOSITY CONTROLLING	$0.04 / L

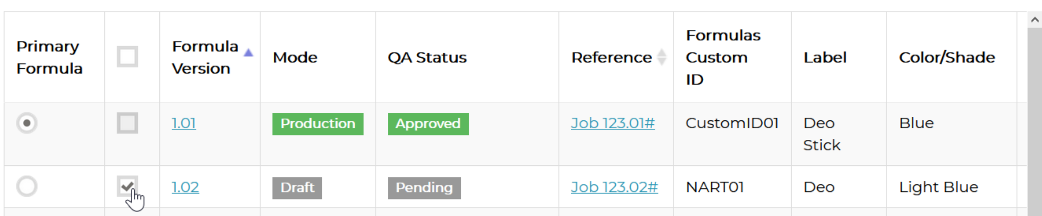
1.02 | Production

Raw Material	Batch	Stage/Phase	%w/w	Functions	Cost
Purified Water	Parent	1	77.5000000	NOT REPORTED	$0.09 / L
Texapon N29	Parent	1	15.0000000	SOLVENT,SURFACTANT	$3.49 / L
Schloridex	Parent	1	4.0000000	NOT REPORTED	$0.54 / L
Requanol	Parent	2	2.0000000	DENATURANT,SOLVENT	$0.38 / L
Citric Acid	Parent	2	0.5000000	NOT REPORTED	$0.03 / L
Triethex 09	Parent	2	0.5000000	NOT REPORTED	$0.15 / L
Summer Scent X1	Parent	3	0.3000000	PERFUMING	$0.71 / L
PrevCG	Parent	3	0.2000000	PRESERVATIVE,SOLVENT,VISCOSITY CONTROLLING	$0.07 / L
			100.0000000		$5.46 / L

Comparison: matrix

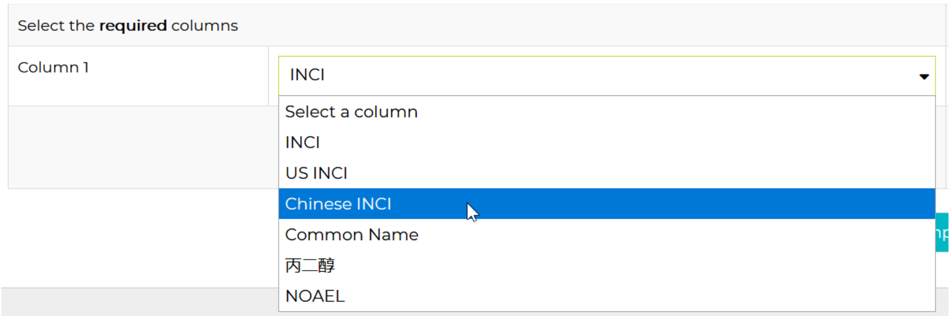
In the comparison matrix version, you can select several formulas at once, and compare them in a single matrix view. Select the primary formula that will be used as a basis for the comparison.

Once the primary formula is selected, start adding formulas that you would like to compare to the primary formula by selecting them one-by-one, or select all using the checkbox at the top of the column.



Primary Formula		Formula Version	Mode	QA Status	Reference	Formulas Custom ID	Label	Color/Shade
		1.01	Production	Approved	Job 123.01#	CustomID01	Deo Stick	Blue
		1.02	Draft	Pending	Job 123.02#	NART01	Deo	Light Blue

You can also select one or more custom ingredient names for the how ingredients are displayed in the comparison view and report:



Once you finished configuring your report, click on the 'Compare Matrix' button, to generate the report.

You can export the results of both formula comparison tool to an .xls file by clicking on 'Export' at the bottom of the generated report.

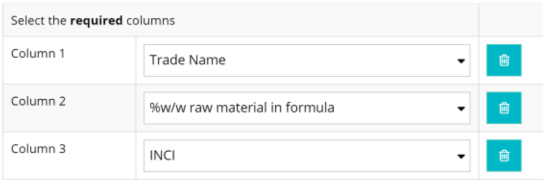
Export formula specification reports

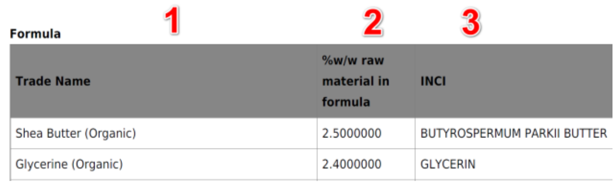
Once your formula composition is complete, it is possible to export the formula in your required format – for example, for submission to an authority.

In the 'Specification/Formula Composition' tab, click on the "Export Formula Specification" button, to display a configuration pop-up.

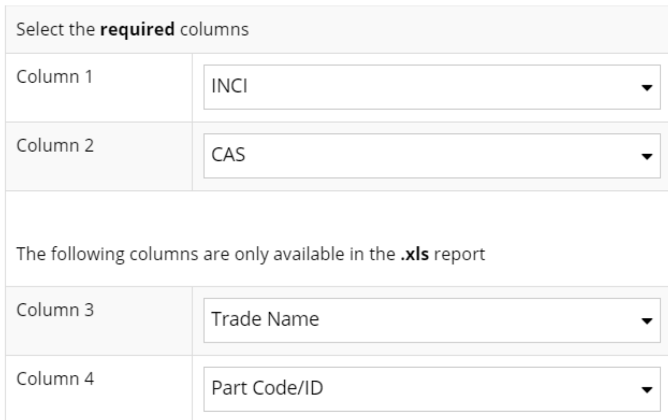
Use the compliance zone selector, and the checkboxes to exclude ingredients from the report based on the ingredient statuses set in the 'Formula Specification/Compliance' tab.

Default pre-selected columns for the formula export are displayed and can be edited as required. The sequential numbering in front of the columns determines the order of the columns in the exported documents.

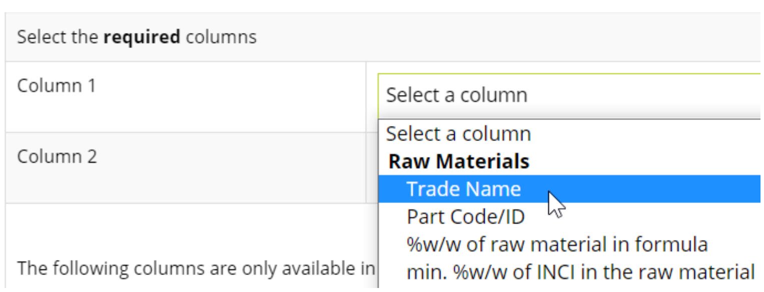




The columns selected under the "Select the required columns" section will be included both in the .pdf and in the .xls file (max. 7 columns). The columns selected in the second section below this are only included in the .xlsx file.

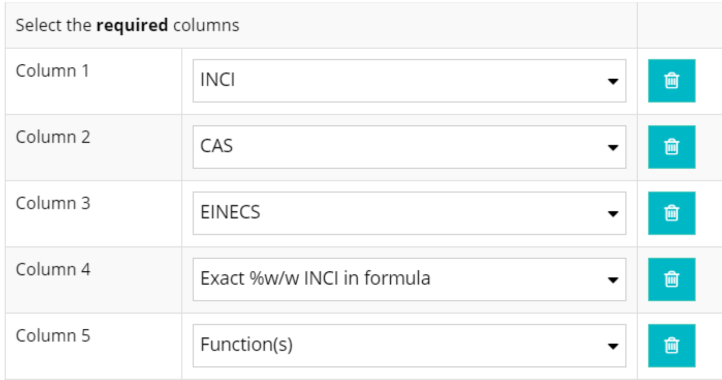


You can modify the selection for each column using the drop-down list for each of the columns.



You can delete each of the columns, and the sequential numbering of the columns will adjust automatically. Click on the "Add New" button, to add new columns for your exported documents.

If you only add ingredient-related columns, the ingredients will be grouped together, and will be sorted by %w/w (descending order) in the exported documents.



Check the “Include method of manufacture” checkbox to include the data you entered in the ‘Formula/Method/Manufacturing Method’ tab. This will be included in both the .xlsx and .pdf documents.

Check the “Include Product Manager formula import format” checkbox to output a separate .xlsx file which can be used to import the formula and its raw materials back into Product Manager.

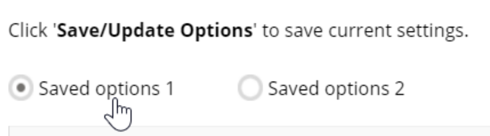
You can also add an additional information that will be printed in the report, below the data tables. Add any formatted text in the “Additional Information’ field:

Export

Click on the “Export” button to export the formula specification based on your configured settings.

Save settings

You can save two different configurations of the formula export. By default, the “Saved options 1” radio button is selected.



Once you click on the "Save/Update Options" button, the current configuration of the pop-up is saved.

Select the "Saved options 2" radio button to configure a second report format and click on the "Save/Update Options" button to save that configuration.

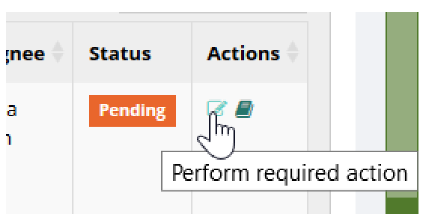
3. Manage Documents

Some of the tasks generated by the Compliance Checker will remind you to upload a document required for compliance.

Documents can be uploaded to the following types of items in Cosmetri Product Manager.

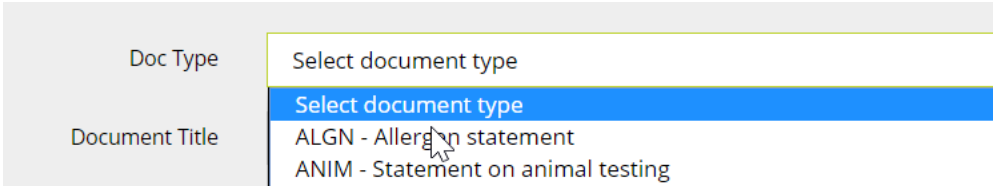
- Product
- Formula
- Raw Material
- Packaging Item
- Test

If you use the 'Tasks' tab to upload required compliance documents, click in the 'Actions' column for the task, to be taken to the document upload tab for that item:



Document types

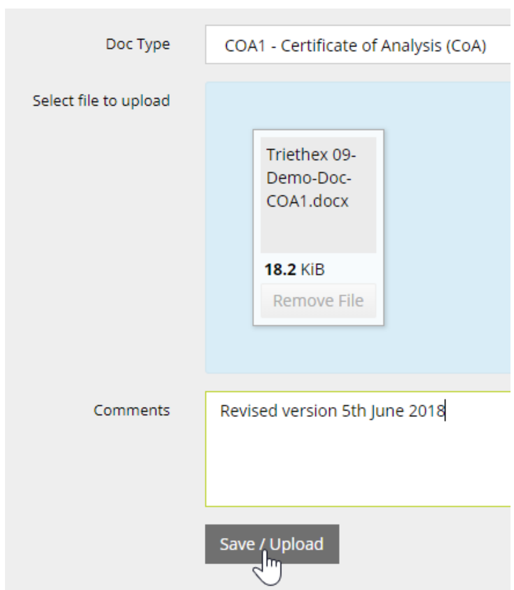
A range of **document types** ('Doc Type') are available, depending on the type of item you are viewing. You must select the appropriate document type before you can upload the document. Using the correct doc type ensures that Product Manager can locate each document and generate the required reports, such as your PIF or batch protocols.



Note: You can also upload non-compliance documents, such as your product brochure or meeting memos related to a specific product. For these types of documents, select the doc type 'CUST'.

Upload Document

After selecting the appropriate doc type, enter an optional document title and comment. To upload a document from your local drive, either drag-and-drop the file from an opened folder to the blue file zone, or click in this zone to use the standard file browser and navigate through your hard drive the file you wish to upload:

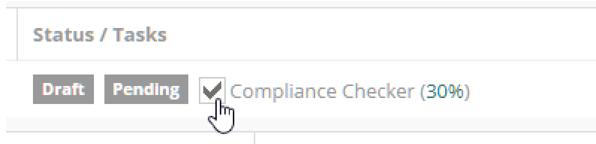


Product Manager allows files of a maximum of **5Mb** and in most common formats, including .pdf, .jpg, .doc, .docx, .rtf, .jpg, .txt, .png, .gif, .csv, .xls and .xlsx

Click on 'Save/Upload' to upload the file.

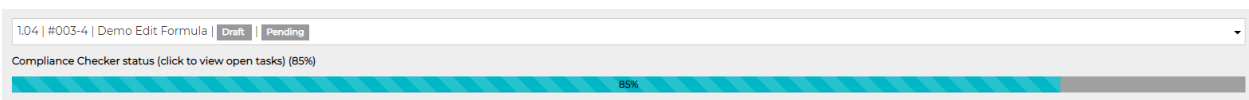
4. Activate Compliance Checker

Your newly created formula will now be in 'Draft' mode. Go to 'Products / List' in the main menu and locate the formula. For any draft-mode formula, you can click on the following checkbox to activate the *Compliance Checker*:

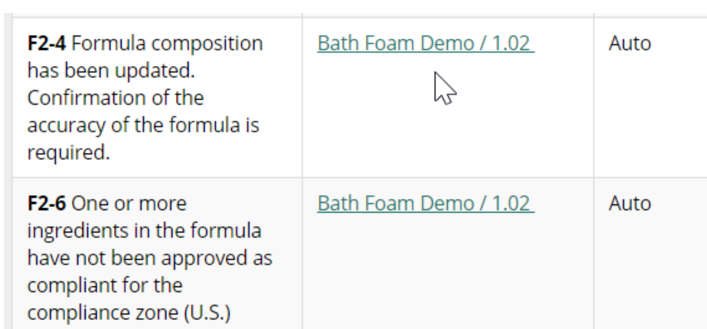


Product Manager will then scan the product, formula and all associated raw materials for missing data and documents required for the PIF/dossier and generate a task for each required action.

If the Compliance Checker is active, in the formula view you'll see a status bar showing the current level of completion.

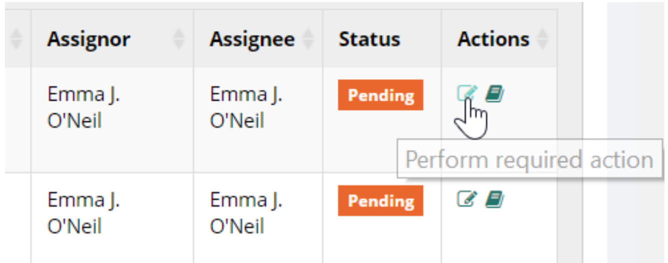


Click on the status bar to view all open tasks or go to the 'Tasks' tab in the formula view. Each task is clearly described:



F2-4 Formula composition has been updated. Confirmation of the accuracy of the formula is required.	Bath Foam Demo / 1.02	Auto
F2-6 One or more ingredients in the formula have not been approved as compliant for the compliance zone (U.S.)	Bath Foam Demo / 1.02	Auto

In the 'Actions' column, for each task click on the 'Edit' icon and you'll be taken to the page and tab where you need to perform the required action, such as entering information in a field, or uploading a certain document such as an SDS for a raw material.



The Compliance Checker also checks for required data and documents for generating complete batch protocols, required for batch traceability once your product is manufactured and commercially available. If you do not require batch-related data and documents, you can de-activate these tasks by clicking the checkbox 'Disable batch-related tasks'.

As you work through the tasks your Compliance Checker completion score will be automatically updated. In the 'Tasks' tab you can set completed tasks to be hidden. Complete a task and then (if in the 'Product' or 'Raw Material' view) click on the 'Back to Tasks' button to return to the task list. If you are still in the formula view, just click back on the 'Tasks' tab after you've saved the change that you made.

Note: For any task, you can click on the 'Notes' icon in the 'Actions' menu to create a note that you use to remind yourself or another team member of anything you want to mention about the task, as well as to set any status any deadline. Each user will see these notes in their dashboard when they login to Product Manager.

5. Check Compliance

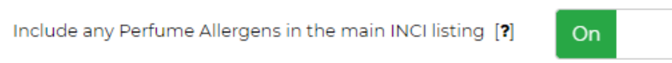
Once your formula composition has been completed and the composition of each raw material has also been correctly entered, you can check the compliance of the formula for different countries or markets.

Click on the 'Compliance' sub-tab under the formula's 'Specification' tab. The tab shows the aggregate %w/w concentrations of each ingredient in your formula composition, in order of concentration.

Perfume/fragrance allergens

Note: Please see the guide section 'Perfume Allergens' for how to manage perfume allergens in Product Manager.

Use the following switch to determine how any fragrance/perfume allergens in the formula are displayed.



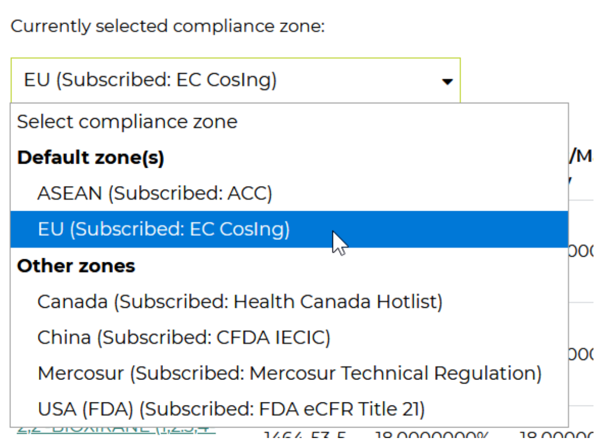
If the switch is turned 'On', the perfume allergens are separately listed at the top and also in the main ingredient listing below.

If the switch is turned 'Off' the perfume allergens are only displayed in a top section and are excluded in the main list. This option is useful if you have entered exact %w/w values for all raw materials in the formulas and you want to the sum of all ingredients in the 'Max. %w/w' column to equal exactly 100%.

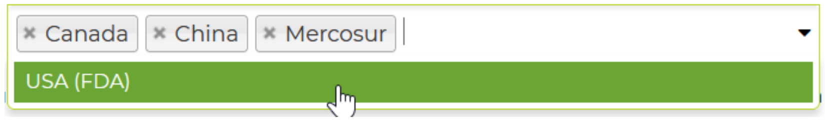
Compliance data and zones (countries/markets)

All plans include EU and US FDA compliance data by default. Subscribers to the Product Manager 'Compliance Pack' plan receive access to all currently available compliance data.

Once your compliance zones have been configured by your admin user, use the following menu to switch between compliance zones to check the formula's compliance:



To associate any non-default compliances zones to the formula, select them in the following menu and then click on 'Update Compliance Zones':

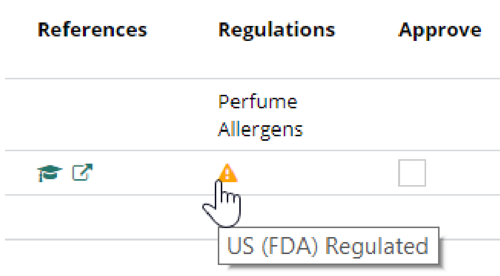


Check formula's compliance

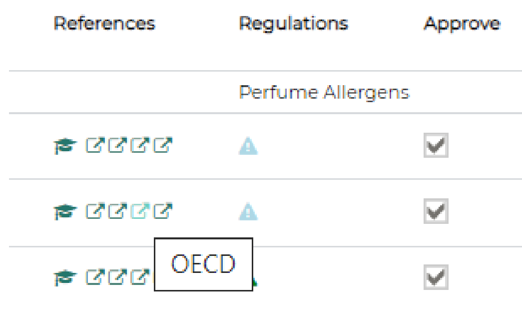
For the currently selected compliance zone, check in the 'Regulations' column for any color-coded compliance advice and click on the alert icon to open a popup with the regulatory data.

Red: banned
Orange: restricted. or allowed with restrictions
Blue: not listed
Green: advisory data only (e.g., US FDA IID)

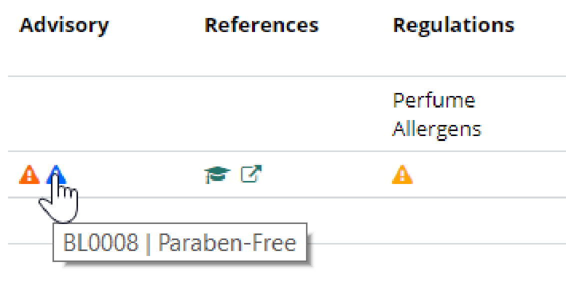
You can easily check if an ingredient is regulated and if the maximum allowed concentrations or other restrictions are acceptable.



If you have configured other compliance zones for manual compliance checking, click on any lookup URLs that you have entered for the selected compliance zone to check the compliance for each ingredient.

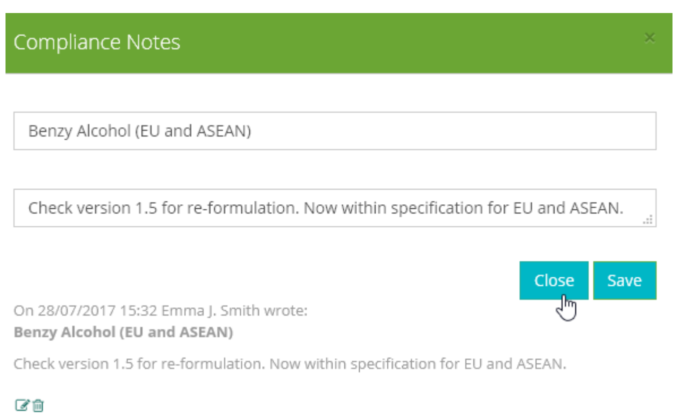


If you have created ingredients advisory lists and an ingredient in the formula appears in an associated list, a warning will be shown in the 'Advisory' column. Click on the warning symbol to view any notes entered for that ingredient in the advisory list.



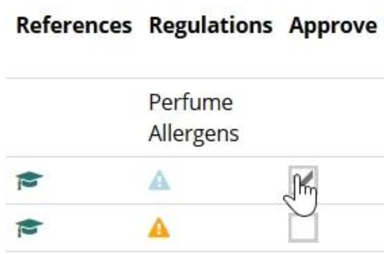
If the advisory list is a positive list, ingredients which <u>are not</u> in the list will show alerts.

In the 'Compliance Notes' column you can also maintain compliance notes for the ingredient. This is useful for resolving any issues, especially for achieving harmonized compliance across multiple compliance countries/zones.

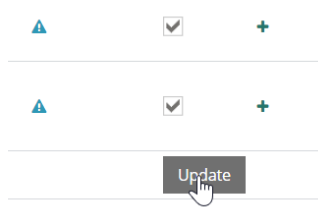


Note: These notes are specific to the compliance of the ingredient for the **currently selected formula only** and apply to all associated compliance countries/zones.

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:



Click on the 'Update' button directly below the checkboxes to save these settings.



The Compliance Checker will warn you if any ingredient has not been confirmed as approved for a compliance country/zone associated with the formula.

Ingredient statuses

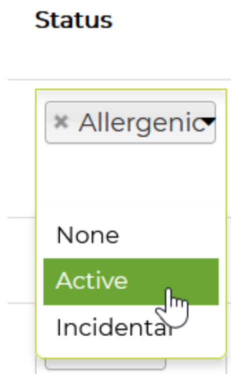
You can optionally associate statuses with ingredients in your formula. These statuses add an additional layer of control when managing the list of ingredients (LOI) to appear on your product labels. For example, for US FDA labelling you may choose to exclude 'incidental' ingredients from the LOI. You can also filter these ingredients from the exported formula specification.

Options are:

- None
- Active

- Incidental

The ingredient statuses are dependent on the currently selected compliance zone.



Set one or more statuses for the required ingredients and click on the 'Update' button to update the statuses.

Compliance reporting

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

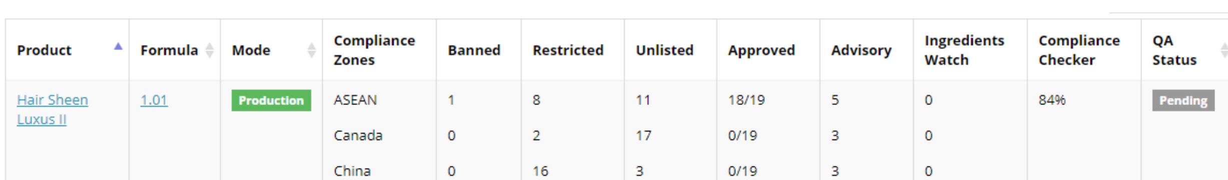
<u>Note</u>: The compliance reporting tool should not replace the requirement for checking each formula's compliance in detail in the 'Compliance' tab of the formula and for a qualified person to determine the compliance of any formula.

Select the required compliance zones to be reported.

If you only require compliance status reporting for production mode formulas, check the option ‘Hide draft mode formulas’.

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 will automatically update according to the current selections and filters.



Product	Formula	Mode	Compliance Zones	Banned	Restricted	Unlisted	Approved	Advisory	Ingredients Watch	Compliance Checker	QA Status
Hair Sheen Luxus II	1.01	Production	ASEAN	1	8	11	18/19	5	0	84%	Pending
			Canada	0	2	17	0/19	3	0		
			China	0	16	3	0/19	3	0		

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.

Ingredients Watch

Ingredients reported by Ingredients Watch for the reporting period set by the user.

Compliance Checker

The percentage completion score, as calculated by Compliance Checker. Reporting requires activation of Compliance Checker for the formula.

QA Status

The approval status of the formula.

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.

6. Generate a PIF/Dossier

A product information file (PIF) – also referred to as the product dossier – can be downloaded in formats compatible with EU/UK and ASEAN requirements.

Note: The ASEAN PIF option is only available if the formula is associated with the ASEAN compliance zone.

If you use the CPSR feature of Product Manager to generate the cosmetic product safety report, the CPSR parts A and B can be optionally generated and included in the main PIF report.

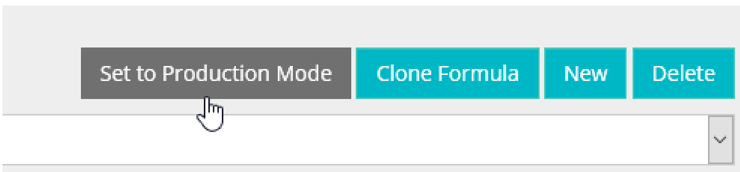
The PIF can be generated in two ways:

- Set a formula to production mode

- Set formula as master formula

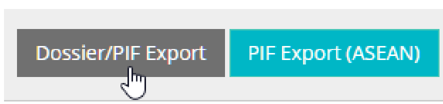
Set formula to production mode

This method of generating a PIF is only advised if you use the manufacturing orders feature of Product Manager and require a locked production mode formula composition that is auto updated after dispensing of each order. In the formula view, select 'Set to Production Mode' once you have a formula that you will use for manufacturing. It is only possible to set the formula to production mode if the formula has the status 'Approved'.



Once you set a formula to production mode, for compliance and traceability reasons you **cannot reset it to draft mode**. You can however clone your production formula at any time, thus ensuring that you have a copy of the formula in 'draft' status.

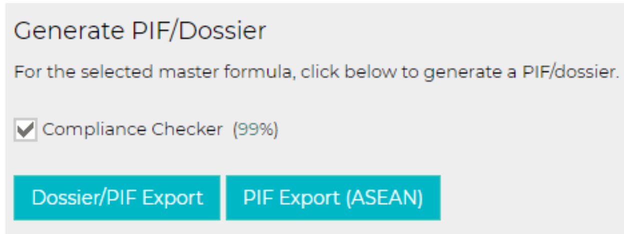
Click on of the following 'Dossier/PIF Export' buttons to generate the PIF. If the Compliance Checker is activated, a dialogue box will warn you of any incomplete tasks.



Set formula as master formula

This method of generating the PIF is recommended if you do not wish to have the formula locked and updated by the manufacturing orders feature. It also does not require that the formula be set to 'Approved' status (though recommended).

Open the product-level for the formula and click on the 'Approve' tab. In the list of formulas associated with the product, in the column 'Master' select one formula version and then click on 'Set Master Formula'. The following buttons are activated for the formula.



Generate the PIF

Your dossier/PIF will be exported in .zip format – normally within 10-15 seconds. Save this .zip file to a destination on your hard-drive and then double-click this. Most browsers can automatically open a .zip file, once downloaded.

Inside the .zip folder you will find a folder named after your product and formula version. You must copy/paste or drag and drop this folder to a destination of your choice on your before opening it.

You'll also require a PDF reader, such as Adobe Acrobat or Foxit to view the PDF files in your PIF.

Inside the folder, you will find the main PIF info file (with _INFO in the filename). The file with _COMP is a file detailing your formula's composition. If you decide to submit an exact percentage concentration formula (for example to the CPNP if you require EU compliance) you'll need this file.

Example view of the PIF folder:

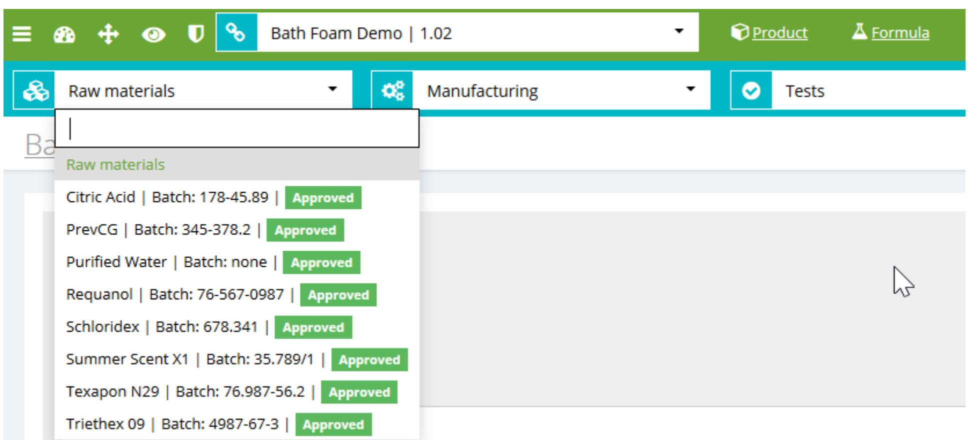
Open the main **_INFO.pdf** file and you'll see a complete, detailed document describing all regulatory data for your product. This may also include the cosmetic product safety report (CPSR) parts A and B. Where further data is referenced, a link to the document on the server is inserted and a copy of the document will also be found in the PIF folder under the same name.

Note: To open an associated document directly by clicking on a link in the PDF report, you will need to login to Product Manager to view the document in the cloud. You can also browse the PIF folder that you unzipped to open a local version of the file.

Configure and use Quick Links

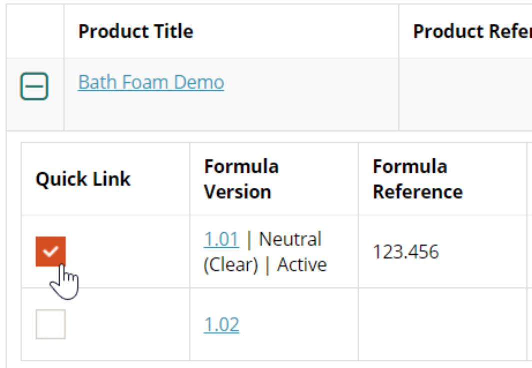
Quick links enable you to bookmark the product/formula versions that you require regular access to. The quick links you set are specific to your user account, enabling each user in your team to configure their own quick link preferences. You can then select a product/formula and navigate between the following associated resources while keeping the product/formula active.

- Raw materials
- Manufacturing orders
- Tests
- Packaging sets
- Documents

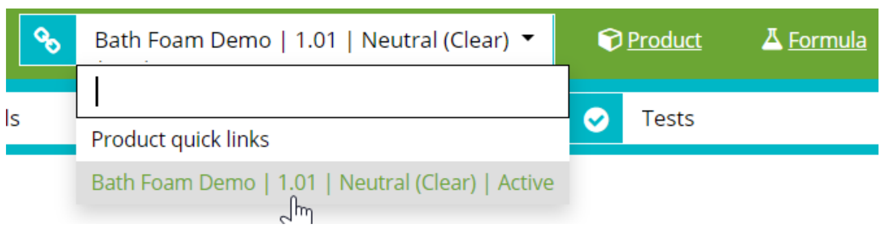


To add a product/formula to your quick links menu, click on the following checkbox in the formula view:

Or select from the main product list:

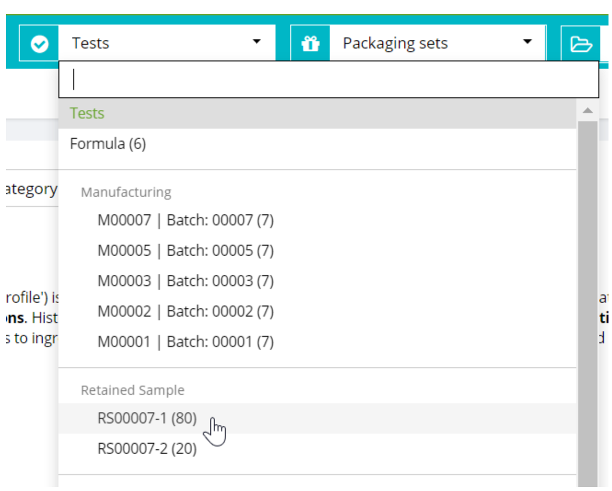


You'll then see the product/formula listed in your quick links menu:



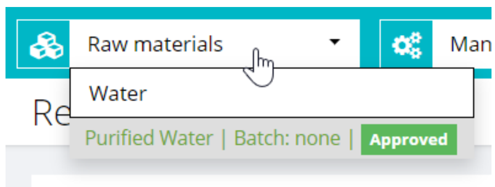
Select any of these quick links to open that product/formula. All associated resources will be listed in the sub-menus displayed in the navigation bar below:

Select any item from one of these menus to open that item.

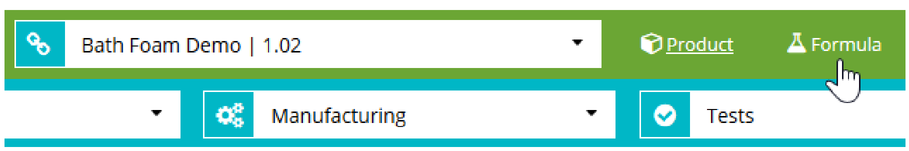


The selected product/formula quick link will remain active, making it possible to navigate quickly between associated items. For example, you can open one of its raw materials, make a change to this and then open the latest manufacturing order associated with the product/formula.

If a sub-menu list is long, you can use the search function to quickly find a match. For example, in the 'Raw materials' sub-menu enter 'Water' to display all associated raw materials.



If you need to return to the product or formula level for the selected quick link, click on either of the following icons to the right of the quick links menu:



Configure and Print Labels

Introduction

You can use the following features in Product Manager to print labels for a variety of uses:

- Formula/QA
- Raw Material/QA
- Packaging Item/Quality Assurance
- Manufacturing Order/Dispense
- Manufacturing Order/Approve
- Manufacturing Order/Retained Sample
- Development Batch/Dispense
- Development Batch /Approve

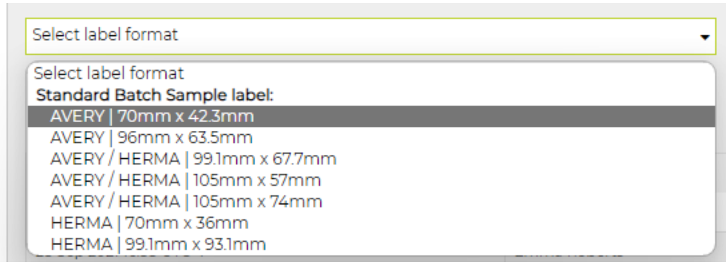
Default labels are available in a range of standard Hermes and Avery formats. Custom label templates can also be built, including barcodes for supported fields. If the feature supports generation of multiple labels, each label will be generated as a separate page within one downloadable .pdf file. The page layout will be at the exact height and width (in mm) for the selected label format.

Your label printer will need to support the selected the label format and the printer driver configured accordingly. If correctly set up, you will be able to print the .pdf file and ensure that each label is correctly printed to the labels sheet loaded in the printer, including printing of multiple labels in one print action.

Note: Cosmetri does not provide support with configuration of printers or drivers. Please refer to the hardware vendor for assistance.

Default Labels

The following default label formats are available. Select one of these to print a default label:



The data fields and template for these default labels cannot be edited.

Click on 'Generate' to generate the label(s) as a .pdf file. In certain cases, you will be required to select data such as a test group before the label can be generated. A warning will be displayed to advise you.

Custom Labels

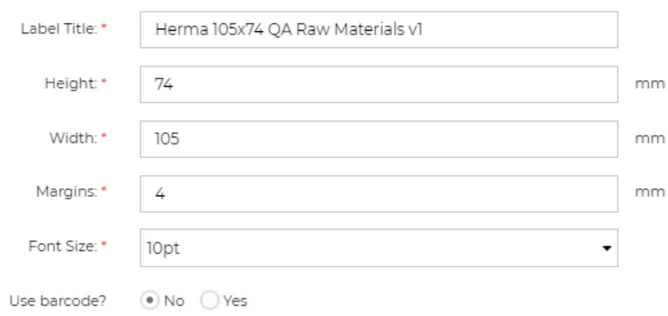
In every location where labels can be printed, an option is displayed for configuring your own custom label templates. You can create up to five custom label templates for each type of item in Product Manager. Custom labels are available for all users of your Product Manager account.

Note: It is recommended to test different custom label formats to ensure that the required data will fit correctly on the label.

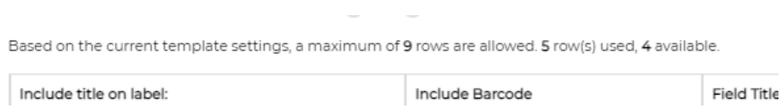
Click on 'Create Custom Label' to start creating the label.

Set up the label format and options

In the top section, enter a **title** for the custom label template, a **height**, **width** and **margin** (in mm) and the required **font size**. If you wish to display a **barcode** for one of the compatible fields, select this option.

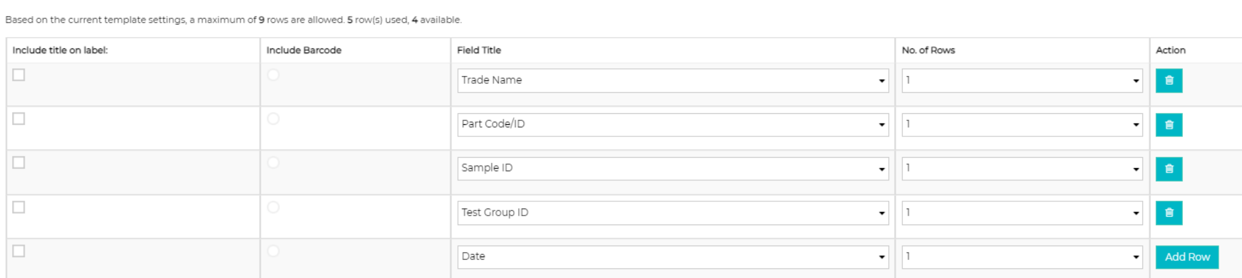


Depending on the format selected, the maximum number of rows will be displayed.



Select label fields

Add each row in the order the data should appear on the label. Select an available data field for each and click on 'Add Row' to enter a new row. You may only add as many rows as will fit on the label, based upon the parameters entered in the previous section.



If you require field titles on the labels, check the checkbox in the first column. Including the field title will limit the space available for displaying the data on the label.

By default, each field is displayed in a single row. If any field includes a long string of data, you may need under 'No. of Rows' to select multiple rows to accommodate the information and to force the data to wrap. Data that extends beyond the available space on the label will be truncated.

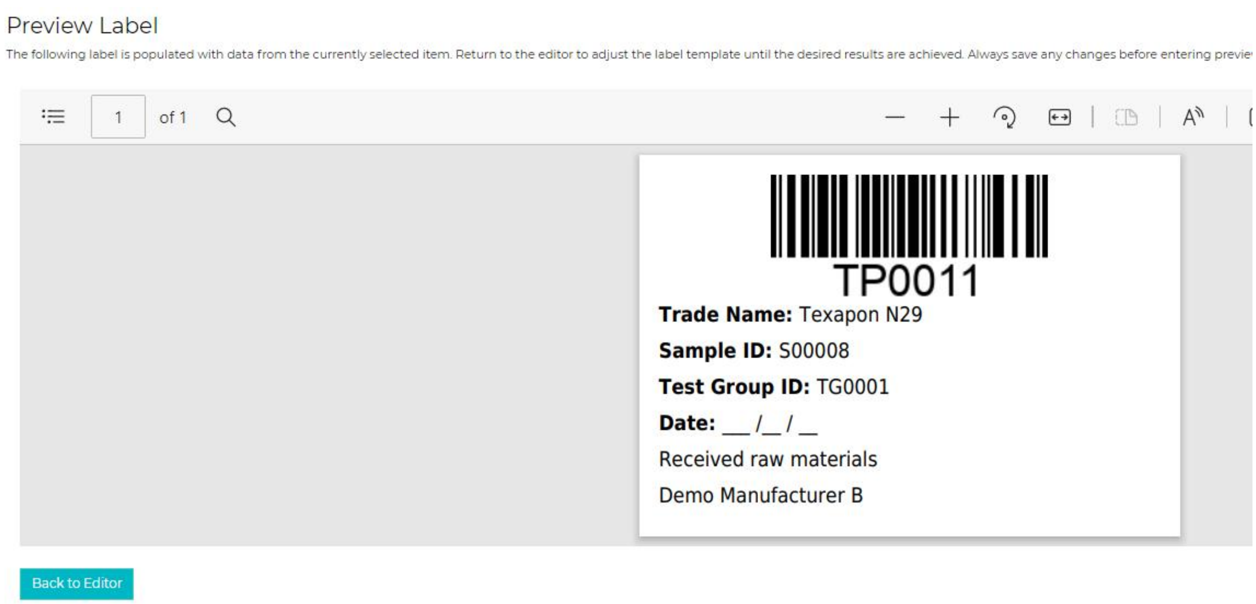
Configure a barcode

You may select one barcode to be displayed for any compatible field. The barcode can be displayed vertically (aligned left) or horizontally (aligned top). Including a barcode will limit the amount of information that can be fitted on the label. Only compatible fields are available for selection.

Preview the label

Click on 'Save' before previewing the label.

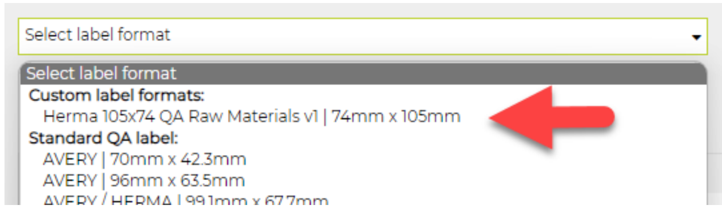
Click on 'Preview' to preview the label. If your label includes test data, first select one or more test groups in the tab. Depending on the length of values entered for any given field, you may need to adjust the label format until the required result is achieved



Click on 'Back to Editor' to return to the edit view and make any required adjustments. Click 'Save' and then 'Close' to exit.

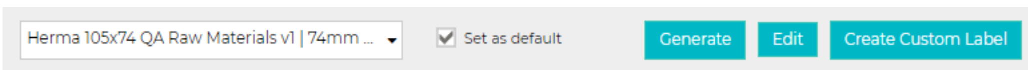
Edit and print using custom label

The custom label format will now be available in the 'Select label format' menu, under 'Custom label formats'.



If a custom label format is selected, an 'Edit' button is displayed to allow you to access the edit mode and adjust the label template.

For any selected label format, you may select the checkbox to the right of the menu to set that label as the default label template to be used in that tab or function of Product Manager.



To print using the custom label, first select it as the required label format and then click on 'Generate' to download a .pdf file.

Tasks Management

Introduction

Product Manager includes tasks management features which are integrated with compliance workflow for managing your cosmetics and personal care products. There are two types of tasks:

Compliance Checker (auto) tasks

These tasks are auto generated by Product Manager once you set a formula to production mode 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.

Custom Tasks

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. For checklists, a custom task can also be associated with any checklist item.

Custom tasks can be configured with a range of options, described later in this section of the guide. A custom task associated with a formula can also be included in the Compliance Checker tasks lists, which affects your product's overall percentage completion score.

You can set yourself or another user a reminder or note associated with a task. A user can then reply, enabling a task to be resolved. 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.

Log in as an admin user 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 enables you to hide 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. You can also access the 'Product Manager Tasks' list from the main user menu (top right).

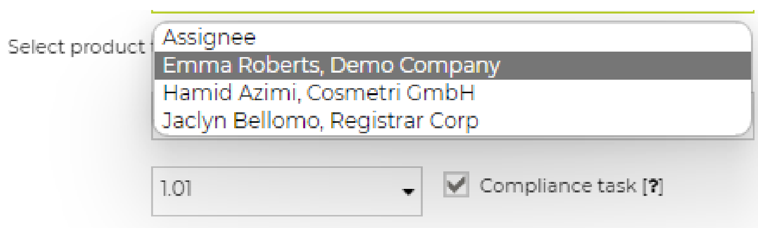
Click on 'Tasks' to view tasks. By default, the tasks assigned to you will be displayed.

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.

You can also filter the tasks list by **Type of task** association.

If you have permission to view tasks assigned for other users, use the following setting to view tasks assigned to a different user:



Formula Tasks Tab

In the formula view, click on 'Tasks' to view any Compliance Checker or custom tasks associated with the currently selected product and formula.

For both types of tasks, you can hide tasks that are set to 'Completed'.

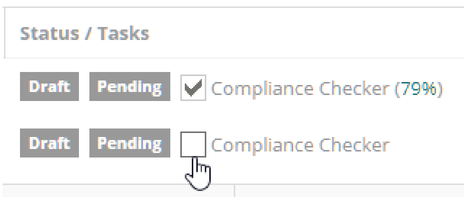
Compliance Checker Tasks

You can activate the Compliance Checker to auto-generate compliance tasks by one of the following methods:

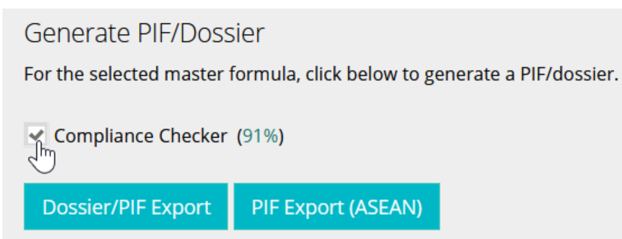
Set a draft mode formula to **production mode**

Check the 'Activate Compliance Checker' checkbox in the formula's 'Tasks' tab.

In the Products list, for any formula with **draft status,** click on the following icon in the 'Actions' column:



On the Product / 7. Approve tab, for the active 'master' formula. Use the following setting:



By default, the Compliance Checker tasks are assigned to the **logged in user** who activates the Compliance Checker.

Auto-generated Compliance Checker tasks can have the status **Pending** or **Complete**.

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.

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

For every item type in Product Manager, you'll see an option to add a custom task for that open item. This makes it easy to view the task in your tasks list and click to the item to perform any required action. You also conveniently review all tasks associated with an item.

Add custom task

To add a custom task, click on the 'Add Custom Task' button:

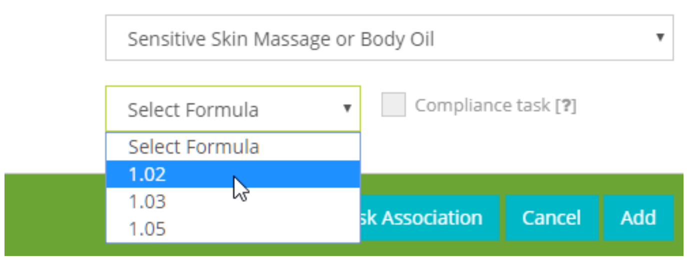
- Next to 'Task', enter a task title or short instruction
- Select a **status** for the task
- Enter a **due date**
- Assign the task to a **user** (assignee)

Set an association

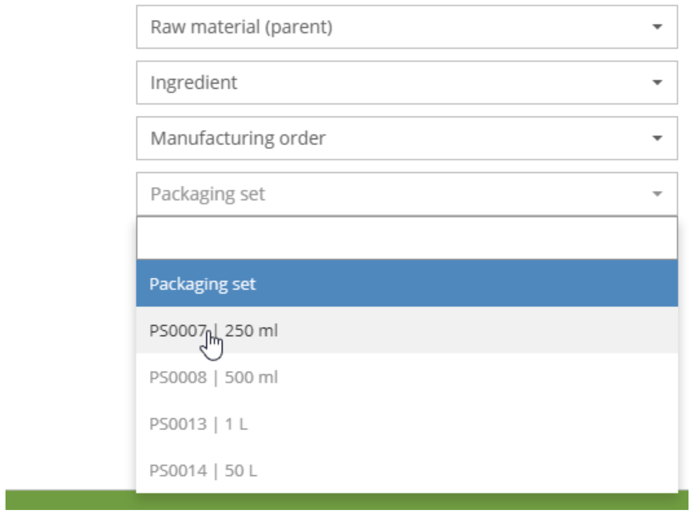
You can optionally associate the custom task with a **product** and associated **formula**. Once a formula is selected, further options will be displayed, enabling you to drill-down to associate the task with a specific item associated with that selected product formula.

Click on the following checkbox:

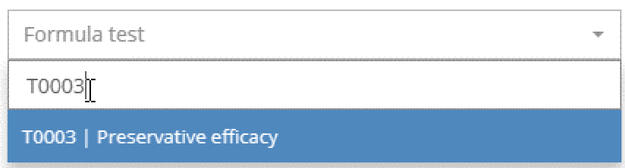
If you select a product, a further list will appear below with the associated formula versions:



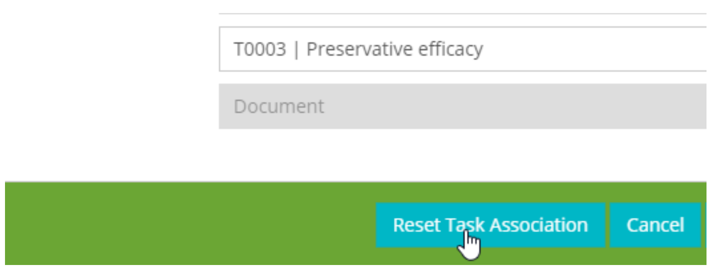
To drill-down to a third level, select one item from the third list which appears once you have selected a formula version:



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'

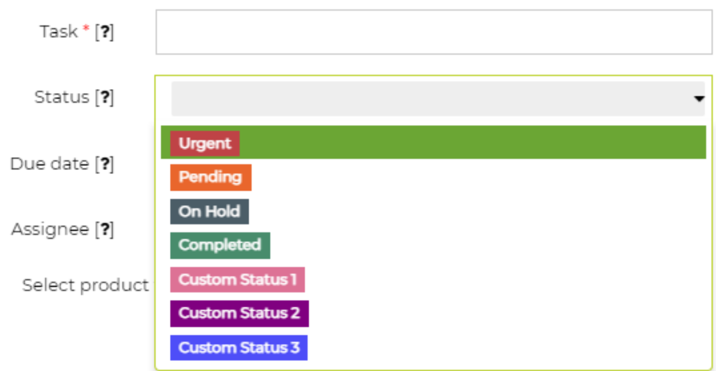


Click on 'Save' to save the new custom task.

Custom task statuses

You can create up to six custom task statuses. To configure these, you need to login as an admin and in the Product Manager 'Custom Settings', scroll down to 'Custom Task Statuses'.

Once set, these custom task statuses will be made available when working with custom tasks, as shown below:

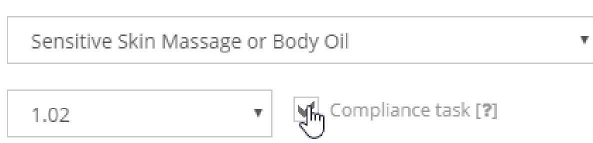


Include custom tasks in Compliance Checker

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:



Task Notes / Reminders

Each task 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.

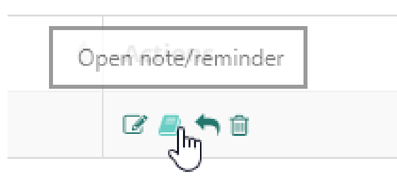
In the Tasks lists on your dashboard and in 'My Tasks' (accessible from the main user menu, top right), you can easily see who created the task (the 'Assignor') and address any note to them.

Date Created	Date Due	Assignor	Assignee	Status	Actions
24 Apr 2018	24 Apr 2018	Emma J. O'Neil	Frank Rogers	Urgent	
17 Oct 2017	17 Oct 2017	Emma J. O'Neil	Frank Rogers	Urgent	

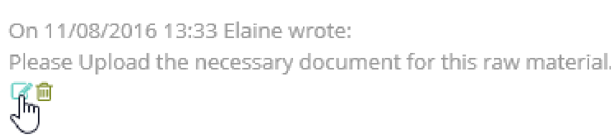
The status of a note/reminder is displayed on your dashboard, under 'My Notes/Reminders' with the status that is assigned to the associated task.

<u>Note</u>: If a custom task associated with any notes/reminders is deleted, <u>all associated notes/reminders will also be deleted</u>.

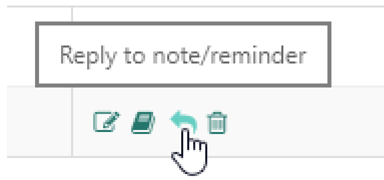
To view the note/reminder and any associated thread, click on the following icon:



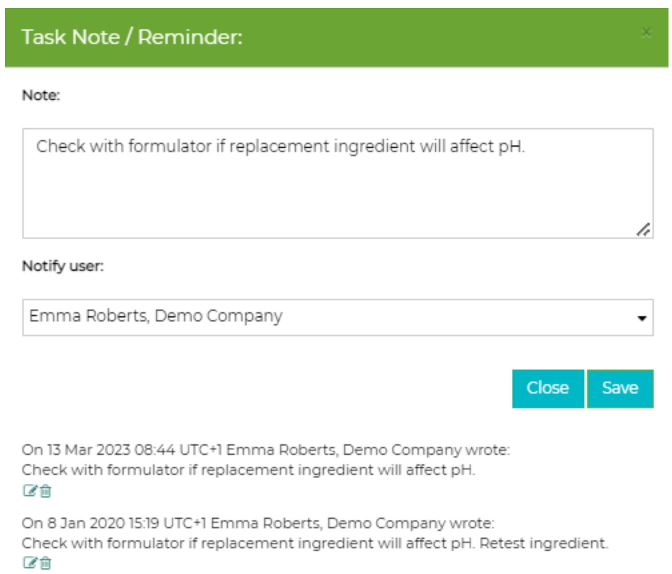
To view other notes/reminders in the thread, click on the pencil icon next to that item:



To add a new note/reminder to the thread and assign this to any user, click on the following icon:

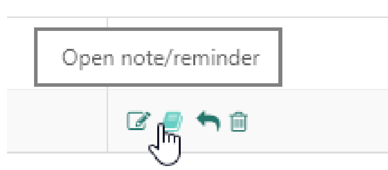


Enter your note/reminder in the 'Note' field. Drag the bottom right corner of the text box if you require more space:



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.

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:

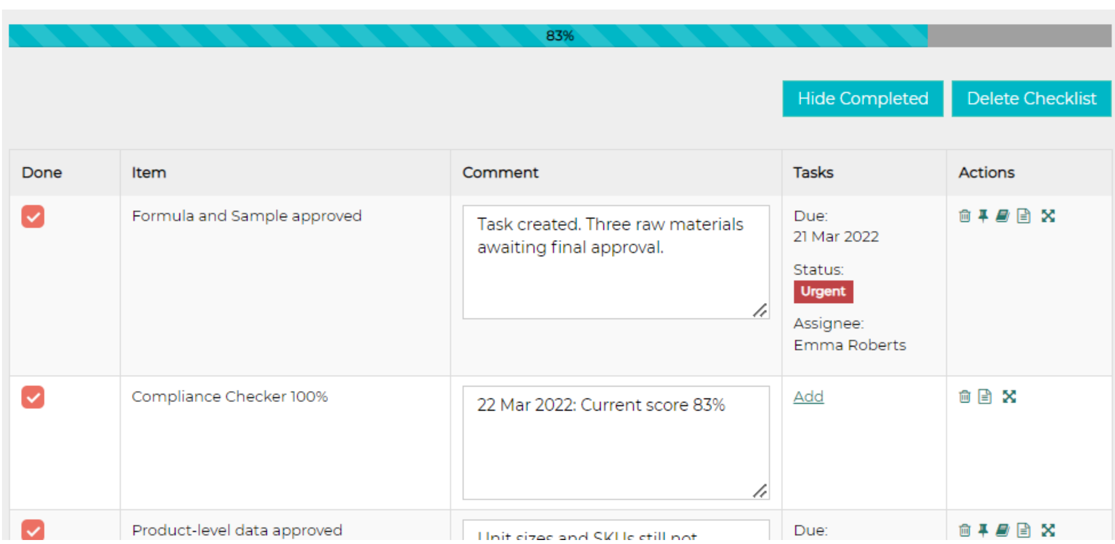


Checklists

Introduction

Checklists enable efficient project management of 'to-dos' for an item. This type of checklist is currently available in Product Manager for projects and products. Checklist templates can be built to enable easy and fast implementation where standard checks are required in workflows, such as:

- **Project (market brief) approval – commence R&D**
  Ensure all project requirements, documents and steps are completed prior to commencing formulation after the approval of a project/market brief.
- **R&D completion**
  Once a master formula has been selected and the R&D project is to be completed ready for the product's go-to-market, use a checklist to perform a final check´ that all steps have been completed.



Note: A logged-in user may only be able to select a checklist template that they are authorized to view. For example, a project must be assigned to a customer group that the user is permitted to access.

A task can be generated and associated with a checklist item, giving even greater control, including:

- Assign an owner to the task
- Set a due data
- Set a status
- Add notes/reminders for users to resolve the task

Note:
Checklists for quality management of items such as formulas, raw materials and packaging items are described in the QA section of the user guide.

Manage Checklist

Add checklist

Open the item in the tab where a checklist can be managed, enter a title for the checklist and click on 'Add New' to create a new checklist. You can now start to add the required checklist items.

Add checklist items

In the checklist area, enter an item description and an optional comment.in the empty row and click on 'Add item' to add a new checklist item.

Checklist templates

To save a checklist as a template click on 'Save Template'. Once saved for the first time, this button will no longer be displayed and is replaced by the 'Update Template' button.

The new checklist template will now be available for selection to use for checklists for that same item type. You may add and edit any checklist items in the template and then click on

'Update Template' to apply the changes to the template associated with the currently in-use checklist.

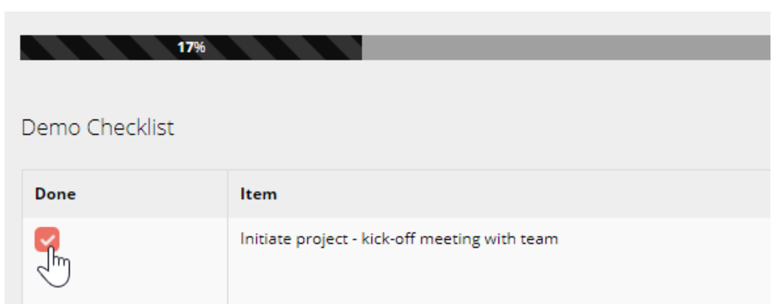
Note:
If any checklist associated with the same checklist template is already in use for another item, these changes will not be applied.

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.

Manage checklist

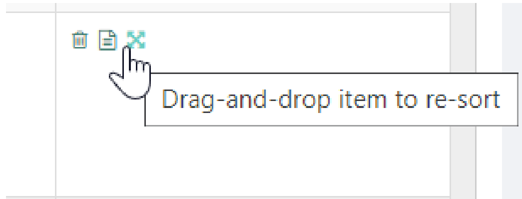
Click in the 'Done' column to mark an item as completed. The checklist status bar will display the current level of completion.



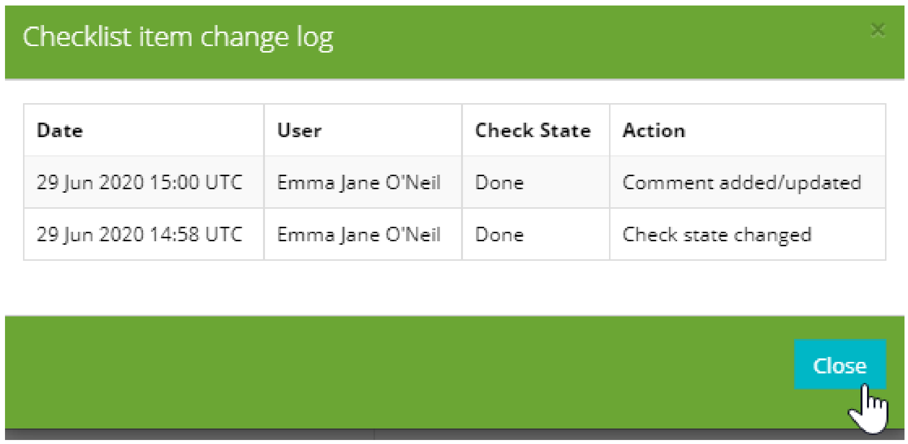
Enter an optional comment for any checklist item. Click outside of the comments window to save the comments.

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.

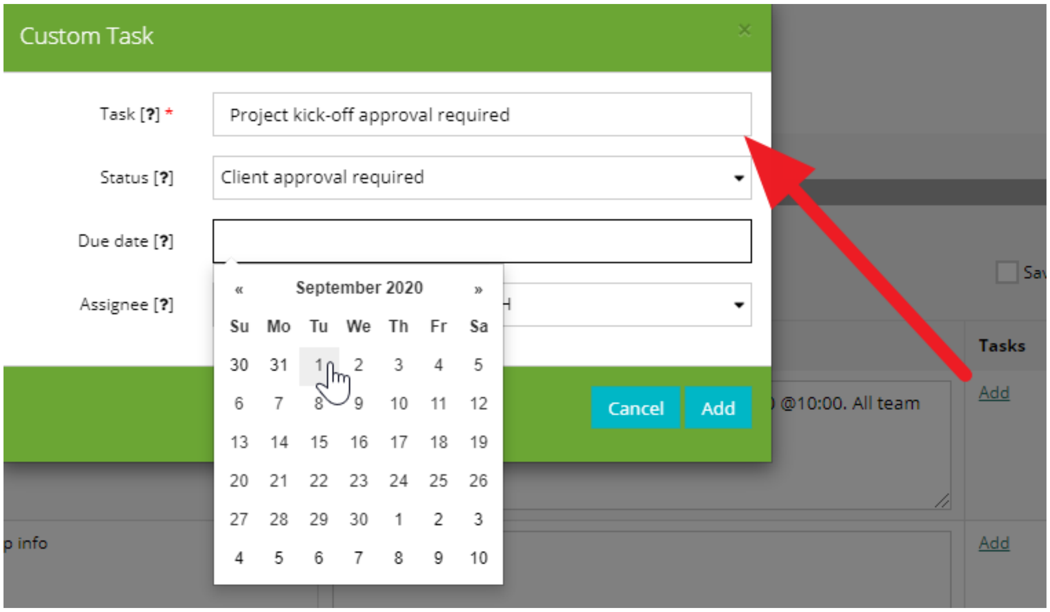


To view a log for a checklist item, click on the ‘Change log’ action.

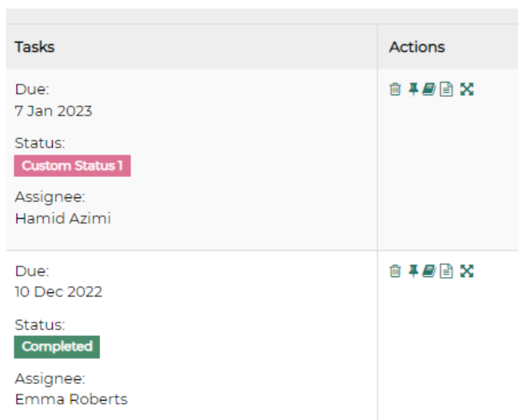


Checklist Tasks

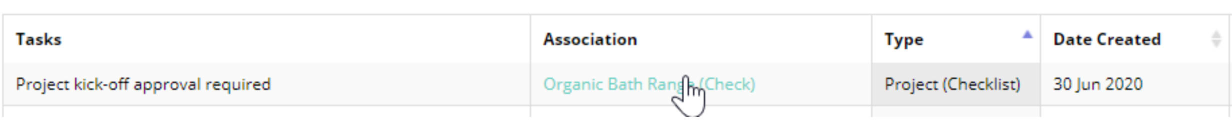
Click on ‘Add’ to create a task associated with the item and to create the task. Only one task per item can be created.



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 a task is associated with a checklist item 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.



Projects (Market Briefs)

Introduction

Projects or market briefs can be created in Product Manager to manage the requirements for a new product or entire product line. You can create a project as a market brief for keeping notes, images and links, further refining the concept until you are ready to proceed to the formulation stage. A checklist of 'to do's' can also be maintained to assist in the management of required tasks and collection of all required data.

Project details can be entered by authorized users within your team.

It is possible to provide a customer with direct access to the projects-level of your Product Manager account, enabling them to collaborate and enter their requirements.

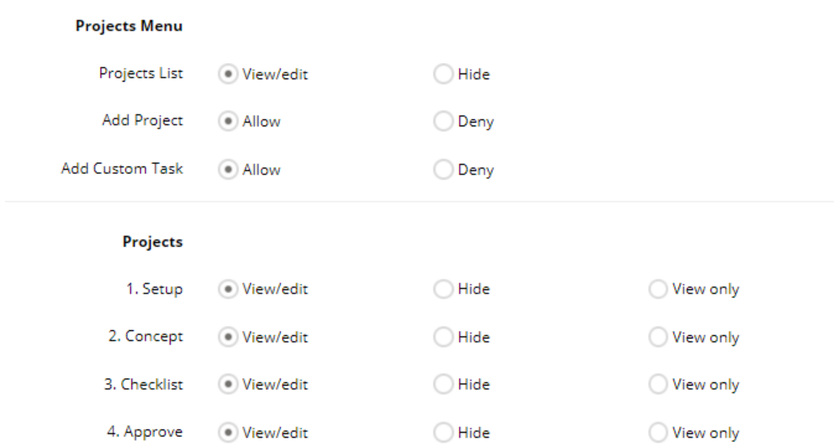
Different approval statuses can be applied to a project and once set to 'Approved', you can associate a project with one or more products in Product Manager and, with a single-click, clone the project data to the 'Requirements' tab of the product. This tab serves as the specification required for the formulation team 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 customer manager. To select one or more users, you must have administrator rights. Go to the Product Manager Global Settings/ Default Settings/Projects

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



If you have configured customer groups, each project must also be associated with one of these. This enables exact permissions to be set for which products and projects a 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 six additional custom statuses assigned. Default statuses are Open, Approved and Closed. A maximum of 15 characters are allowed for the label.

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, PR0002, etc. Each project is listed in the projects list, showing its status and any associated product(s). Click on a product title to open the product(s) linked to the project.

Click in the 'Actions' column to edit, delete or clone the entire project. Clicking on the project ID in the first column also opens the project for editing.

ID	Customer	Ref #	Title	Product	Date required	Status	Actions
PR0001	Beauty Solutions	#12.345_6-3	Organic Bath Range	Aloe Gel SB1x	25 Oct 2017	Approved	
PR0003	Beauty Solutions	123456789	Anti-Acne Shaving Stick	Product Test 1	28 Sep 2017	Closed	

To create a new project, click on 'Add New' and complete the details in the 'Setup' tab.

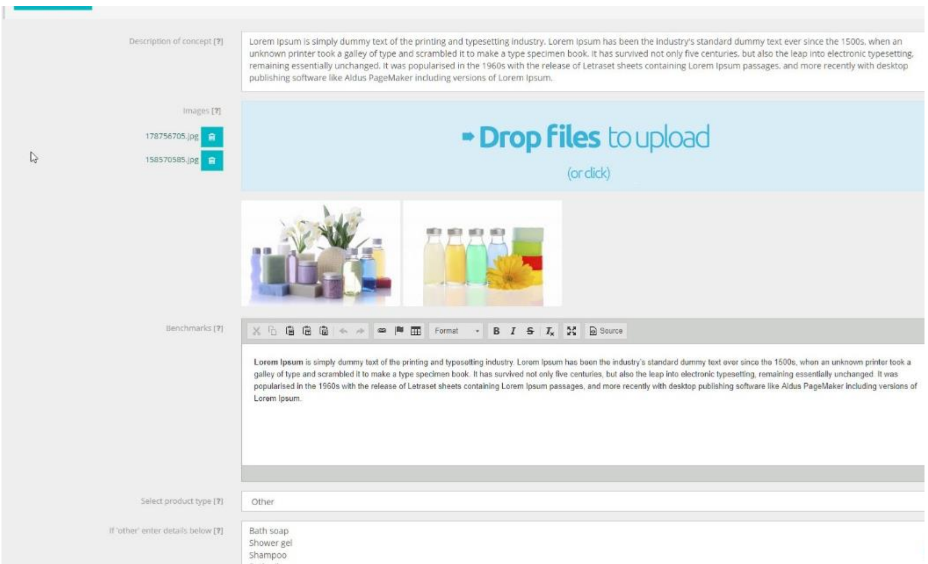
Setup

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. Complete as many of the optional fields as required, or this information can be added later.

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

Concept

Once you have setup your project, use the 'Concept' tab to enter the details describing the concept or requirements for the product(s).



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.

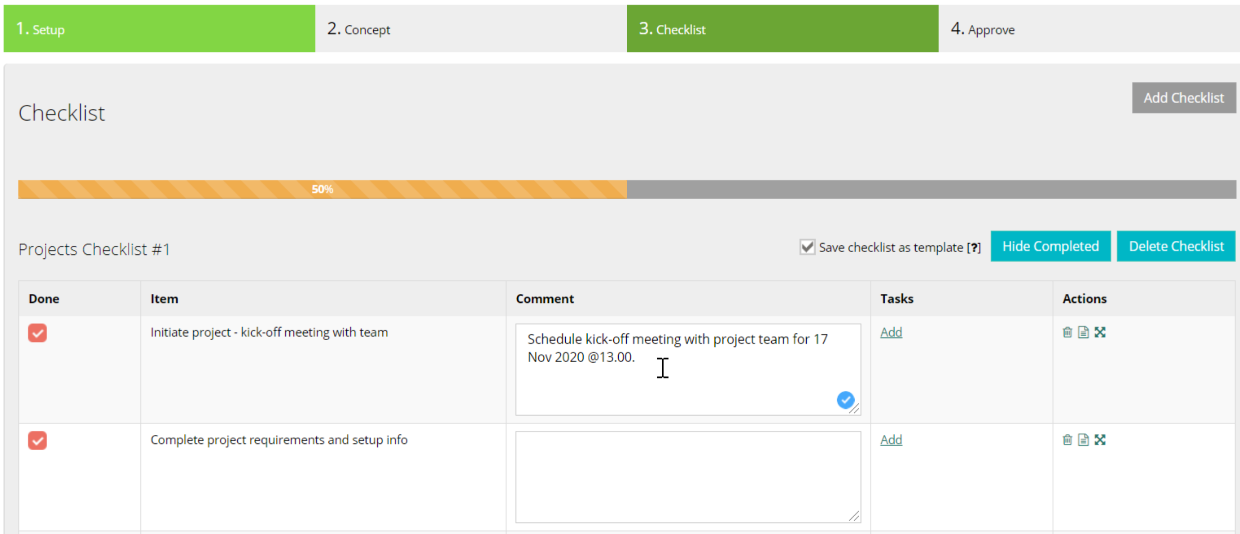
Enter a description for the project and upload any graphic files (as .jpg, .gif or .png format), for example photos of competitor products, references for how the finishing packaging should look, etc. Uploaded images will be resized to 250px width.

Complete as many of the optional fields as required, or this information can be added later.

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

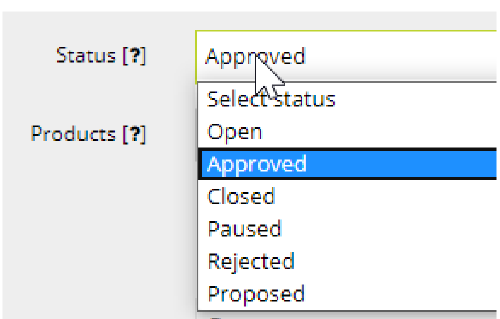
Checklists

This tab enables management of 'to do's' for a project. Full details of checklists functionality can be found in the separate section of the user guide and knowledge base.



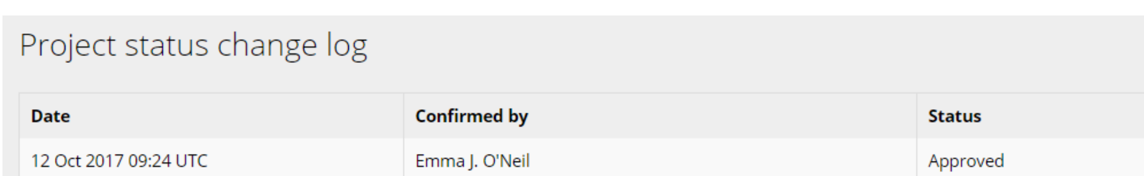
Approval

Projects can have different approval settings. Default statuses are 'Open', 'Approved' and 'Closed'. You may create up to six further custom statuses, which are managed in the default settings. In these settings you may also select any users authorized to set a project to the status 'Approved'.



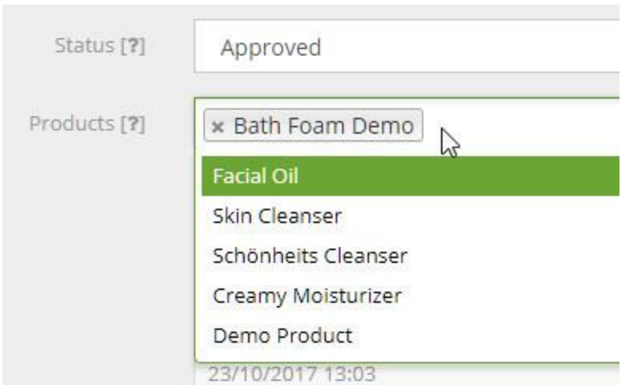
Any other user with permission to access the project may set a project to any status except the status 'Approved'.

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, 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.



Note: 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.

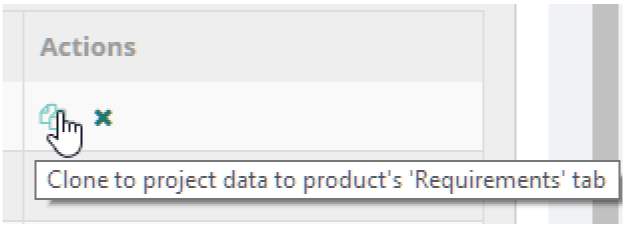
Click on 'Save' to save the associations.

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 X icon in the 'Actions' column.

Clone to Product Requirements tab

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, to serve as the specification.

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



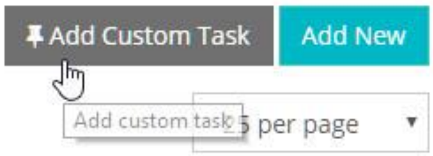
Once cloned, you can click on a product's title to open the product at the 'Requirements' tab and view the project information.

In the Product/Requirements tab, a non-editable summary of the project data is displayed in the header 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 requirements (market brief) could for example, add their own project information and then create a task for the project manager, instructing them to check the new request.



Ingredients (Chemicals) Database

Introduction

Product Manager's ingredients database includes approx. 32,000 chemicals/substances for potential use in cosmetics and personal care products, including extensive search and filtering tools.

Note: In Product Manager 'Ingredients' refers to single chemicals. These are not to 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 ranges or as exact %w/w values. Ingredients are the 'building blocks' of raw materials. Regulatory data and compliance management in Product Manager is conducted at the ingredient/chemical or 'INCI' level.

Over 99% of required ingredients can be found in the Cosmetri ingredients database. In the rare event that an ingredient cannot be found, for certain plans a request can be submitted to have this ingredient added by Cosmetri to the database, further details of which can be found later 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 and set an approval status. Approximately 11,000 ingredients in the Product Manager database include chemical properties data. Over 3,200 ingredients include toxicity and LD_{50} 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/

Grouped Ingredients

Not all ingredients in the Cosmetri ingredients database are available for building raw materials or adding directly to a formula. These are groups of multiple ingredients / chemicals present for **advisory purposes only**. For example, in the EC CosIng database, these grouped ingredients consist of multiple INCI names and/or CAS numbers and may have specific regulatory data associated with them.

Ingredient	US INCI	CAS No.	EINECS	Function	Regulatory	Advisory	Actions
1,2-Benzenedicarboxylic acid, dipentylester, branched and linear [1]; n-Pentyl-isopentylphthalate [2]; di-n-Pentyl phthalate [3]; Diisopentylphthalate [4]		84777-06-0 [1] / 776297-69-9 [2] / 131-18-0 [3] / 605-50-5 [4]	284-032-2 [1] / 933-378-9 [2] / 205-017-9 [3] / 210-088-4 [4]				

Refer to these grouped ingredients for any additional regulatory data. Each ingredient in the group is available as a single ingredient/chemical. It is this single version that must be used in the raw material composition. Your formula should not therefore include any grouped ingredients and Product Manager prevents selection of these for use in raw materials and formulas.

Request to Add an Ingredient

If you search for an ingredient the main ingredients list of Product Manager and cannot find the ingredient, click on the ‘Submit Ingredient Request’ button to access a request form.

Note: The service to request to add a custom ingredient to the Cosmetri ingredients database is only available for certain plans. Please check your plan details. Requests are processed normally within seven working days once all required information has been received.

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**.

Before submitting a request, please also check the following:

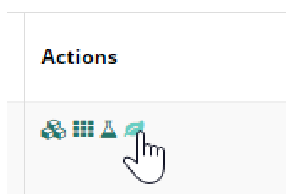
- CAS no. is correct
- Search for a narrower string to get a match to the INCI/IUPAC
- Use a generic version e.g., 'Honey' instead of 'Manuka Honey'
- Check that the ingredient is a single chemical and not a mixture
- The ingredient/chemical must be relevant for cosmetics and personal care

If you are sure that the ingredient does not exist in Product Manager, please submit the request form. To assist the Cosmetri team in assessing your submission, please provide as much information as possible. You are also required to submit a valid document with details of the ingredient – such as an SDS or CoA from your supplier.

Ingredient / Chemical Data

Ingredient data

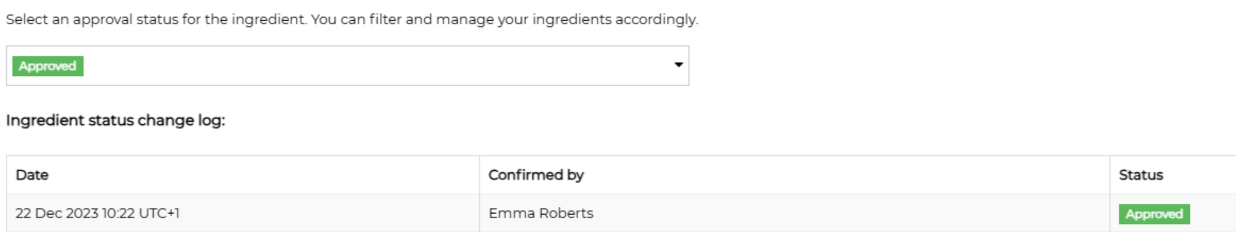
In the ingredients list in Product Manager, search or filter the list to locate an ingredient and click on the following icon in the 'Actions' column:



Wherever an ingredient name is listed as a clickable link, click to open the ingredient data panel:

Ingredient approval statuses

You may set an approval status for the ingredient. The status of the ingredient can be viewed and filtered - for example in the main ingredients list. This can provide an additional layer of control in organizing your ingredients, quality management and compliance.

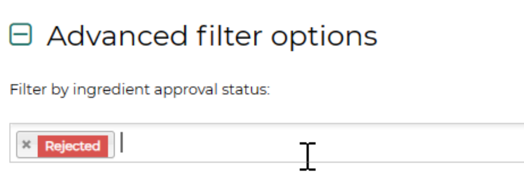


The default status is ‘Pending’, with statuses ‘Approved’ and ‘Rejected’ also available. Each status change is recorded in a change log with the date/time and user ID.

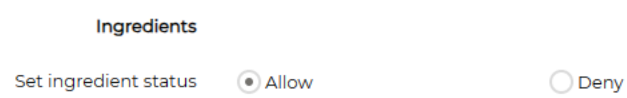
A user with administrator rights can create custom ingredient statuses in the Product Manager settings, under ‘Custom Settings’.

Set whether a status locks the data in the Ingredients Properties to prevent further editing. Create up to six custom statuses. The default status is 'Pending'. Custom statuses that are in-use cannot be deleted.

In the main ingredients list under ‘Advanced filter options’ you can select an approval status to filter the ingredients list:



A departments setting is available for enabling an administrator user to set whether a user has permission to set ingredient statuses.



Managing default and custom ingredient data

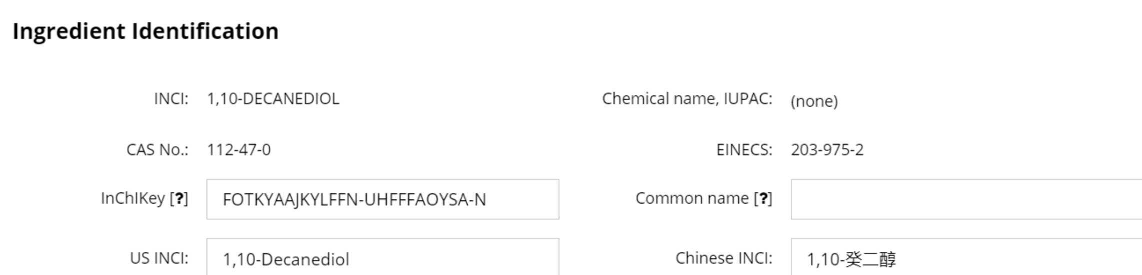
In the ingredient data panel, you can manage ingredient/chemical data including chemical properties, safety, toxicity, GHS and CLP information. Many ingredients have data available from the Cosmetri database. You may add or edit this data with all data you change saved to your own account. **Data that you enter in your account is never shared with other users not associated with your account**.

If you wish to revert to the default ingredient data provided by Cosmetri, click on the 'Load Default Data' button to revert the data for that ingredient. If no or only partial population of the fields occurs, this is because default data is not available. **Use caution when using this function, 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.

Ingredient identification

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



INCI

This is non-editable, taking the official INCI (International Nomenclature of Cosmetic Ingredients) name (international version).

Chemical name, IUPAC

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

CAS No.

This is a non-editable field, taking any existing official CAS (Chemical Abstracts Service) number associated with the ingredient.

EINECS

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

InChIKey

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 'List of Ingredients (LOI)' 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.

Japanese INCI

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

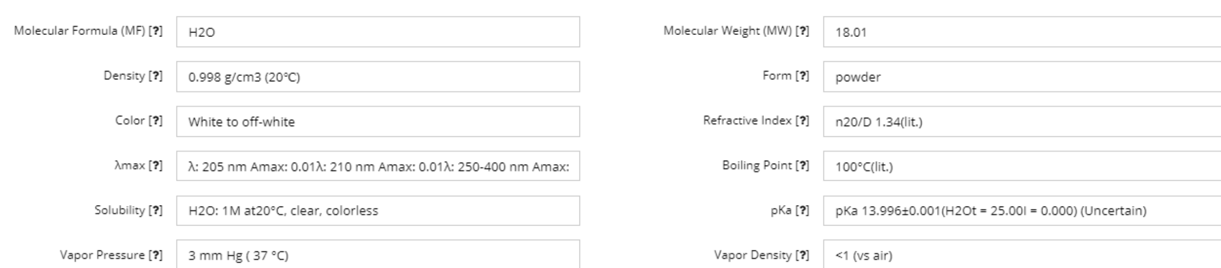
Custom ingredient name fields

You can configure up to six custom ingredient name fields in the Product Manager settings, in the 'Custom Settings' tab. This requires that you have administrator rights.

Once you have added fields, you can find them in the 'Custom Ingredient Names' section. These name fields can be used for example, to manage different language-version common names. These fields are selectable when creating your list of ingredients (LOI) in the Formula/Labels tab and when exporting your formula data.

Ingredient chemical properties

This section of the ingredient panel includes fields describing the chemical properties of the ingredient. Approximately 11,000 ingredients have chemical property data available as default.



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 C_6H_{14}.

Molecular Weight (MW) is measured in [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 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; $D = m/v$.

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.

λmax - wavelength of maximum absorbance (λmax). 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 λmax.

Boiling point, temperature at which the pressure exerted by the surroundings upon a liquid is equaled 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. 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 and LD_{50}

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:

Organism	Test Type	Route	Reported Dose (Normalized Dose)	Effect	Source
dog	LDLo	intravenous	2gm/kg (2000mg/kg)	BEHAVIORAL: SOMNOLENCE (GENERAL DEPRESSED ACTIVITY)	Archiv fuer Experimentelle Pathologie und Pharmakologie. Vol. 21, Pg. 119, 1886.
guinea pig	LDLo	intraarterial	300mg/kg (300mg/kg)		Naunyn-Schmiedeberg's Archiv fuer Experimentelle Pathologie und Pharmakologie. Vol. 131, Pg. 171, 1928.

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 or used to generate a safety assessment or CPSR. 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

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.

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.

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 is a 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 the safety calculations performed by the software.

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.'

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:

http://echa.europa.eu/web/guest/legal-notice

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.

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 are required for labelling.

Suppl. Hazard Statement Codes are required for labelling (any additional notes). Default data may exist for this ingredient or enter your own.

GHS other

Two fields exist in this sub-section where additional GHS data may be managed:

Specific Conc. Limits, M-factors

GHS Notes

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

Ingredient Tags

Ingredient tags enable precise control of ingredients when managing a formula's compliance. Examples are to identify actives and incidentals in the formula and for certain compliance countries or markets, to easily manage which ingredients need to be declared on the list of ingredients (LOI). Functions for ingredients can already be defined and should not require these tags.

There are two types of ingredients tags:

Type 1:
Tags are added to the formula in the 'Compliance' tab in the 'Ingredient Compliance Tags' column and are specific to the currently selected compliance zone. This makes it possible to identify and filter certain ingredients in the formula. An example is to create a country-specific list of ingredients (LOI), such as filtering out allergens or incidentals that may not need to be declared. You can also filter your formula reports to exclude ingredients by tag – useful for exporting INCI lists for different regulations.

Type 2:
Tags are added to ingredients in the raw material's composition. These are then displayed in the formula's compliance view in the 'Raw Material Ingredient Tags' column. They assist in identifying key information and the role of an ingredient in the raw material that may be relevant when checking compliance. Often these tags are then used to determine which type 1 tags to set in the formula (see previous).

Both types of ingredient tags can be customized and extended according to your requirements.

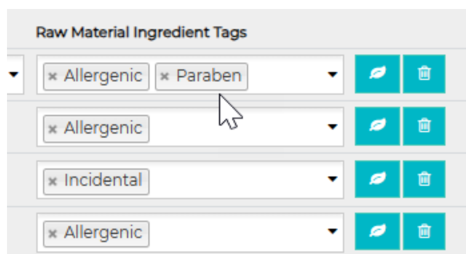
Customize ingredient tags

A user with administrator rights can manage ingredient tags in the Product Manager settings under the tab 'Custom Settings'.

You may change the name of the three default tags 'Active', 'Allergenic' and 'Incidental' as well as create custom tags. For each tag, set whether they should be available as type 1 and/or type 2. Tags that are in use cannot be deleted.

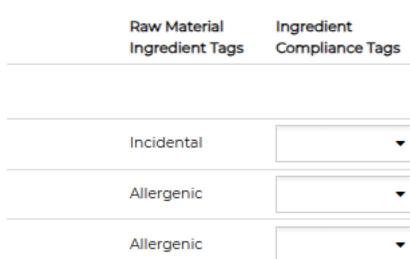
Raw material ingredient tags (type 2)

In the raw material 'Composition' tab in the 'Raw Material Ingredient Tags' column, select any tags that apply to each ingredient in the composition.

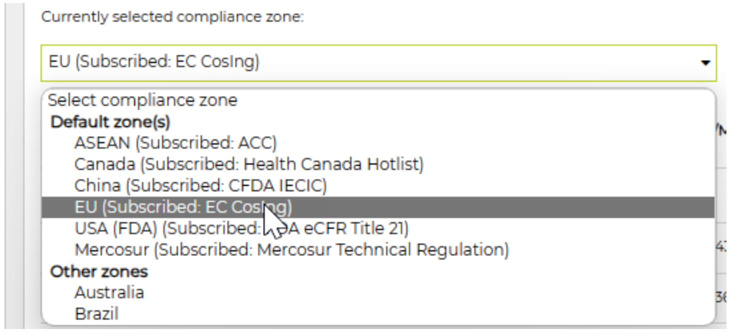


Ingredient compliance tags (type 1)

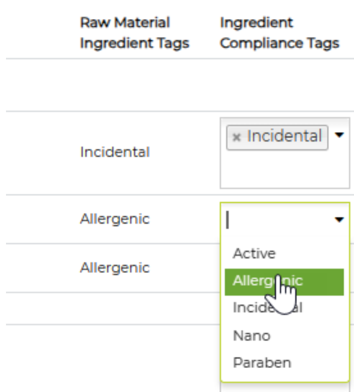
For any raw material with type 2 tags applied to the ingredients (see previous), check in the formula's 'Compliance' tab in the 'Raw Material Ingredient Tags' column. If that raw material is present in the formula, these tags will be viewable.



Select the compliance zone for the formula.



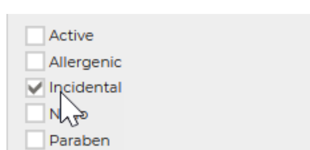
For the currently selected compliance zone, use the tags added at the raw material level as a guideline for setting any tags in the 'Ingredient Compliance Tags' column. This will enable you to set different tags for different compliance zones – giving you granular control of how ingredients will be displayed in the LOI and any reports you export for compliance purposes.



Click on 'Update' to save any tag statuses before switching to a different compliance zone and repeating the process.

Manage list of ingredients using tags

In the 'Formula/Labels' tab under 'List of Ingredients (LOI)', the type 1 ingredient compliance tags are available as checkboxes. Select the compliance zone you wish to generate a list of ingredients (LOI) for. Check any tags which you wish to exclude from the LOI.

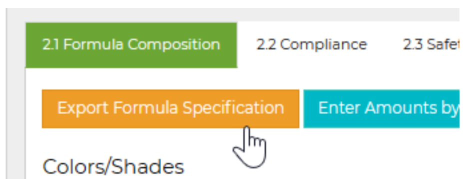


Once a checkbox is checked, the ingredients list will be updated.

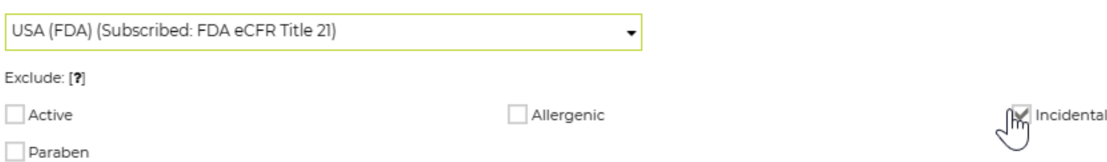
Click on 'Update' to save any tag statuses before switching to a different compliance zone and repeating the process.

Formula specification report

Under the formula tab '2 Specification/21. Formula Composition', the type 1 ingredient tags can be used to determine which ingredients should be included in the report.



First select the required compliance zone. Then select any tags that you wish to exclude from the report.



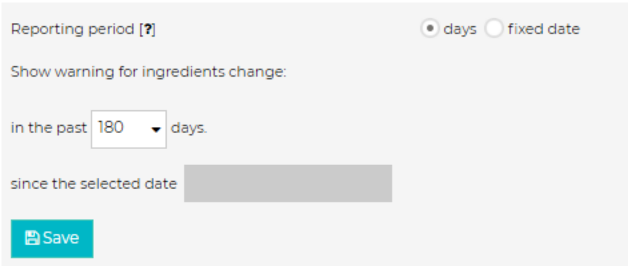
Ingredients Watch

Ingredients Watch monitors and advises on any changes to ingredients in your formulas. This includes any regulatory changes to an ingredient made by an authority, as well as any changes to the ingredient's record as stored in the Cosmetri ingredients database.

Note: Notification of regulatory changes requires subscription to the associated 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 mis-spelled INCI or IUPAC) or to append existing data.

The feature is accessed under the main menu item 'Ingredients/Ingredients Watch'. 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).

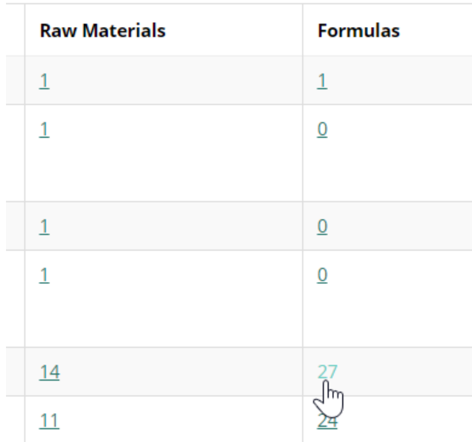


Set your preferred reporting period, either by no. of days in the past based on today's date, or from a specified start date by using the calendar date selector. Click on 'Save' to apply the changes and then return to the Ingredients Watch page to check for any alerts.

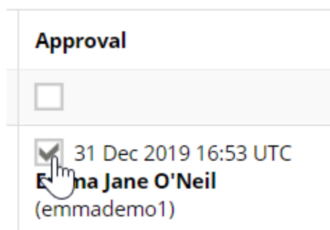
Ingredients listed in the Ingredients Watch page are those that have been updated for **any subscribed regulatory compliance zone** (including EU as default) for the selected timeframe.

All regulatory alerts are displayed for the ingredient. Use the compliance filter to filter the list of ingredients by compliance zone. Note that alerts do not imply that all filtered ingredients in the Ingredients Watch list have been updated only for the selected compliance zone. An update may have been made to the ingredient by multiple authorities. It is therefore important that you check all associated regulations to determine if the change has any impact on the compliance of your formula.

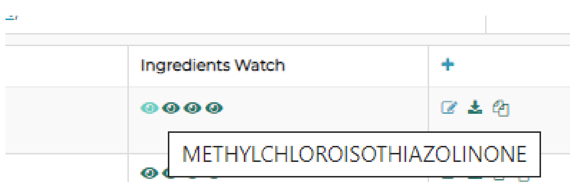
For any reported ingredient, check in the 'Raw Materials' and 'Formulas' columns to see the number of associated items. Click on a link to view a detailed list and the %w/w of the ingredient present.



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.



Ingredient Advisory Lists

This feature enables you to create your own policies for ingredients that should or should not appear in a formula when checking compliance, such as for parabens, nano-ingredients, clean beauty, etc. You can optionally associate an ingredient in the advisory list with any compliance zones and/or customer groups.

Managing advisory lists

You can manage advisory lists by clicking on the main menu item Ingredients/Advisory Lists.

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 existing advisory list.

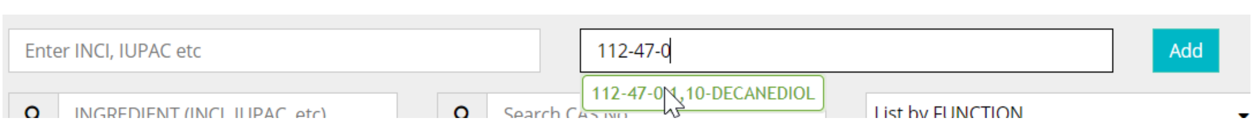
Select a color for the warning triangle to be displayed for the list when checking the formula's compliance.

Select whether the advisory list is 'positive' or 'negative'.

Positive
When checking the formula's compliance, if an ingredient is not on the list, an alert will be displayed. Use this option for example for a clean beauty type list where you only want to formula using ingredients that appear on the list.

Negative
Sometimes referred to as a 'blacklist', any ingredients added to this type of list will be alerted when checking the formula's compliance.

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.

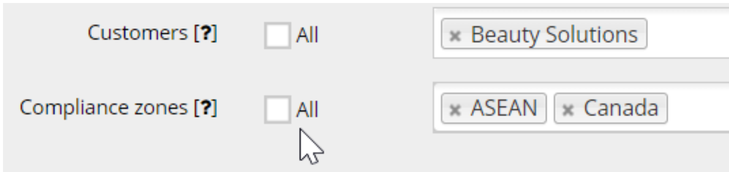


For each ingredient added to the advisory list you can perform the following actions:

- 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

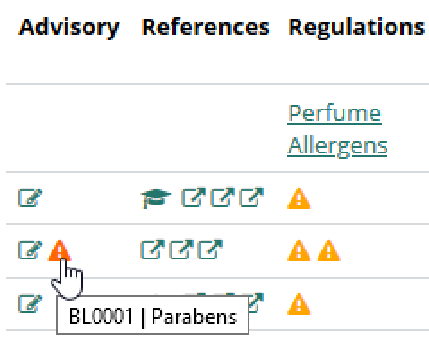
Once you have built the advisory list, you can optionally associate it with any customers and/or compliance zones, or any combination of the two. Or leave the 'All' checkboxes checked to associate the advisory list with all formulas.



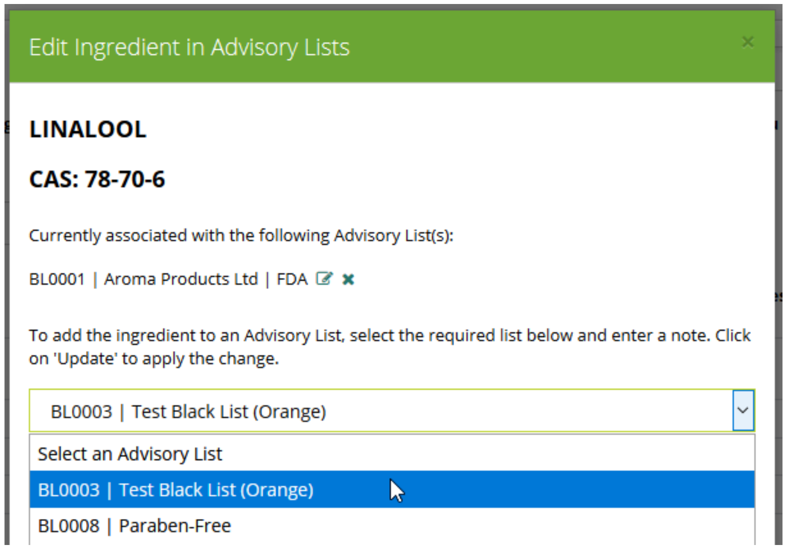
In the above example, alerts in the advisory list will only be displayed if the ingredient exists in formulas associated with the customer 'Beauty Solutions' and where the formula is associated with the compliance zone ASEAN or Canada.

Check advisory list warnings for a formula

Alerts will be displayed in the formula's 'Compliance' tab if a warning associated with an advisory list exists. Click on the alert icon in the 'Advisory' column to view any restrictions.



Click on the edit icon in the 'Advisory' column 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 and optionally add a note. You can 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.

Perfume / Fragrance Allergens

Introduction

This section of guide covers the following:

- Perfume allergens and the regulations
- Setting the product type rinse-off/leave on
- Raw materials: perfumes and fragrances
- Raw materials: essential oils
- Adding raw materials to the formula
- The “benzyl alcohol” case - multi-function ingredients
- Managing perfume allergens in the formula
- Product label list of ingredients (LOI)
- Monitoring allergen concentrations between batches

This section of the guide describes the recommended best practices for managing perfume (aka ‘fragrance’) allergens present in for example, perfumes and essential oils that are used in a formula. This includes recommendations for using the term *Parfum* or *Fragrance* on the product label’s list of ingredients (LOI). Learn how to manage perfume allergens according to *EC Regulation 1223/2009* and manage your LOI for other countries/markets with differing requirements for allergens declaration.

This section of the guide also covers how to manage ingredients such as *Benzyl Alcohol*, which are recognized as perfume allergens but can also be used for other non-perfuming functions.

Perfume allergens should normally be entered in the raw material composition (e.g., for a perfume or essential oil), rather than directly in the formula’s composition.

Perfume/ Fragrance Allergen Regulations

When managing your formula's compliance according to the EU regulations, automatic calculation of perfume allergens in Cosmetri is based upon the logic required for complying with Article 19 (g) of *Regulation (EC) N° 1223/2009*. This section of the guide also explains how to use the ingredient tags feature to assist in the management of ingredients which must be included in the LOI for any non-EU countries or markets.

Note: You are advised to seek professional approval of your product label and list of ingredients for each country/market, prior to selling your product. For the US FDA market, Cosmetri's parent company Registrar Corp LLC provide a label review service. Click here for details.

Use of the term 'parfum' or 'fragrance'

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.

Depending on the country or market, the term *Parfum* may alternatively be displayed as e.g., *Fragrance* on your list of ingredients. Essential oils however should be entered with the oil's main ingredient and any perfume allergens declared additional to this. Usually the main ingredient (the oil itself) would be entered at 100 %w/w. Further details are described later in this section of the guide.

Commission regulation (EU) 2023/1545

Published on 26 July 2023, the regulation amends Regulation EC No. 1223/2009 regarding the labelling of fragrance allergens. In Annex III of the regulation, 56 new allergens were added. Cosmetic products that do not comply with the new regulations (assuming they comply with the previous regulations) can be released onto the EU market until 31 July 2026 and distributed until 31 July 2028.

The 56 new allergens in Annex III were updated accordingly in Cosmetri in July 2023. Some further modifications are currently under development to reflect how perfume allergens must be displayed on the product labels according to *Regulation (EU) 2023/1545* and are set for release in Q4 2023. Please check for an updated version of this guide.

Calculating Perfume Allergens Concentrations

Product Manager calculates the percentage of each perfume allergen in your product, as per the following logic. Let's take the example of Myrtle essential oil, with some typical allergen concentrations in the raw material, based on adding the essential oil to the product formula in concentrations of @0.5 %w/w and 0.1 %w/w:

	Coumarin	***Eugenol***	***Geraniol***	***Citronellol***	***Limonene***	***Linalool***
Myrtle Oil	0.20000%	0.70000%	0.80000%	0.30000%	12.00000%	2.00000%
0.5 %w/w in product	0.00100%	0.00350%	0.00400%	0.00150%	0.06000%	0.01000%
RINSE-OFF 0.01%	OK	OK	OK	OK	DECLARE	BORDERLINE
LEAVE-ON 0.001%	BORDERLINE	DECLARE	DECLARE	DECLARE	DECLARE	DECLARE
0.1 %w/w in product	0.00020%	0.00070%	0.00080%	0.00030%	0.01200%	0.00200%
RINSE-OFF 0.01%	OK	OK	OK	OK	DECLARE	OK

LEAVE-ON 0.001%	OK	OK	OK	OK	DECLARE	DECLARE

Regulation (EC) N° 1223/2009 and countries/markets that base their regulations on this, stipulate that the concentration of *Coumarin* @0.01000% in the 0.5 %w/w version 'rinse-off' example, would not require inclusion on the label because this concentration 'does not exceed 0.01000%', whereas the other five perfume allergens must be declared, with Linalool @0.01000% shown in the above table as 'Borderline'. In this case, we recommend that you consult with your safety assessor and/or check your local regulation for whether in such a case the allergen must be declared on the product's label. Product Manager includes a setting to determine whether a borderline allergen is included or excluded in the LOI.

Setting the product type of exposure

For EU compliance, a perfume allergen must be declared on your label of ingredients if the concentration is above 0.001% (leave-on products) or 0.01% (rinse-off products). It is therefore important that you set the type of exposure correctly. Set the product **type of exposure** in the product's '1. Info' tab:

Click on 'Save' to save your changes.

Raw Materials – Perfumes and Fragrances

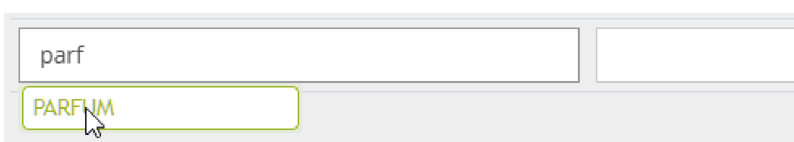
A fragrance or perfume that you use in your formula must be correctly setup as a raw material in Product Manager, before adding this to your formula. Many perfume houses do not disclose the exact composition of their perfume/fragrance. In this case, the term *Parfum* should be added to the raw material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

<u>Note</u>: For US compliance, enter ‘Parfum’ in the formula and in the Formula/Labels tab you can select to display this as ‘Fragrance’ on the product label.

Usually, *Parfum* is added at 100 %w/w concentration to the raw material. Any perfume allergens must additionally be declared at their correct concentrations. It is not important that the total for the raw material composition is > 100%. In the aggregated INCI-breakdown of the formula composition, a setting allows perfume allergens concentrations to be calculated separately from the main ingredients, thus making it possible to still have an exact total of 100.0000000 %w/w for these ingredients, assuming that each raw material composition has exact concentrations entered for each ingredient/chemical in the raw material.

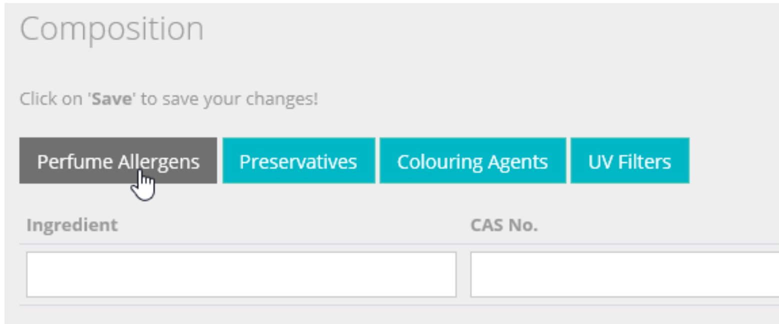
Example of perfume raw material composition, with Parfum entered at 100 %w/w:

To enter *Parfum*, just type the first few letters of the INCI and then select this as shown below:

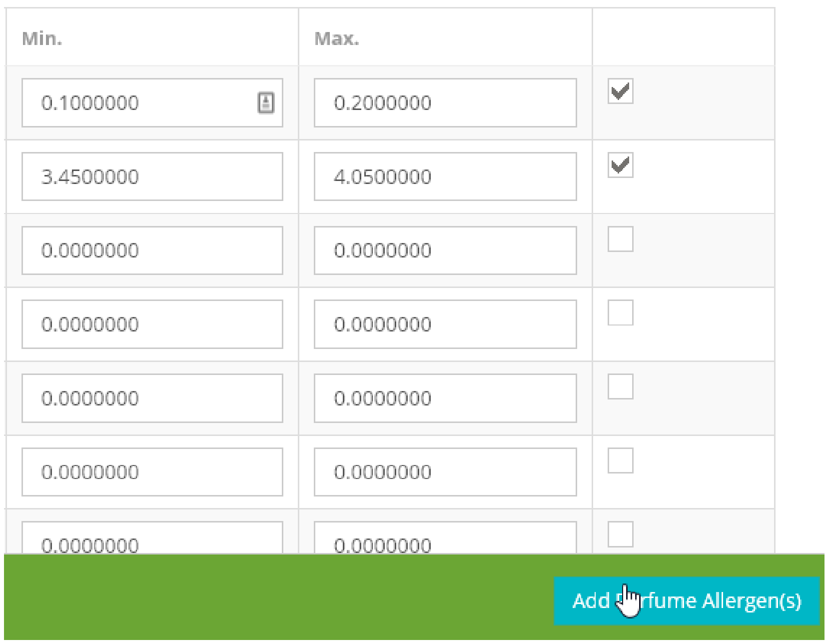


Enter the required function(s) for *Parfum* by ticking any boxes in the ‘Functions’ column, e.g., deodorant, masking and/or perfuming.

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



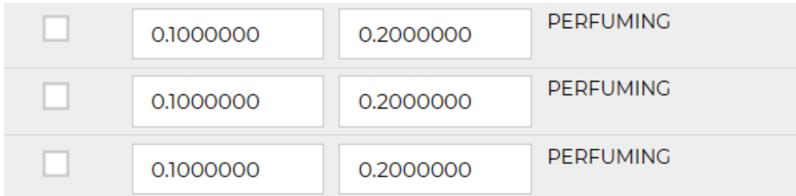
Enter a min. %w/w and max. %w/w value for each perfume allergen and check that the checkbox to the right for each allergen you wish to add to the raw material composition is checked:



If you know the exact percentage concentration, enter the <u>same</u> value in <u>both</u> the 'Min. %w/w' and 'Max. %w/w' 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 safety data sheet (SDS) or certificate of analysis (CoA).

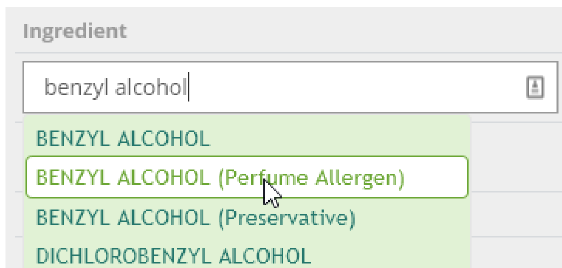
Click on 'Add Perfume Allergens' to add the allergens.

In the raw material composition, you will see that each perfume allergen has been automatically assigned the function 'PERFUMING':



Click on 'Save' in the raw material 'Composition' tab to save the changes.

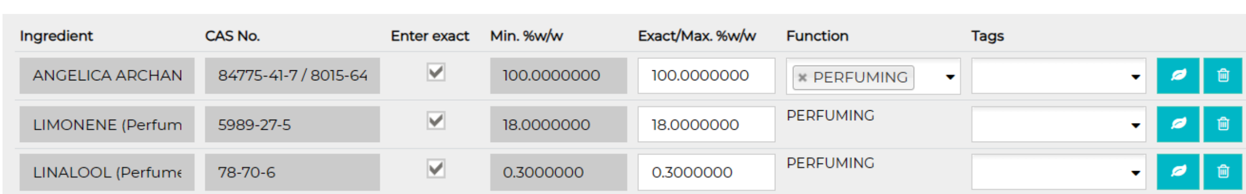
There is a further way to add perfume allergens to a raw material composition. In the 'Composition' tab, type in the INCI string, such as the example shown below for *Benzyl Alcohol*. Select the version with '(Perfume Allergen)' after the INCI.



Raw Materials – Essential Oils

Follow the guidelines above for 'Raw Materials – Perfumes and Fragrances' for how to add perfume allergens.

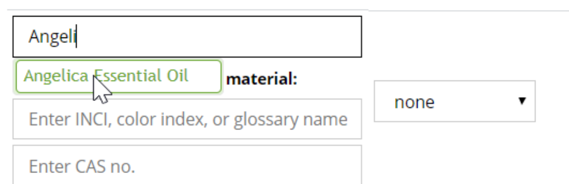
The essential oil must be added as the main ingredient by entering the INCI in the raw material composition, as well as any perfume allergens present within that oil. 'Parfum' is therefore not entered. Below is an example of *Angelica Oil*, with two perfume allergens added (*Limonene* and *Linalool*),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



Click on 'Save' in the raw material Composition tab to save the changes!

Adding Raw Materials to the Formula

Firstly, create the product and set the correct 'Type of Exposure' (see earlier). 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':



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'.

Repeat the same step above, this time adding the demo perfume we created in section 'Raw Materials – Perfumes and Fragrances', @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:

Trade Name [-]

Angelica Essential Oil [-]

ANGELICA ARCHANGELICA ROOT OIL
(100.0000000% - 100.0000000%)

LIMONENE
(18.0000000% - 18.0000000%)

LINALOOL
(0.3000000% - 0.3000000%)

Demo Perfume [-]

BENZYL ALCOHOL
(0.0050000% - 0.0100000%)

ALPHA-ISOMETHYL IONONE
(0.1000000% - 0.2000000%)

AMYL CINNAMAL
(0.1000000% - 0.2000000%)

PARFUM
(100.0000000% - 100.0000000%)

Multi-function Ingredients: Benzyl Alcohol

In some cases, a perfume allergen also exists as the same chemical in Cosmetri 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 the European Union's CosIng database.

For example, in the main ingredients inventory in Cosmetri, type a search for 'Benzyl Alcohol' and you will see the following result:

Ingredient	US INCI	CAS No.	EINECS	Function	Regulatory	Advisory	Actions
BENZYL ALCOHOL	Benzyl Alcohol	100-51-6	202-859-9	PERFUME / FRAGRANCE ALLERGEN, PRESERVATIVE, SOLVENT, VISCOSITY CONTROLLING			
BENZYL ALCOHOL	Benzyl Alcohol	100-51-6		PERFUME / FRAGRANCE ALLERGEN			
Benzyl alcohol (7)		100-51-6	202-859-9	PRESERVATIVE			

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 one in the first row.

In the formula's 'Compliance' tab, let's check the ingredients breakdown and *Benzyl Alcohol* concentrations:

Ingredient	CAS No.	Min. %w/w	Max. %w/w	Black Listed	Regulations
PERFUME ALLERGENS					Perfume Allergens
LIMONENE	5989-27-5	16.2000000%	16.2000000%		
BENZYL ALCOHOL	100-51-6	5.0002500%	5.0005000%		
LINALOOL	78-70-6	0.2700000%	0.2700000%		
AMYL CINNAMAL	122-40-7	0.0050000%	0.0100000%		
ALPHA-ISOMETHYL IONONE	127-51-5	0.0050000%	0.0100000%		
		21.4802500%	21.4905000%		
ANGELICA ARCHANGELICA ROOT OIL	84775-41-7 / 8015-64-3	90.0000000%	90.0000000%		
BENZYL ALCOHOL	100-51-6	5.0000000%	5.0000000%		
PARFUM		5.0000000%	5.0000000%		
		100.0000000%	100.0000000%		

Cosmetri recognizes any of these three instances of *Benzyl Alcohol* in your raw materials and formulas 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 list of ingredients (LOI) and when checking your formula's compliance.

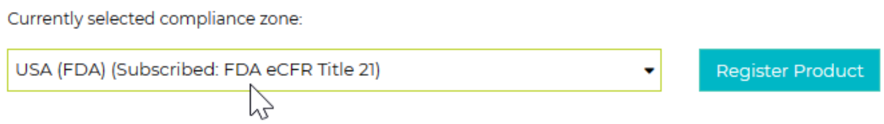
In the above example, we can see that *Benzyl Alcohol* added directly to the formula as a main ingredient (preservative version) @5 %w/w is also shown in the main list and that this concentration has been added to the instance of *Benzyl Alcohol* appearing as a perfume allergen in the Demo Perfume raw 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 displayed as a perfume allergen, due to this group of three versions of the same chemical being linked in Cosmetri.

Product Label List of Ingredients (LOI)

This section of the guide explains how to manage the allergens in your formula for different compliance zones and generate the list of ingredients (LOI) for each country/market.

Setting ingredient compliance tags in formula

In the Formula/2. Specification/2.2 Compliance tab, select the compliance zone you wish to manage:



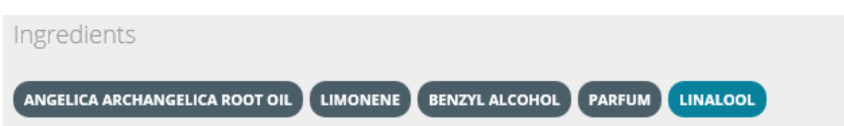
In the right-hand column you can select any available compliance tags for each ingredient. For any perfume allergens listed in the upper section, you can for example select a tag such as ‘Allergenic’

<u>Note</u>: These tags are applied to each ingredient according to the <u>currently selected compliance zone</u>. Switch between compliance zones to apply the required tags to each ingredient. The assignment of these tags therefore enables precise control of how allergens should be declared in the product’s LOI and when exporting the formula data.

Click on ‘Update’ to save your changes.

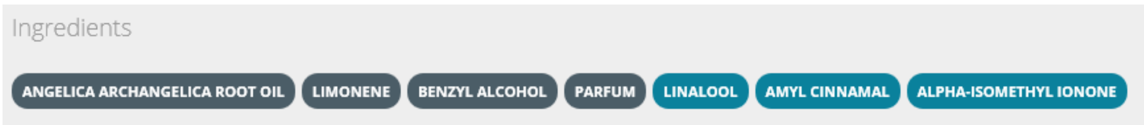
Manage LOI in Formula/Labels tab

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 <u>exceeds</u> 0.001% in leave-on products or 0.01% in rinse-off products. Cosmetri uses the maximum %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’:



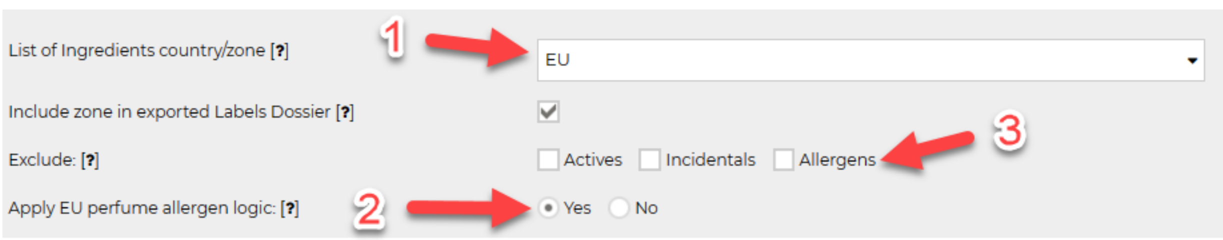
Two of the perfume allergens (*Amyl Cinnamal* and *Alpha-Isomethyl Ionone*) are not declared, because their concentration levels are 0.01% or below. Note how *Benzyl Alcohol* only appears once, since the preservative and perfume allergen versions are added together.

If we change the product type to 'leave-on', the list of ingredients appears as follows:

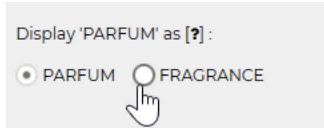


Any ingredients with a concentration < 1% are shown in lighter blue. Drag and drop these to rearrange them in your preferred order.

To manage perfume allergens for each compliance zone, follow these steps:



- Select the required compliance zone (see 1)
- Select whether the EU logic should be applied for calculation of perfume allergen concentrations, according to whether the product is leave-on or rinse-off (see 2).
- Check any available checkboxes to exclude those ingredients that have that checkbox checked for the selected compliance zone (see 3).
- If 'Parfum' is declared in the LOI, select the following setting if you require the term 'Fragrance' to be used instead.



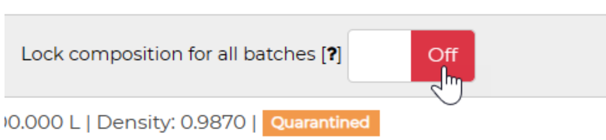
Click on 'Update' to save your changes.

Managing Product Batches – Monitor Allergen Concentrations

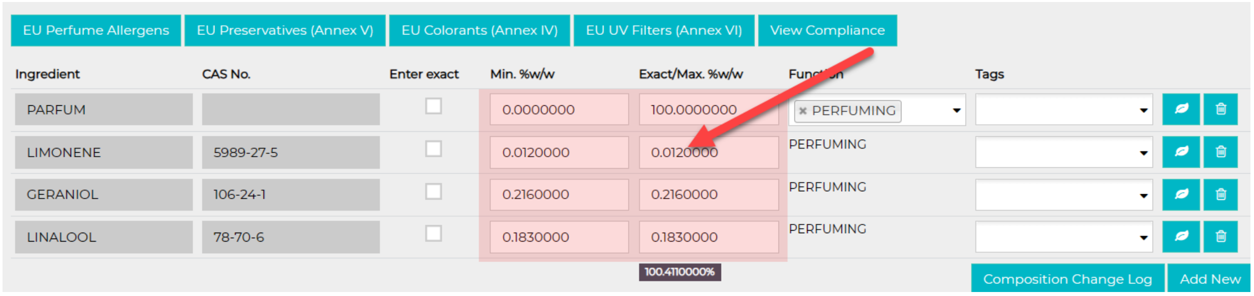
Perfumes/fragrances and essential oils often vary in their exact perfume allergen concentrations from batch to batch. The actual level of these in your manufactured product batches can therefore vary, even leading to a requirement to declare an allergen on your label that was previously below the required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

- **Update the perfume allergen concentrations in each raw material batch**
  We recommend setting a checklist task or test of type 'Done' to remind operators to update the raw material batch's composition to reflect the allergen concentrations present in that batch. This information is normally provided by the supplier in either the certificate of analysis (CoA) and/or the safety data sheet (SDS).

  In the raw material batch containing the perfume allergens, switch the 'Lock composition for all batches' to 'Off'.



It is then possible to update the concentrations of each allergen.



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

Note: It is important to edit these allergen concentrations immediately upon creation of the new raw material batch, prior to it being used in a manufactured product batch. Once a raw material batch has been dispensed in a manufacturing order, its composition is locked.

- **Dispense a manufacturing order**
  Dispense your manufacturing order, selecting the required raw material batches. Be sure that you have followed the previous step and made any necessary adjustments to the perfume allergen concentrations. You may even dispense from multiple batches of the same raw material parent. Perfume allergen concentrations in each batch will be correctly calculated and updated in the formula, according to the proportion of each batch that was dispensed.

- **Check the formula allergens concentrations**
  Each manufacturing order dispensed in Product Manager updates the associated formula to the raw material batches used in the batch. Before any further manufacturing order is dispensed, open the formula and check the 'Compliance' tab to view the current allergen concentrations. It can be helpful to include a

checklist task or test of the type 'done' that is included in a default test group associated with manufacturing orders. This will remind the quality control/compliance team to routinely check each product batch and ensure that any allergen concentrations have changed significantly that could affect compliance and the labelling requirements.

- **Update formula's list of ingredients (if required)**
  If any perfume allergen concentrations have exceeded any threshold according to a regulation, see the earlier section on how to manage your product label's LOI.

Raw Materials

Introduction

Raw materials in Product Manager consist of one or more **ingredients** (chemicals), defined in the 'Composition' tab of the raw material. A raw material represents a physical material that is manufactured and available to purchase for use is production of cosmetics and personal care products. The first version of a raw material added to your Product Manager account is saved as the **parent**. You may add various data and upload documents, such as the SDS or CoA. Batches can be cloned quickly and easily from the parent (or an existing batch), enabling you to manage inventory, dispense batches used in production and for MRP reporting.

In the current version of Product Manager, raw materials must be added or imported, using either the functions available under the menu item 'Import Data', or as a custom service provided by the Cosmetri technical team.

Adding Raw Materials

As well as the import options, there are three methods to add raw materials to your Product Manager account:

1. Add as new raw material

Select Raw Materials/Add New in the main menu. Usually, you would use this method for creating multi-ingredient raw materials. Unless you have set any custom fields that are required, you will only need to enter a trade name before you can save the raw material and move to another tab.

Note: You are advised to enter as much data as possible in the raw material 'Composition' tab. If any raw materials without any such data are added to a formula a warning will be displayed in the formula composition and accurate compliance checking of the formula will not be possible.

2. Convert ingredient in ingredient list to raw material

From any of the ingredients lists, just click on the following icon in the 'Actions' column to save the ingredient as a raw material:

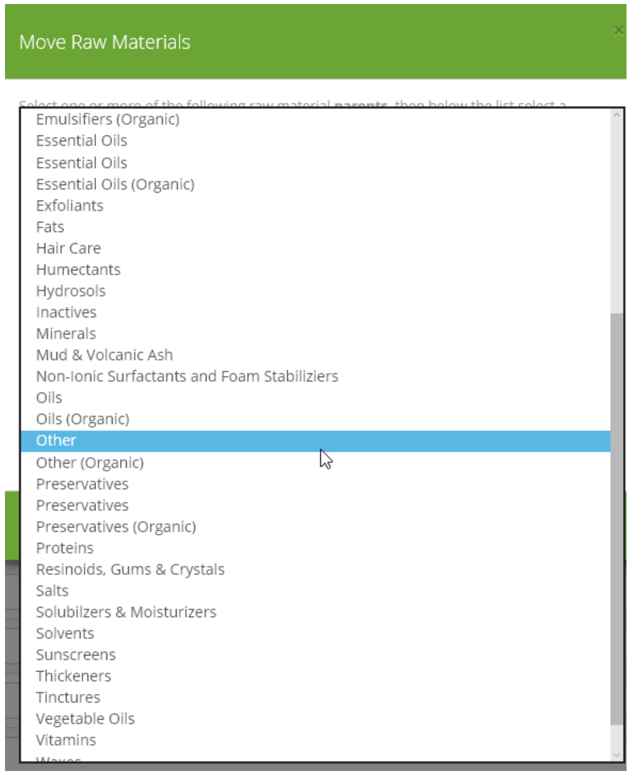
3. Add single ingredient directly to formula composition

When building your formula, adding any ingredient/chemical 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. Enter an INCI or CAS string and select an available match. Enter the required %w/w in the formula and click on 'Add'. The ingredient will be converted to a single-ingredient raw material (as parent). Later you can edit the trade name and add other data and documents for the raw material.

Raw Material Categories

Under the main menu 'Raw Materials/Categories' you can create categories for your raw materials and assign them accordingly.

If a category has associated raw materials, the number of parent items will be displayed. Click on the link to view a list of the raw materials. 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.



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.

Default Settings and Custom Options

You can enable a higher level of control for parent and batch management in the Product Manager global settings, when logged in as a user with admin rights.

Part Code/ID

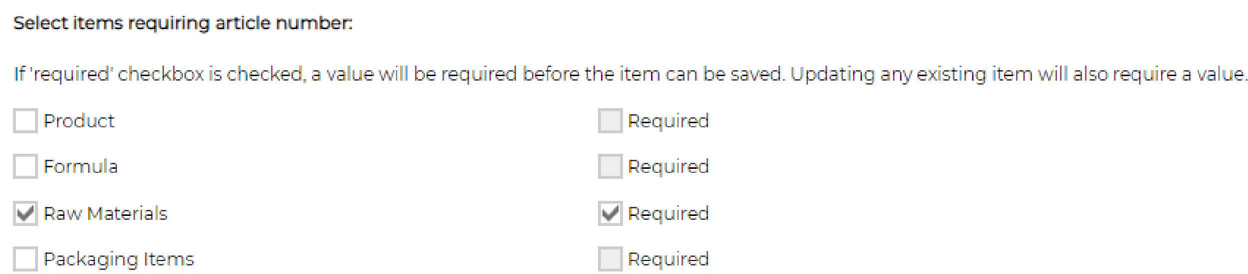
In the 'Custom Settings' tab, under the 'Integration Options' section you can set how the Part Code/ID field should behave. For the highest level of control, you can set the field to be required to be identical for all batches of the same parent.

Article number

In the 'Custom Settings' tab, under the 'Integration Options' section, this special field can be activated. An additional checkbox provides control of whether a value must be unique. Leave the checkbox **unchecked** to require that any article code must be unique across the entire Product Manager account. If **checked**, the same article number may be used for multiple raw material parents but must be unique for the batches of the same parent.

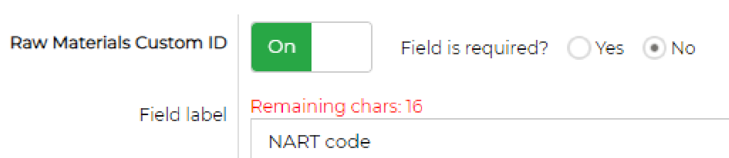
A further option sets whether the article number can be entered manually, or if the field is locked to prevent user input and can only be updated automatically via an integrated application.

To set the article number field to be available for raw materials, check the following checkbox and optionally set the field to be required.



Raw material custom ID

In the ‘Custom Settings’ tab, optionally set the field as required and edit the field label. Once activated, the field is accessible in the raw material ‘Information’ tab and in the main raw materials list view. You can also search the list for any custom ID value using the main search function.



Custom fields

In the ‘Custom Settings’ tab you may add up to ten custom fields for raw materials. Click on 'Add' under the required item type to configure the field. The configured custom fields will be accessible on the item's "1. Information" page, above the "Comment" field.

Enter a **field label** to assist the user in identifying the field.

Enter an optional **hint** that the user can access by placing the cursor on the [?] icon adjacent to the custom field. This provides additional instructions to the user.

Each custom field can have its **field type** set, as follows:

- Checkbox
- Numeric
- Text input, single line (<255 characters)
- Text field, formattable
- Select list (single selection)
- Select list (multiple selection)
- Date (single)
- Date (select range)

Based on field type, the following options may also be set for the custom field:

- Field is required
- Field value must be unique between all items

Inventory control

In the 'Default Settings' tab, use the first setting to enable or disable inventory control for raw materials and packaging items. Disabling inventory control leaves any existing inventory values and data unchanged. The inventory levels for raw materials will however cease to be adjusted. For R&D development batches, you can determine at the dispense stage whether inventory should be deducted from any selected raw materials batches.

Set the required option for **Display low inventory alerts**. Select 'On' to view alerts when inventory is low. These alerts are shown in the 'Avail. Inventory' column of the raw materials list. You must also enter a value in the 'Low inventory level' field for each raw material batch. Once this threshold is reached an alert will be displayed.

Set the required option for **Display expiry date alerts**. Select 'On' to view alerts when the expiry date for a raw material batch is approaching. These alerts are shown in the 'Expiry' column of the raw materials list. You must also enter a value (as no. of days) in the field below this option. Once this date is reached an alert will be displayed.

Custom statuses

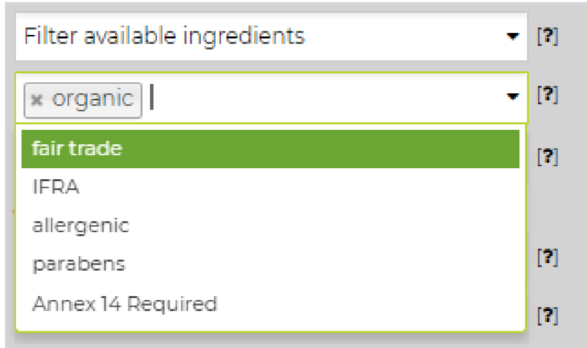
In the ‘Custom Settings’ tab you may add up to six custom QA statuses. Default statuses for raw materials are 'Quarantined', 'Approved', 'Rejected', and 'Destruct'. Enter a name for the status (max. 25 characters) and set a color for the approval status badge that is displayed. Custom statuses can be renamed but not deleted. An admin user of your account may configure any custom statuses to auto lock certain raw material information if that status is applied. A further option determines whether selection of a custom status requires all tests to be passed (or not blocking) in the item's QA tab.

Raw material properties

In the ‘Custom Settings’ tab you can create any custom properties for your raw materials, making it easy to search, sort and identify these e.g., if vegan, organic, or fair trade. Properties 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 main raw materials list, you can select any combination of the properties to filter the list. The selection can also be used in conjunction with any other search criteria that you apply.

Raw material properties can be used to assist in selecting the required raw materials for adding to a formula. In the Formula/Specification/Composition tab, select any combination of properties. Multiple selections require that **all** properties apply to any raw material. For example, selecting both ‘organic’ **and** ‘fair trade’ will only allow selection of raw materials that have **both** properties.



Set the Density/Specific Gravity

If 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.

Note: 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 'density' field in the 'Information' tab.

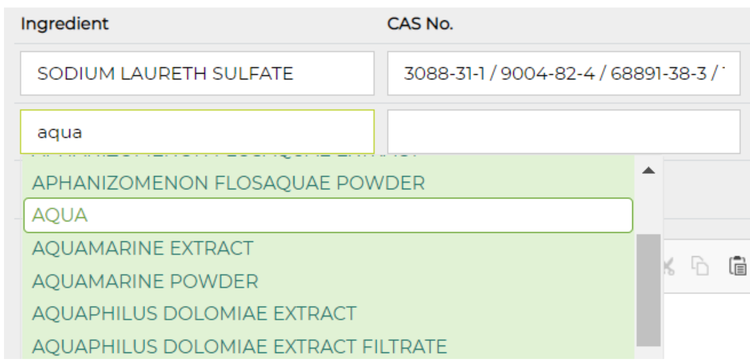
Important:
It should normally not be necessary to change the density value from batch to batch of the same raw material. For production, the density value of the raw material parent or batch currently associated with the formula is used for conversion of volume to weights (L to kg) to determine the total amount required when dispensing a production order.

The density value should ideally be obtained from your supplier and may also be included in any specification sheet or CoA 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. This value is only required if you intend to enter your formula composition by weight/volume and your recipe includes measurements in drops. The accuracy of this measurement method can be affected by certain conditions, and we advise where possible to measure your raw material in L or ideally, by weight.

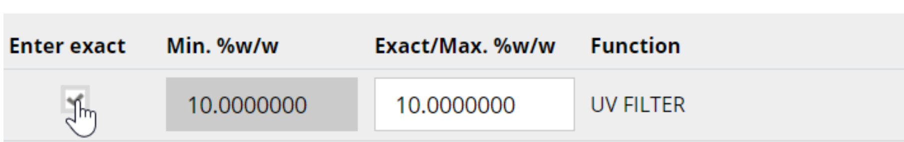
Raw Material Composition

You can manage raw material mixtures which consist of single or multiple ingredients/chemicals. Each of these ingredients must be present and selected from the Cosmetri ingredients database, thus ensuring correct display of any regulatory data when checking a formula's compliance.



<u>Note</u>: You can usually find the raw material composition in section three of the SDS (or MSDS) document received from your Supplier. If this information is not included, please contact the Supplier.

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.



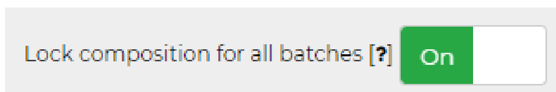
For **single-ingredient raw materials**, usually the "Enter exact" checkbox should be checked and 100.000000 entered in the right-hand %w/w field.

For multi-ingredient mixtures, click 'Add New' to add a further ingredient to the raw material composition.

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

Composition lock

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 <u>all</u> associated batches.

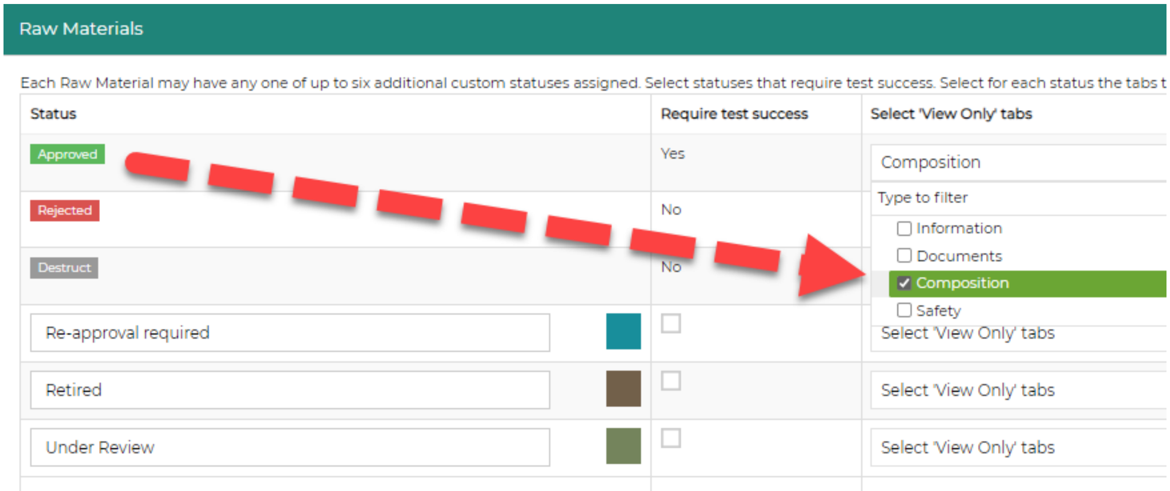


This function is especially useful for managing raw materials which contain perfume allergens – such as perfumes/fragrances and essential oils. Perfume allergen concentrations often vary between batches of the same raw material. Unlocking the composition enables you to adjust these levels for each batch, **prior to using the batch in a production order.** 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 allergen concentrations in the formula compliance between product batches.

A further safeguard prevents such an update of any batch's composition, if it is associated with any dispensed manufacturing order. If a raw material batch has no such association, you can override the default lock by setting the switch to 'Off'.

Locking composition according to QA status

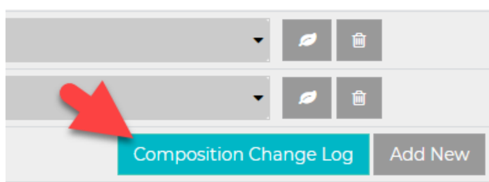
An additional safeguard to lock the composition of the raw material is available by configuring the following options in the Product Manager 'Custom Settings' when logged in as an admin user. For example, in the raw material is set to the QA status 'Approved', the tab can be set to be 'view only', thus preventing all users from further editing the composition.



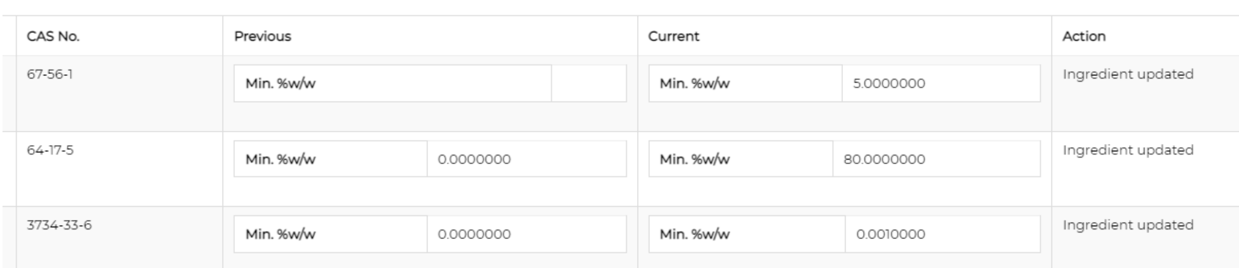
Custom approval statuses can also be configured in these settings and any required tabs set to be locked if the status is applied to the raw material.

Composition change log

Changes made to a raw material composition can have a significant impact on the compliance of any formulas using that raw material. An audit log therefore is accessible directly from the 'Raw Material/Composition' tab to view all changes made.



An entry is displayed for each change applied to an ingredient in the raw material composition. The changed value's previous and current values are displayed, along with a date/time stamp and the identity of the user who applied the change.



CAS No.	Previous		Current		Action
67-56-1	Min. %w/w		Min. %w/w	5.0000000	Ingredient updated
64-17-5	Min. %w/w	0.0000000	Min. %w/w	80.0000000	Ingredient updated
3734-33-6	Min. %w/w	0.0000000	Min. %w/w	0.0010000	Ingredient updated

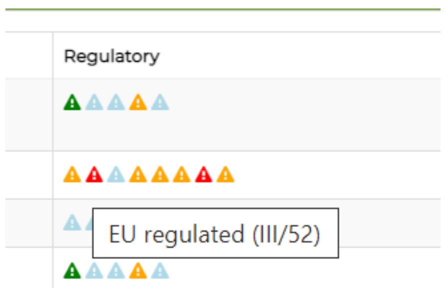
In the 'Action' column the action that caused the change is also displayed.

Click on 'Export Composition Log' to export a report of all change log data as a .pdf file.

Composition compliance check

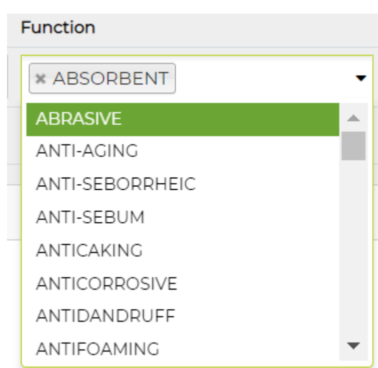
In the 'Raw Material/Composition' tab you can click on the 'View Compliance' button to open a window to view available compliance data for the ingredients in the raw material composition.

Any regulatory alerts in the 'Regulatory' column will depend on the compliance data associated with your subscription. Click on an alert to view detailed information. Close that view to re-open the previous window.



Ingredient functions

For each ingredient/chemical in the raw material composition, you may select one or more functions the ingredient performs in the raw material.



When the raw material is added to a formula, these functions are automatically declared at the formula-level. If required, they can be further edited.

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.

Ingredient list:	**Default function:**
Perfume Allergens	PERFUMING
Preservatives	PRESERVATIVE
Colors	COSMETIC COLORANT
UV Filters	UV FILTER

Parents and Batches

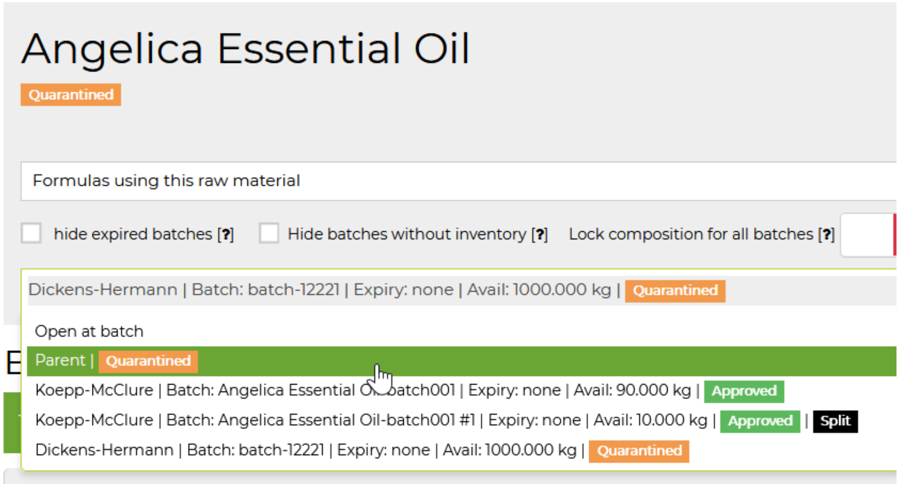
A **parent** raw material is the **first version** that you create. The function of the parent is to describe the raw material and act as a 'container' for all associated batches that you later create. Enter all data and documents for the parent that will be relevant to any associated batches. Each time you clone a new batch, all the data and documents will be copied to that batch, enabling you to easily update any information for the batch as required.

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**' does not need identical between batches, some batches can be stored in liter (L) and others in kilogram (kg). In case a batch is measured in liters, the correct density must also be set to ensure the correct amounts are used.

Note: If you do not intend to use Product Manager for production, 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:



Tips for managing raw material batches

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

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.

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 only alert a missing SDS for a raw material batch currently associated with the formula, but not whether the document is the correct version for that batch.

Avoid creating duplicate raw materials. Provided that the raw material has the same chemical composition, you can store different batches of the raw material under the same parent. For each batch, you can change most of the information in each tab, except for the 'Composition' tab, which normally remains locked and kept identical between batches.

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**

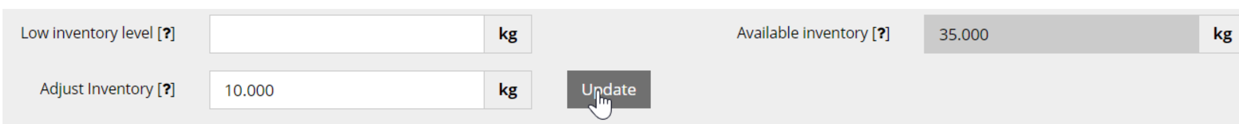
material as a separate batch, by cloning a batch or parent and then entering the new batch information such a supplier batch no., expiry date and inventory amount.

Inventory management

For each batch of a raw material, the initial inventory amount is entered in the 'Available inventory' field in the 'Information' tab. 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.

<u>Note</u>: Inventory in Product Manager is managed to an accuracy of three decimals in kg/L i.e., 0.000 kg/L or 1 gram. For very small adjustments to inventory (e.g., applied manually or when dispensing a production order), an amount such as 1.45g (1.0004500kg) will be rounded down to 1.000kg).

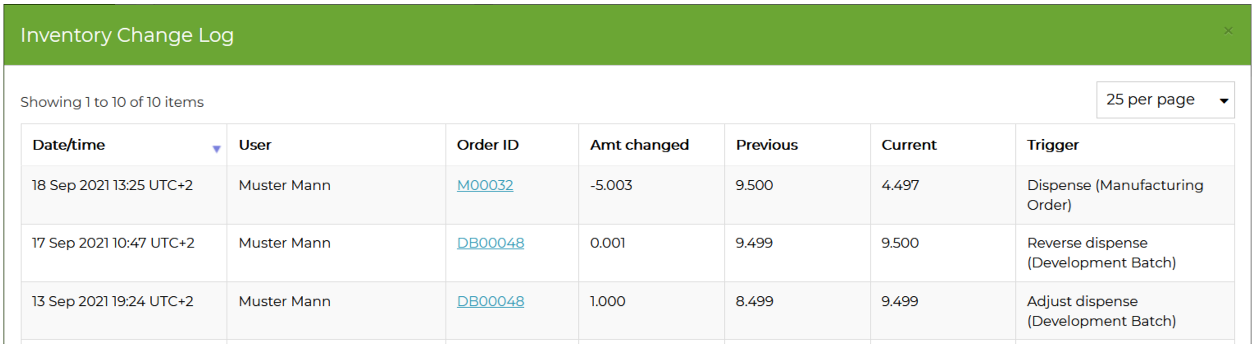
To adjust inventory once the 'Available inventory' field is locked, use the 'Adjust inventory' field to enter the amount to adjust and click on 'Update'.



In the above example, 10.000 kg is added to the 'Available inventory' value, resulting a value of 45.000 kg. To deduct an amount, enter a negative value such as -10.000 and click on 'Update'.

Each manual or automatic inventory change is stored in the database, so you can track the inventory usage. Click on the following icon next to the inventory to access the inventory change log:

In the inventory change log, you can see the date and time of the change, the user who modified the inventory or triggered the automatic inventory update, the amount deducted/added, the previous and the current inventory level, and the trigger.


Inventory Change Log

Showing 1 to 10 of 10 items

25 per page

Date/time	User	Order ID	Amt changed	Previous	Current	Trigger
18 Sep 2021 13:25 UTC+2	Muster Mann	M00032	-5.003	9.500	4.497	Dispense (Manufacturing Order)
17 Sep 2021 10:47 UTC+2	Muster Mann	DB00048	0.001	9.499	9.500	Reverse dispense (Development Batch)
13 Sep 2021 19:24 UTC+2	Muster Mann	DB00048	1.000	8.499	9.499	Adjust dispense (Development Batch)

You can also export the inventory change log.

Set a 'Low inventory level' which will then display an alert in your raw materials list, if this threshold is reached:

Note: Enter your inventory levels prior to commencing to use the Product Manager production features (manufacturing orders or development batches). 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. This may include spillage or inventory otherwise removed from the storage facility.

If you wish to use the manufacturing module without tracking inventory, you can disable inventory control in the Product Manager 'Default Settings' tab under 'Inventory control', which requires admin privileges. Set the switch to off and then after confirming 'OK', click on 'Save' to apply the setting.

Split batches

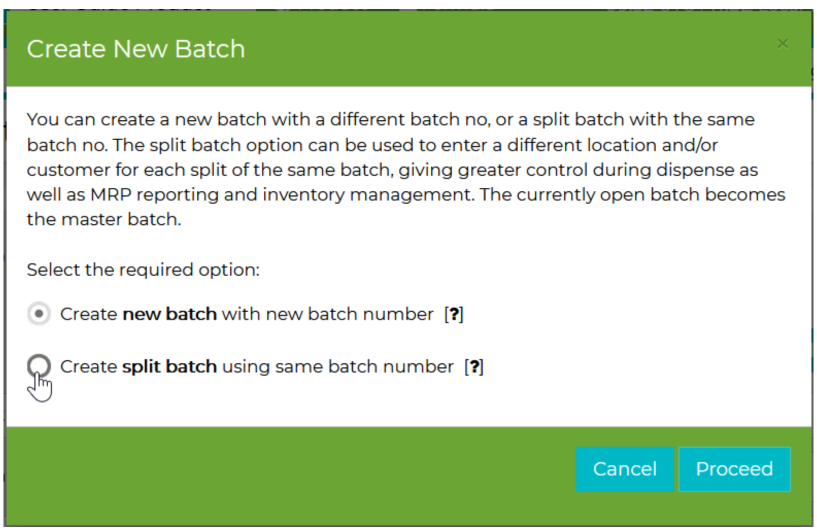
Splitting a batch makes it possible to easily create different batches with the same batch no., but each version may be assigned a different location and/or customer and inventory amount. This feature can be useful, for example if you purchase a bulk raw material batch, but you would like to reserve different amounts of the bulk batch for different customers or split the batch and store it in different locations – for example, assigning some to the lab for producing samples.

The 'master batch' is the first batch and behaves like a parent to the split batches created from it. In a split batch, the following information can be updated:

- Location
- Customer
- Inventory
- QA status
- Costs

All other information (including documents, tests and safety data) can only be edited in the master batch. If you edit any of the data in the master batch, the updated data will be automatically displayed in each associated split batch, except for the above listed data, which is unique to each split batch.

To split a batch, open the raw material batch you would like to split. Click on the 'Clone to New Batch', that will trigger the following pop-up:



Select the 'Create split batch using same batch number' option. Further settings will be displayed, to configure the split batch, as follows:

Available inventory amount

Enter the amount in L/kg and select whether this amount should be deducted from the master batch. You cannot deduct more inventory from the master batch than the available inventory amount.

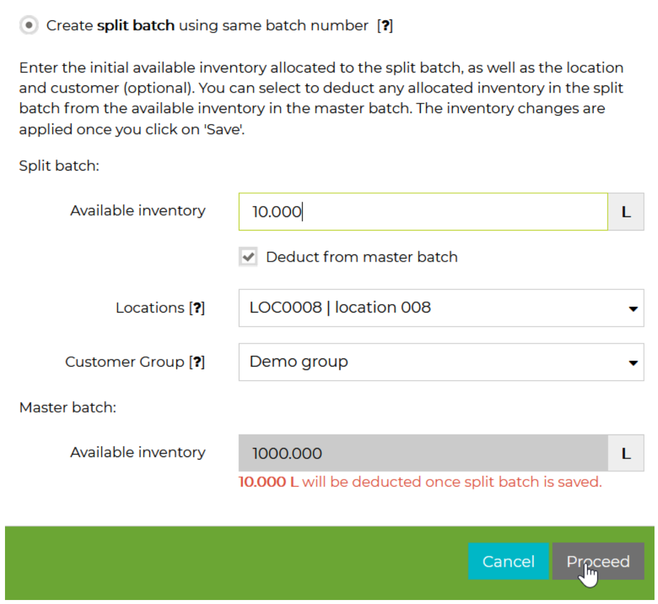
Location

If you are using the locations feature, select a storage location where the split batch will be located. In the MRP feature or Product Manager, or when dispensing a production order, you can filter the reporting by location and/or customer.

Customer group

Optionally associate the split batch with a customer, enabling you to reserve inventory for production of their product batches. In the MRP feature or Product Manager, or when dispensing a production order, you can filter the reporting by location and/or customer.

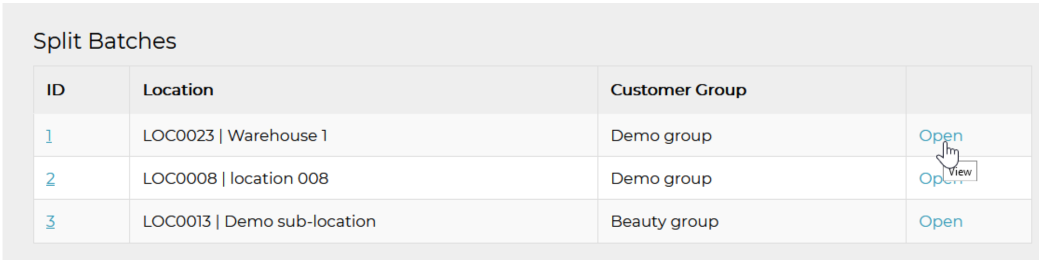
The 'available inventory' associated with the master batch is displayed and updated automatically according to any inventory assigned from it to the split batch.



Once the split batch is created, it will be opened. The batch number will remain the same as the master batch, but the batch number is appended in the sequence -1, -2, -3 etc. to assist in identifying each split batch and the master batch to which they belong.

When viewing a split batch, you can always easily open the associated master batch by clicking on the 'Open Master Batch' button.

If you are viewing a master batch, you will find all associated split batches listed on the '1. Information' tab, under the 'Location and Customer' sub-section:


Split Batches

ID	Location	Customer Group	
1	LOC0023 | Warehouse 1	Demo group	Open
2	LOC0008 | location 008	Demo group	Open
3	LOC0013 | Demo sub-location	Beauty group	Open

Raw Material 'Safety, Toxicity & Purity'

The following section covers the data managed in the raw materials 'Safety' tab.

Safety assessment data

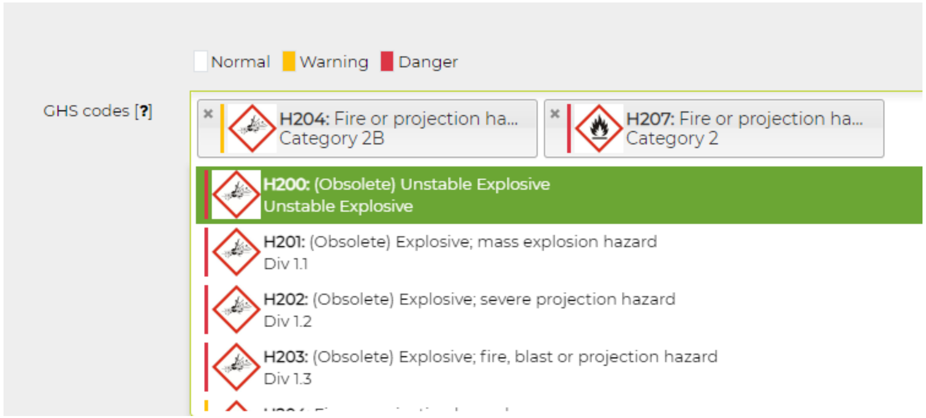
In this section of the raw material 'Safety' tab, certain data can be managed that will be available to insert when creating the safety assessment (CPSR):

- Shelf-life (in months)
- Nanomaterial content
- Source/origin of the raw material (includes snippets tool)

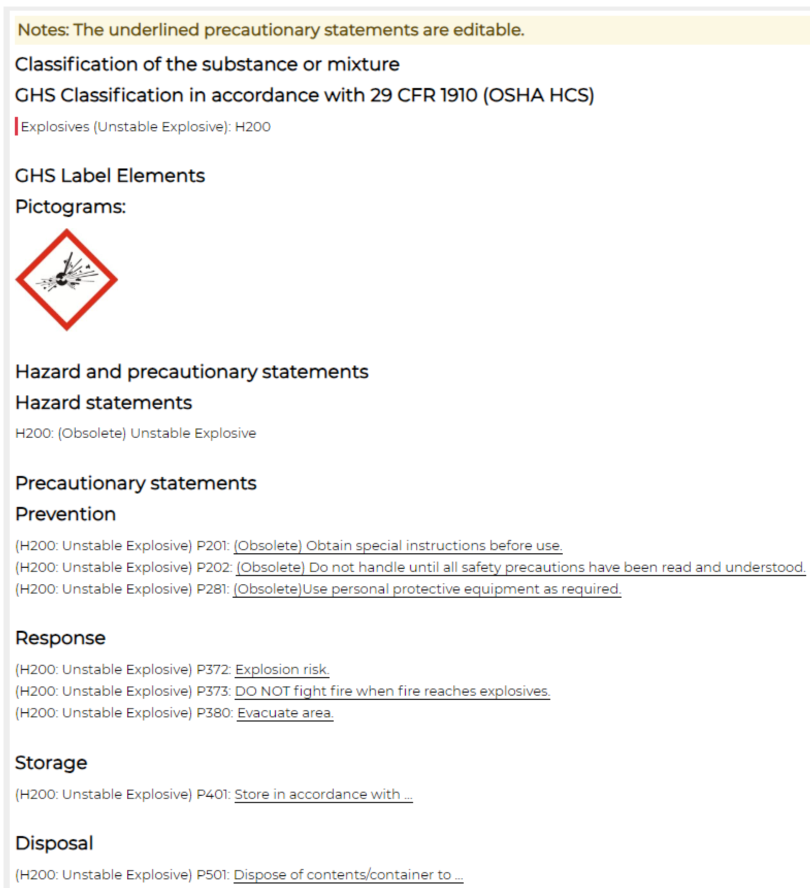
Hazards identification

In this section of the 'Safety' tab you can manage the raw material hazards and enter additional REACH and CLP information. This data can be included for example, in production reports such as the batch ticket and dispense list, alerting staff of any risks and precautions when handling or storing the raw material.

Click in the 'GHS codes' field to scroll through the GHS hazards or type a string such as 'H200' to filter the list for a match. Click to add one or more GHS hazards to the field.

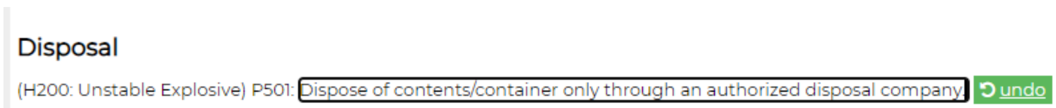


Selecting any GHS hazards in the above field then populates the section below this with the associated phrases.



The standard GHS phrases are displayed as underlined text alongside the hazard code and category. Each underlined phrase is editable. Many phrases require additional information. Click on the phrase at the point where an edit is required and begin typing.

Once the phrase is being edited, an 'Undo' function is displayed to restore the phrase to its original value.

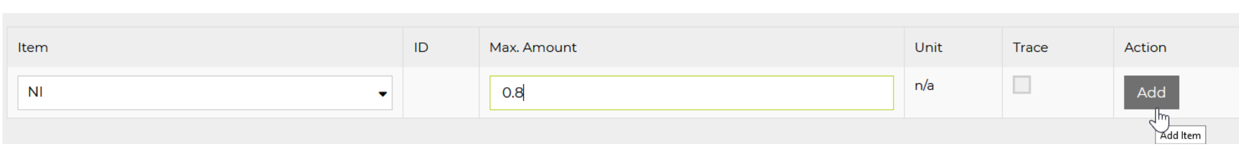


If required for EU compliance, further fields are available for entering any additional information specific to Classification, Labelling and Packaging (CLP) and Registration, Evaluation, Authorization and Restriction of Chemicals (REACH).

Safety, toxicity & purity values

Manage data for the raw material, such as impurities or other contaminants, CITES content and natural/organic purity, according to ISO 16128. These values can then be calculated at the formula level, based on the %w/w of each raw material in the formula.

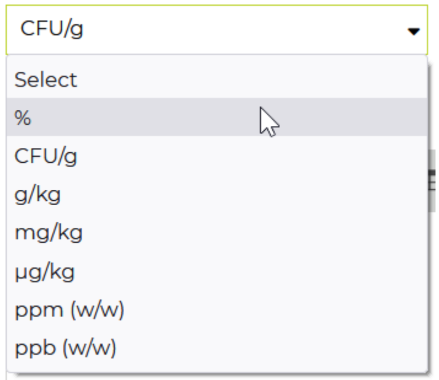
Natural and organic content (according to ISO 16128) management is available as default. Select from the required value and enter in the max amount, and click on 'Add':



Organic and natural content cannot be marked as trace. Enter a value between 0 and 1, as per the ISO 16128 standard.

It is possible to configure custom safety, toxicity or purity values. Click on the 'Manage Default Items' button to display a configuration pop-up, where further values can be added to the raw material.

On the 'Manage Default Items' pop-up, click on the 'Add New' button. Add a name for the property value. Optionally add any notes. Select the required 'Unit'. You have the following options:



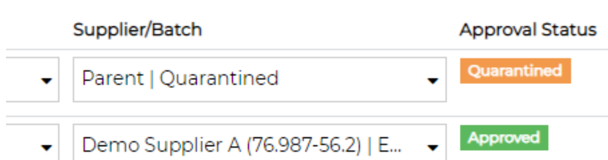
Select an accuracy, up to seven decimals. Once the value is saved, it is also possible to prepare snippets for different advisory texts or warnings that must be displayed on the product label. Select the configured snippet in the 'Formula/4. Labels' tab for any value present in the formula.

Once the custom values are saved, it is possible to enter values for each raw material. All users will be able to use the configured custom values, provided access to the tab has been granted.

Documents

Upload documents for the raw material, such as the certificate of analysis (CoA) and safety data sheet (SDS). If you upload the document to the parent and clone this to a new batch, any documents will also be cloned to the batch. Check therefore if a document needs to be updated for the batch.

All raw material parents or batches currently associated with the formula composition (in the 'Supplier/Batch' column) will be referred to when you generate a PIF/dossier.



If Compliance Checker is activated, it will advise you if any raw material documents for these parents or batches are missing.

Note: Set yourself or another user a custom task for the raw material parent or batch to alert you on a future date that a document is due for review. Alternatively, in the 'QA' tab you can set a checkbox type test for raw material and configure the test to auto change the status from e.g., 'Approved' to a selected status if the checkbox is not checked by the specified date. Name the checkbox e.g., 'Re-approve SDS document'.

Quality Assurance

For a detailed description of the quality assurance and testing features in Product Manager, see the appropriate section of this guide.

The default status for a newly added raw material parent or batch is 'Quarantined'.

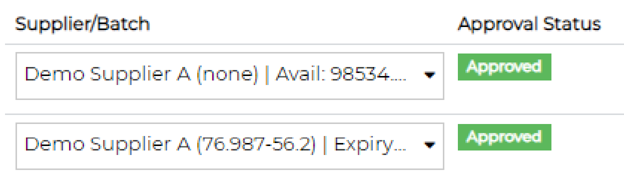
To be able to dispense raw materials batches for your manufacturing orders, by default the raw material batch's QA status must be set to 'Approved'. This restriction can be removed by an admin user, in the Product Manager 'Default Settings' tab.

If any tests or checklist items require to be successfully completed, the status 'Approval' may not be available. The quality assurance and testing features in Product Manager enable standardized quality management of your raw materials, such as:

- Ensure standard procedures are followed for received raw material batches
- Require lab tests to verify acceptable viscosity, pH, color, etc.
- Checklist to ensure all data and documents are provided
- Formulate only using approved raw materials
- Prevent dispense of non-approved batches in production orders
- Set a raw material to auto time-out at a certain date, setting the QA status e.g., from 'Approved' to 'Discontinued'

For any raw material batch, 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.

Setting the appropriate QA status for a raw material parent or batch enables easy identification of the status when creating a formula and adding each raw material.



Raw Materials List

Product Manager provides many options for filtering and searching your raw materials. Click in the Raw Materials/List menu item to view the list. A search field enables searching according to fields including trade name, part code/ID and batch no. You can use this search in conjunction with any combination of the various filters.

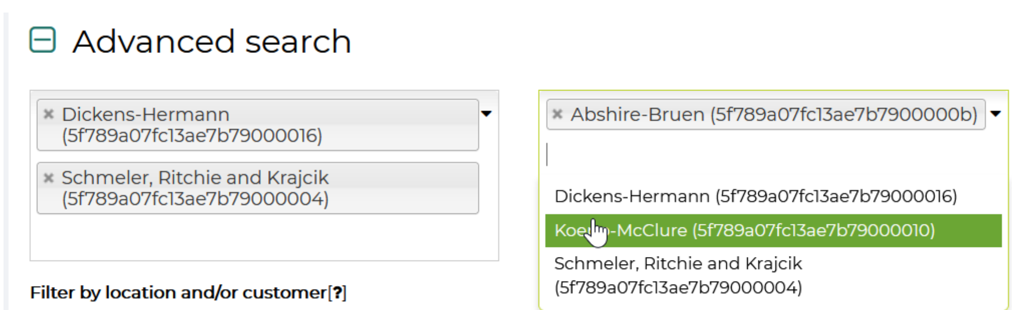
Advanced filter options

You can narrow further the raw materials displayed in the list view using Product Manager's advanced filter options. To access these options, click on the '+' sign next to the 'Advanced filter options'.

Every option you select here works in conjunction with any other filter or search currently set.

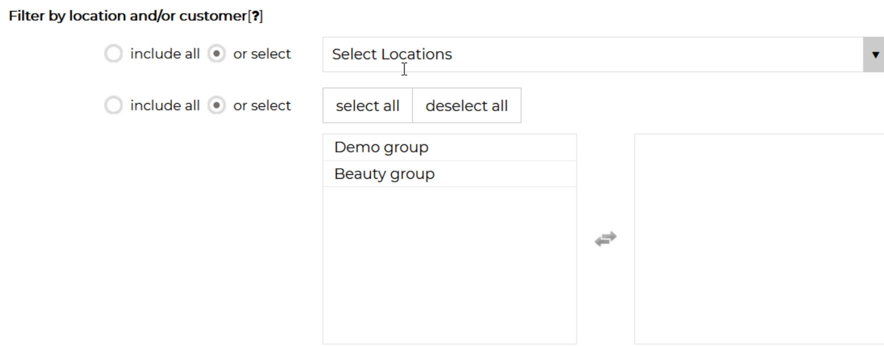
Example #1:

Filter the list by selecting one or more of your suppliers or manufacturers:



Example #2:

To list all raw materials that can be found in selected location(s), or all raw materials that belongs to selected customer(s), use the following select menus:



Once you select the “or select” radio button, you will be able to select one or more locations and/or customers.

Example #3:

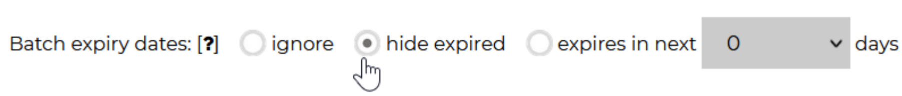
Filter Batches according to inventory status, expiry date and/or date batch received

Hide expired batches from list

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.

Note: This is a temporary method to filter the current view of listed raw materials according to expiry date. Only raw material batches will be hidden from the list view, not their parents. To archive raw materials, see the following section.

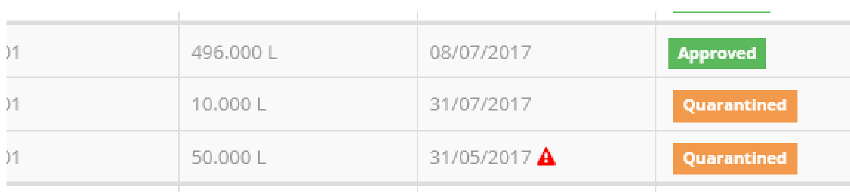
In the raw materials list, use either of the following radio button to filter the list accordingly:



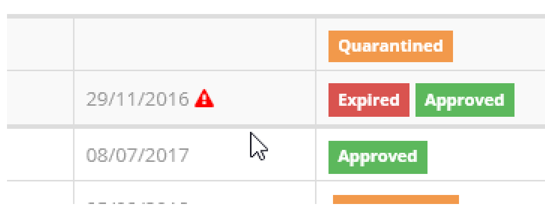
In combination with any of the following checkboxes:

Note: 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'.

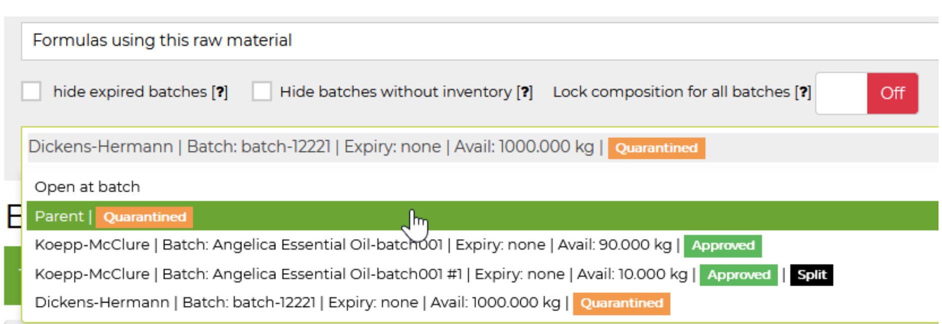
Hiding expired batches is based upon the expiry date set in the batch's 'Information' tab. If the date is older than the current date, the batch will be hidden. Batches which are due to expire within the period set in your global settings (under 'Inventory Control') will still be listed and displayed with a red alert flag.



Expired raw materials are easily identified in the raw materials list by the additional 'Expired' badge.

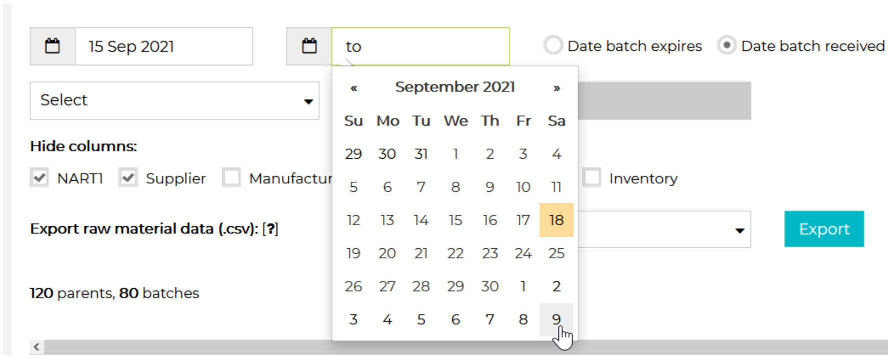


For any raw material currently open, use the same filters to determine which batches of the parent are viewable in the 'Open at batch' list:



It is also possible to filter the list view by the date the batch was received, as entered in the '1. Information' tab.

Select the 'Date batch received' radio button, and select a date interval to filter by:



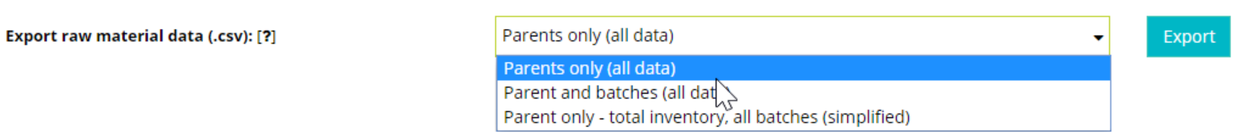
Export raw materials data

You can export raw materials and their batches to .csv format, based on the current search and filter settings applied. The only data not exported is the raw material 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 an ERM or accounting application that allows .csv data import.

Since certain fields in your data may contain commas, these fields are captured 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.



Parents only (all data)

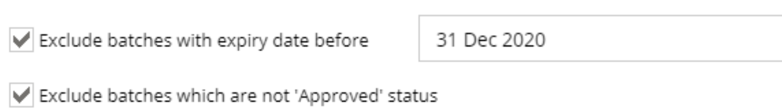
Only the raw material parent data will be exported. All batches are ignored.

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:



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

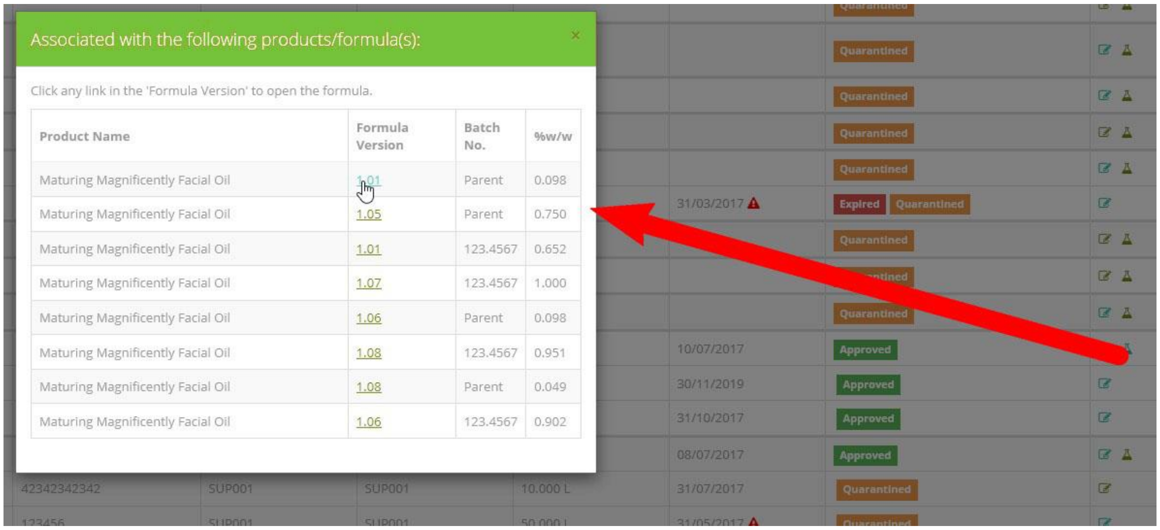
Click on 'Export' to export the data, which will be downloaded by your browser as a .csv file.

View raw materials by 'where used'

View where any raw material is used, either in any formulas or production orders.

Formulas

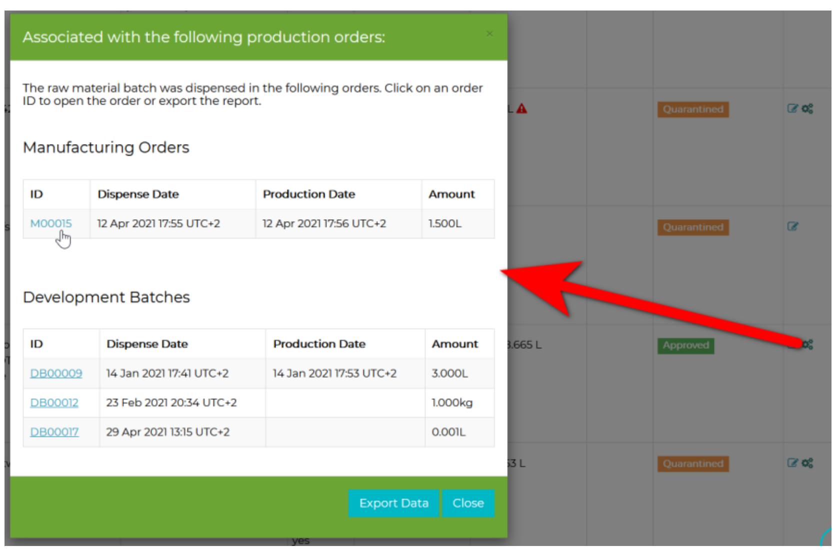
In the raw materials list view, click in the 'Actions' column to view a list of all products/formulas using that raw material, including the %w/w concentration. This action is available at parent-level and checks for associations for all batches of that parent.



Production orders

In the raw materials list view, click in the 'Actions' column on the gear symbol to view a list of all manufacturing orders and development batches using the selected raw material batch.

Click on the manufacturing order or development batch ID to open it. Click on the 'Export Data' button to export a .xlsx and a .pdf file containing the 'where used' data.



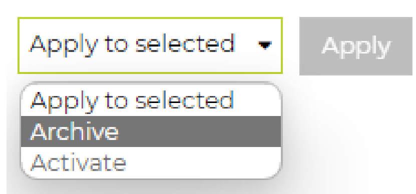
Archiving Raw Materials

Raw material parents and batches can be archived. They are retained in your Product Manager account for traceability purposes but are not viewable in any active raw materials list. Users require permission to archive items and view them. You can set the permissions for users with archiving rights in the Product Manager 'Default Settings' tab, under 'Archiving Items'.

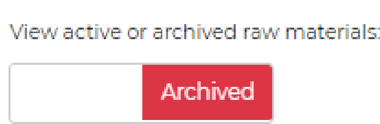
Archived raw materials and batches are also not available for selection in your Product Manager account. This is useful for example, if you have many expired batches and prefer to keep your active raw materials lists at a manageable size.

Note: Archived raw materials can no longer be associated with any new items created/edited after the item was archived, e.g., adding to a formula or dispense of a production order. Their inventory is also not counted in any MRP reporting. Any existing associations are still shown, and no data is lost. An archived item can be activated to make it available again in your account.

In the main raw materials list, to archive or activate raw material parents and/or batches, first select any checkboxes in the left-hand column. Once at least one item is selected, select either of the following options and click 'apply' to move the items between the active and archived lists.



Switch between the active and archived list using the following toggle:



If a raw material batch has been archived **without its parent**, the parent is still listed also in the 'Archived' list to ensure that any of its batches are grouped together. However, the parent is still active and can be found also in the 'Active' list.

If a parent is selected to archive, **all its associated batches** will also be selected. A parent cannot therefore be archived without also archiving all associated batches.

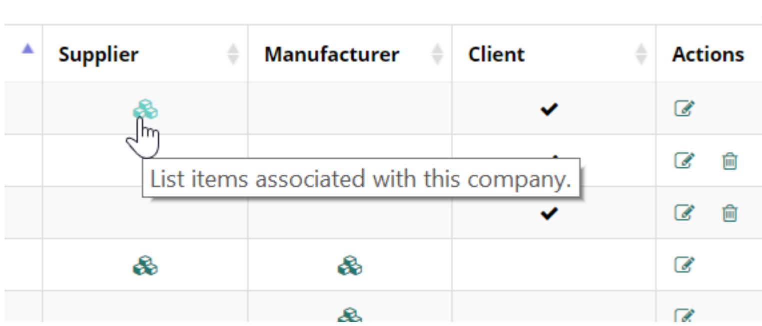
An archived item can still be opened in view-only mode. Click on the 'eye' icon in the 'Actions column to open that item.

Managing Supplier/Manufacturer Relationships

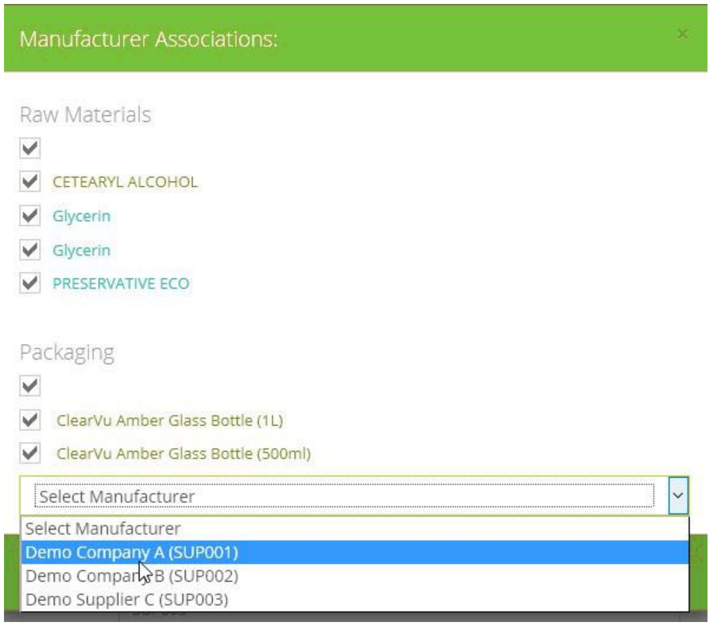
Each batch of a raw material or packaging item needs to be associated with a company as the supplier and manufacturer, as set in the 'Information' tab for the item.

Under the main menu 'Companies' you can view a list of all companies in your product Manager account. Each company's details include a 'type' setting for 'is supplier', 'is manufacturer' and 'is customer'. Use the search to list companies based on company name or ID and filter by company type.

If a company is associated with a raw material or packaging item 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.



You may switch any selected items to 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 a manufacturer or supplier will be available for selection. Once a company is selected, click on 'Move Selected' to perform the action.

Formulation

View a training video on this topic:

How to add a formula, formula composition, adding raw materials or ingredients to formula, %w/w's, adding by amount	view video
Formula stage/phase, formula costs, functions, export formula specification	view video

Introduction

This section of the guide covers more advanced formulation tools and functionality available in Product Manager. For a basic introduction to adding a formula, please first see the section 'Getting Started: First Steps' and view the above training videos.

Merge Formulas

Product Manager can be used to merge different formulas associated with the same product, resulting a merged formula version which includes detailed information about the component formulas and the %w/w values of each in the merged formula version. This can be useful for example, when managing the different components of an aerosol product, such as the gas and main product. The specific gravity of the final product is auto calculated, and fill weights and volumes can be calculated based on the container capacity.

Prepare the product and component formulas

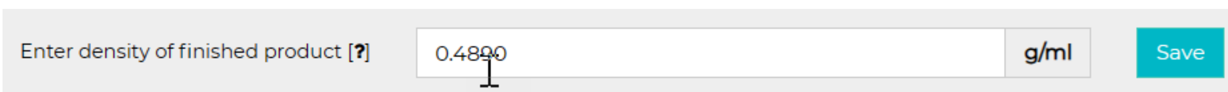
Create a product with which all component formulas will be associated. It is not possible to merge formulas from different products. You may however firstly clone a formula from a different product to the product used to merge your formulas. This can be useful if you require to maintain each component as a separate product – for example for manufacturing

– but also want to merge or mix of each together to manage compliance of the final product, LOI, etc.

Make sure that the product is correctly set (in the product's '1. Info' tab) to be measured by weight (g) or by volume (L). This setting applies to all formulas associated with the product.

Check that each component formula has an exact 100%w/w total, as displayed in the formula's '2. Specification/2.1 Formula Composition tab'.

If your product is set **by volume**, check that each component formula has the correct specific gravity (density), set in the formula's '3. Method' tab. These values can also be adjusted during the merge.

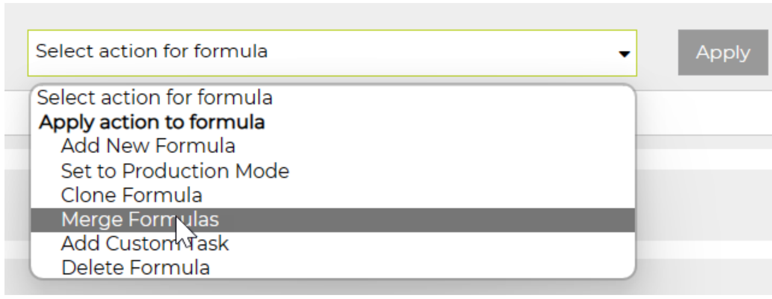


For each component formula, it can be helpful to include a short label in the following field in the formula's '1. Info' tab to assist in identifying which formulas to select and merge.

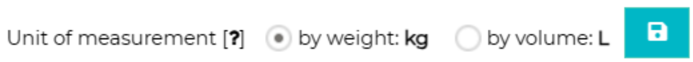
Select the formula components to merge

The following steps apply to both versions of the formula merge tool. For further guidance see the later sections for options available for merging formulas **by weight** and **by volume**.

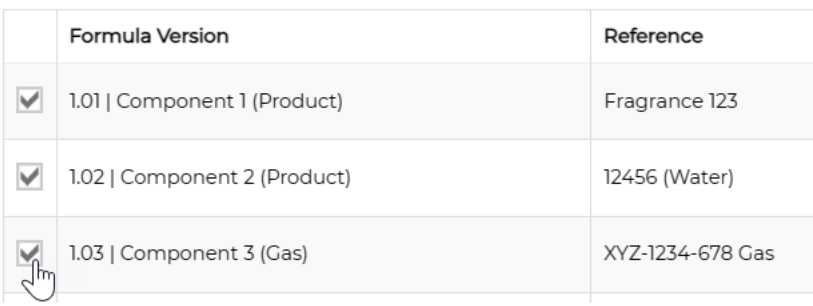
Open any formula in the product and select the 'Merge Formulas' action and click 'Apply'.



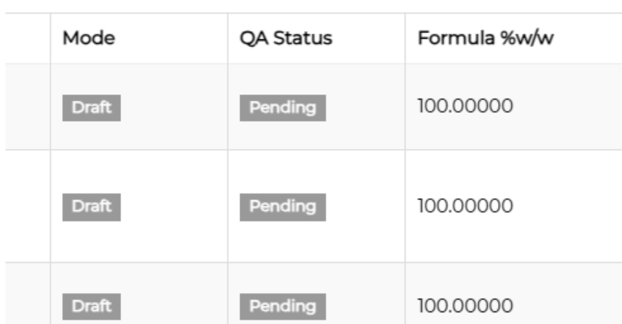
Check that the ‘unit of measurement’ set for the product is correct. If you switch this value, it must be applied by clicking on the adjacent ‘save’ button and will apply to all associated formulas.



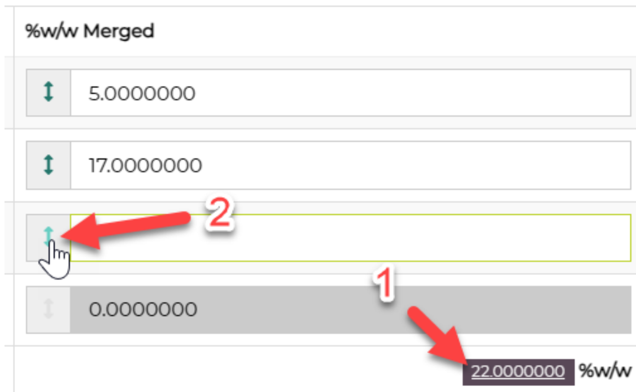
Select the component formulas to merge:



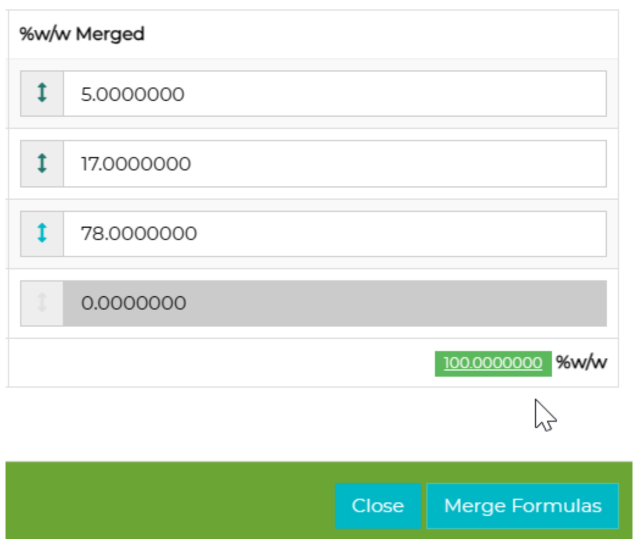
Before proceeding, check for each selected component formula, that the formula composition %w/w is 100% and that any required approval (QA) status is applied:



The %w/w fields for each selected component formula will now be editable. The total %w/w (see 1) must = 100.0000000. Click on the scale tool (see 2) for any formula to scale the formula %w/w to achieve this total.



Once the total is correctly adjusted, it will be displayed with a green badge at 100.0000000%w/w and the 'Merge Formulas' button is now activated. Click on this button to perform the merge.



Merge the formulas: by weight

If the product is set to be measured 'by weight' there are no further actions required. Follow the previously described steps to merge the selected formulas. The new merged formula will be assigned the next available formula version number and opened to view the data in the '1. Info' tab. Scroll down to view the merge data:

Merged Formula Data	Formula Version	Reference	Formula %w/w
	1.01 | Component 1 (Product)	Fragrance 123	5.00000
	1.02 | Component 2 (Product)	12456 (Water)	17.00000
	1.03 | Component 3 (Gas)	XYZ-1234-678 Gas	78.00000
	Total all components		**100.00000 %w/w**

Merge the formulas: by volume

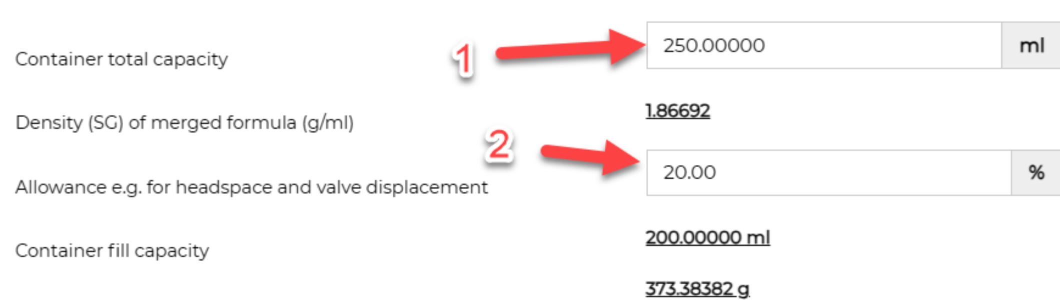
Follow the previously described steps to merge the selected formulas.

Check carefully that the density (SG) for each formula is correct. If the default density of 1.00000 is applied to any formula, an advisory message is displayed in case this value needs to be adjusted.

	Formula Version	Reference	Density (SG)
☑	1.01 | Component 1 (Product)	Fragrance 123	0.9567
☑	1.02 | Component 2 (Product)	12456 (Water)	1.0000 Check density (SG) value before merging
☑	1.03 | Component 3 (Gas)	XYZ-1234-678 Gas	2.4890

Adjust any density value and click on the adjacent 'save' icon to update the value for the formula.

For products managed by volume, the following settings are available:



Enter the total capacity of the container to be filled in ml (see 1). For products such as aerosols you can enter an allowance as a percentage e.g. for headspace and valve displacement (see 2). The container fill capacity volume in ml is then displayed. Based on the %w/w of each component formula and respective density (SG) the total weight of the merged product is also calculated in g.

Additional information is displayed for each component formula, showing the calculated fill weight (g) and fill volume (ml)

%w/w Merged	Fill Weight (g)	Fill Volume (ml)
5.0000000	18.66919	19.51415
17.0000000	63.47525	63.47525
78.0000000	291.23938	117.01060
0.0000000		
100.0000000 %w/w	373.38382	200.00000

The new merged formula will be assigned the next available formula version number and opened to view the data in the '1. Info' tab. Scroll down to view the merge data:

Click on the 'Merge Formulas' button to perform the merge.

In the merged formula version, check in the '1. Info' tab for details of the merged formula.

Formula Version	Reference	Formula %w/w	Density (SG)	Fill Weight (g)	Fill Volume (ml)
1.01 | Component 1 (Product)	Fragrance 123	5.00000	0.9567	18.66919	19.51415
1.02 | Component 2 (Product)	12456 (Water)	17.00000	1.0000	63.47525	63.47525
1.03 | Component 3 (Gas)	XYZ-1234-678 Gas	78.00000	2.4890	291.23938	117.01060
Total all components		**100.00000 %w/w**		**373.38382 g**	**200.00000 ml**

Container total capacity	250.00000 ml
Density (SG) of merged formula (g/ml)	**1.86692 g/ml**
Allowance e.g. for headspace and valve displacement	20.00 %
Container fill capacity	**200.00000 ml**
	373.38382 g

Product Labels

View a training video on this topic:

Labels, label information, list of ingredients, INCI, additional warnings and statements, labels dossier	view video

Introduction

Product Manager simplifies the management of the information that must be included on the product's label and packaging, including the list of ingredients (LOI). You can generate and export a complete label dossier of all required content and lo-resolution artwork – for example to send to your label designer, or for approval by your safety assessor.

It is recommended that you use the Compliance Checker to ensure that all required compliance data and documents are present prior to using this feature.

The product's label content is managed in the 'Formula/Labels' tab.

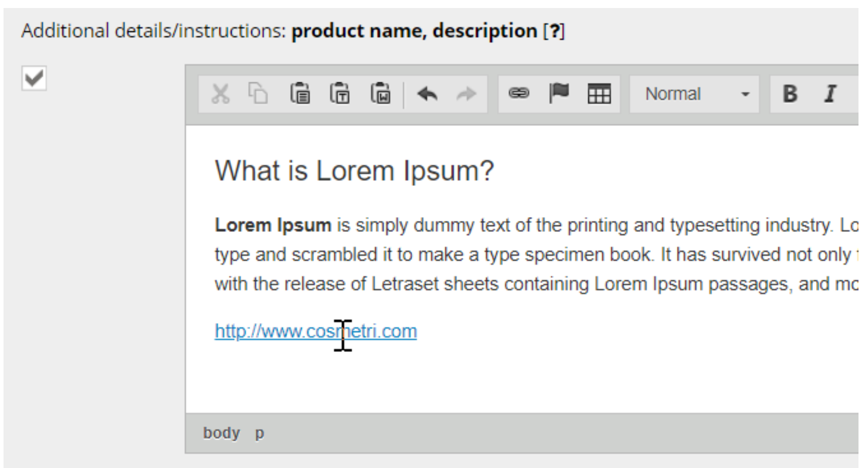
Features include:

- Calculation of list of ingredients (LOI), including perfume allergens
- Set additional shades and colorants that the product may contain
- Customize the display of the LOI and additional warnings/statements, including different country/language versions
- Snippets tool allows management of common library of phrases
- Export all labels data report to .xlsx, .pdf and .doc
- Exported data includes additional files and uploaded lo-resolution graphics

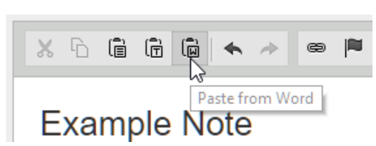
The 'Formula/Labels' data is managed in clear sections. Certain data may have been entered in other pages or tabs of Product Manager but is required for the product label. Many of these fields can also be edited directly from the tab.

Note: Editing any data directly from the 'Formula/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.

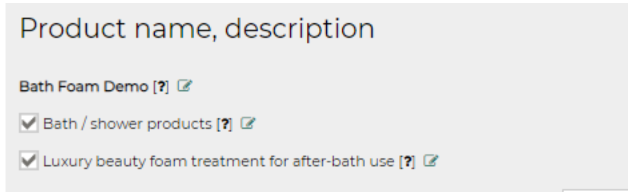
To supplement the data displayed in the tab, for each section you may enter additional information. The text may be formatted using the WYSIWYG editor:



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 tab has a checkbox to the left. Use these checkboxes to select which information you wish to include in the exported label dossier report.



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

Edit Sections

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 country select menu. This is set by default to the country associated with the manufacturer of the product. Changing this setting does not change the country associated with the manufacturer.

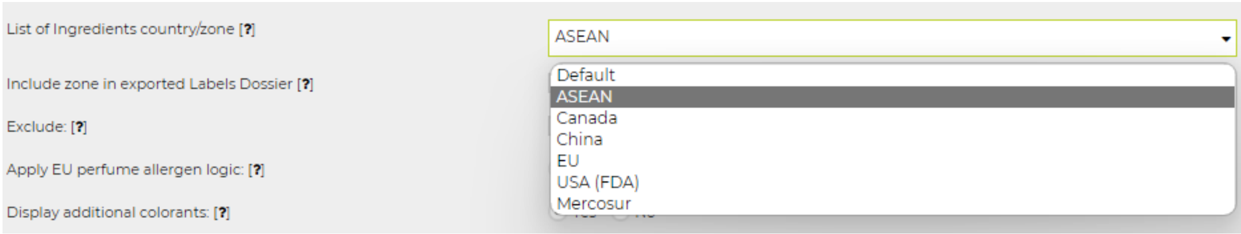
For certain compliance regions/countries, contact details for the **responsible person** (R.P.) must be stated on the product label. Check each checkbox for the data that you wish to include on the product label.

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

List of ingredients (LOI)

Manage language and compliance versions

These sections of the 'Formula/Labels' tab allow different versions to be managed, according to the selection of the available compliance zones associated with the formula, as follows:



The countries/markets available for selection are those associated with the formula and can be edited in the 'Specification/Compliance' tab.

If you do not select a different option, the information you enter will be associated with the 'Default' option.

Select a different option to create versions of the LOI and additional label statements/warnings that are specific to the **currently selected option**. This makes it possible to create different language versions of these sections as well as conform to any regulatory requirements for that country/market.

Note: Only the information entered in these two sections can be saved as different versions. Data entered in all other sections of the 'Formula/Labels' tab is saved as a single version.

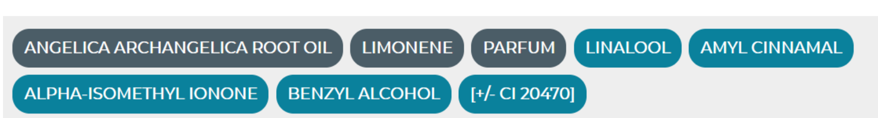
Check the 'Include zone in exported Labels Dossier' checkbox to include the selected version in the label's dossier as .xlsx, .pdf and .doc files.

Click on 'Update' in this section or on 'Save' to save your data.

Edit list of ingredients (LOI)

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

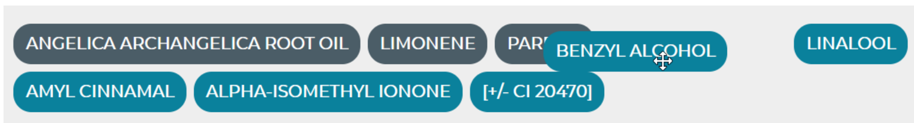
Default view of list of ingredients (LOI):



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.

Use the available options to determine whether ingredients with exactly 1.0000000%w/w concentration can be re-positioned in the LOI.

Ingredients designated by the dark blue badges cannot be re-ordered. Ingredients with a lighter blue badge can be clicked and dragged to re-arrange the position in the LOI.



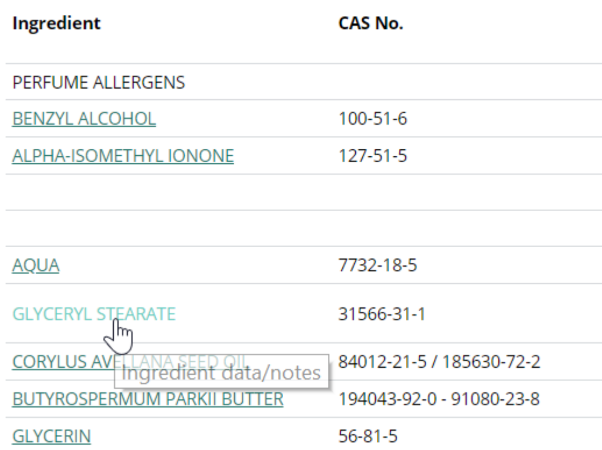
For authorities recognizing the Color Index™ Classification (CI) method of identifying colorants on the LOI, it is recommended to leave any colorants listed between the [ ] brackets in the default position at the end of the list.

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.

For correct display of any perfume allergens in the LOI, check carefully that these are correctly listed the formula's 'Compliance' tab and that the product type (rinse on/leave off) is correct. Select 'Yes' to hide the ingredients from the list of ingredients where the concentration is below 0.001% in leave-on products or 0.01% in rinse-off products**.** Select 'No' to show these ingredients in the LOI.

Edit ingredient name fields

In the 'Labels' tab, all ingredients in the formula are displayed in a list. Click on an ingredient name to open the ingredient.



Ingredient	CAS No.
PERFUME ALLERGENS	
BENZYL ALCOHOL	100-51-6
ALPHA-ISOMETHYL IONONE	127-51-5
AQUA	7732-18-5
GLYCERYL STEARATE	31566-31-1
CORYLUS AVELLANA SEED OIL	84012-21-5 / 185630-72-2
BUTYROSPERMUM PARKII BUTTER	194043-92-0 - 91080-23-8
GLYCERIN	56-81-5

This enables you to edit the different name fields available for how the ingredient is displayed in the LOI, including:

- common name
- US INCI
- Chinese INCI
- Japanese INCI
- custom name fields

Many ingredients have default values available for INCI names. If you adjust these or enter your own values for any of the above listed fields, your changes will be saved to your own database and the default values can be restored.

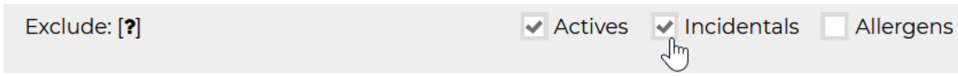
Note: Changes to the ingredient name fields will apply wherever the ingredient is displayed in your Product Manager account.

Click on 'Save' to save any changes and to close the ingredient window. Any updated ingredient name will be reflected in the LOI.

The following options are available to determine how the list of ingredients (LOI) is displayed, for each compliance zone:

Exclude ingredients by status

First associate the required statuses with the ingredients listed in the 'Formula/Compliance' tab for each compliance zone. Then you can optionally exclude any ingredients in the LOI according to any of these statuses by checking the appropriate checkboxes.



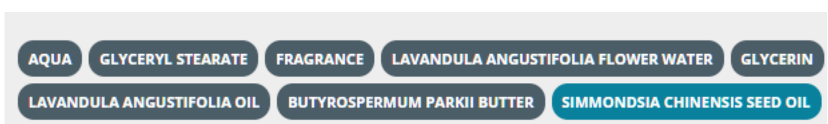
This option is useful for certain compliance zones where for example, only active ingredients must be declared on the LOI, or where perfume/fragrance allergens are not required to be listed.

Additional colorants

Select 'Yes' to list all additional colorants (where possible) by color index (CI) at the end of the LOI. If you select 'No', the additional colorants are hidden from the LOI for the selected zone/country.

Select display of 'parfum' or 'fragrance'

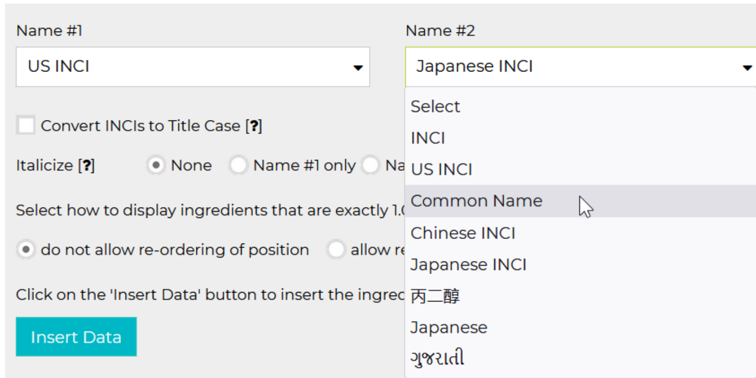
You can add the generic placeholder 'PARFUM' to a raw material in the formula. If PARFUM is therefore included in the list of ingredients, you can use the provided setting in this section to display this as 'FRAGRANCE'.



Set format and display options for ingredient names

For each LOI version you create, you can set up to two combinations of ingredient names to display. You can select from language specific INCIs (USA, Chinese, Japanese) or the custom ingredient names you set up in the Product Manager settings under 'Custom Settings'. If the selected primary name does not exist for an ingredient, the default, international INCI will be displayed instead. Otherwise, any secondary name field will be displayed with () if the field is empty.

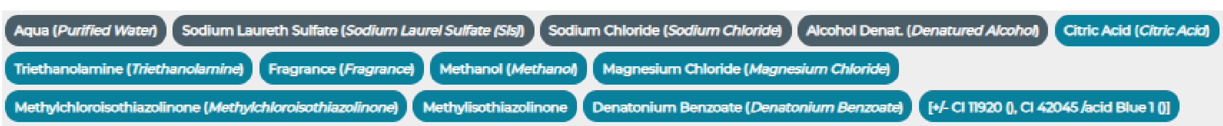
Note: See the previous section for editing an ingredient's names.



Use the available checkbox if you wish to convert the default display from UPPERCASE to Title Case.

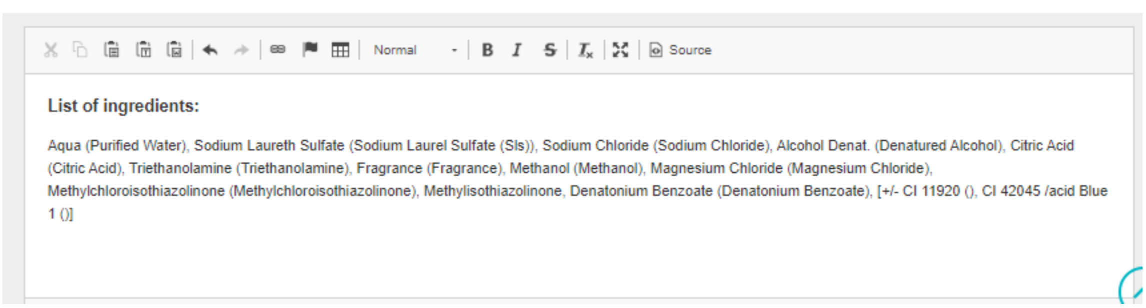
Select one of the available options to italicize the selected ingredient names.

View of LOI with 'Title Case' option and italicized common name selected:



Fine-tune the LOI and select for inclusion in label dossier

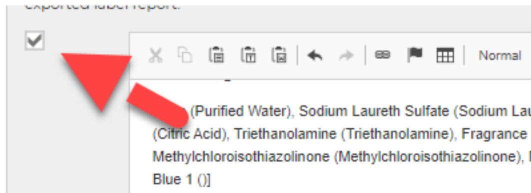
Once you have finished configuring the LOI display settings for the **selected compliance zone**, you can click on the 'Insert' button to insert the formatted LOI in the following editable text field for further editing.



Use the available text formatting tools to fine-tune the list of ingredients.

Note: If you use the insert function multiple times, the new LOI data will be entered into the above field wherever you insert the cursor. You will need to re-apply any adjustments to the newly inserted list. It is therefore advisable to finalize the LOI options before applying any fine-tuning.

Click the associated checkbox to include the data entered in the field in the exported label dossier.



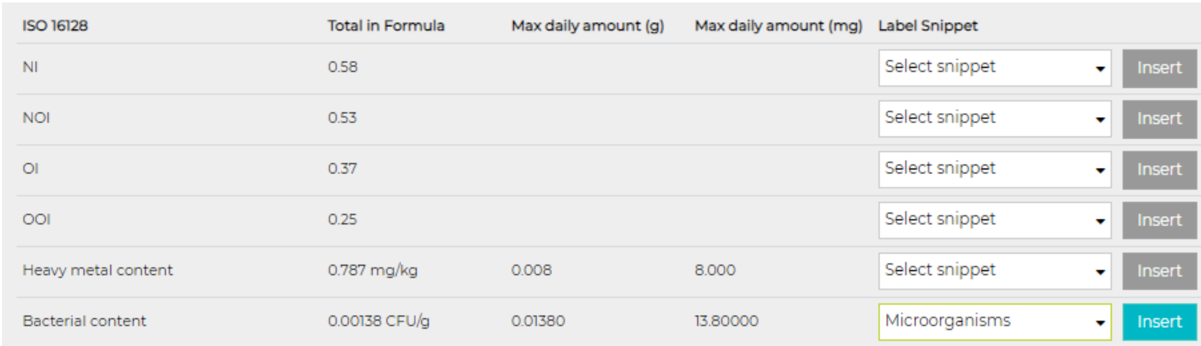
Label Warnings and Instructions of Use

Additional warnings and statements

In this section you can manage any country/language-specific additional warnings or statements that must be displayed on the product label. **The currently active compliance zone is displayed above the section – you are advised to check that you are editing the correct version.**

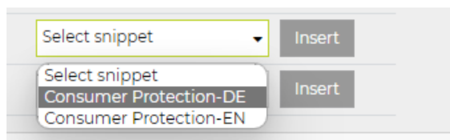
Product Manager assists you in managing any warnings or label advice that must be entered – including alerting you to the presence of any contaminants or allergens in the formula, such as heavy metals or traces of nuts. This data is managed in the raw material 'Safety' tab for each raw material that is included in the formula. In that tab, different snippets (including language versions) can be created for the different items being tracked from the raw materials thru to the final formula. This includes calculating the purity of the product by 'natural' and 'organic' according to ISO 16128.

In the 'Formula/Labels' tab under the section 'Label warnings and instructions of use', the ISO 16128 values will be displayed. Any other contaminants or allergens present in the formula are listed and allow selection of any associated snippet for insertion in the editable text field.

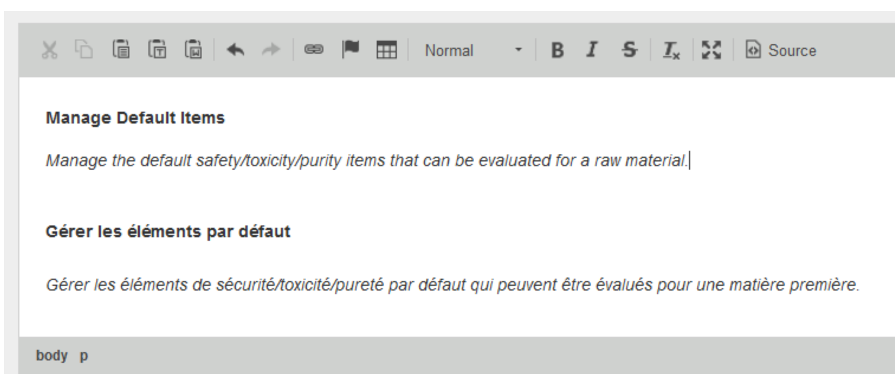


ISO 16128	Total in Formula	Max daily amount (g)	Max daily amount (mg)	Label Snippet	
NI	0.58			Select snippet	Insert
NOI	0.53			Select snippet	Insert
OI	0.37			Select snippet	Insert
OOI	0.25			Select snippet	Insert
Heavy metal content	0.787 mg/kg	0.008	8.000	Select snippet	Insert
Bacterial content	0.00138 CFU/g	0.01380	13.80000	Microorganisms	Insert

To insert a snippet, select a snippet from the 'Label Snippet' drop-down menu for the appropriate property and click on 'Insert'.



The content of the selected snippet will be inserted in the text field at the location where the cursor is placed. Insert multiple snippets below each other and/or select different compliance zones and save different content for the 'Additional warnings and statements' versions.



Click on the 'Update' to save your changes.

Serious undesirable effects

In this section you can enter any additional information on serious undesirable effects (SUE) that must be declared on the product label. Alternatively, this information can be included in the previous section 'Additional warnings and statements'. If any SUEs are known for the product, a declaration to this effect should have been made in the formula's 'Specification/Safety & Properties' tab. This status will be displayed at the top of this section.

Use the available text field to enter any required statements and check the adjacent checkbox to include this information in the label dossier.

If any documents of the following type have been uploaded to the formula 'Docs' tab, these are available for selection to be exported with the label dossier:

ANIM: Statement on animal testing
SUEC: Serious undesirable effects/cosmetovigilance

Instructions of use

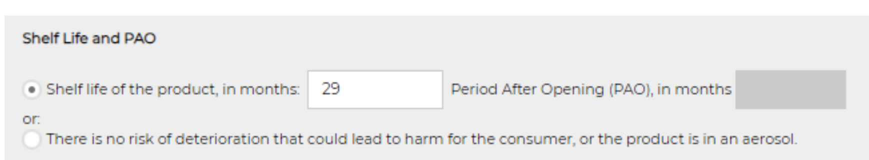
This section is intended for content explaining how the product must be applied and any other instructions for use or advisory statements that were not included in the previous two fields.

Use the available text field to enter any required statements and check the adjacent checkbox to include this information in the label dossier.

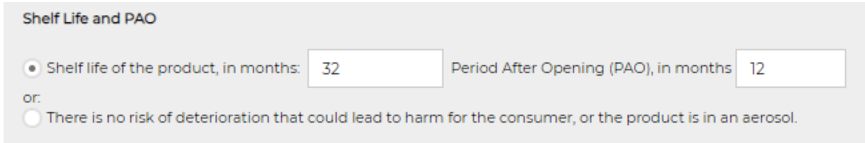
Shelf Life, BBE

You can select options for how details of the product's shelf life and any 'Best Before End' (BBE) 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 dossier.

View if shelf life of product < 30 months:

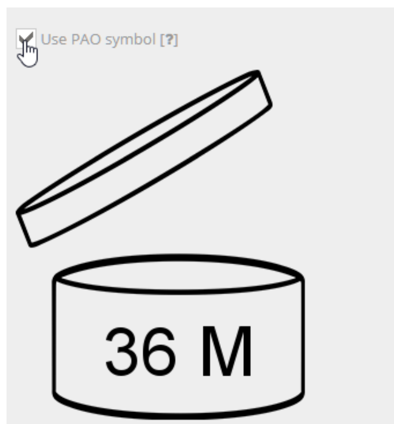


View if shelf life of product is ≥ 30 months – period after opening (PAO) can be entered:



If the shelf life of the product is set as <30 months, you will have the option to select a '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. If you wish to use the BBE 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:

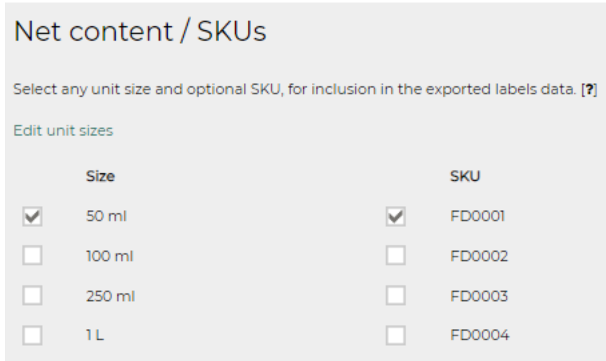


You can also add any further comments or information pertaining to the shelf life/PAO of the product. Check the adjacent checkbox to include this in the exported label data.

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 'Formula/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 dossier.



Check the available option if you also wish to include the average fill system symbol on the label.

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. Since the file size limit is 5 Mb it is recommended to upload lo-resolution files as a guideline (e.g., for the label designer) and submit any corresponding hi-resolution files directly.

In this section you may also select any documents of the type LABL, uploaded to the 'Formula/Docs' tab, for inclusion in the exported label dossier. Click on a document title to download the document. If the document is a .pdf or graphic file (.jpg, .png or .gif) it will open in your browser in a new tab

Select the available option if you wish to include the standard symbol for recycling on your label.

You can enter additional information or instructions in the adjacent text field. Select the checkbox if you wish to include the information in the label dossier.

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. Select the checkbox if you wish to include the information in the label dossier.

Export Label Dossier

Click on the export button at the bottom of the 'Formula/Labels' tab to export your label dossier, according to the selections you made in each section of the 'Labels' tab, as described in this guide.

Note: You must have saved the data on the page to include the changes in the exported files.

A .zip file will be downloaded in 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 .xlsx, .doc and .pdf formats.

View of example report:

Bath Foam Demo **Formula Version: 1.01**

Luscious Brands LLC
1313 NE Fremont St,
Portland,
Oregon-OR 97212,
United States of America
Tel.: +1 133-456 78
Email: v.mcfoggarty@luscious-brands.com
Website: www.luscious-brands.com

Product Label Report

Bath Foam Demo, 1.01 | Neutral (Clear) CHANGED | Active CHANGED
Date generated: 16 Mar 2023 09:38 UTC+1

Product name, description

Title: Bath Foam Demo
Type: Bath / shower products
Brief description: Luxury beauty foam treatment for after-bath use

BATH FOAMS & OILS

Upgrade your bathing routine with our essential-oil infused Spa bath oils, nourishing bath foams, cleansing bath salts and luxury gift sets.

Colors/Shades: Neutral (Clear) CHANGED (main formula) | Additional Colors/Shades: Blue, Orange

Ingredients:

Default LOI data. If further country/language-specific LOI versions exist, check in the same folder that contains this report.

ÀSEÀN
Les ingrédients suivants sont contenus dans ce produit:
Àqua (Water), Sodium Laureth Sulfate (Sodium Laurel Sulfate (Sls)), Sodium Chloride, Àlcohol Denat. (Denatured Àlcohol), Citric Àcid, Triethanolamine, Parfum (Fragrance), Methanol, Magnesium Chloride, Methylchloroisothiazolinone, Methylisothiazolinone, Denatonium Benzoate, [+/- CI 11920, CI 42045 /acid Blue 1]

Contact details, origin

Country of origin: Germany
My Company Ltd
info@mycompany.com
www.mycompany.com

Product Label Report: Bath Foam Demo **Date generated:** 16 Mar 2023
Luscious Brands LLC, 1313 NE Fremont St, Portland, Oregon, OR 97212, United States of America

Bath Foam Demo **Formula Version: 1.01**

Label warnings and instructions of use

Additional warnings and statements
No information available

Serious Undesirable Effects
Additional details/instructions - serious undesirable effects (SUEs):
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Instructions of use
Additional details/instructions: warnings, statements or declarations to be included on product label:
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Shelf-life

Additional details/instructions - shelf life:
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Net content / SKUs

Unit	SKU
50 ml	FD0001

℮

Additional details/instructions - net content/SKUs:

Product Label Report: Bath Foam Demo **Date generated:** 16 Mar 2023
Luscious Brands LLC, 1313 NE Fremont St, Portland, Oregon, OR 97212, United States of America

View of example folder containing additional files:

01-36_PAO.png	PNG File	11 KB	No
02-AvgFillSys.png	PNG File	2 KB	No
03-recycling.png	PNG File	7 KB	No
04-Demo-Doc-LABL.docx	Microsoft Word Document	16 KB	No
05-Cosmetri.jpg	JPG File	14 KB	No
06-cosmetri_239x110_tagline.jpg	JPG File	8 KB	No
Nourishing_Skin_Cream-1.01_LBL_...	Microsoft Word 97 - 2003 ...	2 KB	No
Nourishing_Skin_Cream-1.01_LBL_...	Adobe Acrobat Document	52 KB	No
Nourishing_Skin_Cream-1.01_LBL_...	Microsoft Excel 97-2003 ...	2 KB	No

Product Cost Simulations

View a training video on this topic:

Cost calculations, product cost, distributor and retail profit margin, cost comparison, bill of materials	view video

Introduction

Product Manager provides tools for performing detailed cost simulations for your products. You can calculate and manage costs and optimize the profit margins of your products, including:

- manage production costs, including raw materials and packaging
- calculate cost per unit size/SKU, such as for a 50ml or 250ml pack size
- optimize raw material costs in the bill of materials (BoM)
- optimize profit margins based on distributor and retail price
- see 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 by production amount, e.g., based on bulk purchase savings
- view cost of formula materials per kg/L as you build a formula
- fast BoM 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

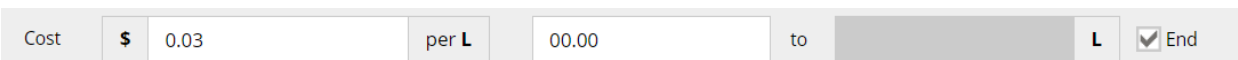
All product cost simulations are calculated and displayed using the default base currency that you set in the Product Manager settings when logged in as an admin user.

Raw materials 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 using the current exchange rate.

The method for entering costs for raw materials and packaging items is similar. Raw material costs are based on the price per kg or L. Packaging item costs are entered based upon the 'packaging unit' set in the packaging item's 'Information' tab. 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'.

Enter Material Costs

Costs are entered in the 'Costs' tab of the raw material or packaging item (parent or batch). 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:



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.

You can set different costs for each batch of your raw 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

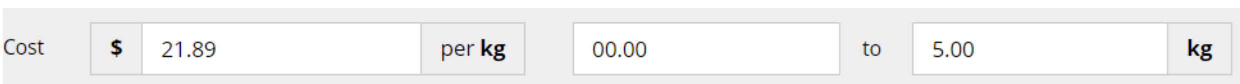
An array enables bands of amounts purchased to be set, with a cost per each band if the required amount to be purchased falls within the range set. You can set arrays or price points for raw materials and packaging items - required for factoring in the savings possible when purchasing in larger amounts from a supplier.

Since packaging items, 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 therefore 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.

For example, the following view shows a cost of €21.89 per kg for amounts purchased between 0.00 and 5.00 L, €20.90 per kg for 5.01 – 10.00 kg, etc with the cost dropping to €18.91 per kg for any amount above 20.01 L.

To build the above array, enter the first range, such as follows:



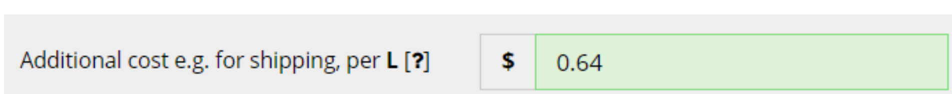
Click on 'Add New' to enter the next row. The start value of the range will be auto entered as 5.01, based on the 'to' value in the previous row:

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 costs

Enter an optional additional cost per L, kg or unit in the following field:



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:

This field is useful for entering additional costs e.g., 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 * 10) + (20 * 10 * 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:

Amt	Min. Cost, per kg/L	Avg. Cost, per kg/L	Max. Cost, per kg/L	Total Cost
10.000 kg	€ 3.10	€ 4.10	€ 5.10	€ 56.00

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

Set default cost value used for packaging items

In the Product Manager settings under 'Default Settings' you can select which packaging item costs to use by default, if an array exists for any packaging item associated with a packaging set:

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.

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.

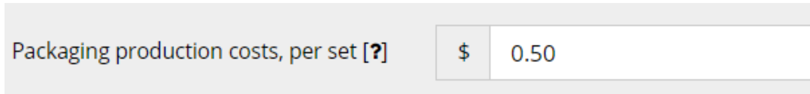
In the 'Packaging/Packaging Sets' tab, you can view the total cost of the packaging set, including any additional production cost e.g., for the cost of assembly of the packaging set.

Associated Packaging Items	Quantity	Cost
Avery Label 70 mm x 42.3 mm | 1 item/unit	1	$ 0.22
Airless Pump Dispenser, White Plastic with Clear PP Ove...	0.5	$ 0.97
Cardboard Recycled 175 g/m² | m²	0.25	$ 0.01
Cardboard Recycled 250 g/m² | m²	1	$ 0.03
Sellotape | m	1.25	$ 0.19
Avery Label 70 mm x 42.3 mm | 1 item/unit	1	$ 0.22
Cardboard box type B (outer packaging) (Cloned) | 1 ite...	1	$ 1.02
		Production cost: $ 0.50 **Total: $ 3.16**

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 update the costs for that item.

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:



Set Target Bulk Product Costs

In the product's '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.

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) = <u>€56.00</u>

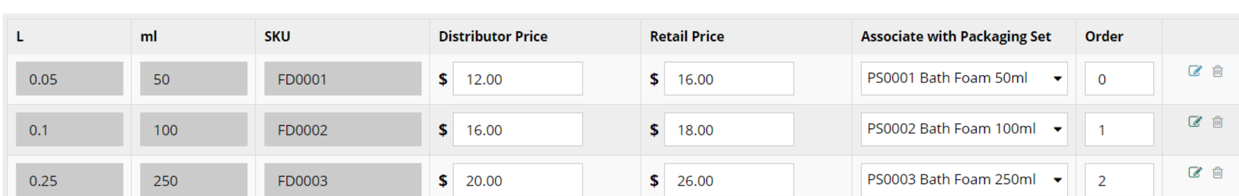
Total cost per 1kg = 56.00 /10 = 5.60

Target costs €5.00 - €10.00 per kg

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

Set Target Distributor and Retail Prices

In the product's 'Requirements' and 'Unit Sizes' tab, you can enter a target distributor and retail price for each unit size/SKU of the product.



L	ml	SKU	Distributor Price	Retail Price	Associate with Packaging Set	Order	
0.05	50	FD0001	$ 12.00	$ 16.00	PS0001 Bath Foam 50ml	0	
0.1	100	FD0002	$ 16.00	$ 18.00	PS0002 Bath Foam 100ml	1	
0.25	250	FD0003	$ 20.00	$ 26.00	PS0003 Bath Foam 250ml	2	

These targets enable Product Manager to perform product cost simulations and calculate profit/loss based on your materials, labor, shipping any other entered costs.

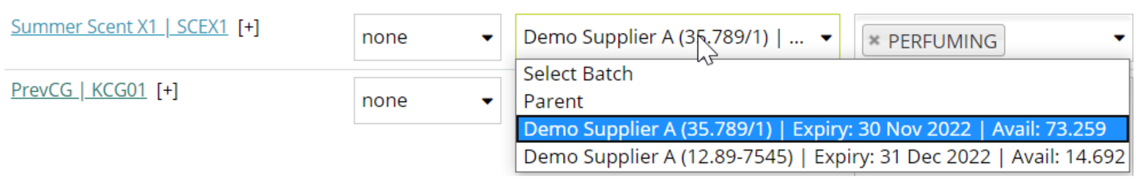
Run Product Cost Simulations

Data check

Before you run product cost simulations, check that you have entered the following:

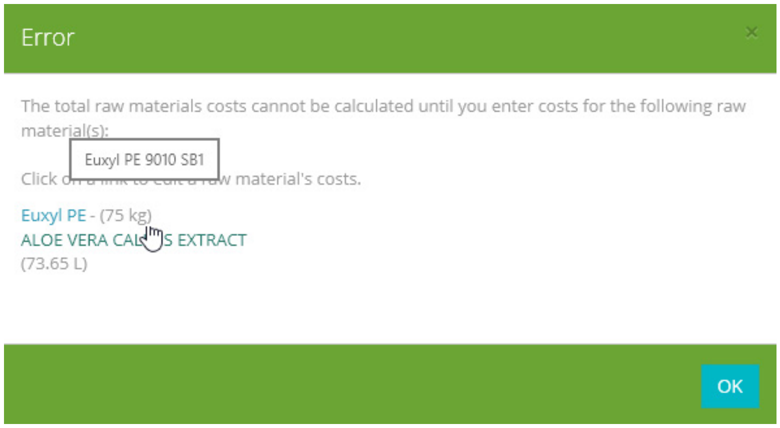
- raw material costs, including any additional costs
- packaging item costs, including any additional costs
- target distributor price for each unit size/SKU of the product
- target retail price for each unit size/SKU of the product
- target bulk product costs

The cost simulations are performed in the 'Formula/Cost' tab. 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.

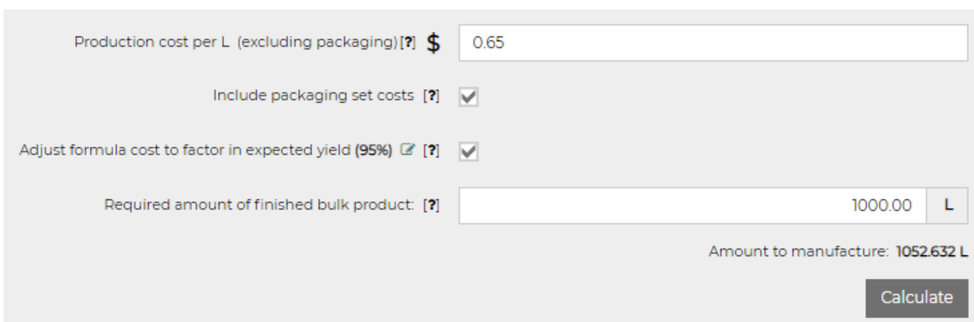
If any costs are missing, clicking on the 'Calculate' button will trigger an alert.



The alert will display the raw materials with missing costs and the amount of the raw material required for the production amount entered.

Enter parameters

You only need to set a maximum of four parameters to run the product cost simulation.



Production costs

Enter an optional additional cost per kg/L of your product to include any production costs.

Include packaging 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.

Expected yield

Check this option if you use an expected yield % value to calculate wastage during production and wish to factor this in when calculating the target bulk finished product.

Required amount of finished bulk product

Enter this value in kg or L.

Click on 'Calculate' to run the product cost simulation.

Product Manager will calculate your product's costs and display the results.

Click on 'Save' to optionally save the values you entered in the 'Cost' tab.

View results summary

A summary of your cost simulation results 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 product bulk 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.

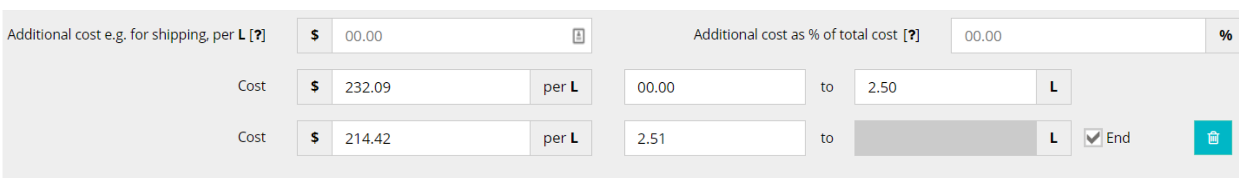
A summary statement informs you whether the results are within range. If they are out of range, the alert is displayed in red.

Bill of materials (BoM)

A BoM is generated, showing each raw material in the formula, the amount required and various cost calculations.

Bill of Materials (BoM)								
Raw Material	**Part Code/ID**	**Supplier**	**Batch**	**Amount**	**Min. Cost, per kg/L**	**Avg. Cost, per kg/L**	**Max. Cost, per kg/L**	**Total Cost**
[illegible]	[illegible]	[illegible]	123-456.890	**2.5000000 kg** (2500.0000 g)	€ 4.01	€ 4.50	€ 5.00	€ 12.50
[illegible]	[illegible]	[illegible]	432-432	**2.3762376 L** (2376.2376 ml) **2.4000000 kg** (2400.0000 g)	€ 62.12	€ 65.12	€ 68.12	€ 161.87
[illegible]	[illegible]	[illegible] [illegible]	543-543	**2.4000000 kg** (2400.0000 g)	€ 48.12	€ 51.78	€ 55.45	€ 128.23
[illegible]	[illegible]	[illegible]	825-825	**2.2653061 L** (2265.3061 ml) **2.2200000 kg** (2220.0000 g)	€ 16.04	€ 19.52	€ 23.00	€ 52.10
[illegible]	[illegible]	[illegible]	932-932	**2.0000000 L** (2000.0000 ml) **2.0000000 kg** (2000.0000 g)	€ 25.80	€ 27.90	€ 30.00	€ 60.00
[illegible]	[illegible]	[illegible]	434534535	**74.0000000 L** (74000.0000 ml) **74.0000000 kg** (74000.0000 g)	€ 0.06	€ 0.07	€ 0.07	€ 4.44
							Additional cost	€ 1211.00
							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 2.00 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.



This enables you to enter different target production amounts in the 'Required amount of finished bulk product' field and compare the costs. You can export different versions or scenarios in .xlsx format as described later in this section of the guide.

Costs per unit size/SKU

For each unit size or SKU of the product, the raw materials costs (including production) and packaging costs will be displayed, as well as the total cost.

Bath Foam Demo / 1.01

SKU	Unit Size	Raw Materials/ inc. Production	Packaging	Total	Distributor Profit/ % Margin	Retail Profit/ % Margin
FD0001	50 ml	$ 0.35	$ 4.39	$ 4.74	$ 7.26 (60.50%)	$ 11.26 (70.38%)
FD0002	100 ml	$ 0.71	$ 4.59	$ 5.30	$ 10.70 (66.88%)	$ 12.70 (70.56%)
FD0003	250 ml	$ 1.77	$ 5.30	$ 7.07	$ 12.93 (64.65%)	$ 18.93 (72.81%)
FD0004	1 L	$ 7.07	$ 5.30	$ 12.37	$ 17.63 (58.77%)	$ 33.63 (73.11%)

If you entered a target distributor and retail price 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.

× 1.03
1.02
1.04 (Production
1.05 (Production)
1.06

Nourishing Skin Cream / 1.01

SKU	Unit Size	Raw Materials/ inc. Production	Distributor Profit/ % Margin	Retail Profit/ % Margin
10001	50 ml	€ 0.26	€ 4.74 (94.77%)	€ 7.74 (96.73%)
10002	250 ml	€ 1.31	€ 5.69 (81.31%)	€ 8.69 (86.92%)
10003	500 ml	€ 2.62	€ 6.38 (70.93%)	€ 10.38 (79.87%)
10004	1.0 L	€ 5.23	€ 5.77 (52.43%)	€ 10.77 (67.29%)
10005	5 L	€ 26.17	€ -26.17 (-NF%)	€ -26.17 (-NF%)

Nourishing Skin Cream / 1.03

SKU	Unit Size	Raw Materials/ inc. Production	Distributor Profit/ % Margin	Retail Profit/ % Margin
10001	50 ml	€ 0.36	€ 4.64 (92.86%)	€ 7.64 (95.54%)
10002	250 ml	€ 1.79	€ 5.21 (74.49%)	€ 8.21 (82.14%)
10003	500 ml	€ 3.57	€ 5.43 (60.32%)	€ 9.43 (72.53%)
10004	1.0 L	€ 7.14	€ 3.86 (35.07%)	€ 8.86 (55.36%)

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

Export results

You can export your cost simulation results using the 'Export as .xlsx' button. The .xlsx 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 orders feature to manage production, 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 therefore be reflected in your product cost simulations and calculated profit margins.

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.

You can use the Product Manager's testing/QA features to add any tests or checklist items 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.

Packaging

Introduction

If you are familiar with working with raw materials in Product Manager, managing packaging items (components) as parents and batches is almost identical. Your packaging item parents can be cloned as batches, each having their own inventory level and unique supplier batch information and documents. Batches can also be split. Packaging item parents and batches can have tests and checklists applied to them.

Please refer to the relevant raw materials section of this guide for information on the following functions, which are also applicable to packaging items:

- Parents and batches
- Inventory
- Spilt batches
- Locations and customers
- Search and filter main list
- Archiving packaging items

Information in this section mostly covers specific guidance for managing packaging.

Packaging is managed using the following two tabs accessible under the 'Packaging' menu item:

- Packaging Items
- Packaging Sets

Packaging Items (Components)

Like raw materials, you first create a parent packaging item or component, entering as much generic information as possible, and then clone it to create a batch. Add the packaging item parents for each item required for creating your packaging sets – everything from labels, inner and outer packaging, containers, wrapping, caps, inserts, etc.

Note: You can 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 from the 'Actions' column of the packaging items list.

As well as describing the packaging item by trade name, supplier, manufacturer, inventory level, etc., in the different available tabs, you can also enter details for costs, upload documents and apply tests. Please refer to the relevant sections of this guide for details of how to manage common workflows and features in Product Manager used also for packaging, such as costs, QA and testing, MRP, document management and tasks.

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:

- Information
- Costs
- Documents
- Quality Assurance

Information

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 assist identification when building your packaging sets.

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 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 function.

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 e.g., 'unit' or 'item'. 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 'm', 'g', 'cm' or 'sq.cm'.

Note: Once you create packaging sets, you can enter a quantity required for each of the packaging components needed to build one package set. For example, if you use wrapping paper you could select 'other' and then enter '10 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', additional fields will be displayed, requiring input or selection.

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 remain the same.

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

Location and Customer - You can associate your packaging items with locations and customers. You can directly add a location when adding or editing a packaging item. This is useful, if you would like to pack out a production order using packaging items from a specific location or customer, or you would like to filter the packaging MRP report based on location and/or customer.

If you do not have at least one customer group, this option is not displayed. If the batch's inventory is required to be split between locations and/or customers, use the 'Clone to New Batch' button and select the option to create a split batch.

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 one available doc type to upload a document.

If you require any packaging documents to be included in the product dossier/PIF, these must be uploaded to the **product** 'Docs' tab as document type PACK.

Quality Assurance

For a detailed description of the quality assurance and testing features in Product Manager, see the appropriate section of this guide.

The default status for a newly added packaging item parent or batch is 'Quarantined'.

To be able to dispense packaging item batches for pack-out of your manufacturing orders, by default the batch's QA status must be set to 'Approved'. This restriction can be removed by an admin user, in the Product Manager 'Default Settings' tab.

If any tests or checklist items require to be successfully completed, the status 'Approval' may not be available. The quality assurance and testing features in Product Manager enable standardized quality management of your packaging items, such as:

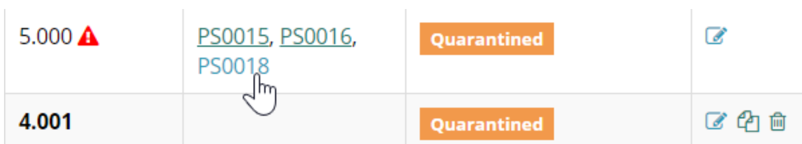
- Ensure standard procedures are followed for received batches
- Require lab tests to ensure conformity to required specifications
- Checklist to ensure all data and documents are provided
- Prevent pack-out of non-approved batches in production orders

- Set a packaging item to auto time-out at a certain date, setting the QA status e.g., from 'Approved' to 'Discontinued'

For any packaging item material batch, you can select the 'Auto-approve' checkbox to set the batch to be available for pack-out, without any tests requiring to be passed and without it having 'Approved' status.

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:



You can then associate each unit size of your product, such as a 100ml, 250ml and 500ml with a packaging set (see below). By doing so, inventory control of packaging items, pack-out of your production order and calculation of packaging costs can be managed.

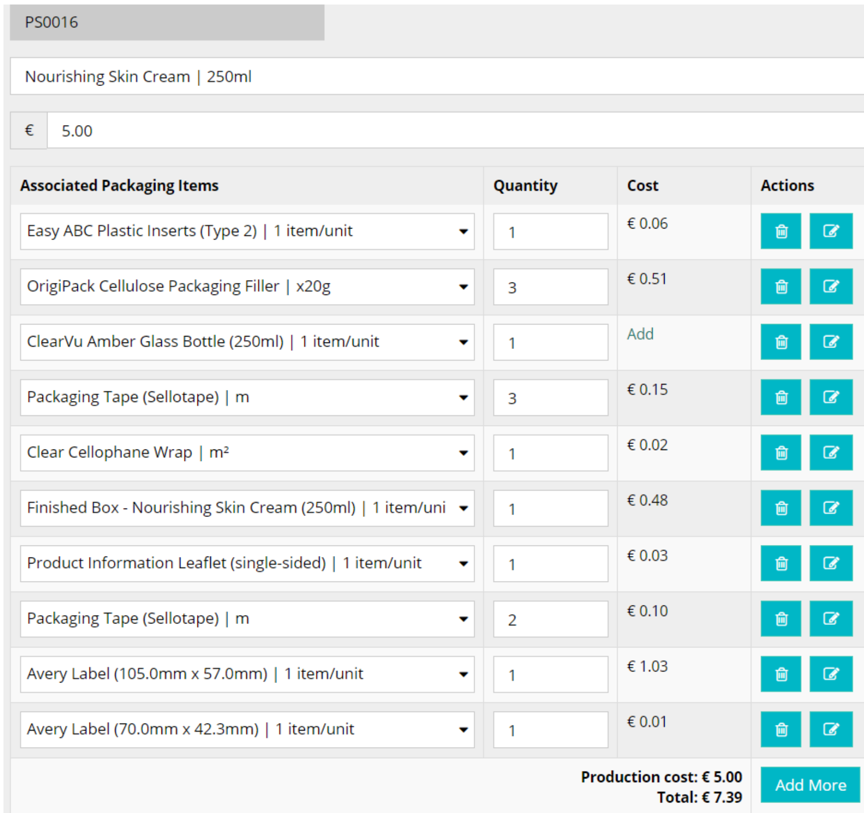
A clone feature enables easy duplication of a packaging set, enabling you to create variations e.g., for each container/pack size. You can also create packaging sets as 'templates' which contain packaging components common to many packaging sets, cloning these to customize them for use with specific products and pack (unit) sizes.

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

- fast pack-out of your production order (manufacturing or development batches)
- correct deduction packaging inventory (using the FIFO method)
- inclusion of packaging costs in your formula's cost simulations

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.

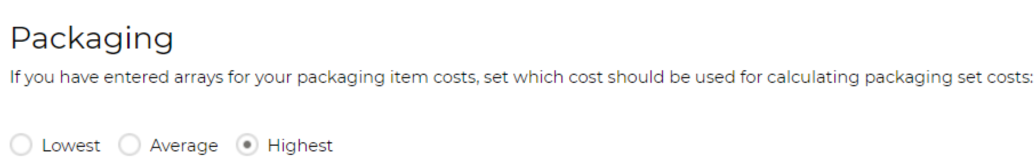
A typical packaging set will look like the following example:



Each packaging set has its own unique **ID,** beginning with 'PS' - 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. The cost value for each packaging item is taken from the most recent batch added. Click on the cost for any packaging item to open a popup where you may edit the costs.

If you have entered arrays for your packaging item costs, in the admin 'Default Settings', you can set your preference for which cost should be used:



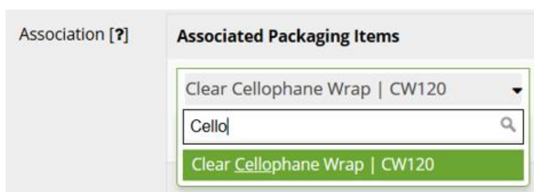
Enter an optional **production cost** for assembly of a single packaging set.

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 in the 'Cost' column to enter cost data. Check carefully that all costs are entered for your packaging items.

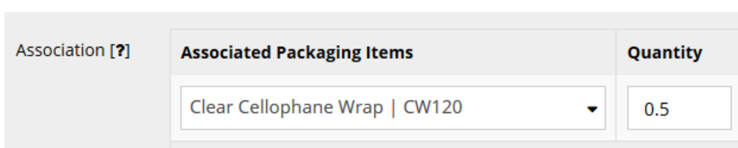
Add packaging set

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'

You can now start to add the packaging items as components of the packaging set. 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.

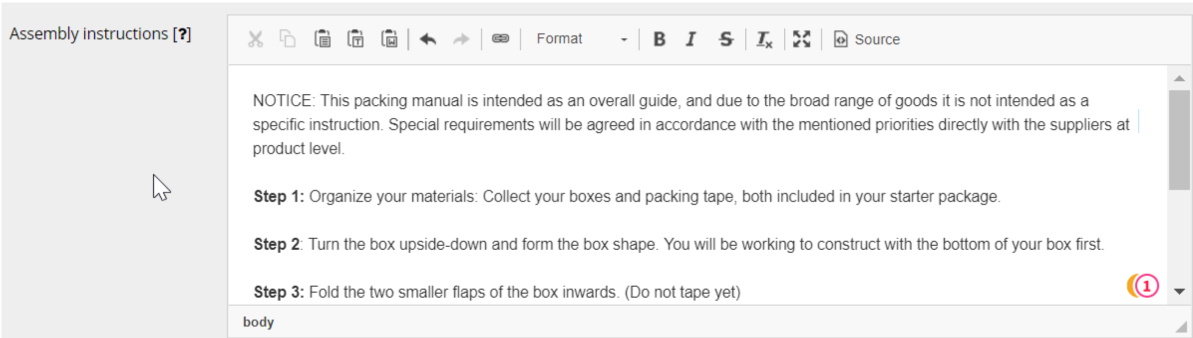


Enter a 'Quantity' - you can also add a value such as '0.5' – for example, if your inventory unit of measurement for packaging tape is 1 'm' and your packaging set only requires 0.5m of tape.



Click on 'Add More' to add a further packaging item to the packaging set and repeat the process until all packaging 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.

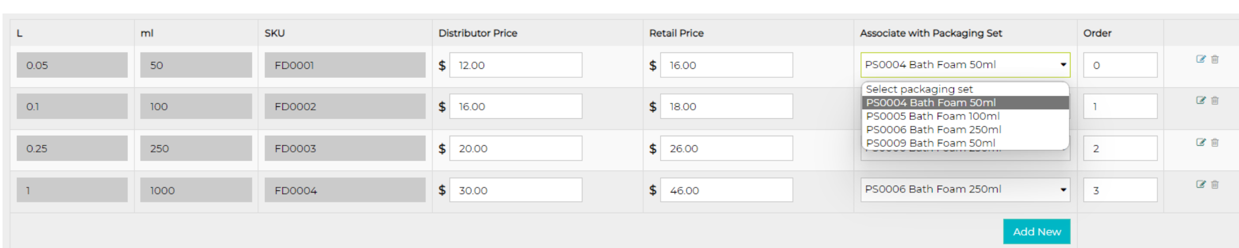
Associating packaging sets with product SKUs

Once you have created your packaging sets you can now associate these with a product’s SKUs for the different unit sizes the product is available in. This makes it possible to pack-out your production orders by unit size and calculate packaging costs for the product.

Open the product and click on the ‘Unit Sizes’ tab.

<u>Note</u>: 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.

For each unit size that you have configured for your product, select a packaging set from the ‘Associate with Packaging Set’ column.



Click in the ‘Actions’ column to open a selected packaging set. Click on ‘Save’ to save your changes.

Dispense packaging set

A packaging set can be dispensed by entering the number of complete packaging sets 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 packaging items will be listed.

You can optionally filter the inventory to be used for the packaging items by location and/or customer. If no inventory is found for the selected location and/or customer, a warning will be displayed.

If packaging items require approval (as set by an admin user in the Product Manager global settings), each batch must be set to ‘Approved’ to be available for dispense. A warning will be displayed for any items where approval is blocking the dispense.

If inventory warnings are displayed, you may click on ‘Dispense Ignore Inventory’ to generate a packaging dispense list 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, including any assembly instructions for the packaging set.

Inventory is deducted using the ‘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 your Product Manager account.

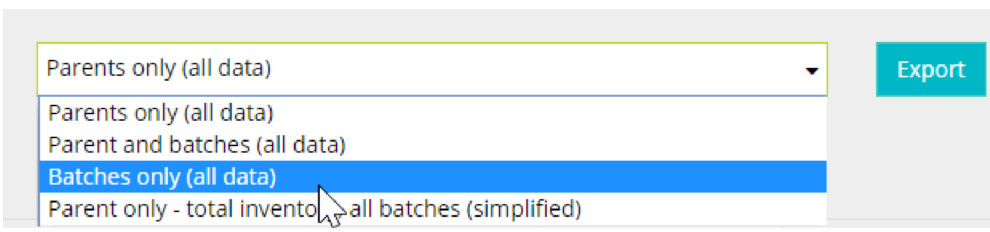
Export Packaging Data

In the ‘Packaging Items’ list, 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 captured using quotation marks ‘to retain the integrity of the data structure in the .csv file. Cells containing multiple values use a 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)

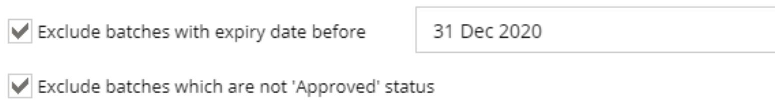
All data for the parents and their batches will be exported.

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:



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.

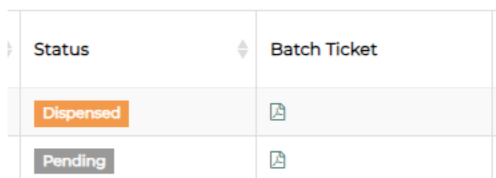
Production: Configure Production Reports

Introduction

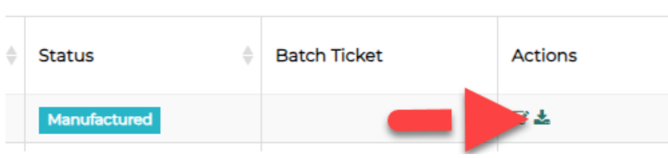
Product Manager provides a manufacturing orders module for managing commercial manufacture of product batches as well as a development batches feature for managing samples built for R&D purposes. For each of these workflows, the following production reports can be fully configured:

- Batch ticket
- Dispense list (raw materials)
- Dispense list (packaging)

The batch ticket is available to download from the 'Batch Ticket' column in the main orders list while the order is still in the status 'Pending' or 'Dispensed'.



The batch ticket and dispense lists can also be downloaded from the order's 'Dispense' tab. Once the order has been set to the status 'Manufactured' (manufacturing orders) or 'Produced' (development batches), the batch ticket is moved to a downloadable batch protocol .zip folder, which can be downloaded from the 'Actions' column in the main orders list:



The versions of the reports downloadable in the batch protocol are almost identical to the versions downloaded individually. The configuration options described in this section of the guide apply to both.

Configuring the Reports

The production reports configuration options can be accessed by an admin user when logged into the Product Manager settings, under the 'Reports' tab. There are three main groups of settings:

- Manufacturing orders
- Batch ticket
- Dispense list (quick version)
- Dispense list (full version)
- Development batches
- Batch ticket
- Dispense list (quick version)
- Dispense list (full version)
- Packaging Dispense Lists
- Dispense list (quick version)
- Dispense list (full version)

Testing the selected report options

It is recommended to carefully check the options you set by generating sample reports when logged in as a standard user.

Tip: If you have access as an admin user and require testing of the reports as a standard user, you can use two different browsers (e.g., Edge and Chrome) to be logged into Product Manager as both users simultaneously. You can then toggle your browsers between the admin and standard users to fine-tune the report settings and generate test reports.

Depending on the amount of data you tend to enter in certain fields in Product Manager, your options may need to be optimized until the desired results are achieved. If your data does not fit, it is recommended to reduce the number of columns to be displayed in the report and/or select to display the report in DIN A4 landscape (297mm x 210mm) format.

Configure reports

The following described options are available in the various report settings.

Select page format

Select whether the report should be displayed in DIN A4 portrait (210mm x 297mm) or landscape (297mm x 210mm) format.

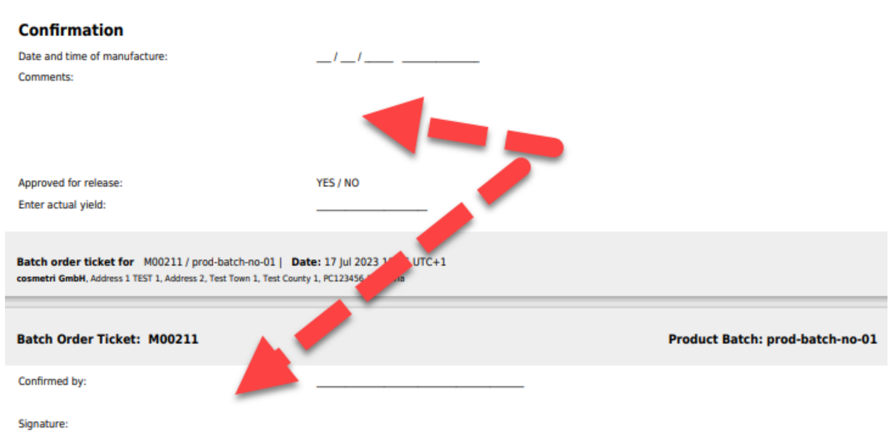
An additional checkbox enables any additional instructions to be omitted from the report, as entered in the order's 'Setup' tab.

Header area

This option enables the removal of the light grey header area of the report pages, as follows:

Confirmation and signature area

This option enables the removal of the confirmation and signature area of the report pages, as follows:



Production method

This setting controls how raw materials and instructions for each stage/phase of production are displayed. Select 'separate' to display this information in a separate section of the report, as per the following example:

1 | 1. Water Phase	
Raw Materials	**Instruction**
Cocoa Butter (Organic) | 84649-99-0 / 8002-31-1 (25.0000000%)	Heat the Water (W) phase in a bain marie between 75-80˚C.
2 | 2. Fat Phase	
Raw Materials	**Instruction**
	Heat the Fat (F) phase in a bain marie until all the ingredients have melted and the temperature has risen between 75-80˚C.

Select 'combined' to display the production method for each stage in a separate row beneath each raw material in the raw materials list:

Stage ID	Trade Name	Part Code/ID	Supplier Name	Supplier Batch No.	Density (g/ml)	Location / Customer	Amount
1	Cocoa Butter (Organic)	84649-99-0 / 8002-31-1	The raw material production Ltd	543-543 - abc-			8.4460000 kg 8446.0000 g (25.0000000%)
Heat the Water (W) phase in a bain marie between 75-80˚C.							

Amounts and %w/w values

These settings control how the raw material %w/w values and dispensed amounts are displayed:

- [x] Amount (combined amount and %w/w)
- [ ] Amount (amount only, in kg/g, or L/ml)
- [ ] %w/w (percentage weight %w/w)

The default setting is 'Amount (combined amount and %w/w)', as per the following example:

8.4460000 kg

8446.0000 g

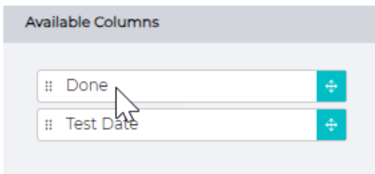
(25.0000000%)

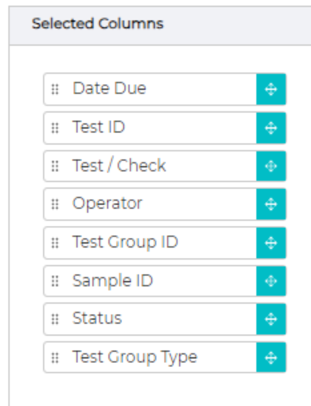
Uncheck this option to enable one or both of the other options to be selected. This displays each value in separate 'Amount' and '%w/w' columns.

Test data

This setting determines whether the test data associated with the order is displayed in the batch ticket. Check the 'Do not include "Testing Protocol" section of report' to disable all test-related data.

If the checkbox is unchecked, to the right you can select which columns of test-related data to include in the batch ticket. Drag and drop a field from the 'Available Columns' list (left) to the right-hand 'Selected Columns' list.



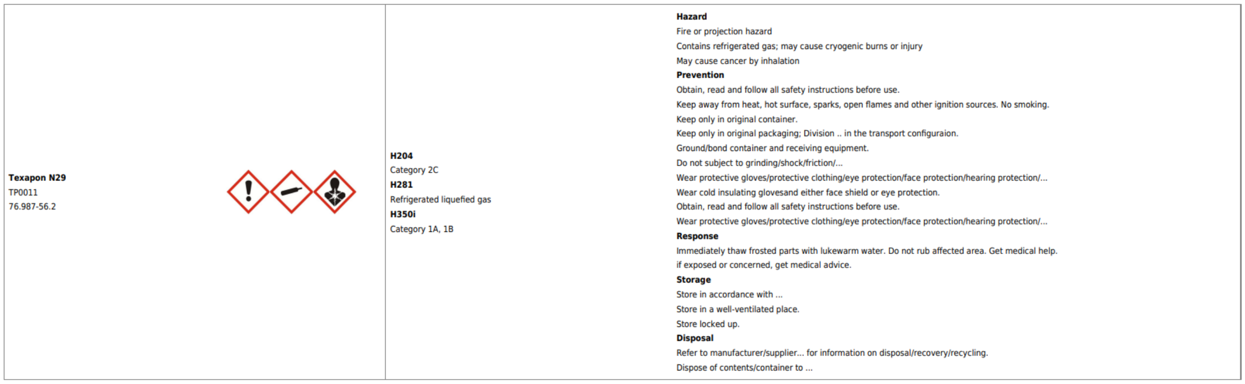


You can drag the selected column items up/down to re-arrange their order. Items listed from top to bottom in the list are displayed in the report respectively from left to right. Click on 'Save' to save the column preferences, or on 'Reset' to reset them.

GHS data

Select from the available options to configure how any GHS data entered for the raw materials is displayed in a separate section of the report. This is the data entered in the raw material 'Safety, Toxicity & Purity'' tab for the parent or batch associated with the formula.

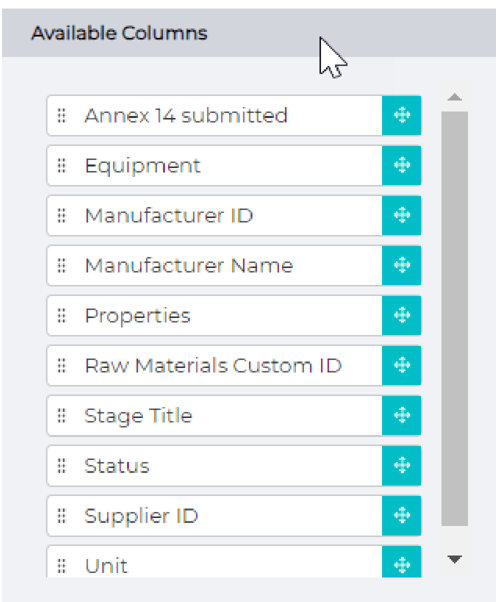
For each GHS code, the associated pictogram, hazard and selected precautionary statements will be displayed.

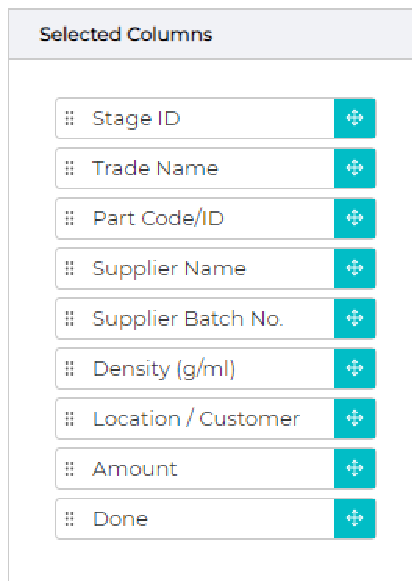


Column layout

In this section in the right-hand side of the settings, select the columns of data required to be displayed in the main section of the batch ticket.

Drag and drop a field from the 'Available Columns' list (left) to the right-hand 'Selected Columns' list.





You can drag the selected column items up/down to re-arrange their order. Items listed from top to bottom are displayed in the report columns respectively from left to right. Click on 'Save' to save the column preferences, or on 'Reset' to reset them.

Production: Manufacturing Orders

View a training video on this topic:

Method of production, stages and phases, method of storage	view video
Steps to take prior to creating a manufacturing order, production mode formula, batch inventory	view video
Creating a manufacturing order, configuring tests, dispensing raw materials	view video
Approving a manufacturing order, packing out and releasing an order	view video
Download batch protocol, production report	view video

Introduction

Product Manager's manufacturing orders feature is designed for cosmetics manufacturers requiring a powerful, yet easy-to-use manufacturing software that is integrated with formula management, compliance and quality assurance – providing full traceability and reporting capabilities.

The production mode formula's composition is auto updated to show the **currently used raw material batches** in the most recently dispensed manufacturing order. This has the following functions:

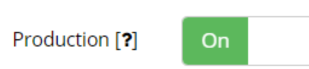
- Compliance Checker will check the currently used raw material batches and report on any missing data or documents for these.
- Small variations in chemical composition between batches – such as perfume allergen concentrations – can be tracked. For example, you can routinely check if an allergen threshold has been exceeded and would need to be displayed in the list of ingredients (LOI).
- Generating a PIF/product dossier based on the formula will always show the currently used batches.

Prepare for Manufacturing

The following steps are required in preparation for using Product Manager's manufacturing orders feature.

Configure manufacturing options

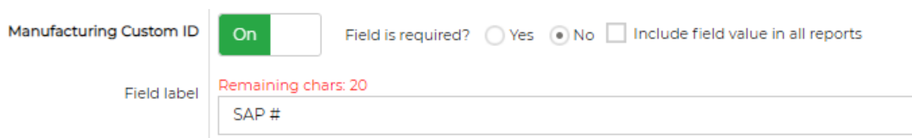
Firstly, check that you can see the 'Production/Manufacturing Orders' menu item in the left-hand menu when logged in to Product Manager. If you cannot see the menu, you can enable the manufacturing module in the Product Manager global settings if logged in as an admin user. Select 'Global Settings' in 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:



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 'Product batch numbers' switch to 'Custom'.

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. Now change the global setting to 'Auto', save the settings, and create your next manufacturing order. The product batch is automatically set as ABC0002. 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 Options’ 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 and set if you require the value to be included in reports such as the batch ticket and dispense list.

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

Set unit of measurement and density/specific gravity

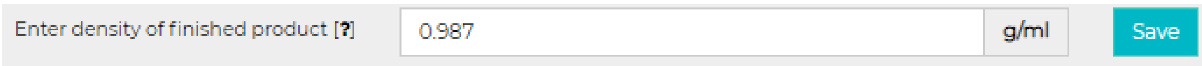
The Product Manager manufacturing module calculates the required amount of your product to be manufactured **by weight**. If you have set your product to be measured **by volume** (e.g., for oils or creams), **you must enter an accurate density value** (or specific gravity), so that the correct dispense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

Note: For a simple method to calculate the product density, 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.

To set whether your product is measured by weight or volume, use the ‘Unit of measurement’ field in the ‘Product/Info’ tab.

Note: The unit of measurement (L/kg) is set at the **product level**, but the **density/specific gravity value** is set at the **formula level**, in each formula’s ‘Method’ 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 (kg)** the density field is locked.

Note: During the setup of each manufacturing order, you can also verify and adjust the product's density value.

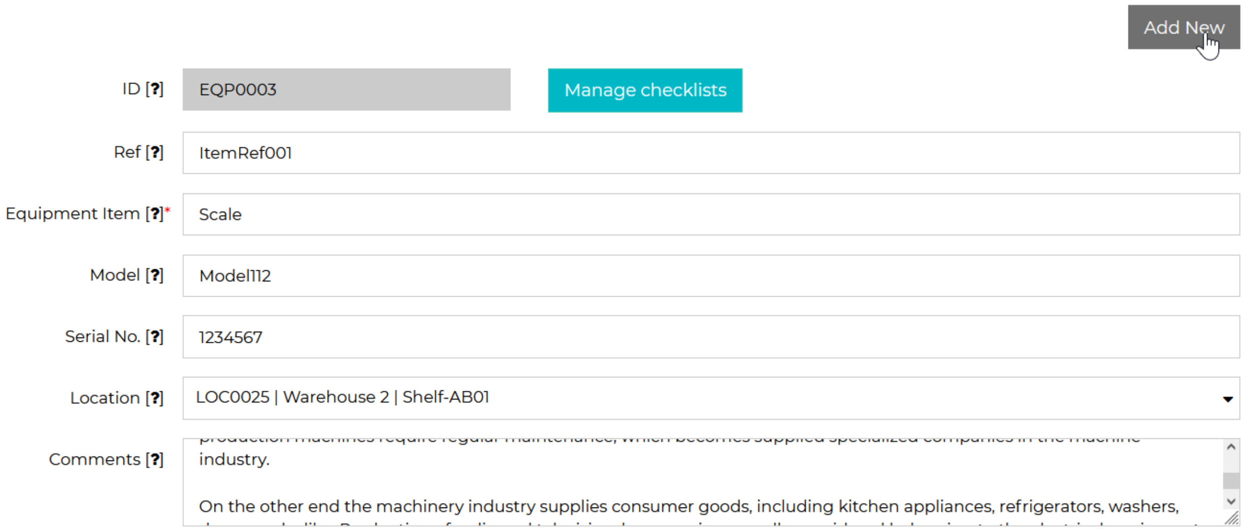
Set up equipment items

Under 'Production/Equipment' you can manage equipment used for production. Equipment items can optionally be associated with locations. Using the equipment feature you can associate equipment with the method of manufacture used for manufacturing orders.

Note: If you cannot access the equipment feature in Product Manager, your current plan may not include this. Please contact Cosmetri support.

The equipment used during production of each batch can be adjusted prior to manufacture. The equipment items used for the batch's production will be listed in the batch ticket and also in the PIF report.

To add a new equipment, click on the 'Add New' button:



The ID of the equipment is auto assigned, and non-editable. The equipment list view can be filtered based on the ID and the name of the equipment item. Add further non-required data to help identify the equipment item, such as 'Model' and 'Serial No'.

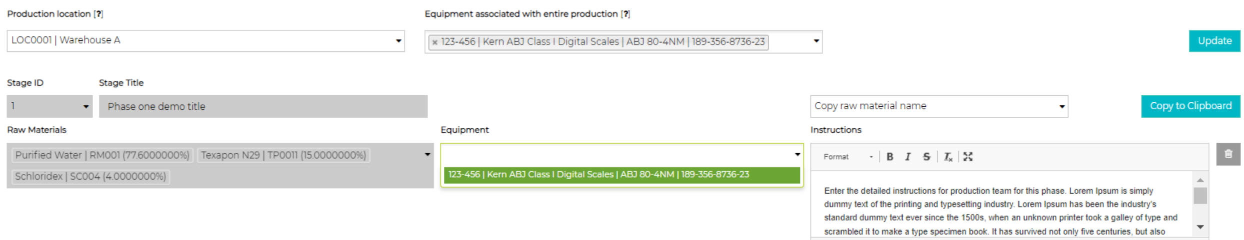
Optionally select a location, or sub-location from the list of locations to associate with the equipment item.

Note: If you are subscribed to Cosmetri GMP, the equipment items can also be managed in that application and the data is accessible in your Product Manager account. In Cosmetri GMP you can also associate checklists with equipment items. This enables management of routine cleaning and maintenance of equipment, including setting schedules such as weekly, monthly, etc.

Enter method of manufacture

On the formula's 'Method' tab under the sub-tab 'Manufacturing Orders', you can manage the instructions used for manufacturing your product and optionally associate equipment used.

Note: You can enter a separate method for producing development batches (samples) on the 'Development Batches' sub-tab.

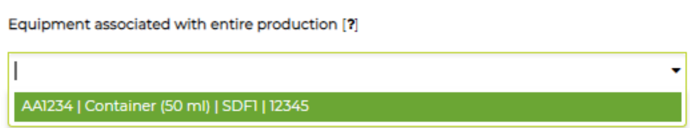


The instructions for each stage/phase as well as the equipment used can be adjusted directly from the manufacturing order during production of each batch. This data is then updated in the 'Manufacturing Method' tab of the formula, ensuring that the details are kept up to date.

Production location

If you are using the equipment feature, you may select a **location** for the production. If you wish to associate **equipment items** with the method, only items associated with the selected location will be available for selection.

Optionally select any equipment items used for the **entire production**. Only select items that are not specific to a stage/phase.



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

Stage ID

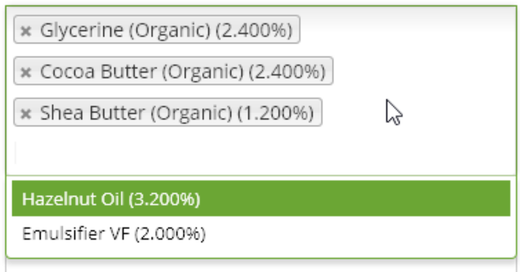
Select a stage or phase number from the select menu. Clicking on the 'Sort' button will then re-order the stages/phases.

Stage title

Enter a short title for ease of identification of the stage/phase, such as 'Fat phase' or 'Water phase'.

Raw materials

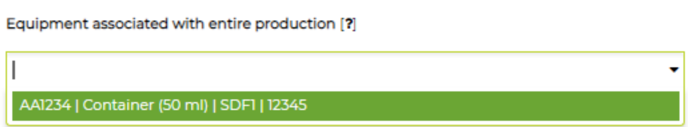
Use this field to optionally associate each stage/phase with any raw materials in the formula. Click in the field to select one or more of the raw materials in your formula.



These associations will also be shown in the formula's 'Composition' tab, 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's composition.

Equipment

If you have configured equipment items, you can select items to be associated with a specific phase/stage of production.



Check that if you have selected a location for the production, that equipment items have been associated with that location.

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 and %w/w value to the clipboard. Use Ctrl + V (or Command + V for Mac) to paste the text into the text window at the point where you have placed the cursor:

Set formula to production mode

The role of the 'Production' mode is as follows:

- Auto activation of the *Compliance Checker*
- Only production mode formulas may be selected for manufacturing
- A product information file (PIF) may be generated

A formula can only be set to production mode if it has been set to 'Approved' status in the QA tab. This is an important safeguard to prevent manufacturing using a formula that is currently not conforming to any specified acceptance criteria.

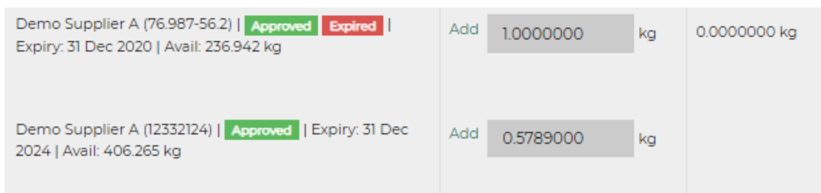
By default, all formulas are set to 'Draft' mode. To set a formula to 'Production' mode, open the formula and click on the 'Set to Production Mode' button when in the formula view.

Save copy as original formula version

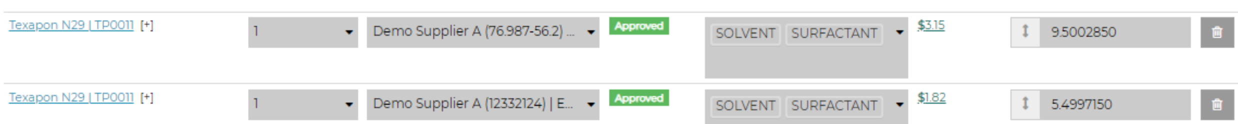
Product Manager will automatically update your production mode formula's composition to display currently used batches and at the %w/w values they were dispensed, based upon the amounts dispensed from each batch.

Example:

Original formula composition uses Texapon N29 (as parent) @15.0000000 %w/w
Formula is cloned, set to approved and set to production mode.
Production mode formula is used for manufacturing.
Last dispensed manufacturing order, with two batches of Texapon N29 dispensed:



Texapon N29 in the production mode formula composition with the dispensed batches selected in the formula at their %w/w as proportional to the dispensed amounts: 9.500285 + 5.499715 = 15.0000000 %w/w.



If required, we recommend keeping a clone of the production formula as an original version that is not adjusted during the dispense of each manufacturing order.

In the main product list, expand the view by clicking in the [+] icon to list all associated formulas. In the 'Actions' column, click on the clone action to copy the formula. You can then label it accordingly. You can also clone any formula by clicking on 'Clone Formula' when viewing the formula.

Preparing formulas for color variations

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.

	Colors/Shades [?]	Colorant [?]	Max. %w/w	
☑	Blue	× Blue CI 42045 /ACID BLUE 1 (Colorant)	0.0010000	
☑	Orange	× Orange CI 11920 (Colorant)	0.0020000	
☑	Green	× CI 42053 | FD&C Green No. 3	5.0000000	

To manufacture separate color products, each color/shade of your product must exist as a **unique formula**, with the color pigment(s) entered in the main formula composition as raw materials. This will enable accurate traceability of the manufactured product batches and associated colors/shades as well as correct calculations of required inventory for the dispense lists and MRP reporting.

The required steps for preparing each formula version are as follows:

- Clone the main formula and enter description in the 'Color/Shade' field
- Enter the color pigment(s) raw materials in the main formula composition
- Update the formula
- Check and confirm compliance
- Approve the formula
- Convert formula to production mode

Prepare raw material and packaging item batches

You can only manufacture if you have available raw materials batches in your Product Manager account. Similarly, if you intend to use the pack-out feature to manage packaging dispense, you will require packaging item batches to be correctly set up. Unless you have configured your Product Manager account otherwise, you will require **approved** batches with **sufficient inventory**.

Refer to the section of the user guide covering raw materials and batches for detailed information.

Prevent dispense of expired batches

For each raw material and packaging item batch that you enter, you can optionally configure a test of type 'Done' that will cause the batch to be changed on a specified date from 'Approved' status to any designated status, thus making the batch unavailable for dispense once it has expired or is too close to its expiry date.

Please refer to the section of the guide covering testing and QA for further details.

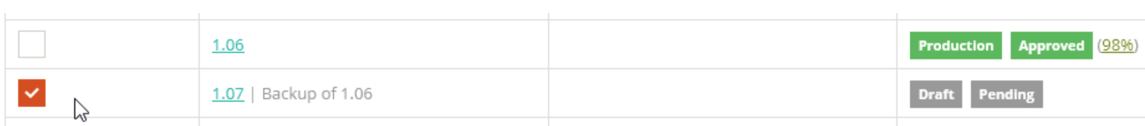
Backup/restore formula

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 to ensure traceability from batch to batch of your product.

It is therefore important that a backup is made of the original 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 order. If you do, it is recommended that you routinely check your formulas and delete any backups that you do not require.

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



If you do not create a backup using this method, Product Manager will only back up the composition of your 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 a **production mode formula**, open the formula and click on 'Restore Composition'.

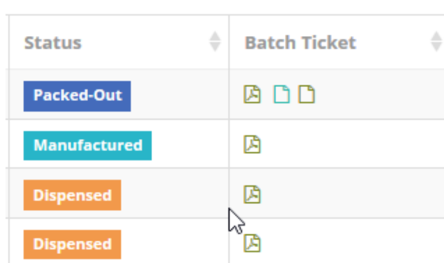
If you wish to manually perform a backup of the entire formula at any time, open the product list and click on the 'clone' icon in the 'Actions' column:

You can also clone the formula by opening it and using the 'Clone Formula' action. Using this manual method of cloning any formula does not automatically create the formula label 'Backup of x.x'. In this case 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:

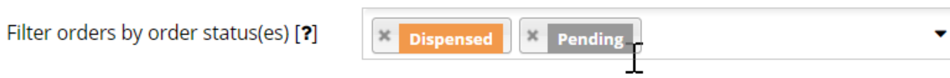
Note: Restoring a formula composition will not affect existing manufacturing orders and development batches based on this formula. During the period between performing a restore and dispensing your next order, all raw material batch associations in the formula composition will have been reset to the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

Manufacturing Order Statuses

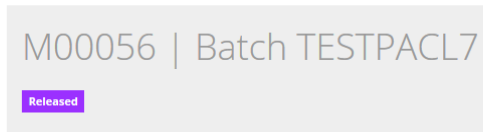
Manufacturing order statuses are either assigned automatically at certain stages of the manufacturing process or are set manually. The status of each order is displayed in the 'Status' column of the manufacturing orders list as follows:



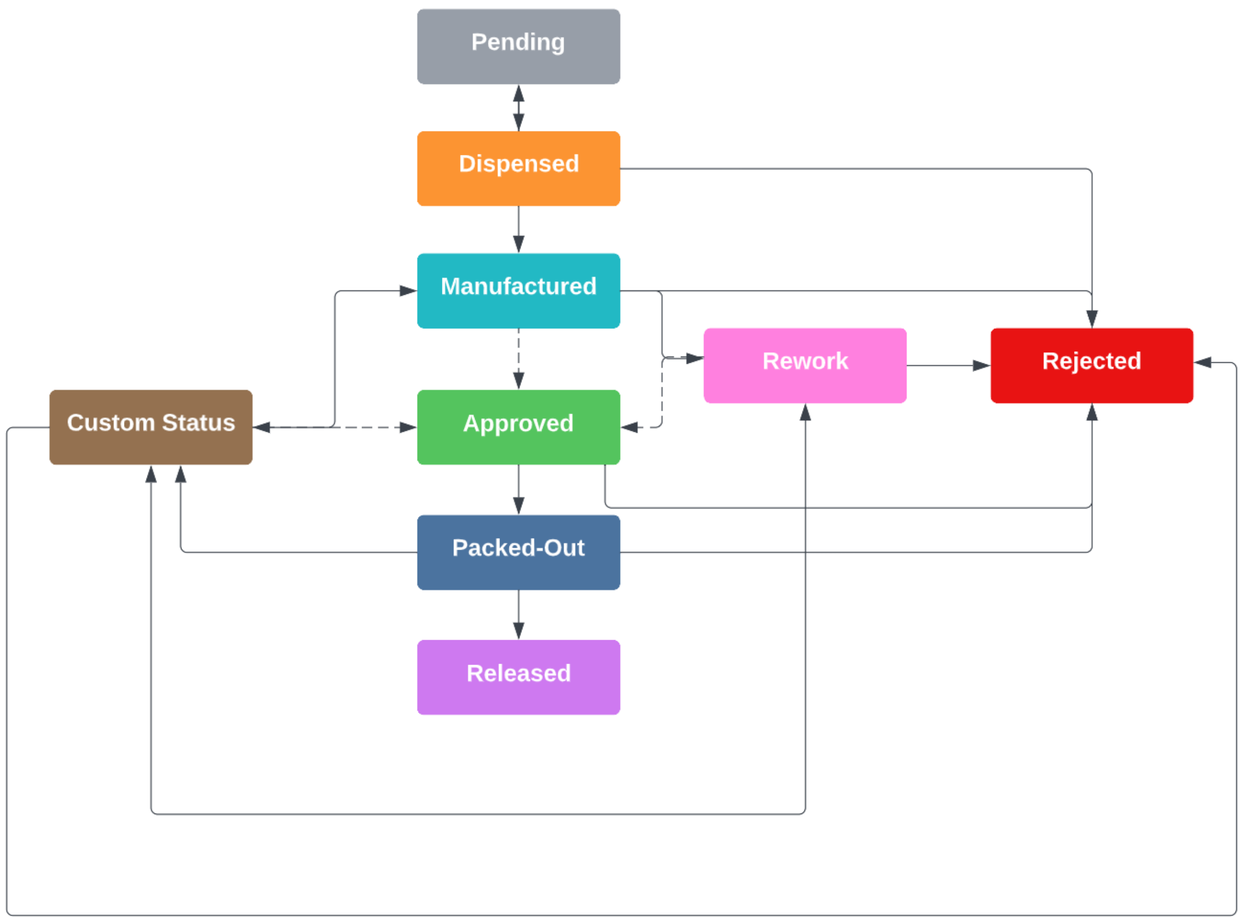
In the orders list, you can filter orders by any combination of statuses:



In the order view, you can also view the status underneath the manufacturing order number:



Manufacturing order statuses are as follows. A dashed line implies a conditional relationship, such as requiring that tests are not blocking.



Pending

The first status assigned automatically to a new manufacturing order. The order may be deleted. No custom statuses may be assigned. Tests can be configured in the ‘Configure’ or ‘Approve’ tabs.

Dispensed

Assigned automatically once the pending order has been dispensed. No custom status may be assigned. The dispense may be reversed, resetting the order to ‘Pending’ status. The dispense amounts may be adjusted in the ‘Dispense’ tab. Tests can still be added in the ‘Approve’ tab. The order may be deleted from the orders list, prompting the user to determine what should happen to any dispensed inventory.

Manufactured

Assigned manually in the ‘Approve’ tab once an order has been set to ‘Dispensed’. Once status is ‘Manufactured’ the order may have a custom status assigned (see ‘Custom statuses’, below). Orders with this status may also be set to ‘Rework’.

Once set to ‘Manufactured’ status, the batch ticket and dispense lists, along with other compliance documents are downloadable from the orders list as a batch protocol in .zip format. Tests can still be added in the ‘Approve’ tab.

Approved

Provided no tests are blocking, this status can be assigned manually in the ‘Approve’ tab once an order has been set to ‘Manufactured’ or any custom status. Tests may no longer be added to the order. The order may have a custom status assigned (see ‘Custom statuses’, below). Orders with this status may also be set to ‘Rework’.

Rework

This status can be assigned to an order with status ‘Manufactured’, ‘Approved’ or a custom status. Selecting this status unlocks the ‘Adjustments’ function in the ‘Dispense’ tab, enabling an order to be re-processed.

Packed-Out

This status is automatically assigned once an order has reached the status ‘Approved’ and the pack out function (quick or full version) has been performed in the ‘Pack-Out’ tab. Tests may no longer be added to the order. The order may have a custom status assigned (see 'Custom statuses', below). The pack-out status may only be applied once to an order.

Released

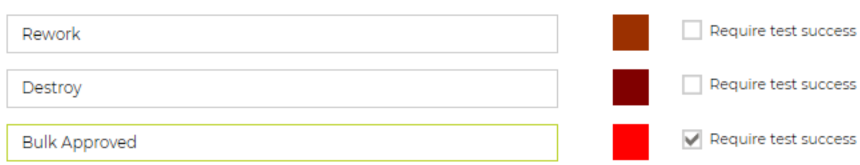
Assigned manually in the 'Pack-Out' tab once an order has been set to 'Packed-Out'. This status cannot be reversed.

Rejected

Available to manually select in the 'Approve' tab. This status cannot be reversed.

Custom statuses

Each manufacturing order may have any one of up to six additional custom statuses assigned, after the order has been set to the status 'Manufactured'. These statuses are configured by an admin user in the Product Manager settings under 'Custom Setting'.



Enter a maximum of 15 characters for the custom status name. Select whether the status is only available for selection when all tests in the 'Approve' tab of the manufacturing order have been passed, skipped or OOS accepted.

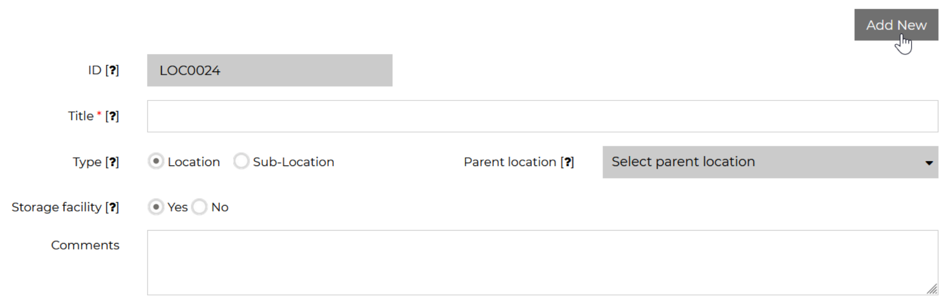
Locations

With Product Manager's locations feature you can:

- associate a raw material or packaging item batch with a location
- associate a split batch with a location
- dispense inventory in a production order by location
- generate MRP reports filtered by location
- associate a production order with a location
- filter production reports by location

You can access the locations in the main menu under 'Locations'.

To add a new location, click on 'Add New':

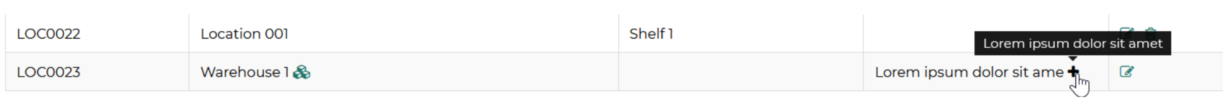


The ID of the location is auto generated, and non-editable. The 'Title' is required. The locations list view can be filtered based on the ID and the title of the location.

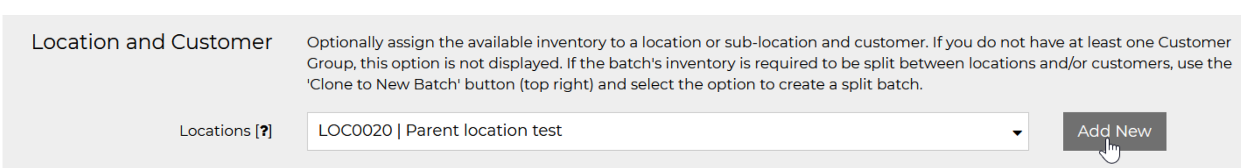
Select if the location is a sub-location. You will first need to create a location, since all sub-locations must belong to a location. If you select sub-location, selecting a parent location is required.

Select if the location is a storage facility or not. If a parent location is not a storage facility, the sub-locations belonging to the parent can still be storage facility. This is useful, if you have a factory as the main location which is not a storage facility, but there are shelves in the factory that are storage locations.

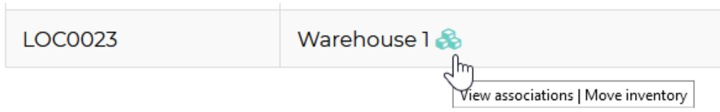
You can alternatively add a comment, that you can also view for each location in the list view.



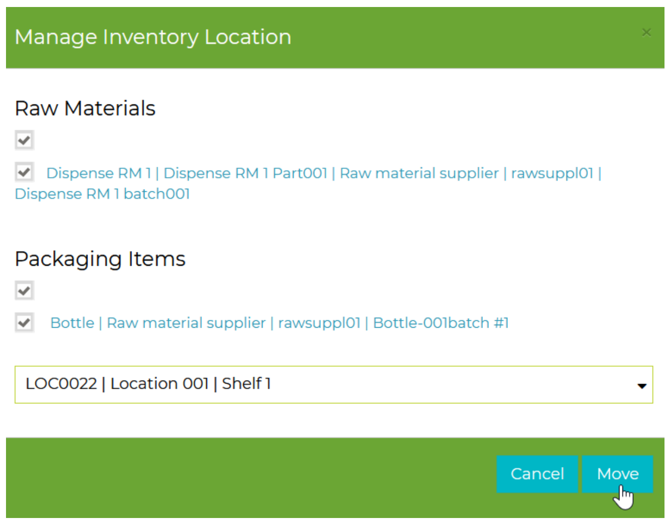
You can alternatively add locations directly when editing a raw material or packaging item. Under the 'Location and Customer' section, click on the 'Add New' button:



In the 'Locations' list view, you can also manage your inventory locations. If a location has associated inventory, the following icon appears next to it:

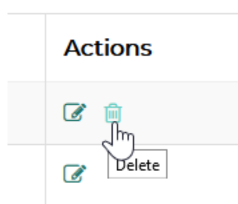


Click on the icon to view and optionally move all inventory associated with the location. Select one or more batches to move using the checkboxes and select the target location you wish to move the inventory to.

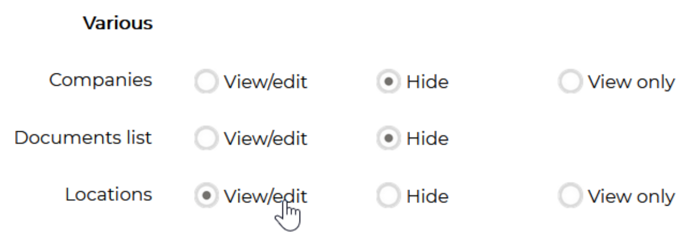


Click on 'Move' to finalize the action.

You can only delete locations, where no association exists.



Log in with the admin user and under the 'Department' settings you can control which user has permission to manage the locations:



Order Setup

A manufacturing order is created and managed in logical sequence by stepping through each tab of the order. You'll see a status change for the order as it progresses, from the initial 'pending' status through to 'packed-out' and final 'released' state. A change log enables you to trace the status changes, user and date/time.

Date:	Confirmed by:	Status:
14 Jun 2022 09:50 UTC+1	Hamid Azimi	Released
14 Jun 2022 09:49 UTC+1	Hamid Azimi	Packed-Out
14 Jun 2022 09:48 UTC+1	Hamid Azimi	Approved
14 Jun 2022 09:47 UTC+1	Hamid Azimi	Manufactured
14 Jun 2022 09:42 UTC+1	Hamid Azimi	Dispensed
14 Jun 2022 09:38 UTC+1	Hamid Azimi	Pending

A manufacturing order is set up as follows:

Add 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.

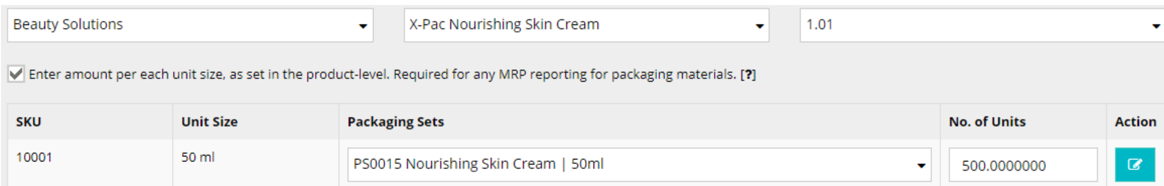
Select product and formula

Now select the product and any approved production mode formula that will be used for the manufacturing order. If you are using the customer groups feature to manage products, first select the customer group to which the product belongs, and the product and formula menus will then be populated accordingly.

<u>Note</u>: Only **approved, production mode** formulas can be selected for manufacturing.

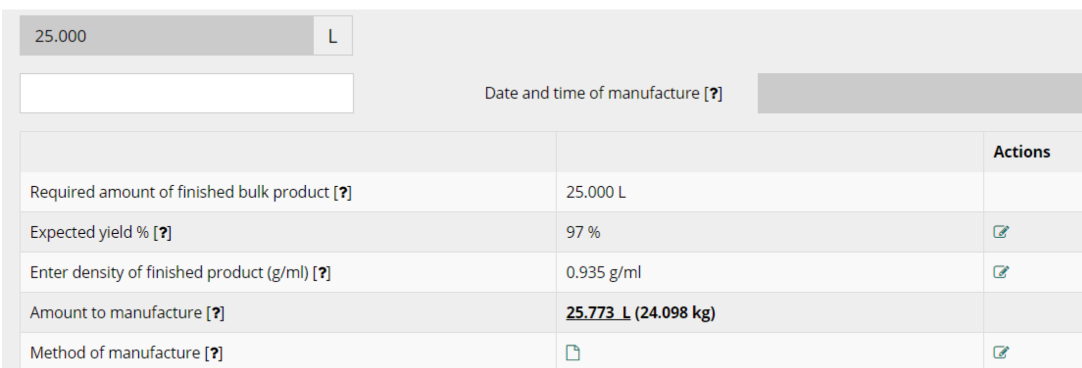
Enter amount to manufacture

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.



The total required amount of bulk product will then be auto calculated and displayed in the 'Amount of finished bulk product required' field, which is locked from editing.

Alternatively, you can leave the checkbox unchecked and instead directly enter an amount of finished bulk product required.



Set an expected yield percentage

You can set an **expected yield %** which represents the amount of finished bulk product that you estimate will be achieved, accounting for the wastage that occurs 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.

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 convert volume to weight.

Enter date due

Click in the field to select a date when the production should be performed. This date enables you to sort your orders as a production schedule. The due date also has an important role in MRP reporting.

Note: The 'date and time of manufacture' field is displayed in the 'Order Setup' tab but is view-only. Once the order has been manufactured, the actual date and time that the production of the bulk product was completed will be displayed.

Enter a location

If you have entered your production facilities as locations (see 'Locations' in the menu menu), you can optionally associate the manufacturing order with a location. This enables you to:

- Generate MRP reports based on production planning per location/facility
- Generate production reports by facility/location
- Select equipment items associated with the production facility/location

Enter additional instructions

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

It will be saved as 'pending' status and now be viewable in the manufacturing orders list.

Enter any comments

A field is available for entering any additional comments that are not displayed the batch ticket or other reports.

Save the order

Click on 'Save' to save the manufacturing order.

Configure

In the 'Configure' tab you can:

- Configure any default test groups already associated with the order
- Add and configure any additional test groups
- Adjust the method of manufacture instructions
- Associate equipment items

Add and configure test groups

Test groups can be configured for manufacturing, which can include checklists and laboratory-type tests for testing the bulk product as well as ensuring that all required procedures are followed. Test groups can also be added and configured later in the 'Approve' tab, **prior to setting the order to 'Approved' status**.

If the production team and quality manager do not approve these tests and checks, the manufacturing order cannot be approved and completed. Please refer to the testing and QA sections of the user guide for further details.

Adjust the method of manufacture

In this tab you can view and edit the instructions for manufacturing the order. This is the same information that is managed in the formula's 'Method/Manufacturing Orders' tab. If the formula is already associated with at least one dispensed manufacturing order or development batch, the stages/phases and associated raw materials can no longer be edited. You may however edit the instructions for each stage – useful as you fine-tune the production process for the product.

Associate equipment

In the 'Configure' tab you may also associate each stage/phase of the production with specific equipment items. These must first be entered under the menu item 'Production/Equipment'.

Note: The equipment feature is only available with certain Product Manager plans. If you do not have access, please contact Cosmetri support.

These equipment associations can also be created by location – useful if you have multiple production facilities. You can associate equipment items used for the entire production as well as separately associating equipment used for each stage/phase of the production. If equipment associations are created, this information will be displayed in the batch ticket and main PIF/product dossier report.

Save the order
Click on 'Save' to save the manufacturing order and update any changes to the formula's 'Method/Manufacturing Orders' tab.

Dispense

If you have read and understood the 'Raw Materials' section of this guide, you should have been able to setup your raw material 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 account's global settings. This will then allow you to dispense from all available raw materials batches.

Note: 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 material batches 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 production order can be generated.

Since your formula concentrations are entered in %w/w, Product Manager uses **weights (kg/g)** as the basis for all calculations of required inventory.

Note: Inventory amounts (including MRP reporting) in Product Manager is managed to an accuracy of three decimals in kg/L i.e., 0.000 kg/L or 1 gram, whereas dispense is managed to an accuracy of seven decimal places i.e., 0.0000000kg/L. For very small adjustments to inventory when dispensing a production order, an amount such as 1.45g

(1.0004500kg) will be rounded down to 1.000kg when adjusting the raw material inventory level)

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.

A manufacturing order with the status 'Dispensed' has all required raw material inventory reserved for that order. It is therefore important to dispense any orders to ensure that you will have sufficient inventory available for the production. While the order remains in the status 'Dispensed' it can be reversed so that inventory is added back to the available inventory amount for each dispensed raw material batch. The manufacturing order's status is changed from 'Dispensed' back to 'Pending'.

Perform inventory check

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

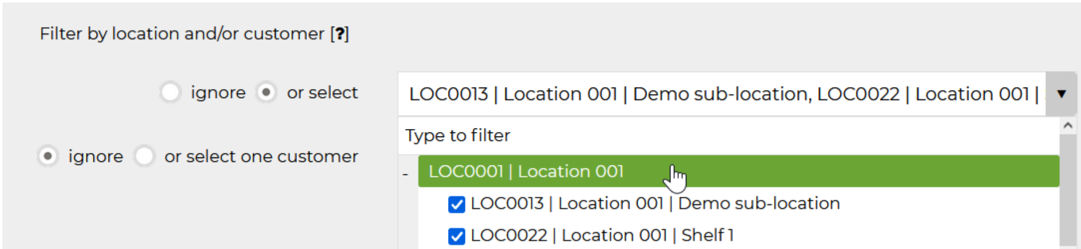
Note: if you are using Product Manager's materials resource planning (MRP) feature, you can plan for all required inventory for scheduled production and ensure that sufficient raw materials are purchased and available in time.

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.

Once it is verified that sufficient raw materials inventory is present, you can proceed with dispensing the manufacturing order.

Dispense by location and/or customer

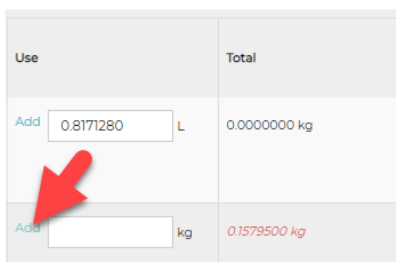
If you have associated raw material and packaging inventory with customers and/or locations, you can filter the listed raw materials in the 'Dispense' tab based on their location, and/or associated customer.



Only those batches will be displayed that are stored in the selected location(s) and/or are reserved for the selected customer.

Dispense each raw material

All required inventory must be assigned for each raw material before the order can be dispensed. Product Manager calculates the exact amount required for each raw material. In the 'Use' column, simply click on 'Add' to allocate the required dispense amount from each available raw material batch. If the selected batch has sufficient inventory, in the 'Total' column the amount will be shown as 0.0000000 kg and you can proceed to the next raw material.



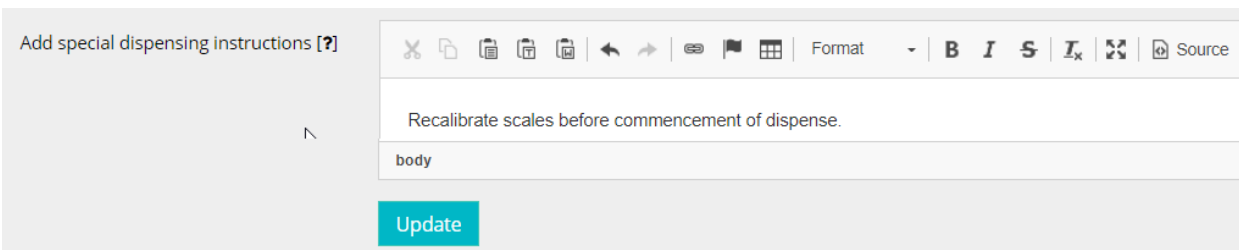
If the first batch added has insufficient inventory for the order, you can firstly click on 'Add' to dispense the remaining amount and you will then need to dispense the required balance from another batch of the **same raw material parent**. Product Manager will calculate and display how much inventory is required to be taken from the second batch. Click again on 'Add' to dispense that amount until 0.0000000 kg is displayed in the 'Total' column.

If required, you can click on 'Add' to dispense from any available second, third, etc batches until all required inventory has been allocated. **Product Manager prevents you from adding more inventory than is required.**

Product Manager will automatically update your production formula's composition to display all batches and at the %w/w values as they were dispensed, based upon the amounts dispensed from each batch of the <u>most recently dispensed manufacturing order</u>. If required, we recommend keeping a clone of the production formula as an original version that is not adjusted during the dispense of each manufacturing order.

Add any dispense comment

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



Perform the dispense

Once you have assigned all required inventory you can now dispense the order by clicking on the 'Dispense' button. If this button is not active, inventory for one or more raw materials has not been allocated and you are advised to check in the 'Total' column for any amounts indicated in red.

Once the manufacturing order has been set to 'Dispensed' status, all fields in the order's 'Order Setup' tab will be disabled from further editing, except for the following fields:

- Custom ID
- Production location
- Additional instructions
- Comments

Dispense list

Once dispensed, you'll be able to generate 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, location of the raw materials 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 **parent** 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'.

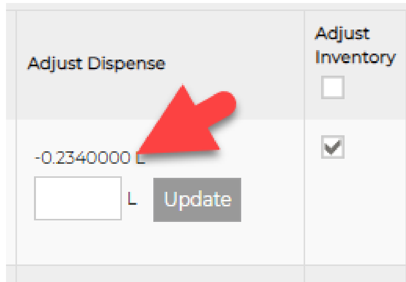
Adjust dispense

While the manufacturing order is in the status 'Dispensed' you can further adjust the actual used amounts for each raw material batch during production.

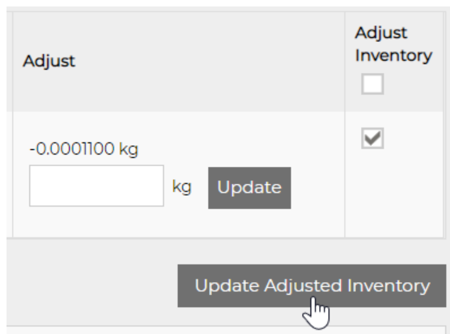
<u>Note</u>: Once you set the order to the status "Manufactured" you will no longer be able to make any adjustments.

To adjust a raw material batch, dispense amount, enter a negative or positive amount to the corresponding input field and click on 'Update'. You can continue updating the adjusted amounts incrementally.

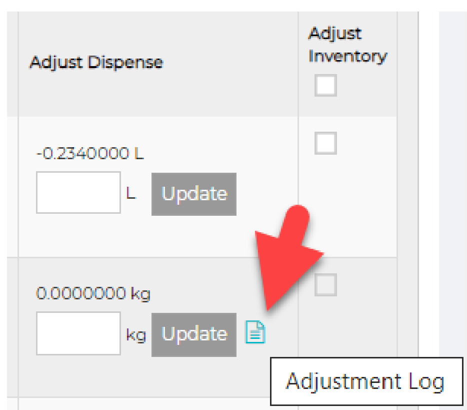
To **add inventory back** to the available inventory, enter an amount such as 0.0050000 to add 5 grams **back** to the raw material available inventory. To **deduct** an amount, enter -0.0050000. In the location shown in the view below, the total amount of the adjustment is calculated.



Check the 'Adjust Inventory' checkbox for each batch that you would like to adjust the inventory level for. Finalize the adjustments by clicking on the 'Update Adjusted Inventory'.



Once the inventory adjustments have been applied, any raw material batch that has been adjusted will have a clickable icon to view an audit log of all inventory adjustments made in during the dispense stage.



Reverse the dispense

If the manufacturing order has the status 'Dispensed' you can reverse the dispense by using the 'Reverse Dispense' button. Using this action will return all assigned inventory to the available inventory level 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.

If you adjusted your raw material batches, the adjusted inventories will also be returned to the appropriate batch if the corresponding 'Adjust Inventory' checkbox was checked.

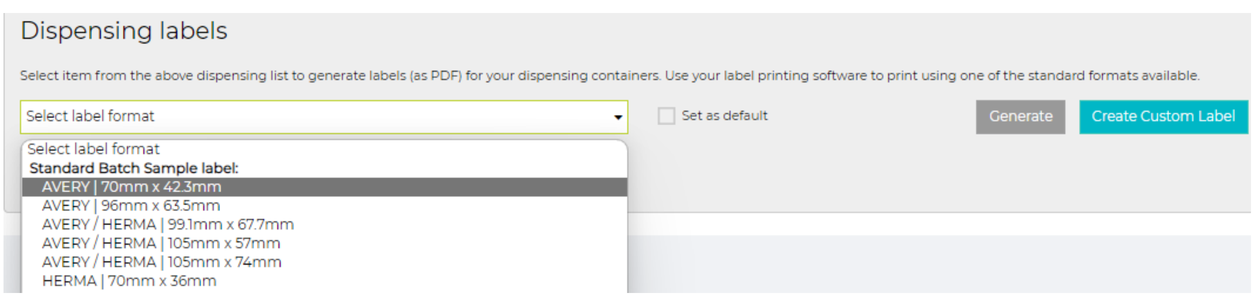
Performing a return to inventory will set the manufacturing order's status back to 'Pending'.

Dispense labels

To generate a dispense label for one or more raw material batch, first select the batches from the 'Dispense label' column.

Note: The manufacturing order must still be in the status 'Dispensed' to perform this function.

Under 'Dispensing labels', select the required label format from the standard Hermes and Avery label templates and click on 'Download' to generate the PDF labels that you can print using your label printing software.

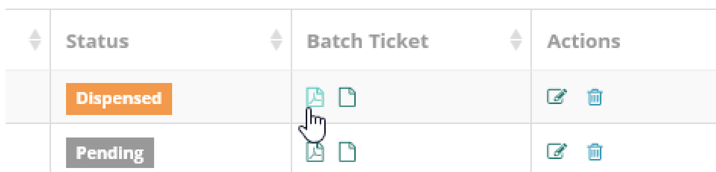


It is also possible to create labels in your exact required format – please refer to the relevant section of the user guide for details. For any default or custom label format, click on the 'Set as default' checkbox to save that option. The next time you require a dispense label, the label format will be pre-selected in the menu.

Generate a batch ticket

The batch ticket is a PDF document generated once you add the manufacturing order, including the manufacturing instructions, equipment and locations as well as the dispense list (once the order has been dispensed), as well as a list of any tests that must be performed.

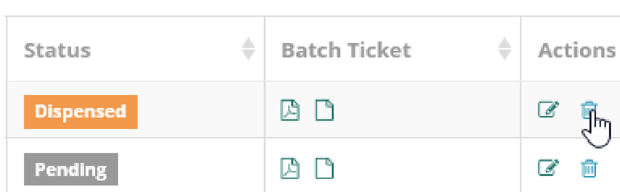
While the order is still in 'Pending' or 'Dispensed' status, the batch ticket can be downloaded from the main list of manufacturing orders, in the 'Batch Ticket' column.



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. These documents are intended to include any detailed production and storage information to supplement the information in the batch ticket. If you later update a document of type MANU, the batch protocol (see below) for the manufacturing order will include the version that was current **at the time of the manufacturing order creation.**

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 a prompt to determine what should happen to the raw material inventory allocated to the order:

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

Approve

In the 'Approve' tab of the manufacturing order, the following actions can be performed:

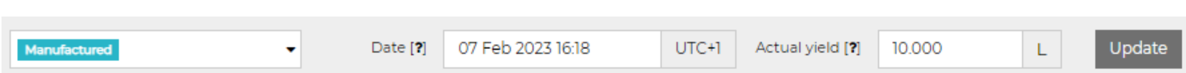
- Set order to 'manufactured' status and adjust the date and time of manufacture
- Adjust the actual yield amount
- Add and configure any further test groups
- Enter test results
- Export test results
- Manage a checklist
- Approve the manufacturing order
- Assign other available status to the order
- View a status change log
- Retain a sample of bulk product for testing
- Print a label

Several of the above functions are described in other sections of this user guide. Below are some guidelines for functions available specifically in this tab.

Set order to manufactured status

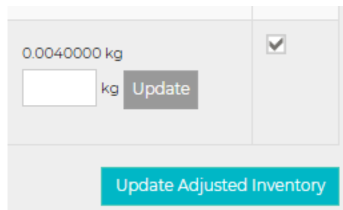
Once your order has been manufactured, select the status 'Manufactured'. **This is only possible once there are no tests or checklist items blocking approval**.

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'.

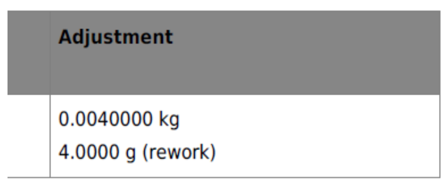


Re-process the order

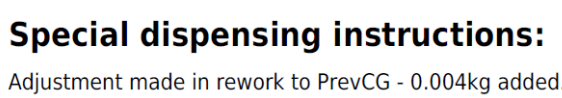
While in the status ‘Manufactured’ or ‘Approved’ the manufacturing order may be set to the status ‘Rework’. This unlocks the ‘Adjust Manufactured Order’ column in the ‘Dispense’ tab and enables further adjustments to be made to the order.



Selecting any adjusted raw materials and using the ‘Update Adjusted Inventory’ updates the dispense list. A separate section of the list details any such dispense changes.



Any additional processing steps applied to the order can be entered in the ‘Additional instructions’ field of either the ‘Order Setup’ or ‘Dispense’ tabs to include this information respectively in the batch ticket or dispense list. To obtain the updated version of these reports, locate the order in the main orders list and in the ‘Actions’ column download the updated batch protocol version as a .zip file containing these documents.



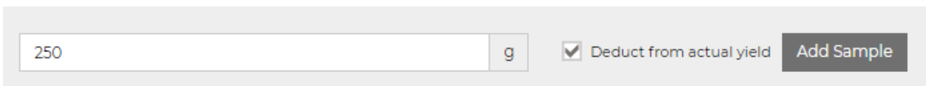
Once the re-processing has been successfully completed, the order may be set to ‘Approved’ status, provided no tests are blocking approval. Alternatively, you may set the order to ‘Rejected’ status.

Approve the order

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.**

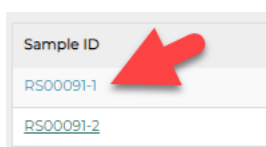
Retain sample

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' or a later status.



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

Each retained sample is assigned a unique ID by Product Manager. They are listed in the 'Retained Samples' section and in the manufacturing orders list. Click on a retained sample ID link to open the sample, where you can configure QA, such as scheduling stability tests for the sample.

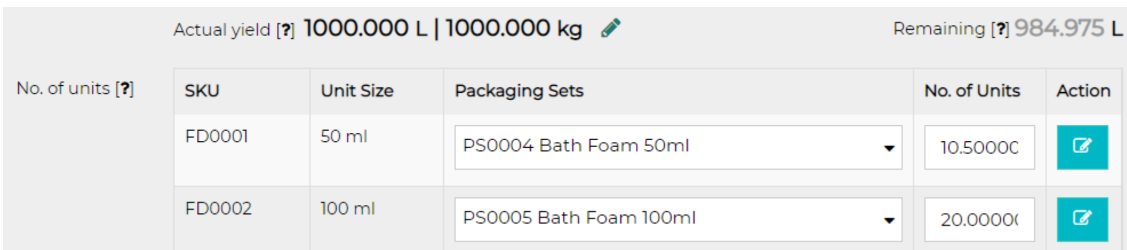


Pack-Out and Release

Once a manufacturing order has the status 'Approved', it can be packed-out in the 'Pack-Out' tab of the production 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. For manufacturing orders, you can also set up the order to require a specified number of each unit size to be filled, so that the total bulk product amount can be calculated (see '1. Order Setup'). If this method is used, in the 'Pack Out' tab the number of units filled will be already entered for each selected packaging set. If the actual number of units filled varies during pack out, the amount can be adjusted.

<u>Note:</u>
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, entering 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 '10.5', packaging inventory for an entire packaging set will be deducted, since only complete packaging sets can be utilized. In the above example for SKU FD0001, inventory for 11 complete packaging sets will be deducted from the available inventory and 525 ml of bulk product deducted (10.5 x 50 ml).

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'.

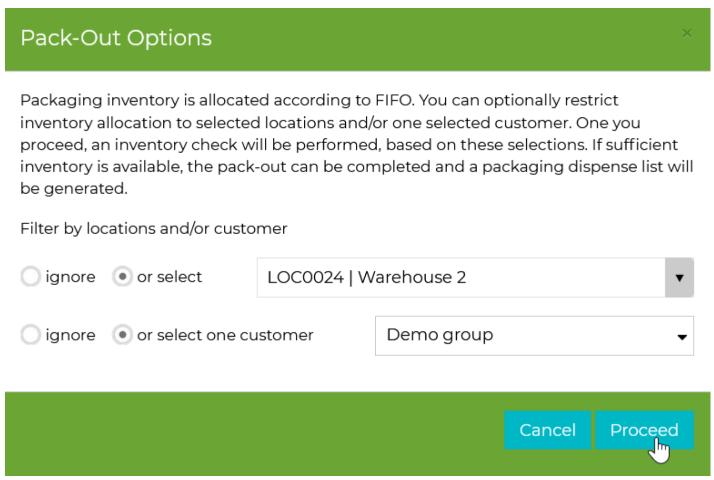
Click on 'Pack-Out' to perform the full pack-out, with inventory deducted. Click on 'Confirm' to proceed.

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.

If packaging items require approval (as set by an admin user in the Product Manager global settings), each batch must be set to 'Approved'. Warnings will be displayed for any items where approval is blocking the dispense.

Click on 'Pack Out | Ignore Packaging Sets' to pack the order out without affecting your packaging inventory.

If you select 'Pack-Out', a pop-up is displayed:



You can optionally filter by location and customer. Product Manager will deduct from the inventory of the packaging items, that can be found in the selected location(s) or associated with the selected customer.

You will find a warning if there is no inventory found for the location(s)/customer. Once any inventory warnings have been resolved and you click on 'Confirm', all packaging inventory will be deducted.

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 and any assembly instructions.

Once packed out, the production order's status will be set to 'Packed-Out'

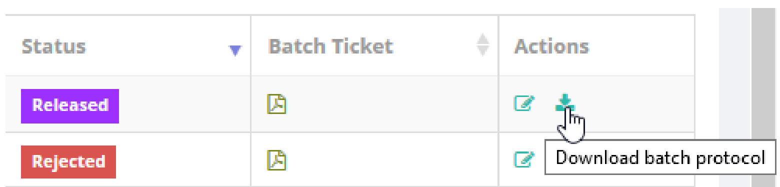
You may now complete the manufacturing order by clicking on 'Release' to confirm that a final inspection of the filled and packed-out product has been satisfactorily completed.

Release

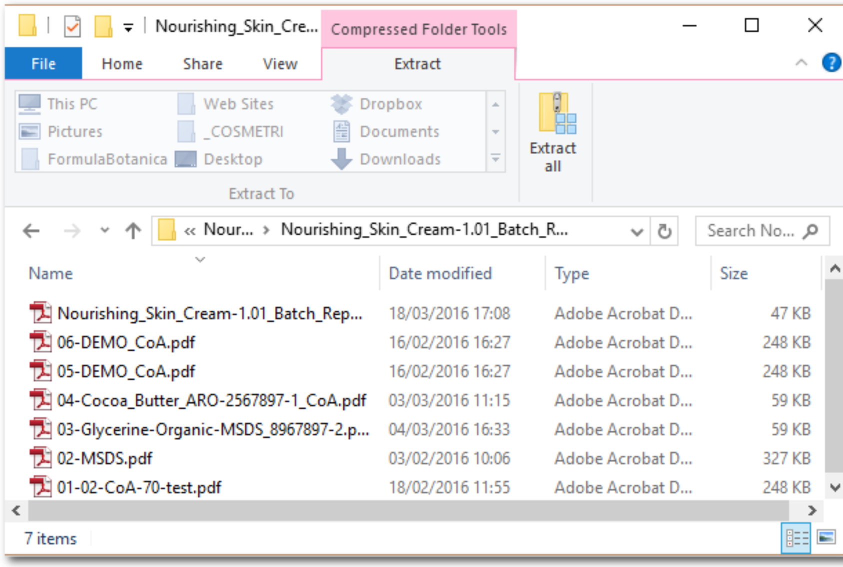
The final stage of the manufacturing process is to approve the final filled and packed-out order before it is released to market. This step is performed in the 'Pack-Out' tab by clicking on the 'Release' button for any order with the status 'Packed-Out'.

Download Batch Protocol

Once a manufacturing order has been set to the status 'Manufactured' or later status, 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 (raw materials and packaging) and associated raw materials documents (e.g., CoA, SDS), as well as 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

Once the pack-out stage is performed, the packaging dispense list will be added to the batch protocol.

Production: Development Batches (R&D Samples)

Introduction

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

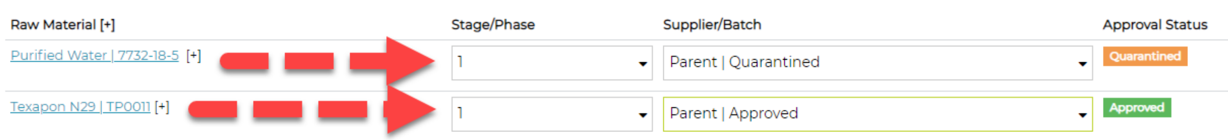
- select any formula version (draft or production) with any approval status
- full control of which raw materials to dispense, including parents
- enter amounts required in g/ml for small sample quantities produced
- dispense using raw materials with ‘sample batch’ status only (optional)
- ignore inventory option during dispense
- no rework option available
- no ‘Release’ status
- optional, simplified pack-out stage
- select any packaging set for pack-out
- packed-out order can be re-approved (approve bulk + packaging)
- no BBE date set for development batches
- no auto backup/restore of formula composition
- separate non-packed-out and packed-out approval statuses
- authorize users who may set approval statuses only for development batches
- create custom approval status specifically for development batches
- assign test groups specifically used for development batches

This section of the guide covers some of the important differences when working with development batches. For a general background in using the production features of Product Manager, please first refer to the previous section on manufacturing orders.

Enter Method of Production

You can optionally enter separate instructions for how to produce development batches, by using the Formula 'Method' tab, 'Development Batches' sub-tab. This information is used in the batch ticket for the instructions on how to produce the sample, which usually will differ from method used for manufacturing orders. By default, the method configured on the 'Method/Manufacturing Orders' tab is also used for development batches.

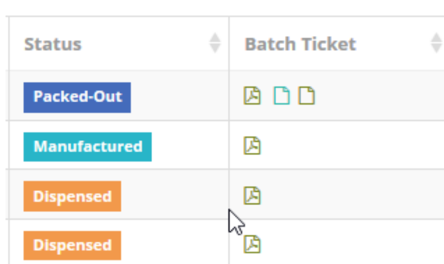
The development method phases/stages are not linked with the formula's composition. If you create different phases/stages with different raw material associations, the following data in the formula is not updated.



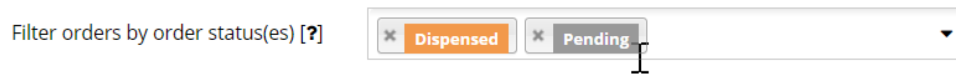
Check the 'Use this version for development batches (samples) production method' checkbox to use this method when producing development batches. This data will be used as the basis for the development batches batch ticket but won't be used in the Product Information File (PIF) report and in the batch protocol, which instead use the data entered in the 'Manufacturing Method' tab.

Order Statuses

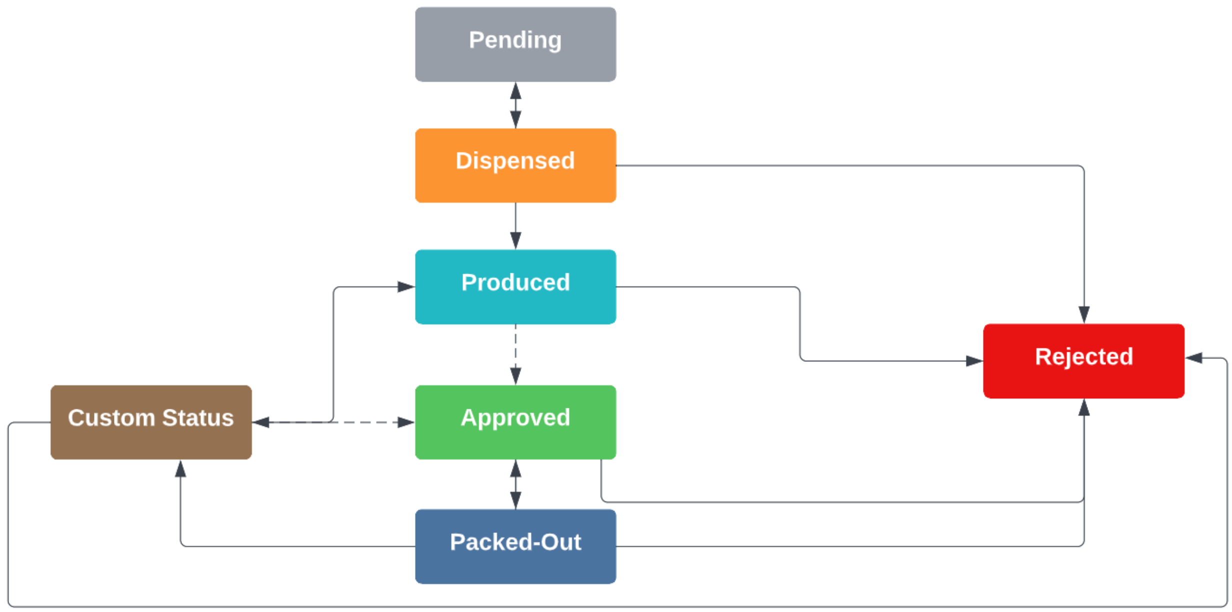
Development batch order statuses are either assigned automatically at certain stages of the sample development process or are set manually. The status of each order is displayed in the 'Status' column of the development batch orders list as follows:



In the orders list, you can filter orders by any combination of statuses:



Development batch order statuses are as follows. A dashed line implies a conditional relationship, such as requiring that tests are not blocking.



Pending

The first status assigned automatically to a new order. The order may be deleted. No custom statuses may be assigned. Tests can be configured in the 'Configure' or 'Approve' tabs.

Dispensed

Assigned automatically once the pending order has been dispensed. No custom status may be assigned. The dispense may be reversed, resetting the order to 'Pending' status. The dispense amounts may be adjusted in the 'Dispense' tab. Tests can still be added in the 'Approve' tab. The order may be deleted from the orders list, prompting the user to determine what should happen to any dispensed inventory.

Produced

Assigned manually in the 'Approve' tab once an order has been set to 'Dispensed'. Once status is 'Produced' the order may have a custom status assigned (see 'Custom statuses', below).

Once set to 'Produced' status, the batch ticket and dispense lists, along with other compliance documents are downloadable from the orders list as a batch protocol in .zip format. Tests can still be added in the 'Approve' tab.

Approved

Provided no tests are blocking, this status can be assigned manually in the 'Approve' tab once an order has been set to 'Produced' or any custom status. Tests may no longer be added to the order. The order may have a custom status assigned (see 'Custom statuses', below).

Packed-Out

This status is automatically assigned once an order has reached the status 'Approved' and the pack out function (quick or full version) has been performed in the 'Pack-Out' tab. Tests may no longer be added to the order. The order may have a custom status assigned (see 'Custom statuses', below). The pack-out status may only be applied once to an order.

If you are testing your sample batch along with packaging, after pack-out you may assign the status 'Approved' to approve the batch and packaging in combination. Alternatively, you may set the order to 'Rejected' or an appropriate custom status.

Rejected

Available to manually select in the 'Approve' tab. This status cannot be reversed.

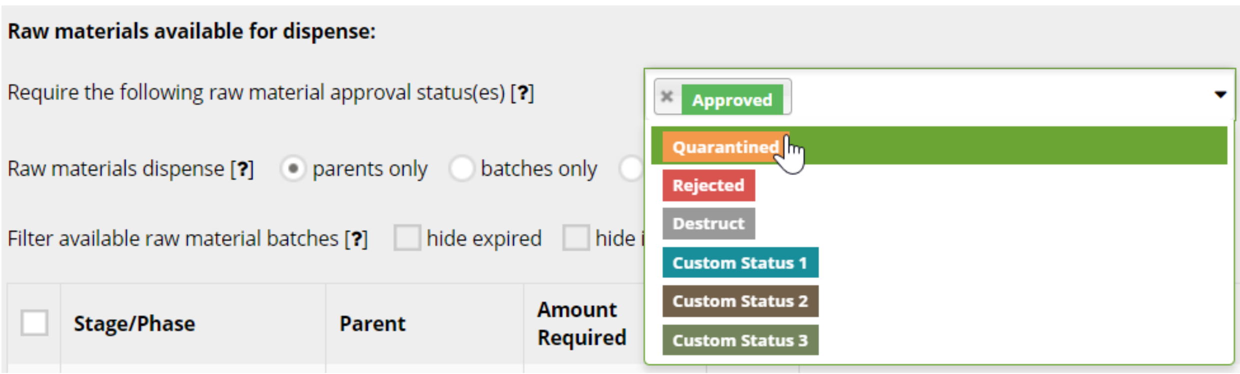
Custom statuses

Each development batch order may have any one of up to six additional custom statuses assigned, after the order has been set to the status 'Manufactured'. These statuses are configured by an admin user in the Product Manager settings under 'Custom Settings'.

Enter a maximum of 15 characters for the custom status name. Select whether the status is only available for selection when all tests in the 'Approve' tab of the development batch order have been passed, skipped or OOS accepted.

Dispense

Whereas for manufacturing orders you may only dispense approved raw material batches, for development batches you can 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**.

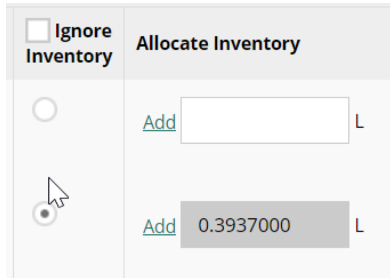
Select 'parents only' to ignore inventory and batches. If either option that includes batches is selected, all batches will be displayed for each raw material. You may then set the batch filters to determine which batches are listed and available for dispense.

- Hide batches that are expired
- Hide batches that have no inventory
- Dispense only from batches reserved for R&D samples ('sample' status)

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.

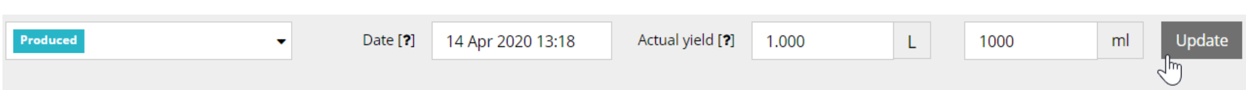


Click in the 'Ignore Inventory' checkbox in the column header to ignore inventory for all batches. If multiple batches are available for any raw material, the **first batch** listed will be selected.

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.

Approve

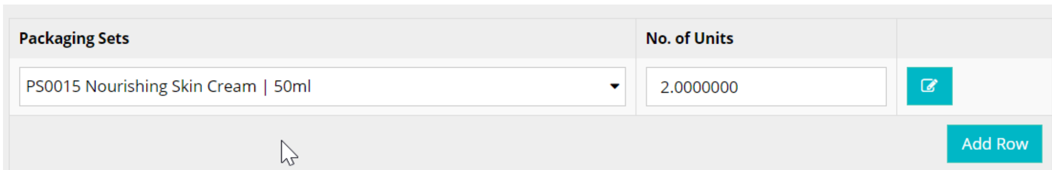
Once your order has been produced, you must first set the order's status to 'Produced' and enter the date of production before you can approve the order or assign any custom status. You may also optionally update the 'Actual yield' value. Click on 'Update' to update the order status.



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.



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.

Download Batch Protocol

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 and packaging.

Setting up Product Manager for MRP

To utilize the MRP features of Product Manager, you'll need to first schedule manufacturing orders or development batch orders 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 time period. Please refer to the respective section of this guide for details of how to create production orders.

View of a pending manufacturing order:

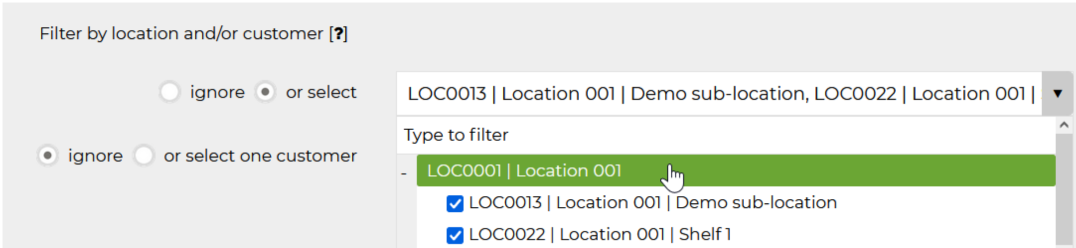
Order No.	Batch No.	SAP ID	Date Due	Date Manufactured	Product	Formula	Retained Samples	Amt Required	Actual Yield	Status	Batch Ticket	Actions
M00139	3423423423		21 May 2020		Nourishing Skin Cream	1.01		56.000 L		Pending		

Raw Materials MRP

This feature enables accurate planning of raw materials inventory required for your future scheduled production, reporting the available inventory and the amount required to be purchased to fulfill all planned production orders.

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.

You can configure the MRP report by locations and/or customers to only include inventory allocated to these.



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.

Note: Raw materials inventory can be designated for use only for samples development. This inventory may only be dispensed for development batches and not for manufacturing orders. Select this option in the raw material batch inventory section of the '1. Information' tab.

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 include 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.

Packaging MRP

Reporting of required packaging materials inventory for planned manufacturing orders functions almost identically to raw materials MRP described in the previous section. 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 manufacturing orders

First create manufacturing orders with the status 'Pending', entering the no. of units of associated packaging sets required 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.

☑ Enter amount per each unit size, as set in the product-level. Required for any MRP reporting for packaging materials. [?]

SKU	Unit Size	Packaging Sets	No. of Units	Action
10001	50 ml	PS0015 Nourishing Skin Cream | 50ml	15.0000000	
10002	250 ml	PS0016 Nourishing Skin Cream | 250ml	30.0000000	

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.

View MRP report

Based on the report criteria you have set, a list of all raw materials or packaging inventory will be displayed, listed by trade name and part code/ID.

Under the 'Inventory' columns of the report, the 'Total Amount' displays the total required amount of the raw material for all listed production orders. The 'Available' value is the amount of inventory currently held, and the 'Required' value shows the shortfall of inventory that must be purchased.

	Inventory		
Amount	Total Amount	Available	Required
1.1111000 kg	1.9953932 kg	0.1040000 kg	1.8913932 kg

Export MRP data

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 displayed. The 'list by order' option will generate a full report.

For importing into 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:

11	Trade Name	Part Code/ID	Total Amount	Available	Required	Unit
12	ABIES ALBA LEAF OIL	90028-76-5	108.6418667	1124.692	5.7	L
13	ABIES ALBA LEAF WAX	90028-76-5	24.44442	915.556	2.9	kg
14	Almond Oil (Organic)	OIL580	10	0	10	L
15	Avocado Oil Refined	OIL686	0.45	0	0.45	L
16	Calendula Flower Oil	8001-21-6	2.1439296	0	2.14393	L
17	Cetyl alcohol 30/70	36653-82-4	2.382144	0	2.382144	L

Note: You will need to remove the lines preceding the main data in the csv, which includes a report summary.

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 manufacturing or development batch order. A summary of each product (total yield and units filled) as well as details of each order can be exported in csv, pdf or xlsx file formats.

The following options are available:

Products
Manually select any products to include in the report or select all. If you use customer groups, you can select an available group to add the associated products.

Location
If you associate manufacturing orders with locations, you can choose any available locations to report on production output by production facility. The locations setting does not apply to development batches.

Approval statuses
For manufacturing orders, select any combination of approval statuses. If no approval statuses are selected, the default report will include all manufacturing orders.

Reporting period
Select the timeframe for the production report by selecting a start and end date or select 'all' to cover all dates. These dates are based on the date of production or manufacture set for each order.

Export production report

Select the export option as follows:

- Manufacturing orders report (pdf only)
- Manufacturing orders data and report (.zip containing pdf, csv and xlsx files)
- Development batches report (pdf only)

- Development batches data and report (.zip containing pdf, csv and xlsx files)

If any of the export buttons are not active, no data exists based upon the current products selection, approval statuses and/or time frame.

Safety, Toxicity and Purity

Introduction

Product Manager enables management of safety, toxicity and purity of the formula, including:

- toxicological and safety data at ingredient and raw material level
- safety data entered for the product and formula
- auto-calculate SED, MoS and max daily amount applied values in formula
- calculation of ISO 16128 natural and organic content
- calculation of contaminants such as heavy metals and bacterial content
- create a cosmetic product safety report (CPSR) or safety assessment
- export all safety, toxicity and purity data for the product and formula

It is recommended to familiarize yourself with this section before reading the section of this guide covering the cosmetic product safety report (CPSR) – or safety assessment. The safety and toxicity data you enter is available for selection to add in the relevant sections of the CPSR.

Formula Safety & Properties

Access the '2.3 Safety & Properties' sub-tab under the formula 'Specification' tab. Below are guidelines for some of the fields found in each section.

Safety properties - product & formula

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. This field can also store formatted data.

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)

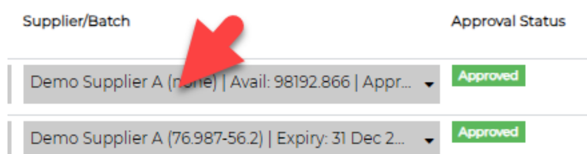
Use this field to keep any notes that you do not wish to be included in the safety report, such as instructions to other team members, notes or reminders.

Safety properties – raw materials

This section of the tab displays purity and toxicity related values entered for each raw material and calculated in the formula, based on the %w/w of the raw material in the formula. It can include values such as:

- ISO 16128 natural and organic (available by default)
- Heavy metals and other contaminants
- Trace allergenic items such as peanuts
- Bacterial content
- CITES

Note: If you use raw materials batches in Product Manager, the calculations will be based on the values entered for the parent or batch that is currently associated with the formula, as displayed in the following column of the formula's composition:



Please refer to the section of the guide covering raw materials for how to enter the values for each raw material so that they can be calculated in the formula level.

Safety Properties - Raw Materials

Hide columns

Edit Raw Material Values | Manage Default Items

Raw Materials					ISO 16128 (Organic and Natural Content)					
Edit Values	Trade Name	Part Code/ID	Batch No.	%W/W	NI	NOI	OI	OOI	Heavy metal content	Bacterial content
	Purified Water	RM001	none	77.6000000	0.47 (46.5600000%)	0.47 (46.5600000%)	0.31 (31.0400000%)	0.16 (15.5200000%)	0.677 mg/kg	trace
	Texapon N29	TP0011	76.987-56.2	9.5002850	0.06 (5.7001710%)	0.02 (1.9000570%)	0.01 (0.9500285%)	0.02 (1.9000570%)	0.061 mg/kg	0.00011 CFU/g
	Texapon N29	TP0011	12332124	5.4997150	0.05 (5.4997150%)	0.03 (2.7498575%)	0.04 (3.8498005%)	0.04 (4.3997720%)		
	Schloridex	SC004	678.341	4.0000000	0.00 (0.4000000%)	0.02 (2.0000000%)	0.02 (2.0000000%)	0.04 (4.0000000%)		
	Requanol	CSHL543	76-567-0987	2.0000000	0.00 (0.2000000%)	0.00 (0.4000000%)	0.01 (0.6000000%)	0.01 (0.8000000%)	0.020 mg/kg	0.00086 CFU/g
	Citric Acid	CA28876	123-567	0.5000000	0.00 (0.0500000%)	0.00 (0.1000000%)	0.00 (0.1500000%)	0.00 (0.3000000%)	trace	trace
	Triethex 09	TRX09	4987-67-3	0.5000000	0.01 (0.5000000%)	0.00 (0.0000000%)	0.00 (0.0000000%)	0.00 (0.2000000%)	0.000 mg/kg	trace
	Summer Scent X1	SCEX1	35.789/1	0.3000000	0.00 (0.3000000%)	0.00 (0.0600000%)	0.00 (0.2100000%)	0.00 (0.0900000%)	0.006 mg/kg	0.00036 CFU/g
	PrevCG	KCG01	345-378.2	0.1000000	0.00 (0.0500000%)	0.00 (0.0700000%)	0.00 (0.0900000%)	0.00 (0.0100000%)		
Formula										
			100.0000000		0.59 (59.2598860%)	0.54 (53.8399145%)	0.39 (38.8898290%)	0.27 (27.2198290%)	0.764 mg/kg	0.00133 CFU/g
		Max. daily amount applied (g)	10.000						0.008	0.01330
		(mg)							8.000	13.30000

Export Safety Data

If a value has been entered for a raw material in the formula, its final value in the formula will be calculated by considering the %w/w of the raw material in the formula composition. ISO 16128 values are displayed by default for all formulas. Other values are only displayed if present in the formula.

Values will be calculated using the unit that was configured for the property. If a property has the option to enter its presence as 'trace' instead of a quantity, the value 'trace' will be displayed. When summing the total amount present in the formula, trace amounts are therefore not included in the calculation.

Heavy metal content	Bacterial content
0.677 mg/kg	trace
0.061 mg/kg	0.00011 CFU/g

ISO 16128 naturality indexes

Each value is calculated for the formula, showing the value per each raw material. The values are each rounded to the nearest two decimal places.

NI: Natural Index

NOI: Natural Origin Index

OI: Organic Index

OOI: Organic Origin Index

ISO 16128 (Organic and Natural Content)			
NI	NOI	OI	OOI
0.47 (46.5600000%)	0.47 (46.5600000%)	0.31 (31.0400000%)	0.16 (15.5200000%)
0.06 (5.7001710%)	0.02 (1.9000570%)	0.01 (0.9500285%)	0.02 (1.9000570%)
0.05 (5.4997150%)	0.03 (2.7498575%)	0.04 (3.8498005%)	0.04 (4.3997720%)
0.00 (0.4000000%)	0.02 (2.0000000%)	0.02 (2.0000000%)	0.04 (4.0000000%)
0.00 (0.2000000%)	0.00 (0.4000000%)	0.01 (0.6000000%)	0.01 (0.8000000%)
0.00 (0.0500000%)	0.00 (0.1000000%)	0.00 (0.1500000%)	0.00 (0.3000000%)
0.01 (0.5000000%)	0.00 (0.0000000%)	0.00 (0.0000000%)	0.00 (0.2000000%)
0.00 (0.3000000%)	0.00 (0.0600000%)	0.00 (0.2100000%)	0.00 (0.0900000%)
0.00 (0.0500000%)	0.00 (0.0700000%)	0.00 (0.0900000%)	0.00 (0.0100000%)
0.59 (59.2598860%)	**0.54 (53.8399145%)**	**0.39 (38.8898290%)**	**0.27 (27.2198290%)**

For each raw material, a more precise value is displayed as a percentage in parentheses. These values are summed at the bottom of each column to show the final score for the formula for each of the ISO 16128 indexes – displayed as a rounded down value and percentage.

Safety properties – ingredients (chemicals)

In this section of the tab, you can access the safety, toxicity and GHS/CLP data for each ingredient (chemical) 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.

The table view displays a summary of this ingredient safety data, including aggregating the %w/w of ingredients present in multi-chemical raw materials. The columns of data are:

- Ingredient (INCI)
- CAS no.
- Min %w/w in formula
- Exact or max. %w/w in formula
- Function(s) performed by the ingredient/chemical in the formula
- GHS Hazards
- Max. Daily Amt. (g)
- LD_{50}
- NO(A)EL
- SED (systemic exposure dosage)
- MoS (margin of safety)

To access the ingredient data (chemical properties, GHS, safety and toxicity) for an ingredient listed in the 'Safety' tab, click on ingredient name in the 'Ingredient' column. This opens the ingredient panel.

Using this view, you can view and/or edit the following ingredient safety data required for safety calculations and typical values required for safety assessments:

LD_{50}

Lethal dose (LD_{50}) 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.

In the section 'Safety & Toxicity" of the ingredient panel, the ingredient may have a table of toxicity values published from certain public sources for reference purposes. If you require a specific data to be used for the ingredient, enter an abbreviated value in the LD_{50} field. This data will be displayed in the LD_{50} column for the table displayed in this section. This data is then available for export.

NO(A)EL

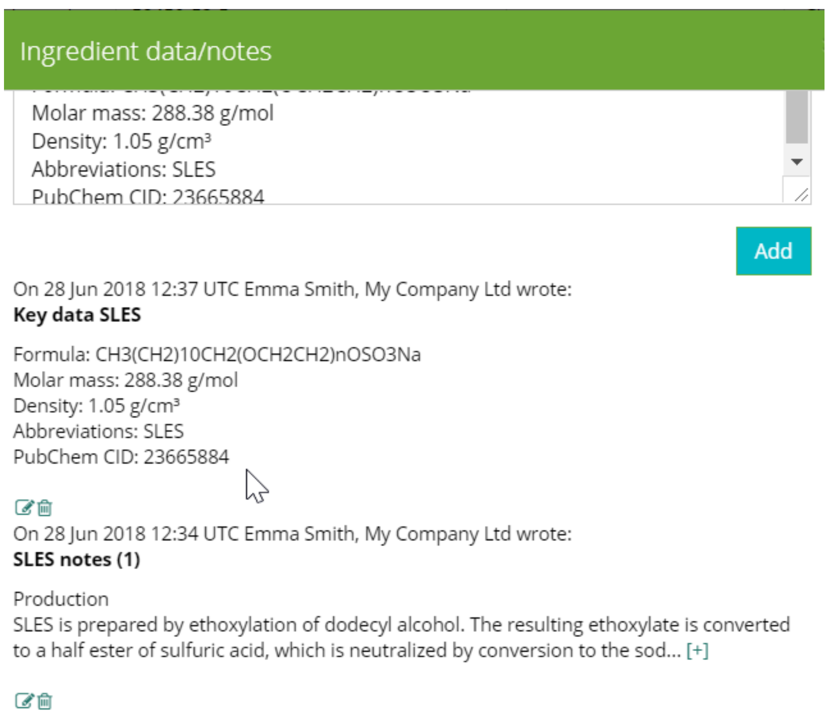
NO(A)EL stands for 'no-observed adverse effect level' and is a value measured in mg/kg bw/day required for calculating the Margin of Safety (MoS). It is determined or proposed by qualified personnel (pharmacologist, toxicologist) depending on the study, drug indications and its pharmacological therapeutics 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.

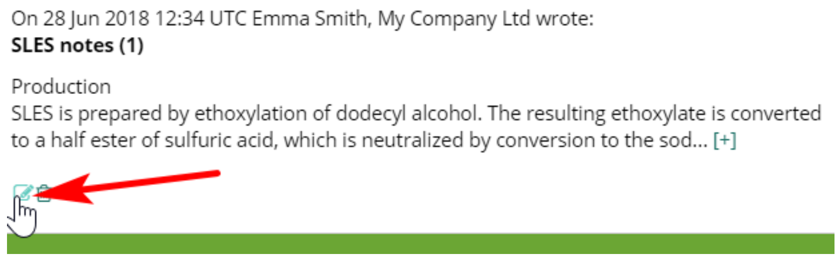
Ingredient notes

Keep comprehensive additional notes for the ingredient:



Click on 'Add' to add a new note to the ingredient.

The user, date and time stamp are included with the note. Open any of the notes by clicking on the following icon:



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.

Summary & Safety Calculations

Having confirmed that your 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:

Ingredient

The INCI (International Nomenclature of Cosmetic Ingredients) name of the ingredient.

CAS No.

Chemical Abstracts Service (CAS) number associated with the ingredient.

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.

GHS Hazards

Displays any GHS hazard 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}

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:

$$\text{SED} = \mathbf{A}\ (\text{mg/kg bw/day}) \times \mathbf{C}\ (\%)/100 \times \mathbf{DA_p}\ (\%)/100$$

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[3]

Margin of Safety (MoS)

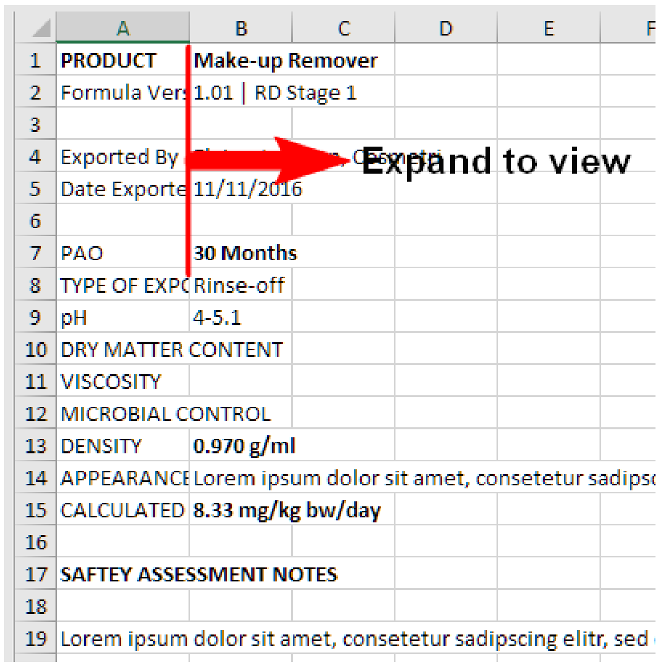
The MoS is calculated as follows:

MoS = NO(A)EL/SED

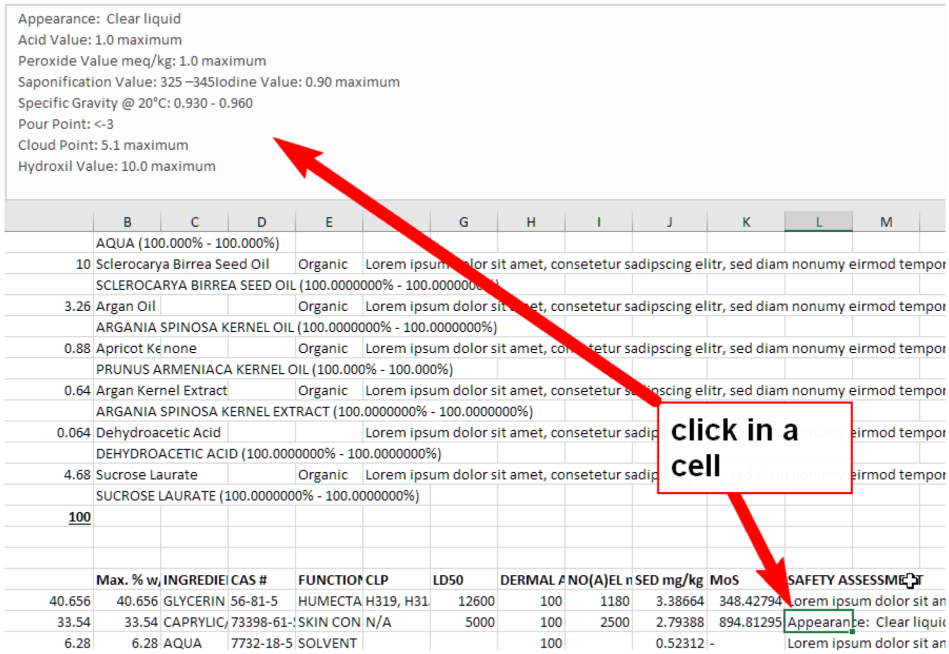
If the value is <100 this will be displayed in red in the table.

Export Safety Data

Once all safety data has been entered and confirmed, you can export the entire data to a .xls (Microsoft Excel) file by clicking on 'Export Safety Data'. Once opened, you may need to expand the width of some of the columns in the .xls spreadsheet to view the safety data:



Click in a cell to view the full data in the display field, as follows:



Additional Safety-Related Test Data

Along with the exported safety data any safety-related tests that you have performed such as challenge tests, can be exported for inclusion in your safety assessment. Typically, these will be tests that have been applied to the formula (in the 'Formula/QA' tab), any development batches (samples) and for each raw material.

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.

Safety Assessments / CPSR

Introduction

A cosmetic product safety report (CPSR) or safety assessment can be generated for any formula in Product Manager. For EU, UK and ASEAN compliance, the Cosmetic Product Safety Report (CPSR) is a core requirement of the cosmetics regulations. The CPSR Parts A + B can be compiled in Product Manager and included in the main PIF report.

A Product Manager user must be assigned safety assessor rights by an account administrator, including uploading a PDF document confirming their credentials and eligibility to act in this role. This document is included in Part B (section 4) of the CPSR.

A safety assessor in Product Manager may have their own company details and logo used in the header area of the safety assessment, or for internal safety assessors, the default company details, and company logo associated with the Product Manager account can be used.

Each safety assessment may be associated with one or more compliance zones. Clone an existing safety assessment to create the different versions.

For several of the sections of the safety assessment, relevant data for the product, formula and raw materials can be selected. If these data field are not locked, the safety assessor may also edit the data and save it, prior to insertion in the safety assessment. A snippets tool enables standard phrases to be saved for each section and re-used, thus saving time and ensuring consistency. Certain data can be selected and displayed in table form, with the option to select which columns of data to display.

Each section of the safety assessment must be approved by the safety assessor. When all sections are completed and approved, the entire safety assessment can be approved and signed.

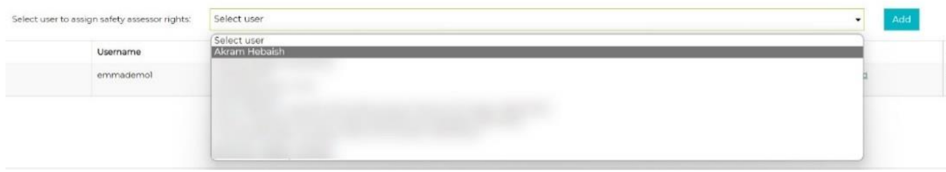
The safety assessor may sign the safety assessment by uploading a graphic signature file. Alternatively, the safety assessment can be exported as .pdf, electronically signed and then re-uploaded to Product Manager for inclusion in the PIF.

Safety assessor users

Only users authorized to act as safety assessors may create and edit safety assessments in Product Manager. These permissions are set by an administrator user, in Product Manager Settings/Default Settings/Safety Assessors.

Select user and Edit Safety Assessor Details

Select an existing user using the following menu and click on 'Add':



Click on the 'Edit' action to edit the details and set the required options for the user. Options include the following:

- First Name and Last Name*
- Email address
- Company details
- Company logo (if safety assessor's own company is selected).

* Updating this information will also update the user's name associated with their profile.

If the option 'Use safety assessor's own company' is selected, a separate company logo may be uploaded. All common graphic file formats are supported. The logo must be between 225px and 250px wide.

Safety assessor credentials

Click on the 'Enter credentials' action to open a window to enter the credentials and qualifications for the safety assessor user. This data will be automatically included in the CPSR Part B section 4, as an integral part of the safety assessment. You may format the text entered in this window or copy/paste data from a word-processing document, including data in table format. Use the formatting options to adjust the display of the data before clicking on 'Save'.

Note: It is recommended to generate a test CPSR in Product Manager to check that the safety assessor's credentials are correctly displayed in the report.

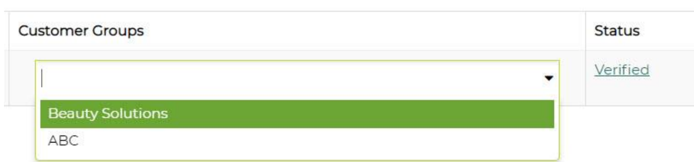
Verify the safety assessor

Click on the 'Safety assessor status' action set the status for the user. The default status after adding a new user is 'Pending'. To set the user as a verified, check the confirmation checkbox, select 'Verified' as the status and then click on 'Confirm'. The 'Verified' status will now be displayed for the user and they will now be able to create and manage safety assessments in Product Manager.

Customer groups

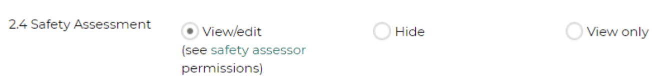
Check that the safety assessor user has been added to any customer groups, ensuring that they can access any required products.

Note that the customer groups assigned to the user assign them rights to access products in these groups for all areas of Product Manager and not only in their capacity as a safety assessor.



Departments settings

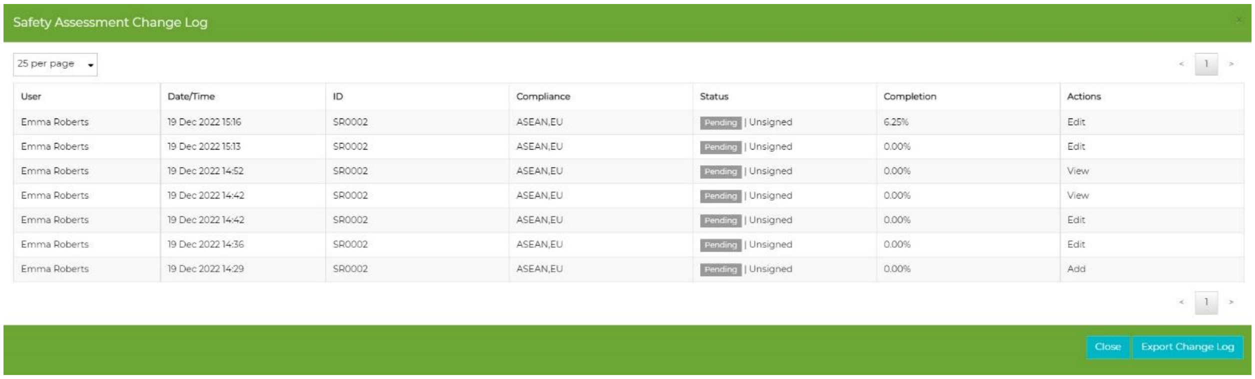
To ensure that your Product Manager users have the required access to the safety assessments feature, the following department setting under 'Formulas' must also be correctly configured:



If a user is associated with a department that has the setting 'view/edit', to have edit permissions they must also be verified as a safety assessor, as described in the previous section.

Change log

For any formula, in the 2. Specification/2.4 Safety Assessment tab you can click on 'Change Log' to view a detailed history of all actions performed for any safety assessments associated with the currently viewed formula.



Click on 'Export Change Log' to export the current change log data as a .pdf report.

Add safety assessment

A verified safety assessor user with permission to access a product's formula may add a safety assessment for the formula in the 2. Specification/2.4 Safety Assessment tab. Click on 'Add New' to create the safety assessment.

The first safety assessment will be created, and a unique ID assigned. Click on any of the 'Update' buttons (available in each section) to save the assessment. You can then close the assessment and continue editing later.

Versions and compliance zones

Select the compliance zone(s) to associate with the safety assessment. You may create a different safety assessment for different zones. For any formula, you may only have one safety assessment associated with the same compliance zone.

Editing the CPSR sections

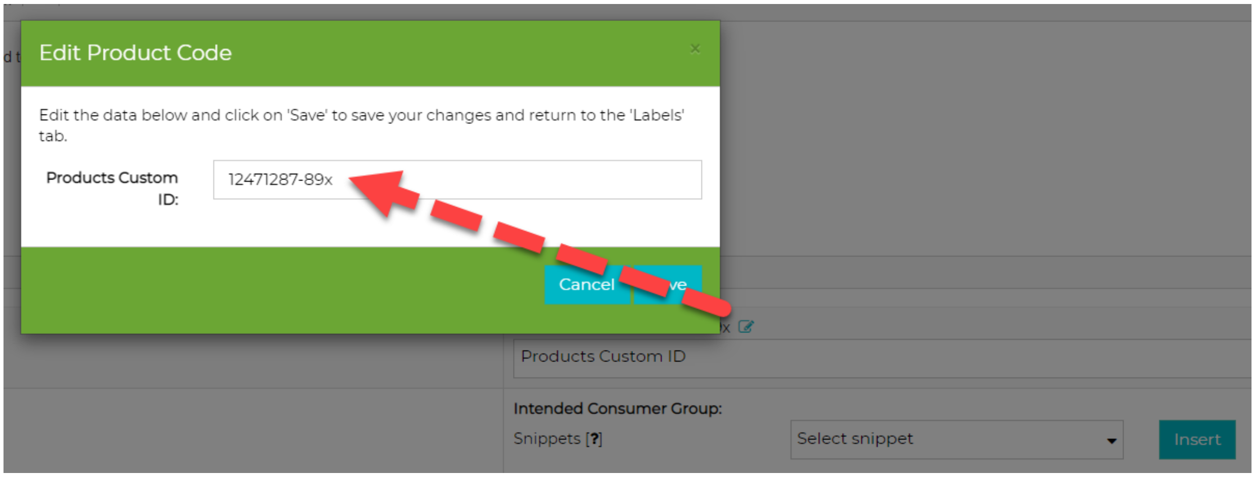
Part A of the CPSR has ten sections and Part B has four sections. Each section has a snippets tool to enable you to build a library of commonly used phrases specific to each section. You may also use the snippets tool to store different language version phrases. Snippets are available for all safety assessor users of the account and can therefore be used for safety assessments for different products.

To save a new snippet, enter the required text in the main edit window. You may format the text as well as build tables. Note that any data in the window is stored as it is and is not dynamically updated. Snippets should therefore only be used for standard. Re-usable phrases. Once you add a snippet, you can insert data into any required location.

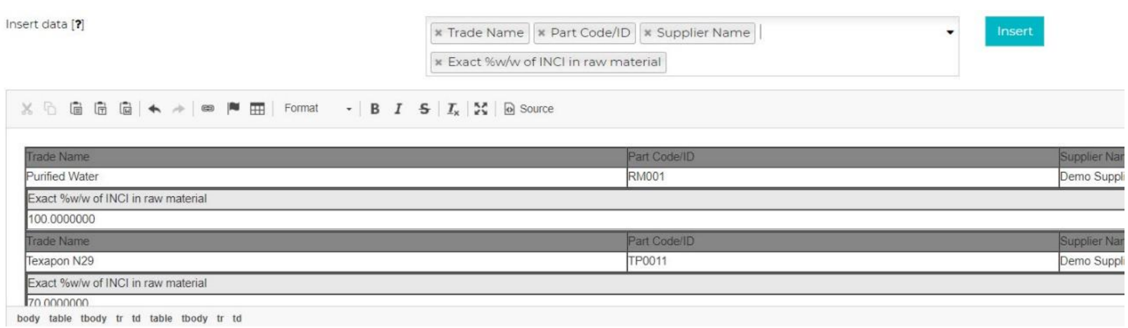
Enter a title for snippet and then click on ‘Save as New’.

To use a snippet, enter the cursor at the required insertion point in the main edit window. Select the required snippet and click ‘Insert’.

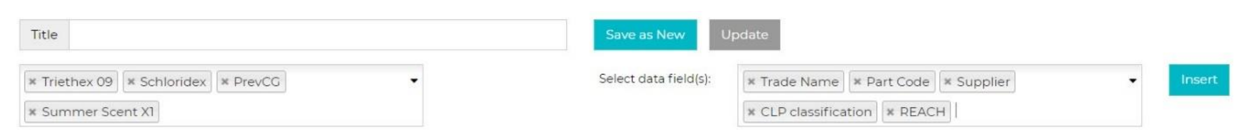
Certain sections of the safety assessment have selectable data. If the data field is not locked, the safety assessor user may be able to click on the edit action to edit the data directly from the safety assessment.



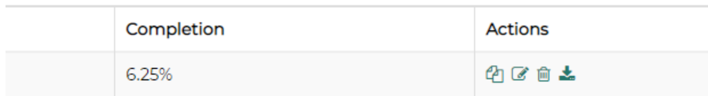
The selection method depends on the section. For example, in section 1 'Quantitative and qualitative composition of the product', the required raw materials data can be selected. Click to select the required columns to display and then click on 'Insert'. A data table will be inserted in the insertion point within the main edit window.



In section 7, the data selection method consists of two data sets. In the left-hand menu, select all required raw materials that should be included in that section of the assessment. In the right-hand menu, select the required data columns. Add these in the order required to be displayed in the data table. Click on 'Insert' to insert the data into the edit window.



Once a section is completed, check the confirmation checkbox. This will lock that section from further editing and update the completion status of the safety assessment.



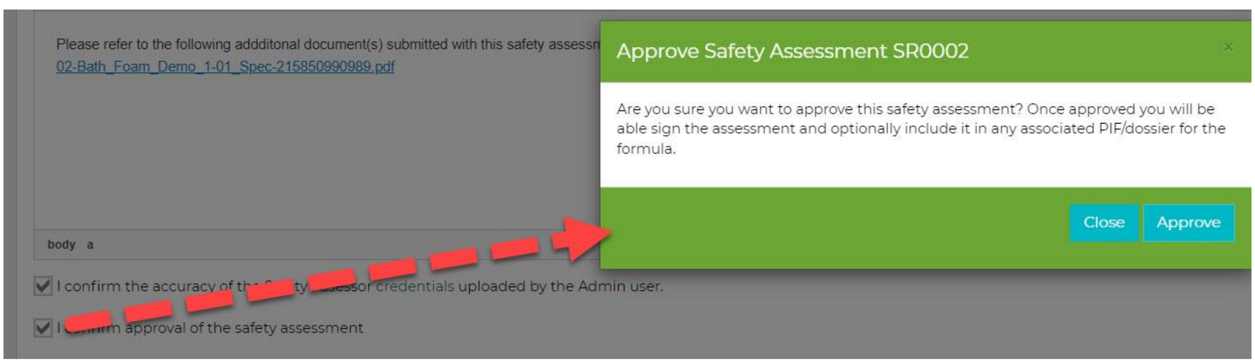
	Completion	Actions
	6.25%	

All sections of the safety assessment must be conformed as completed before the safety assessment can be approved and signed.

Final approval

Once all sections of the safety assessment are completed, the following checkbox confirms the approval of the safety assessment:

.



Click on 'Approve' to confirm the action.

Sign safety assessment

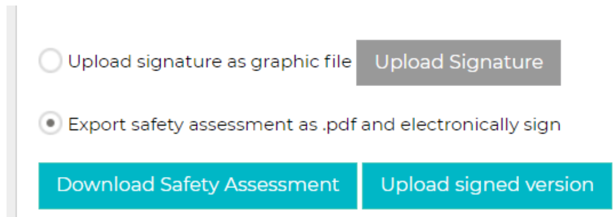
Once the safety assessment has been approved, it may be signed using either of the following methods:

Embed signature as graphic

Select the following option and click on 'Upload Signature' to upload a graphic file of the safety assessor's signature:

Digitally sign the CPSR

Select the following option. Click to download the safety assessment as a PDF file. You may then electronically sign this and use the function to re-upload the signed PDF version.

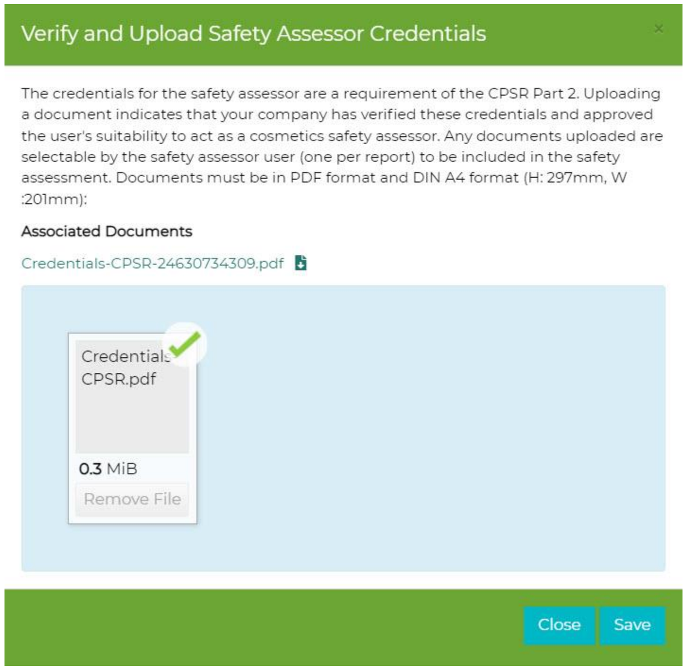


Once uploaded a 'View' button will be displayed, enabling you to view the signed version of the CPSR.

Embed signed CPSR in PIF

In the final section of the CPSR editing window, under 'Product Information File (PIF)' there are options to embed the CPSR in the main PIF report. There are separate options available for the EU and ASEAN version PIFs. Click on 'Confirm' to confirm the action. You may then export the PIF including the CPSR Pt. A and Pt. B.

Note: Since the electronically signed PDF version can include several pages of the signing envelope data appended to the document, it may be preferable to store any e-signed version separately and use the version signed only with a graphic signature for embedding into the PIF.


Verify and Upload Safety Assessor Credentials
The credentials for the safety assessor are a requirement of the CPSR Part 2. Uploading a document indicates that your company has verified these credentials and approved the user's suitability to act as a cosmetics safety assessor. Any documents uploaded are selectable by the safety assessor user (one per report) to be included in the safety assessment. Documents must be in PDF format and DIN A4 format (H: 297mm, W :201mm):
Associated Documents
Credentials-CPSR-24630734309.pdf
CPSR.pdf
0.3 MiB
Remove File
Close
Save

QA & Testing

Introduction

By following the steps in this section, you will be able to:

- create tests
- build QA checklists for quality management
- create test groups, including stability test groups
- configure tests
- print barcoded sample labels
- enter test results and export test data
- perform repeat tests for any existing test
- manage quality assurance for the following workflows:
- raw materials
- packaging items
- manufacturing orders
- formulas
- retained samples (from manufactured product batches)
- development batches (R&D samples)

You can use Product Manager to easily create tests and test groups that can be associated with workflow areas where quality assurance (QA) is required. A **test group** is built from any combination of **tests.**

Tests can be of the following type:

Numeric
A numeric value must be entered, with the unit of measurement set as a property of the test. During configuration of the test, the acceptable range is defined. If the value entered in the test result falls within the range, the test is passed. Example uses are for lab-type tests measuring viscosity, pH or color.

Pass/fail

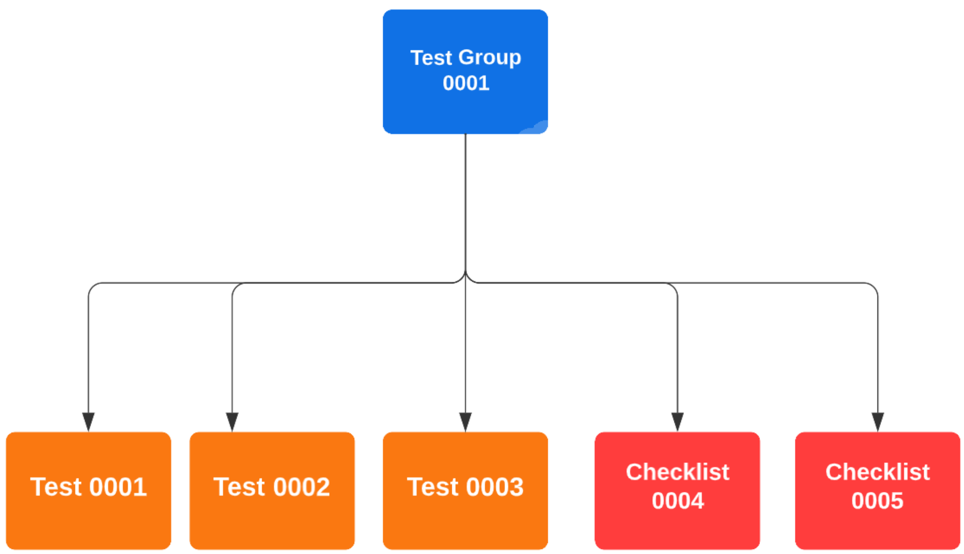
This is a simple test where no values must be recorded, and the test operator simply determines if a criteria is acceptable or not. An example would be a smell test.

Done

Used where a single checkbox is required for only one check or confirmation. For multiple checks it recommended to use the checklist option (see below).

Checklists

Used for confirmation that required steps or actions were taken as part of the QA process. Unlike standard workflow checklists, checklists used in test groups can be set to block approval if a checklist item is not completed. An example would be to ensure adherence of certain procedures during production, such as cleaning surfaces and calibrating equipment.



Applying tests in Product Manager therefore requires the following steps:

- Add tests
- Add tests to test group
- Configure test group associated with an item
- Enter test results for the item

Usually, it is only necessary to build tests and test groups once when starting with Product Manager. Correct configuration of your test groups and checklists at the beginning is a significant step towards automating your QA workflows and ensuring adherence to standard operating procedures.

Once a test group is built it can be associated with workflow areas and optionally set as a default test group. For example, a test group set as default for raw materials means that for every raw material (parent or batch) created or imported in Product Manager, the test group will be already associated in the QA tab, ready to be configured. The test operator cannot forget to apply the tests. The tests in the test group will therefore be blocking approval of the raw material until they are all configured, and the successful test results entered.

This section of the guide also covers advanced testing capabilities of Product Manager, including:

Certificate of Analysis (CoA)
A test group can be set as CoA to enable management of a conformity to a formula's specification and to generate a CoA report.

Stability tests
A test group can be set as stability test which has a special control panel for managing the tests and different reporting capabilities.

Auto change of approval status
A test can be set to a specified date so that if a successful test result is not entered by the date, the item's approval status is auto changed. This can be used for example, to require re-approval of a raw material or formula upon a future date.

Re-running tests
If a test fails and requires to be re-run, the test can be repeated. This can be useful for example when conducting an out of specification (OOS) investigation.

User Permissions, Statuses and Lock Control

Departments

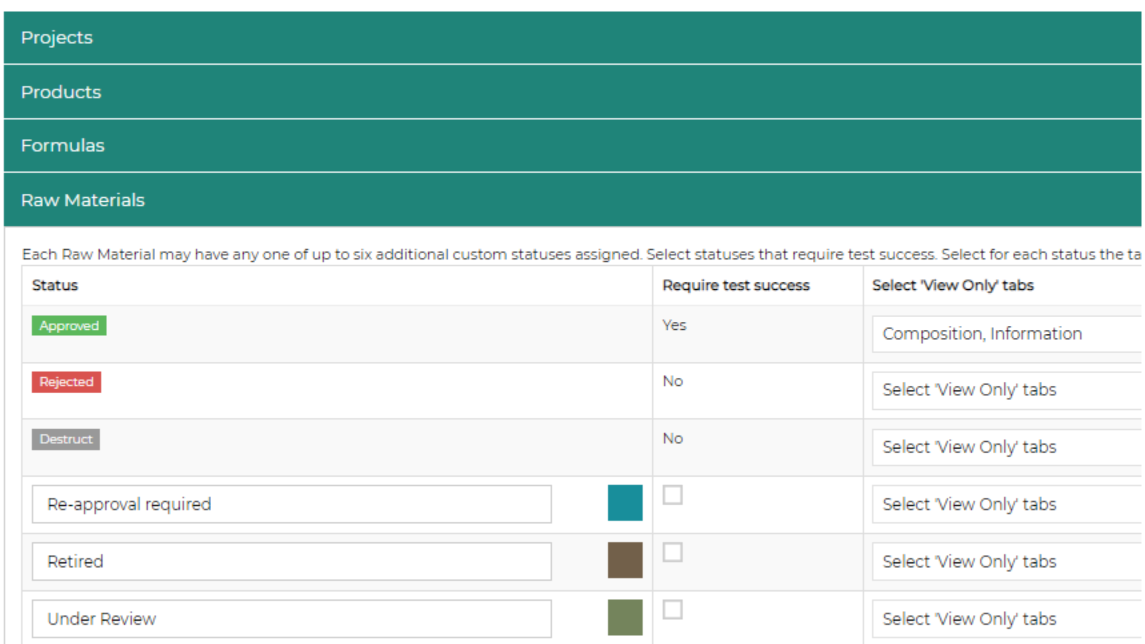
In the Product Manager settings under ‘Departments’ an administrator can set various permissions for how users can access the testing and QA features.

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 specific item types such as formulas and raw materials.

Custom and default status lock control

In the Product Manager settings under ‘Custom Settings’, for each item type you can create up to six custom statuses. For any status (default or custom), you can set whether a tab is locked (view only) if that status is applied to the item.



For custom statuses you can also select whether the status requires all tests to be passed successfully before the status can be applied to the item.

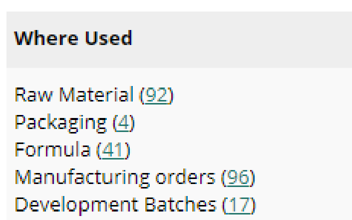
Click on 'Save' to apply the changes.

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** as applicable to the specific item being tested.

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.

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.


Test T0001 Associations - Packaging Items

Click on a link in the 'Items' column to open the item.

Showing 1 to 8 of 8 items

25 per page

Items	Result
BOTTLE Avery Label (105.0mm x 57.0mm)	OK
BOTTLE Avery Label (105.0mm x 57.0mm)	OK
BOTTLE Avery Label (105.0mm x 57.0mm)	OK
Clear Cellophane Wrap (clearBatch01)	Configure
Clear Cellophane Wrap (clearBatch01)	Configure
JAR Avery Label (105.0mm x 57.0mm) (213213123)	OK

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.

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:

Analysis

Enter the test title by describing briefly what kind of analysis should be performed.

Test result type

Select from one of the available options. The test types are described earlier in this section.

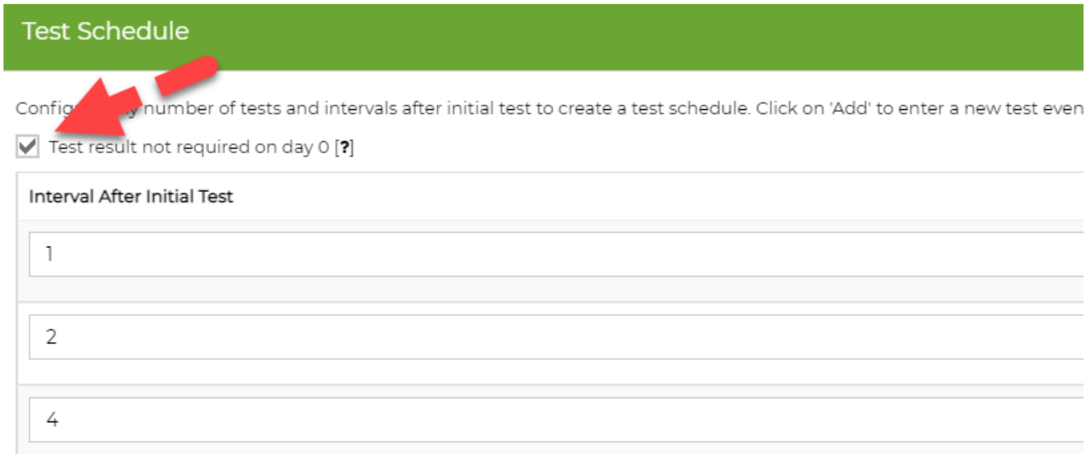
Testing period

Set whether the test should be performed only once, or if a test schedule should be used for repeat tests.

Setting a schedule

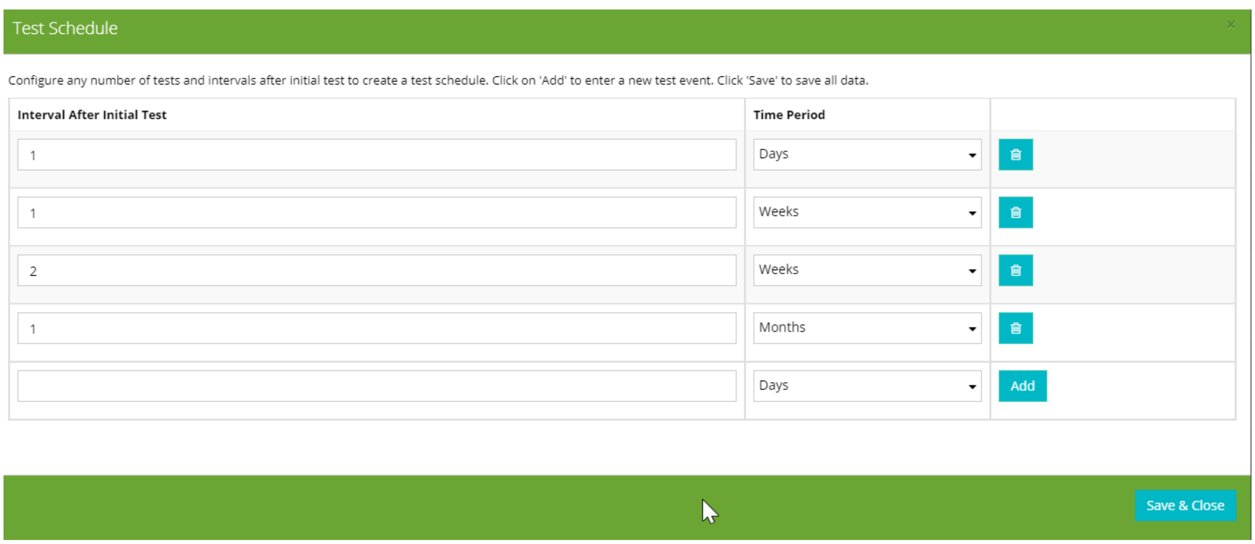
If you select 'multiple' for the testing period, you can click on the 'Schedule' button to set the test schedule intervals. This is useful for tests such as stability tests, enabling you to set the required intervals between tests.

By default, a test will be created for 'day 0'. Check the checkbox to skip the day 0 test. Therefore, if you configure the test on 1 Jan and have set the first interval after one week, the first test will be due on 8 Jan rather than on 1 Jan.



Note: It is also possible to skip any interval when managing the test once it is associated with an item. 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 required interval as 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 2023, subsequent tests will be scheduled as follows.

1st June 2023 (‘day 0’ start test, but can be set to be skipped)

2nd June 2023 (start + 1 day)

8th June 2023(start + 7 days)

15th June 2023 (start + 14 days)

1st July 2023 (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 enter 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 setup for a viscosity test:

Enter the following test parameter in the **test setup**:

Spindle speed: 00,000 – 00,000 T-bar XX Initial: 0,000 – 0,000 T-bar 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** T-bar **TA** Initial: **15,000 – 20,000** T-bar **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.

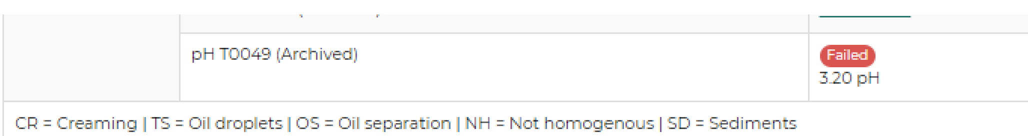
Custom statuses

You may add up to ten custom statuses which may be selected when entering the test's results.

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:



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.

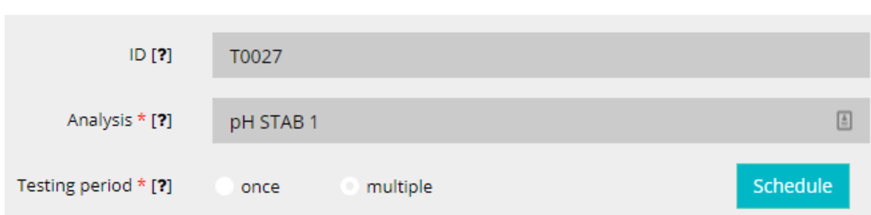
Comments for operator

Use this optional field for any additional instructions or comments intended for the test operator.

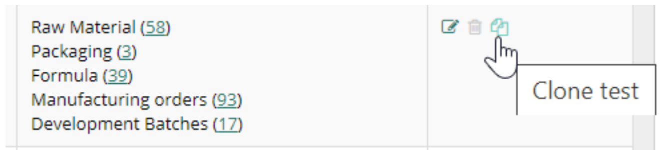
Editing, deleting and cloning tests

Once a test has been configured for use with an item, in the test view the fields will be locked, preventing editing or deletion.

Example of a locked 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.

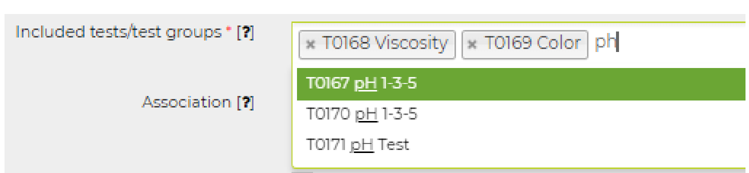
Test Groups

Use the '2. Test Groups' tab under the main menu item 'Tests/QA' to create and manage your test groups. To create a test group, click on 'Add New'. A test group ID will be automatically assigned.

Enter a short **title** for the test group.

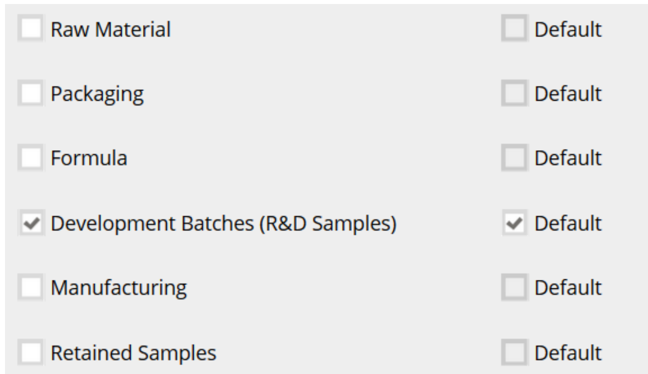
Select the tests that you want to include with the test group. Click in the adjacent field to view a list of available tests and click on any test to add it. Repeat until you have added all tests that are to be associated with the test group. Type a short string in the box to search for a test by ID or title. Click on a test to add it to the included tests.

Note: a test may be associated with more than one test group.



Association

Check which of the following QA workflows you require to make the test group available to select.



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

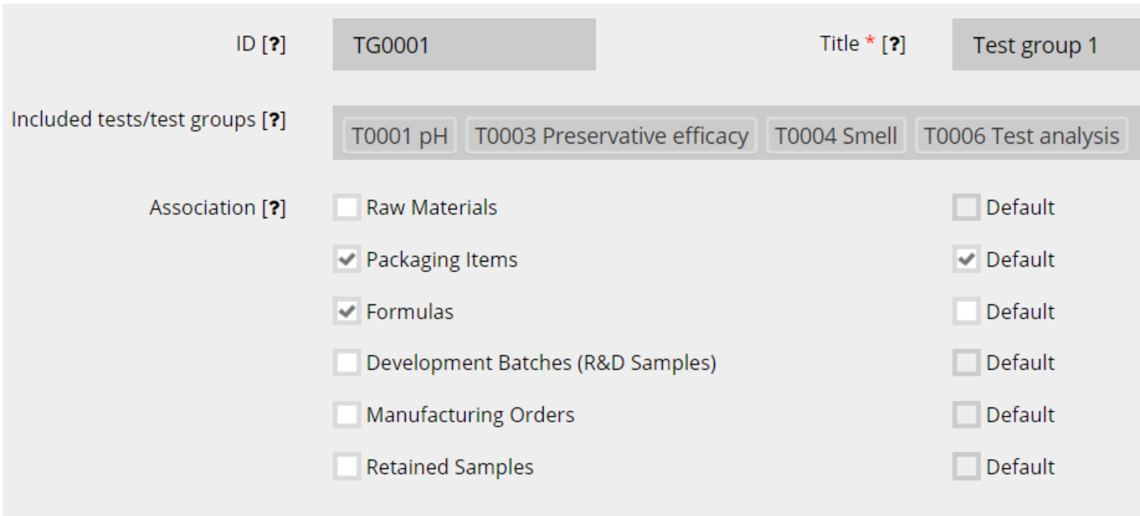
Enter any comments for the test group. These are not included in the test information visible to the test operator or in any test reports or exported data.

Click on 'Save' to save the test group.

Editing, deleting and cloning 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:

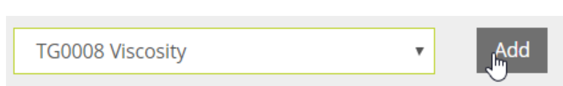


If you need to make other changes to a test group, first clone it and apply the required changes to the new version:

Configure Tests

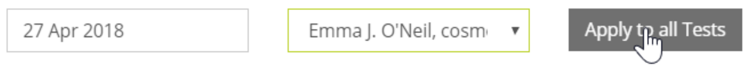
Test groups that have been set as 'default' for a workflow area will be pre-loaded in an item's QA, for each new item you create.

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 **due date** 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 admin may have restricted your permissions via the 'Departments' settings. In either case, you will be assigned by default as the test operator.

If any test has a schedule, the assigned 'Due date' will be the 'day 0' date. For each test's interval settings, the first scheduled test will depend on how the test is configured. If the test is set to ignore the 'day 0' test, no test instance will be created for the 'day 0' date.

All tests in the schedule will be auto calculated based on the 'day 0' date. Once these dates are configured for the first time, they may not be changed!

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 later in this section). You must enter all required data for each test in the test group before saving a closing the test panel is possible.

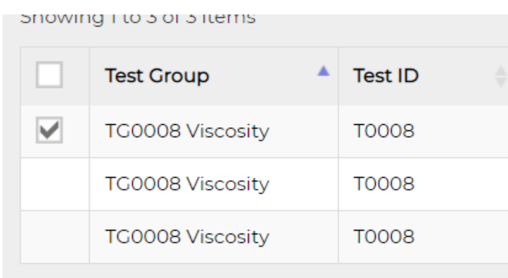
Note: If a test in a test group has already had results entered, it cannot be further configured.

Test configuration templates

For fast configuration of any type of test group, you can save any configuration as a template to apply to another item using that same test group. This is especially useful for the following cases:

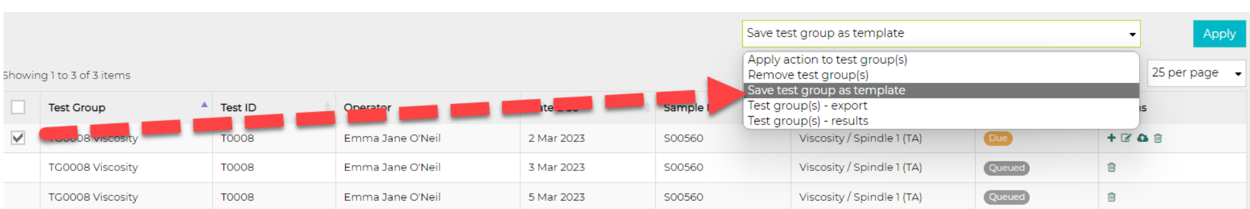
- Applying the same in-process tests to each manufacturing order batch
- Repeating the same standard stability tests on development sample batches
- Repeating the same standard stability tests on retained samples

To save a template, first configure a test group for an item. Then select the test group in that item's QA:



If the test group is already loaded by default for an item, select the test group in the list and then choose the following action and click on 'Apply'.

Note: For stability tests, please see the separate section of the user guide for managing test configuration templates.



A panel will be displayed where you must enter a short title for the template. Click on 'Save' to save the template. Each template is saved and associated with the test group and assigned an ID in the format TG0001_1, TG0001_2, etc, where 'TG0001' is the test group ID, and the suffix identifies the template version.

Optionally check the box 'Associate with parent of this item'. This makes it easier to identify and select a test group template, because these templates are available in a separate list.

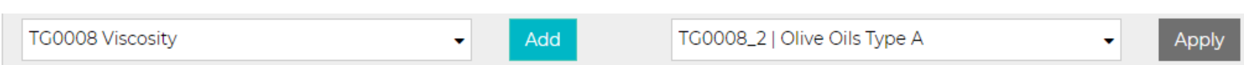
Note: Associating a test template with a parent item still makes that template available for association with another item

The parent associations are as follows:

Item tested	Parent associated
Raw material batch	Raw material parent
Packaging item batch	Packaging item parent
Formula	Product
Development batch	Product
Manufacturing order	Product
Retained sample	Product

For example, a stability test group is applied to a retained sample for a manufacturing order. After configuring the first test group, the configuration is saved as a template and associated with the parent item (product). When a retained sample is generated for another manufactured batch, the saved test group template is available for selection in a separate menu.

To apply a saved template associated with a test group, first select the test group in the left-hand 'Select test group' menu. Any associated templates are then available for selection in the adjacent menus to the right. It is recommended to look firstly in the left-hand menu, since any template available here has been saved as a template to be used for all items associated with the parent of the currently opened item.



Or look in the 'Select other test group template' for any other templates associated with the selected test group.

Click on 'Apply' to apply the template.

The test configuration panel will now open. All tests will be pre-configured. The 'day 0' date will be auto set as the current date but can be changed. You will need to assign an operator to the tests. Click on 'Save' to confirm and close the panel. The tests are now available for entering the test results.

To manage test group templates, open the Tests/QA/Test Groups tab. In the column 'Test Group Templates' all associated templates can be accessed for each test group. Click on the link to open a panel where you can view the associated templates, including the ID, title and any parent association. In the 'Action' column you can delete any templates.

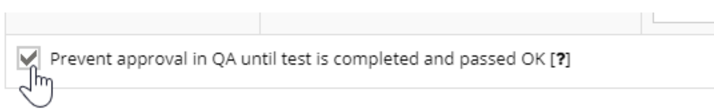
Note: Deleting any test group template will not cause any loss of data for any configured test groups.

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.

Note: This feature is not available when applying tests to manufacturing or development batch orders.

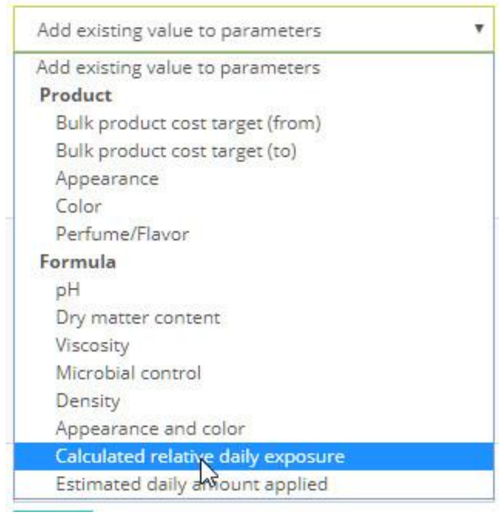
By default, this checkbox is checked, and the test will prevent approval of the item unless it is passed OK, skipped or 'allow OOS'. If a test should not block the approval, uncheck the checkbox. This will make it possible to enter the test result for that test later, after initial approval of the item.



Note: For QA checklist type tests the above option is not available. Whether a checklist item blocks approval is set in the checklist test for each check (see later in this section).

Test parameters

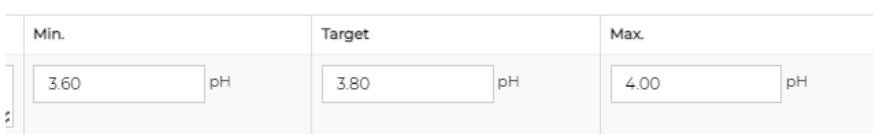
If the test parameters are set to 'configurable' for a test, you can edit or enter the details in the parameters column when configuring the test for that item. For convenience, a menu exists above the parameters field, with some key values that you may have entered for the product and its formula. This 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. Once selected, click on 'Add' to add this value to the parameters field below.

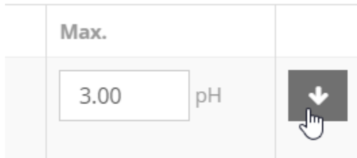
You can add multiple values, which are inserted at the top of the data in the parameters field.

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.

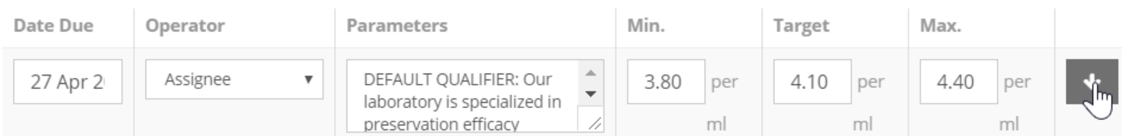


Fill-down feature for repeat tests

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 configuration is completed, these dates may not be changed! To reset the entire schedule, remove the test group from the QA and add it again.

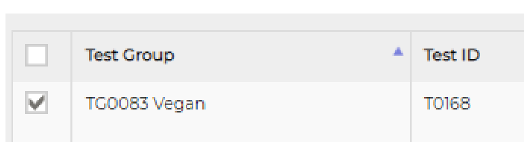


Click on 'Save' to complete the configuration of the test(s).

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'.

Remove tests from item's QA

You can remove individual tests that have been applied to an item's QA 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.



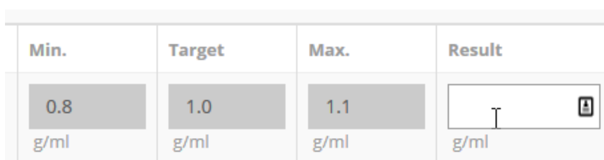
Once selected, use the 'remove test group(s)' function.

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.

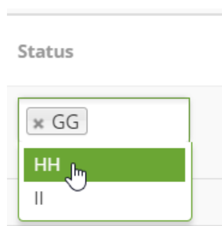
Enter Test Results

To enter a single test result, click on the + icon in the 'Actions' column in the item's QA. To enter results for multiple tests, first select one or more test groups in the left-hand column, then select the required action from the select menu.

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 data, depending on the test type. For numeric tests, enter the result in the 'Result' column. If the value falls within the range configured for the test, the test will automatically be passed and labelled 'OK'.



If a test has custom statuses available, you may select from available statuses.



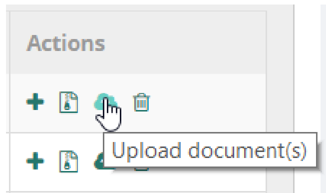
Any selected statuses will be shown in conjunction with the result 'OK' or 'Failed', as well as 'OOS' for 'out of specification' or a hyphen '-' if the test was skipped.

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 and will not block approval of the item.

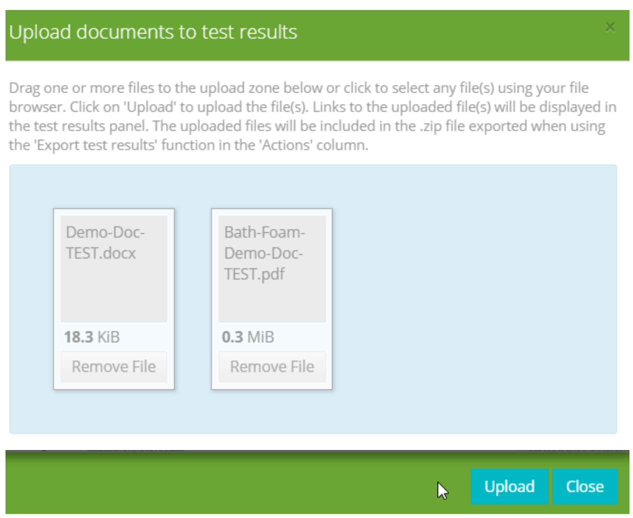
Upload documents to test results

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.

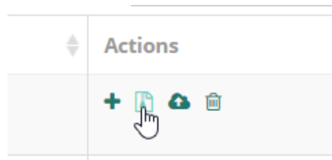
Click on the action icon to open a document upload panel. Drag and drop one or more documents to the upload zone or click to select the file(s) on your hard drive using your file browser. The maximum allowed file size is 5Mb.



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.

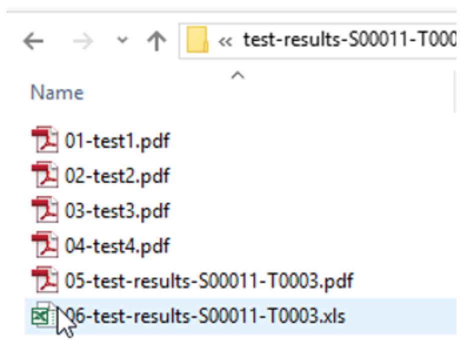
Export Test Data

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 required test group(s). If at least one test group is selected, the 'Export Test Results' button will be activated which you can then click to generate the test result report.

Test data will be exported as a .zip file, with the results generated as .xls and .pdf files. Any documents uploaded to the tests' results will also be included in the zipped folder.

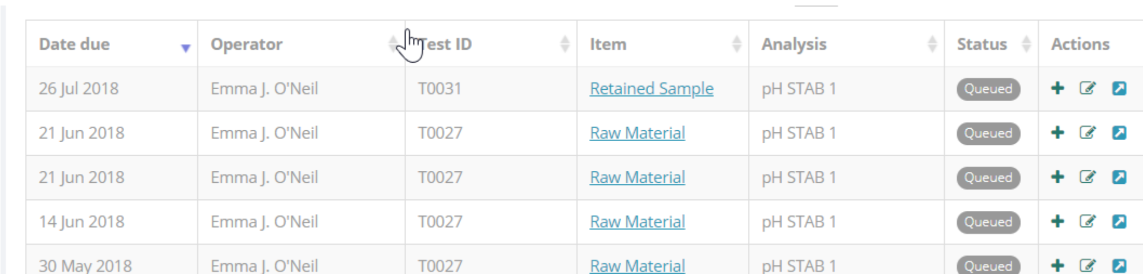


Manage Testing Schedule

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 'queued. You can access the test schedule in two ways:

Dashboard view

In your dashboard view, you'll find the Test Schedule:



Date due	Operator	Test ID	Item	Analysis	Status	Actions
26 Jul 2018	Emma J. O'Neil	T0031	Retained Sample	pH STAB 1	Queued	
21 Jun 2018	Emma J. O'Neil	T0027	Raw Material	pH STAB 1	Queued	
21 Jun 2018	Emma J. O'Neil	T0027	Raw Material	pH STAB 1	Queued	
14 Jun 2018	Emma J. O'Neil	T0027	Raw Material	pH STAB 1	Queued	
30 May 2018	Emma J. O'Neil	T0027	Raw Material	pH STAB 1	Queued	

Test schedule tab

Click on the main menu item 'Tests/QA' and then on the 'Test Schedule' tab.

In either of the above-described views, 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)

Use the 'Item' column sort function to sort the list per the type of association.

Use the 'Date Due' column sort function to sort the list in order of due date, either in ascending or descending order.

In the 'Actions' column, click on the + icon to enter the test results for that test.

To configure the test, click on 'Configure test'.

Use the arrow icon in the right of the 'Actions' column to open the test at the associated QA tab, where you have the option to upload documents to the test or manage tests for the entire item.

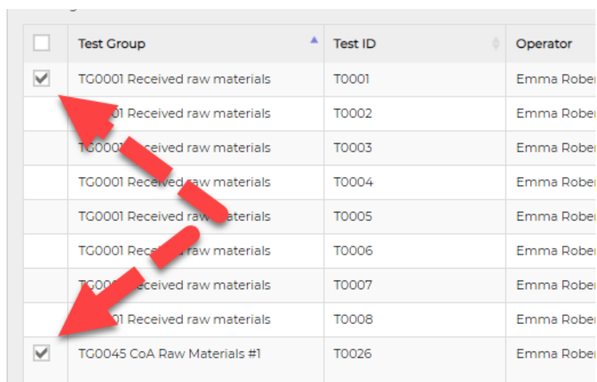
Print Barcoded Sample Labels

If any test group requires the taking of a sample, sample labels can be easily printed in a variety of default Avery and Herma label formats. You may also create custom label formats and define the fields that should be displayed on the labels. See the section of the guide on label printing for full details.

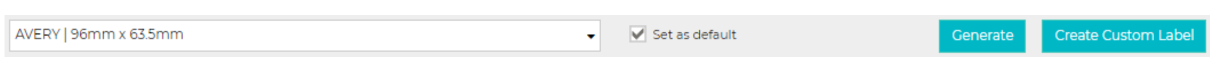
Use these labels for clearly identifying the sample in its container and the test group to be applied.

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 any checkboxes to select the required test group(s). One sample label will be generated for each selected test group:

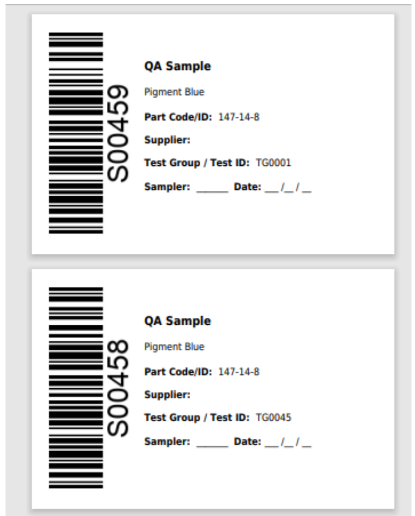


In the ‘Select label format’ menu, select the required label format and then click on ‘Generate’.



Use the ‘Set as default option’ to save the selected label format so that for that same item type you do not need to re-select that label format each time you need to generate a label.

Click on ‘Generate’ to generate the label(s).



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.

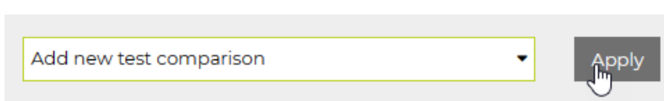
Compare Test Results (Standard Tests)

This section of the guide explains how to manage test comparisons between items where standard tests are used. For stability test comparisons please see the later section under 'Stability tests/compare stability test results'.

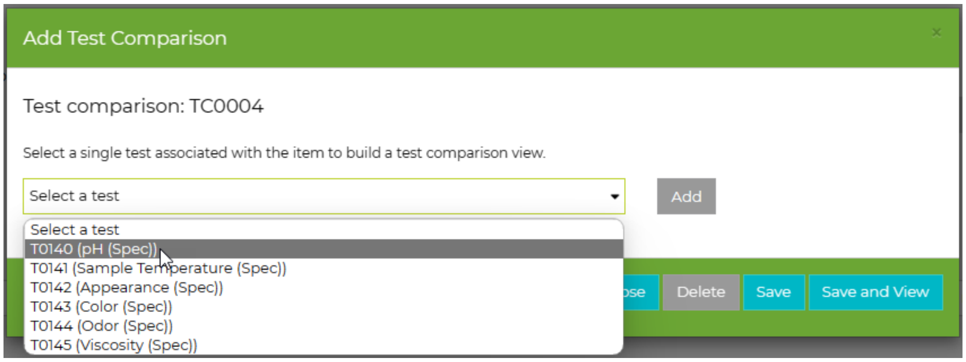
Note: The test must have the exact same test ID and be present in each test that you wish to compare. The test does not however need to be in the same test group.

Note: Checklist tests cannot be selected for comparison.

Open the item at the location where standard (non-stability) tests are managed, such as the 'Approve' or 'QA' tab and select the following option. Click on 'Apply' to access the test comparison builder.



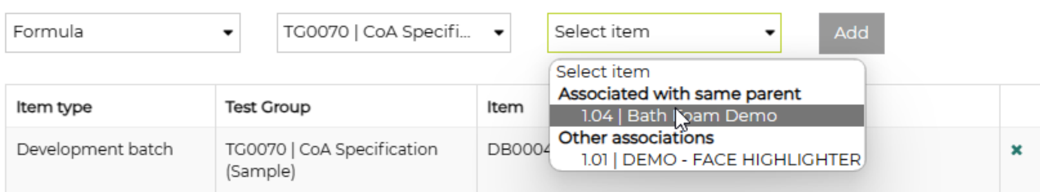
Select one test form the tests currently associated with the item. Click on 'Add'.



By default, the currently viewed item is pre-selected.

Item type	Test Group	Item	
Development batch	TG0070 | CoA Specification (Sample)	DB00042 | 00042 | Bath Foam Demo | 1.01	✖

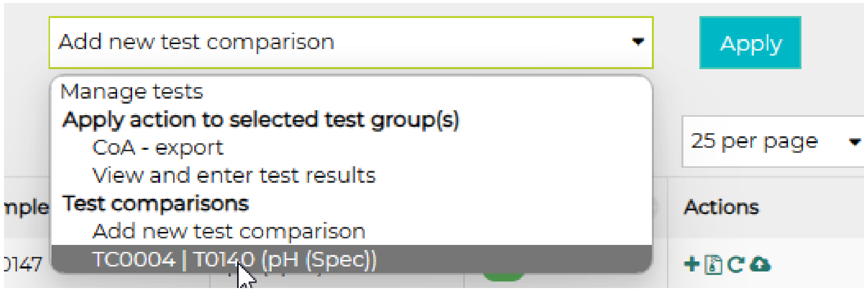
To compare the selected test's results with different items, select an item type in the first menu and then a test group. Then select from any matching items found and click 'Add' to select.



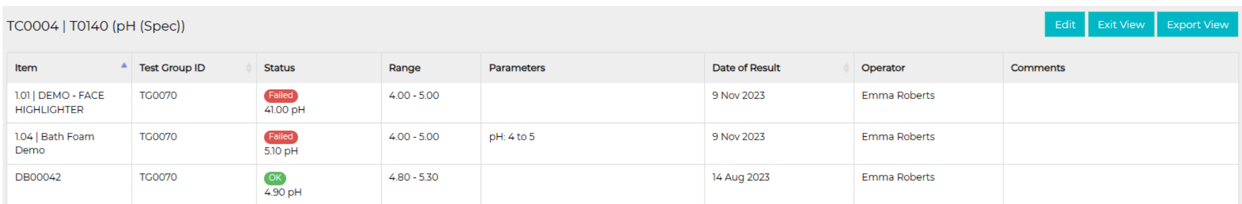
Click on 'Save' or 'Save and View' to save the changes.

<u>Note</u>: Associations with items are reciprocal. If you open one of the items, you can access the same test comparison view.

Back in the item's test view, the saved view is now selectable in the 'Manage tests' menu. Click on 'Apply' to open the test comparison.



In the following example we see the test T0140 (pH) compared between three different items (two formulas and one development batch)



TC0004 | T0140 (pH (Spec))

Edit Exit View Export View

Item	Test Group ID	Status	Range	Parameters	Date of Result	Operator	Comments
1.01 | DEMO - FACE HIGHLIGHTER	TG0070	Failed 41.00 pH	4.00 - 5.00		9 Nov 2023	Emma Roberts	
1.04 | Bath Foam Demo	TG0070	Failed 5.10 pH	4.00 - 5.00	pH: 4 to 5	9 Nov 2023	Emma Roberts	
DB00042	TG0070	OK 4.90 pH	4.80 - 5.30		14 Aug 2023	Emma Roberts	

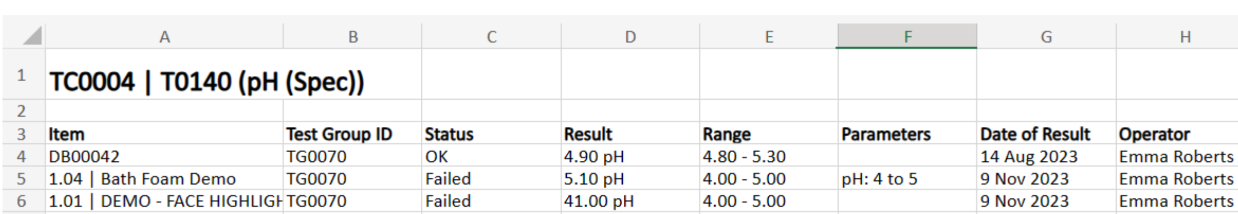
To edit the view, click on ‘Edit’.

You may follow the previously described steps to add or remove items from the view or click on ‘Delete’ to delete the entire test comparison.

Select which columns are required in the view.

Click on ‘Exit View’ to return to the main stability test view.

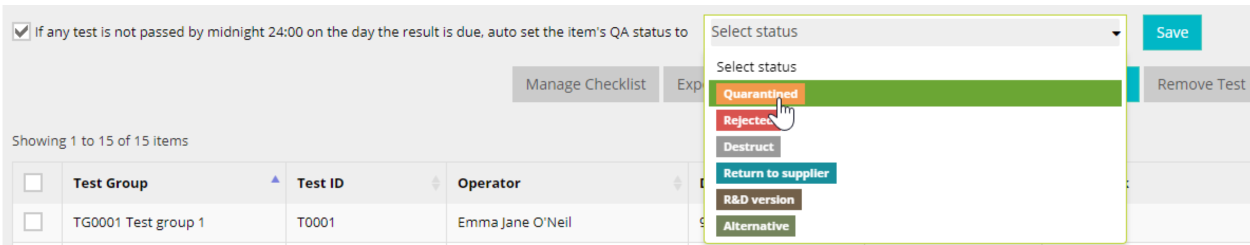
To export the stability test comparison data, click on ‘Export View’ to export the data to a .xlsx file.



	A	B	C	D	E	F	G	H
1	TC0004 | T0140 (pH (Spec))							
2								
3	Item	Test Group ID	Status	Result	Range	Parameters	Date of Result	Operator
4	DB00042	TG0070	OK	4.90 pH	4.80 - 5.30		14 Aug 2023	Emma Roberts
5	1.04 | Bath Foam Demo	TG0070	Failed	5.10 pH	4.00 - 5.00	pH: 4 to 5	9 Nov 2023	Emma Roberts
6	1.01 | DEMO - FACE HIGHLIGH	TG0070	Failed	41.00 pH	4.00 - 5.00		9 Nov 2023	Emma Roberts
7								

Auto Change QA Status of Item

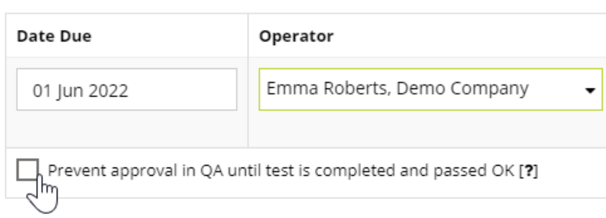
In the QA tab of an item, the following setting auto changes an item's QA status on a specified date to the selected status, if a test is not passed prior to midnight on that date. Only one status change is possible, triggered by the test that has the closest due by date.



Note: The auto change of QA statuses feature is available in the QA for the following item types:

- Raw materials
- Packaging items
- Formulas

Click to configure a test and set the due date of the test to the date when the item's approval should be auto changed. Uncheck the following checkbox so that it does not block approval of the item.



Assuming that the current status of the item is 'Approved', and all other tests are therefore not blocking approval, on 1 June 2022, at 24:00 local time (as the day ends) the item's QA status will be auto changed from 'Approved' to whatever status is selected in the QA tab.

Note: If multiple tests in the item's QA are configured similarly, the test with the due date that is reached first will be the one that triggers the auto change of the item's QA status.

Manage QA Checklists

A checklist can be created as a type of test that performs an important QA function for an item, such as ensuring that certain procedures are followed. This is faster and more flexible than creating multiple tests of the type 'Done', since the single checklist test can have multiple checklist items instead of a single checkbox.

An example is a standard checklist for checking raw material batches received from a supplier. The checklist can be configured once and used for every raw material batch that is added. Approval of the batch is only possible once all checks have been performed, such as:

- Outer packaging OK
- Batch number OK
- Item is consistent with order (product, quantity, etc)
- Best before date OK
- CoA document confirmed
- SDS document confirmed

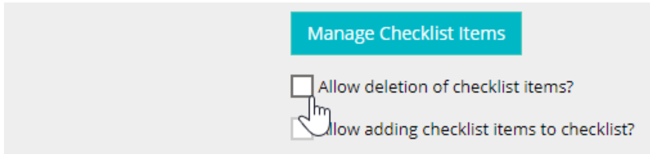
Unlike standard checklists such as for projects or products, QA checklists have the following capabilities:

- Incomplete checks can block approval of an item
- Set to use once, or repeat on schedule

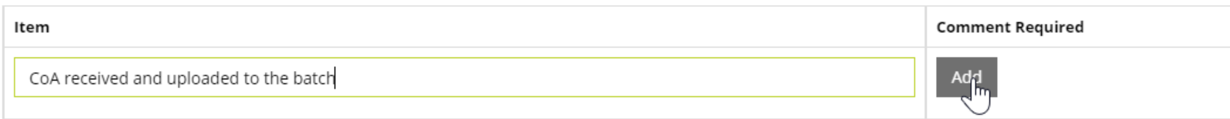
Add test of type 'checklist '

Under the menu item 'Tests' click on 'Add New'. Under 'Analysis' enter a title for the checklist. 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.



Click on the button to manage the checklist items. Under 'Item' enter a description for a checklist item and click 'Add:

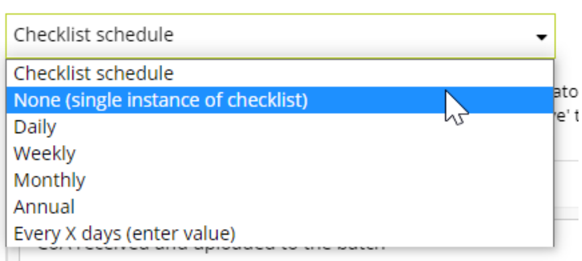


For each checklist item added, set whether a comment must be entered by the test operator before it can be checked off. Select 'Required for Approval' if the checklist item should block approval in the QA if it is not checked by the operator.

Repeat the procedure to add all checklist items and then click on 'Save' to return to the 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, if the item's status is currently 'Approved' it will revert to the default status once the due date expires.

The default option is 'None (single instance of checklist)'. To run the checklist, select a required interval such as 'Daily' or 'Weekly', or set any required interval in days.

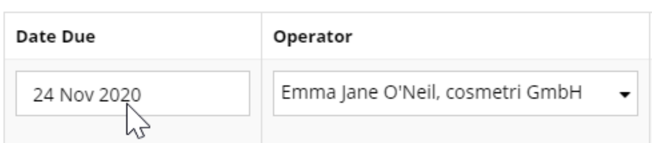
Add checklist to test group

Under 'Tests/QA /Test Groups', add the checklist test to any available test group. Test groups that are already in use may not be edited. You may add other tests to the same test group, if required. 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'.

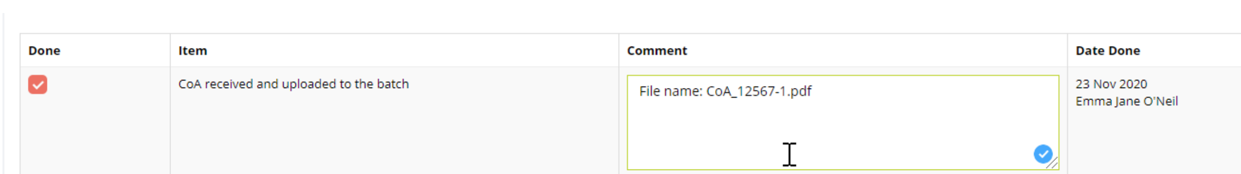
Complete the configuration by selecting a 'Date due' and a test operator, who is responsible for quality management of the item.



Manage checklist in QA

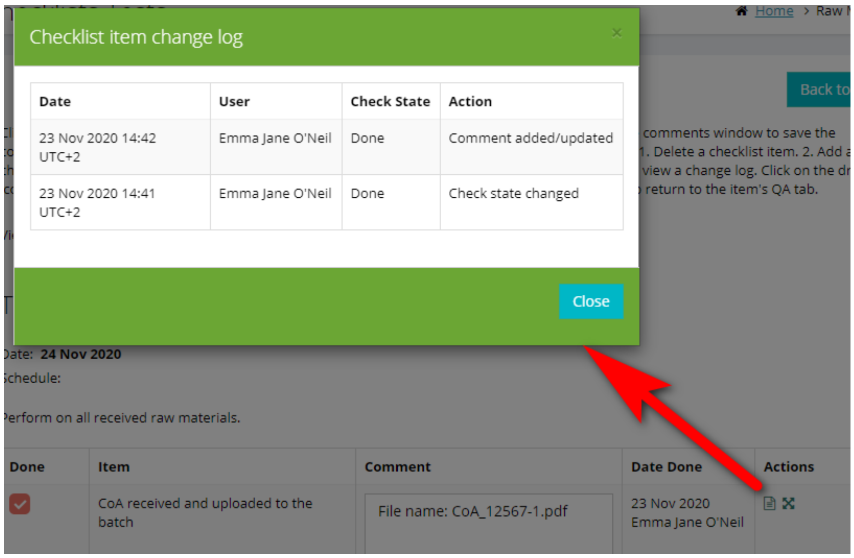
Once configured, a user with rights to access the item's QA may click on 'Manage Checklist' to manage the checklist.

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 how the checklist is configured, a comment may be required before the checklist item can be confirmed as completed.



Depending on the test options set it may be possible to delete or add further checklist items.

Use the 'Actions' column to view a change log.

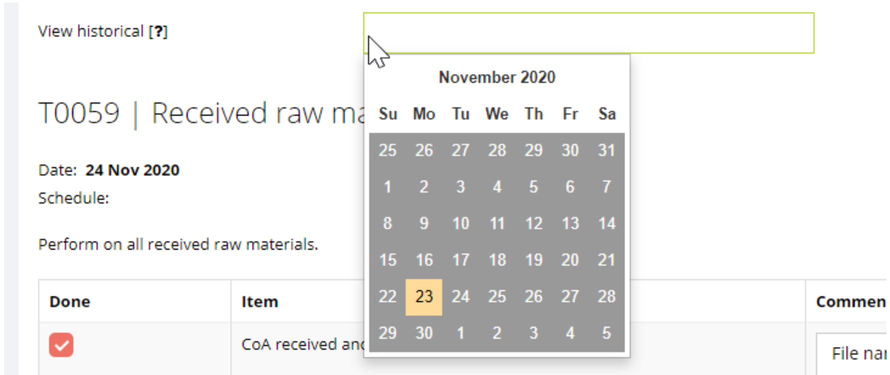


Click on the drag icon or on any checklist item row to rearrange the order of the checklist items. Click on 'Back to QA' to return to the item's QA tab.

Scheduled checklists

If a checklist has been set to repeat on a schedule, 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:



Note: Checklists set to a schedule may be configured for manufacturing orders and development batches, 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 use.

Note: In the Product Manager 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 00:00 based on your local time.

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 sample 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 is 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.

Export checklist data

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.

View of exported checklist data (as .pdf):

TG0055 | Received Raw Materials		
TEST DETAILS	**DUE DATE**	**SCHEDULE**
T0059 Received raw materials	24 Nov 2020	

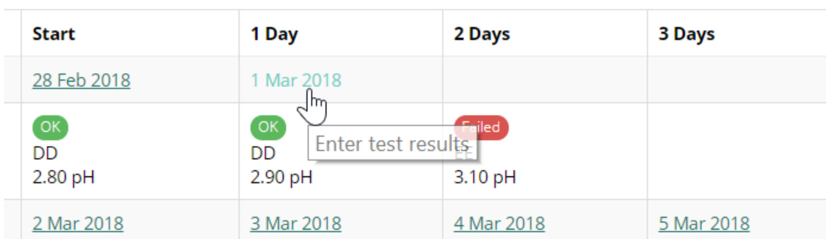
DONE	ITEM NAME	COMMENT	DONE DATE	USER NAME
Yes	CoA received and uploaded to the batch	File name: CoA_12567-1.pdf	23 Nov 2020	Emma Jane O'Neil
Yes	SDS received and uploaded to the batch		23 Nov 2020	Emma Jane O'Neil
Yes	Costs updated or added to batch		23 Nov 2020	Emma Jane O'Neil
No	Inventory added to batch			
No	Batch no. verified and added to batch			
Yes	Expiry date verified and added to batch		23 Nov 2020	Emma Jane O'Neil
Yes	Set raw material batch to auto-expire, based on expiry date		23 Nov 2020	Emma Jane O'Neil

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. In the QA tab, click in that test's row on the 'Export test results' icon in the 'Actions' column for the required checklist test item.

If you only require abbreviated results for the checklist, select the test group to which the checklist test belongs and then click on the 'Export Test Results' 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 Tests

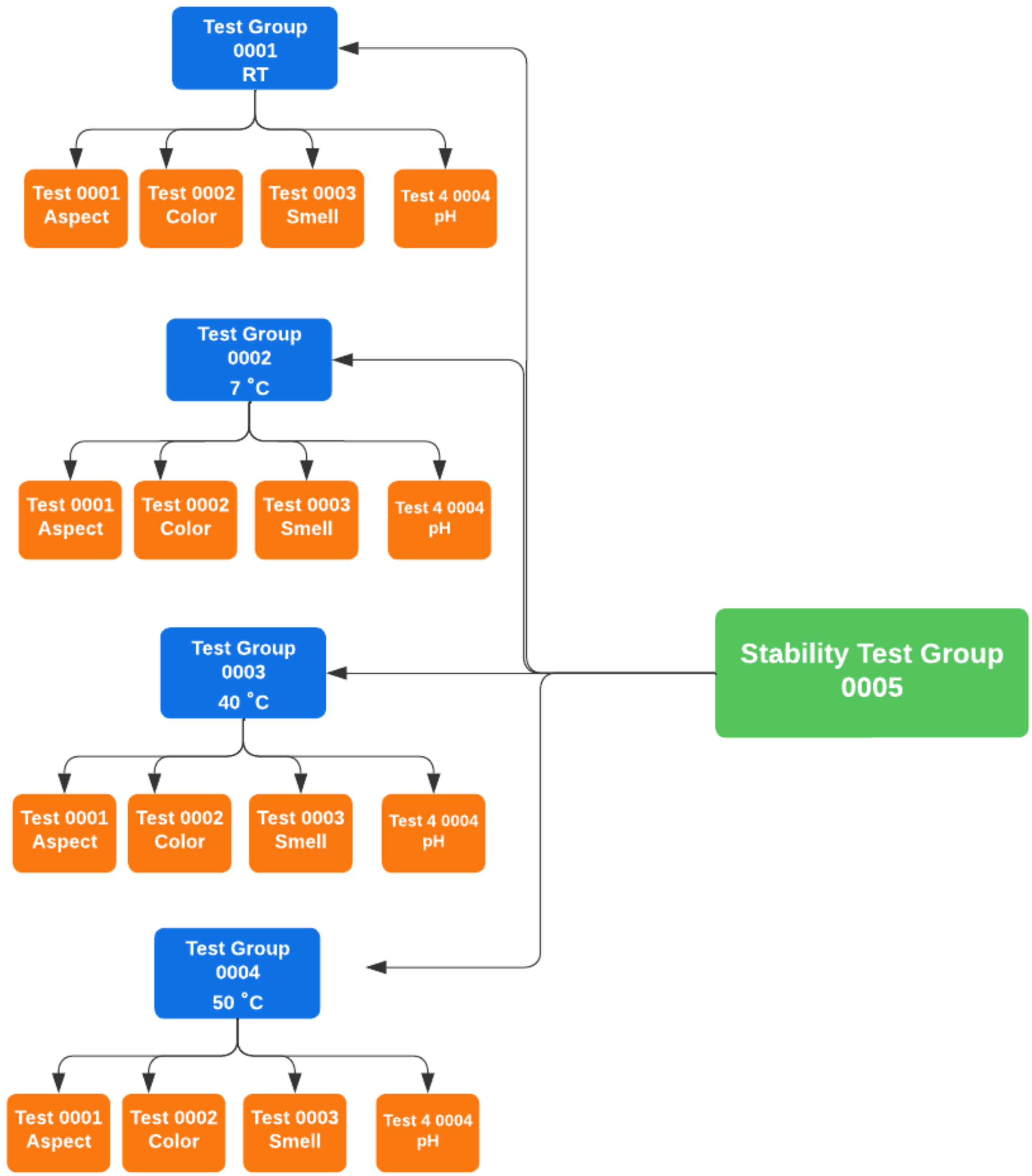
Stability test groups enable easy overview and fast configuration of tests that are repeated on a schedule, such as preservative challenge tests. They are displayed in a single view, making it easy for the test operator to see when a test is due and the status of all tests in the group. This overview 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.



Stability test groups can be applied to the following QA workflows:

- Raw materials
- Packaging items
- Formulas
- Development batches
- Retained samples

Stability test groups are built from test **groups** and thus act as a kind of 'super test group', as per the following logic.



Let's build an example stability test group using the following tests and apply it to a retained sample.

Measurement stability						
		1D	1W	2W	3W	4W
RT	Aspect	ok	ok	ok	ok	ok
	Colour	ok	ok	ok	ok	ok
	Smell	ok	ok	ok	ok	ok
	pH					5,31
7°C	Aspect					
	Colour					
	Smell					
	pH					
40°C	Aspect	ok	ok	ok	ok	ok
	Colour	ok	ok	ok	ok	ok
	Smell	ok	ok	ok	ok	ok
	pH					
50°C	Aspect	ok	ok	ok	ok	ok
	Colour	ok	ok	ok	ok	ok
	Smell	ok	ok	ok	ok	ok
	pH					

OK = OK / CR = creaming / TS = oil droplets / OS = oil separation / NH = not homogenius / SD = sediments / > = more

Prepare the stability tests

To build the above stability test group, we require four tests – Aspect, Color, Smell and pH. 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.

Note: You may also check the provided option if you wish to skip the 'day 0' test. Therefore, in the below example if the day 0 test is set to be skipped, if the day 0 date is set as 1 Jan, the first test will be scheduled for 8 Jan (day 0 + 1 week).

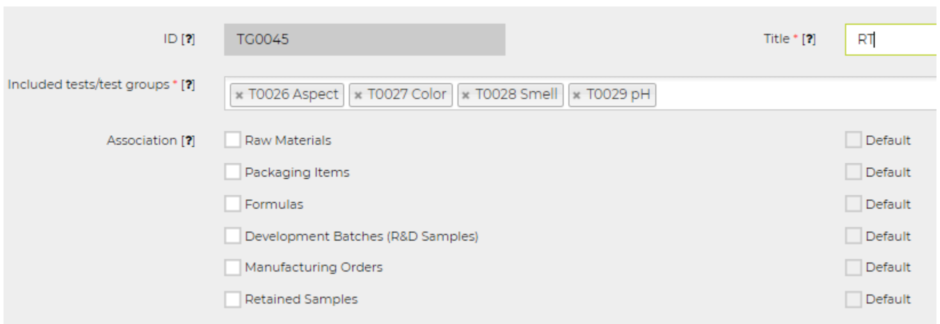
Example schedule for test 'Aspect':

Remember for each test, to add any custom statuses required (e.g., CR = creaming, TS = oil droplets, etc), enabling these to be selected in addition to the results entered for the test.

Build test groups

We now need to build four test groups, each consisting of the four tests – Aspect, Color, Smell and pH. 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.

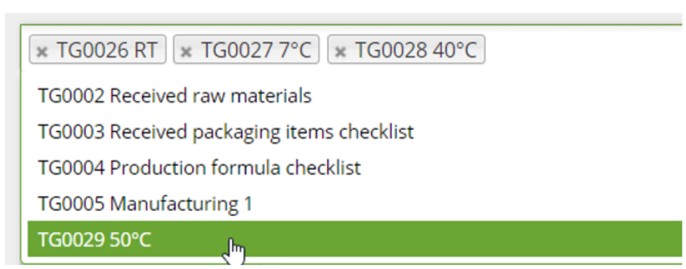
Example 'RT' test group:



In the 'Actions' column of the test group, click on 'Clone test group' to clone the 'RT' test group three times and rename each test group 7˚C, 40˚C and 50˚C.

Add the 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 four test groups that you created in the previous step



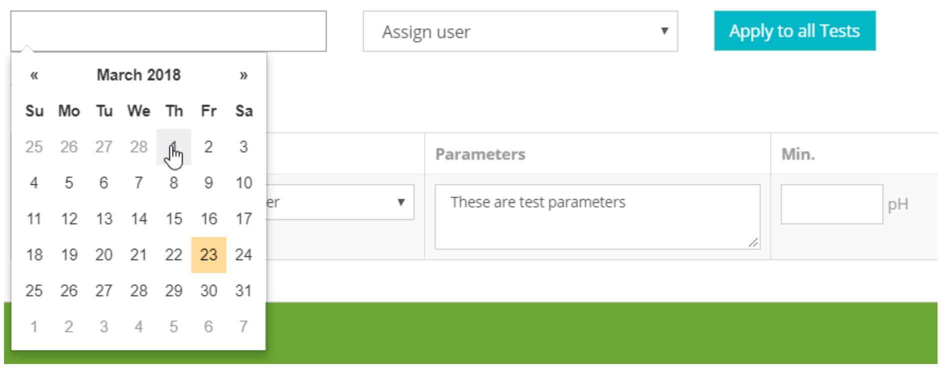
Under 'Association', check any workflow areas to associate with the stability test group. Select the default checkbox if you want the stability test to be applied to every item created for that workflow. For example, if you intend to run the same stability test for every sample you create, select the association 'Development batches' and check the default checkbox to the right.

Note: The test operator can still remove the stability test group from an item's QA/Approval tab if it has been loaded by default.

Configure stability test group

Open an item that requires stability testing at the tab where testing and QA is performed. In the 'Select test group' select the stability test group and click on 'Add' to open the configuration panel.

For fast configuration of all tests in the stability group, you can set a day 0 date and assign the test operator and then click on 'Apply to all Tests'.



Now that a day 0 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.

The configure view shows the intervals as separate columns, such as 'Start', '1 Day', '1 Week' etc. These are the intervals that were set in each of the tests.

Note: You may set different intervals in each test. If for example, you only require testing of pH once per month and the other tests are to be performed daily, the pH test will only be displayed for each monthly interval but not for each day.

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. You may also click on the 'skip' function at the top of an interval's column to skip the entire interval. This is useful for example, if you do not require to run stability tests on day 0.

Note: You can only skip an interval while configuring the stability test. Once test results are entered, the interval cannot be skipped.

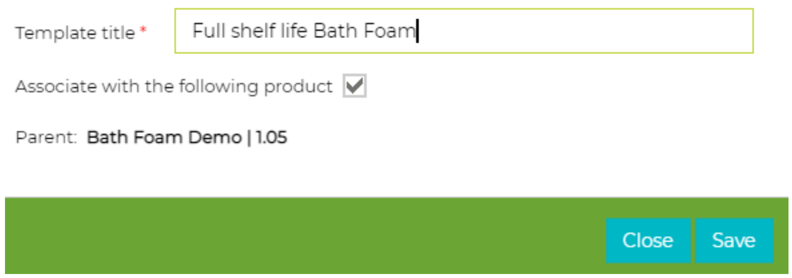
Stability test configuration templates

Once a stability test is completely configured, you may save the configuration as a template. This makes it possible to apply the same stability test to another item without needing to repeat enter the configuration data. You will only be required to set the day 0 date and test operator.

Stability test configuration templates can be saved and applied from the 'Stability Test' view for any configured stability test.

Note: If the 'Save Stability Test as Template' button is not active, check that all tests in the stability test have first been configured.

Enter a title for the template. To enable quick access to the template for all items of the same parent, check the available box. In the following example, if the stability test is to be repeated for different development batches of the same product, the template will be available for selection in a separate menu for every development batch you create for that same product.



The parent associations available for stability test configuration templates are as follows:

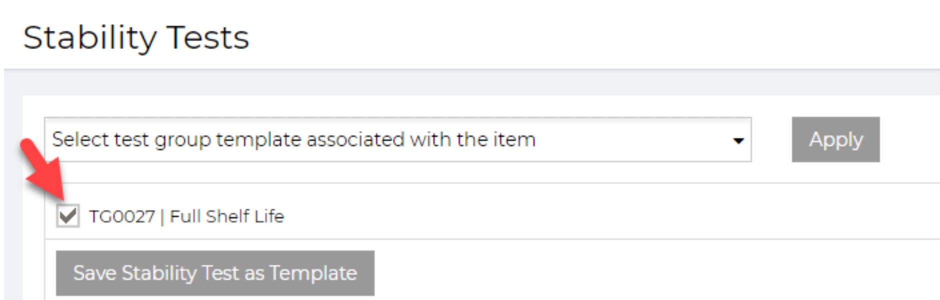
Item tested	**Parent associated**
Raw material batch	Raw material parent
Packaging item batch	Packaging item parent
Formula	Product
Development batch	Product
Retained sample	Product

To apply a test configuration template to a new stability test, follow either of the below steps:

Stability test already added in item's QA:

If the stability test has already been associated with an item (e.g., because it is set as a 'default' test group), but has not yet been configured, click on the 'Stability Test' button in the QA/Approve tab to enter the stability test view.

Check the checkbox as shown below to activate the test configuration templates menu.



Any associated templates will be available for selection. Click on 'Apply' to apply the selected template. You will be prompted to select a 'day 0' date and a test operator to complete the configuration. The 'date 0' date is the date from which the intervals are calculated. Therefore, a test set with intervals of 7 and 14 days and with day 0 set as 1 Jan will have tests configured for the following dates:

Day 0	1 Jan
Day 7	8 Jan
Day 14	15 Jan

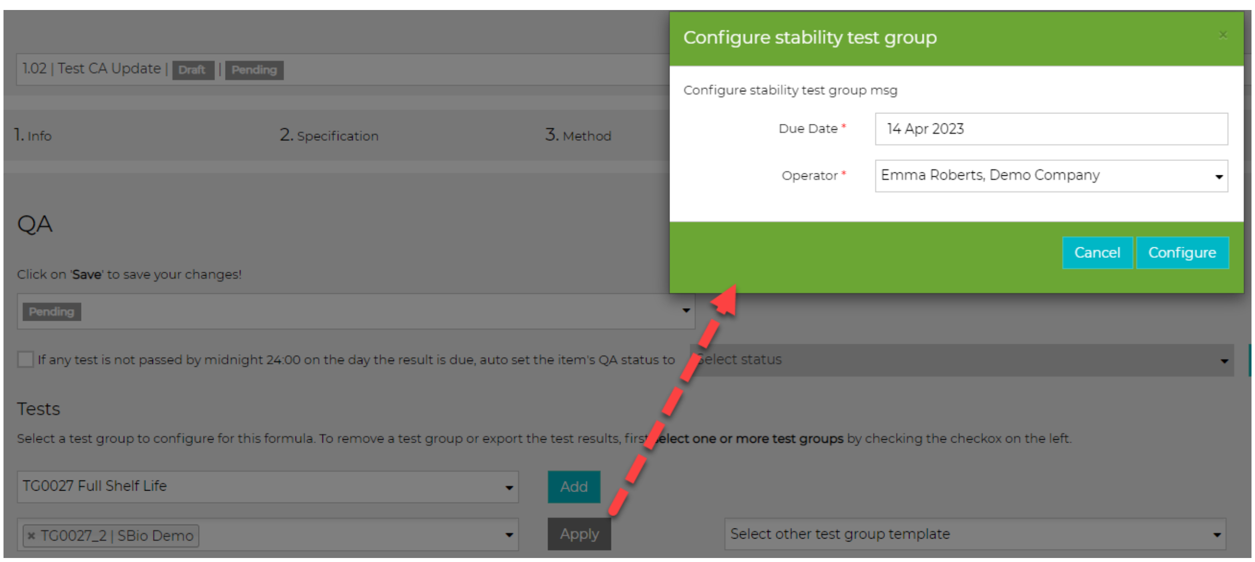
If the test is set to skip day 0, the tests will be scheduled as follows:

Day 7	8 Jan
Day 14	15 Jan

Click on 'Configure' to complete the stability test configuration. All configuration data will now be populated for the stability test.

Stability test manually added to item's QA:

If the stability test is manually added to an item's QA, once the stability test group is selected, menus to the right are activated and display any associated test group templates. In the left-hand menu you can select any templates associated with the parent of the currently viewed item. The right-hand menu contains all available test group templates. Select a required template and click on 'Apply'.

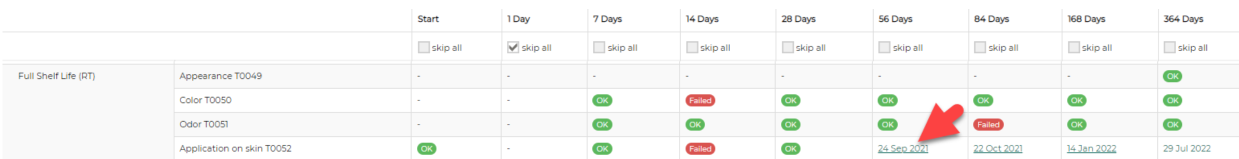


A panel will prompt you to enter a 'day 0' date and a test operator. Enter the required details and click on 'Configure' to complete the stability test configuration. The stability test view will open where you can begin to enter any test data once the first test interval due date is reached.

Enter stability test results

Once you have configured the stability test group, click on the 'Stability Tests' button in the item's QA tab to enter the test results.

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.



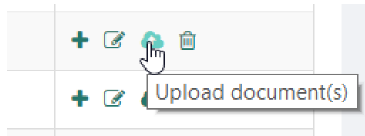
If a test is due in the future, results may not be entered and only the date is displayed, without a link.

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.



Compare stability test results

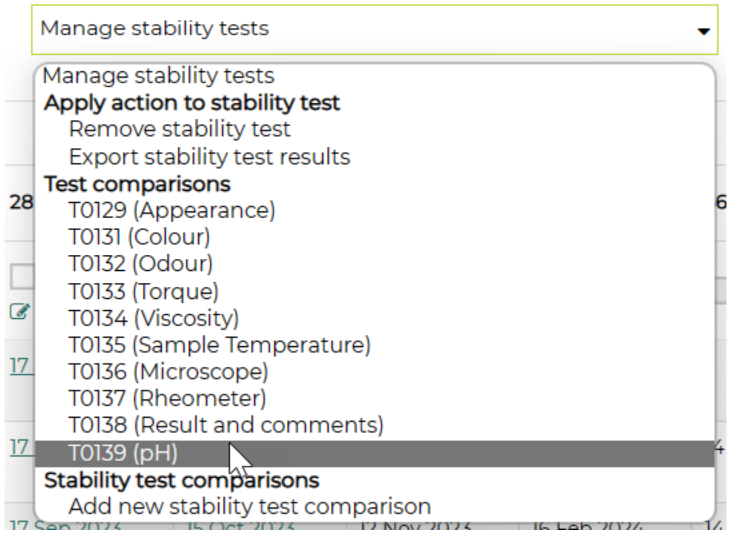
In the stability test view for an item, you may choose any single test in the stability test to view and compare test results and export the currently viewed data. You can also compare the test's results for different items – for example for different selected development batches, or even compare between different item types such as between formulas and development batches.

Note: The test must have the exact same test ID and be present in each stability test that you wish to compare. The test does not however need to be in the same stability test group.

Compare test's results within currently viewed stability test

This mode enables easy side-by-side comparison and export of all test results for one selected test (with identical test ID) in the currently viewed stability test - for example, when you are testing pH and that same test appears in different test groups in the stability test, e.g., for testing @4 deg C, 25 deg C, etc. The comparison view hides all other test data and enables easier comparison between the test groups and facilitates analysis of the data to identify trends and problem results.

Open the stability test and select a test to compare. These tests are automatically available to select in the menu based on the tests used in the currently viewed stability test.



Click on 'Apply' to view the comparison data.

T0139 (pH) - Stability Test Group: TG0066 | Development batch: DB00057 | DEV12345-1

[+]		0 Day	1 Day	2 Days	3 Days	7 Days
[+]	**4°C** TG0062	- pH	OK 4.90 pH	OK 4.90 pH	OK 4.95 pH	OK 4.98 pH
[+]	**25°C** TG0067	- pH	OK 4.95 pH	OK 4.95 pH	OK 4.95 pH	OK 4.95 pH
[+]	**40°C** TG0068	- pH	OK 4.95 pH	OK 5.01 pH	OK 5.02 pH	OK 5.03 pH
[+]	**50°C** TG0069	- pH	OK 4.90 pH	OK 5.00 pH	OK 5.10 pH	OK 5.15 pH

Each instance of the selected pH test is shown, one row per test group. The intervals which the test appear in are displayed chronologically from left to right for easy comparison.

Click on a [+] icon to expand the test to view more detailed data.

T0139 (pH) - Stability Test Group: TG0066 | Development batch: DB00057 | DEV12345-1

		0 Day	1 Day	2 Days	3 Days
	4°C TG0062	- pH	OK 4.90 pH	OK 4.90 pH	OK 4.95 pH
		Range: 4.80 - 5.30	**Range:** 4.80 - 5.30	**Range:** 4.80 - 5.30	**Range:** 4.80 - 5.30
		Parameters: Take range value from day 1 spec.	**Parameters:** Take range value from day 1 spec.	**Parameters:** Take range value from day 1 spec.	**Parameters:** Take range value from day 1 spec.
		Date of Result: 20 Aug 2023	**Date of Result:** 21 Aug 2023	**Date of Result:** 22 Aug 2023	**Date of Result:** 23 Aug 2023
		Operator: Emma Roberts	**Operator:** Emma Roberts	**Operator:** Emma Roberts	**Operator:** Emma Roberts
		Comments:	**Comments:**	**Comments:**	**Comments:**
	25°C TG0067	- pH	OK 4.95 pH	OK 4.95 pH	OK 4.95 pH

To edit the view, click on 'Edit'.

Select which data is required in the view.

For each test result, select any additional information be included in the view:

☑ Date of Result ☑ Operator ☑ Range ☑ Parameters ☑ Comments

Click on 'Exit View' to return to the main stability test view.

To export the stability test comparison data, click on 'Export View' to export the data to a .xlsx file.

	A	B	C	D	E	F	G	H
1	**T0139 (pH) - Stability Test Group: TG0066 | Development batch: DB00057 | DEV12345-1**							
2								
3		**0 Day**	**1 Day**	**2 Days**	**3 Days**	**7 Days**	**14 Days**	**21 Days**
4	**4°C TG0062**	- pH	OK4.90 pH	OK4.90 pH	OK4.95 pH	OK4.98 pH	Due	Due
5		Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 -
6		Parameters: Take	Parameters: Take	Parameters: Take	Parameters: Take	Parameters: Take	Parameters: Take	Parameters:
7		Date of Result: 2(	Date of Result: 21	Date of Result: 22	Date of Result: 23	Date of Result: 27	Date of Result:	Date of Resu
8		Operator: Emma	Operator: Emma	Operator: Emma	Operator: Emma	Operator: Emma	Operator: Emma	Operator: En
9		Comments:	Comments:	Comments:	Comments:	Comments:	Comments:	Comments:
10	**25°C TG0067**	- pH	OK4.95 pH	OK4.95 pH	OK4.95 pH	OK4.95 pH	Due	Due
11		Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 - 5.30	Range:4.80 -
12		Parameters: Take	Parameters: Take	Parameters: Take	Parameters: Take	Parameters: Take	Parameters: Take	Parameters:
13		Date of Result: 2(	Date of Result: 21	Date of Result: 22	Date of Result: 23	Date of Result: 27	Date of Result:	Date of Resu
14		Operator: Emma	Operator: Emma	Operator: Emma	Operator: Emma	Operator: Emma	Operator: Emma	Operator: En
15		Comments:	Comments:	Comments:	Comments:	Comments:	Comments:	Comments:

Compare test's results with stability tests in other items

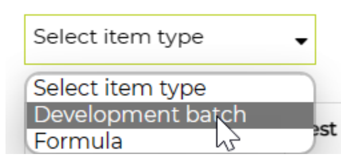
It is also possible to select and compare a selected test's results wherever the **same test** is used in different items. For example, you could compare the same pH test's results in stability tests running for different development batches, or even between development batches and formulas.

Select the required test to compare and click on 'Add':

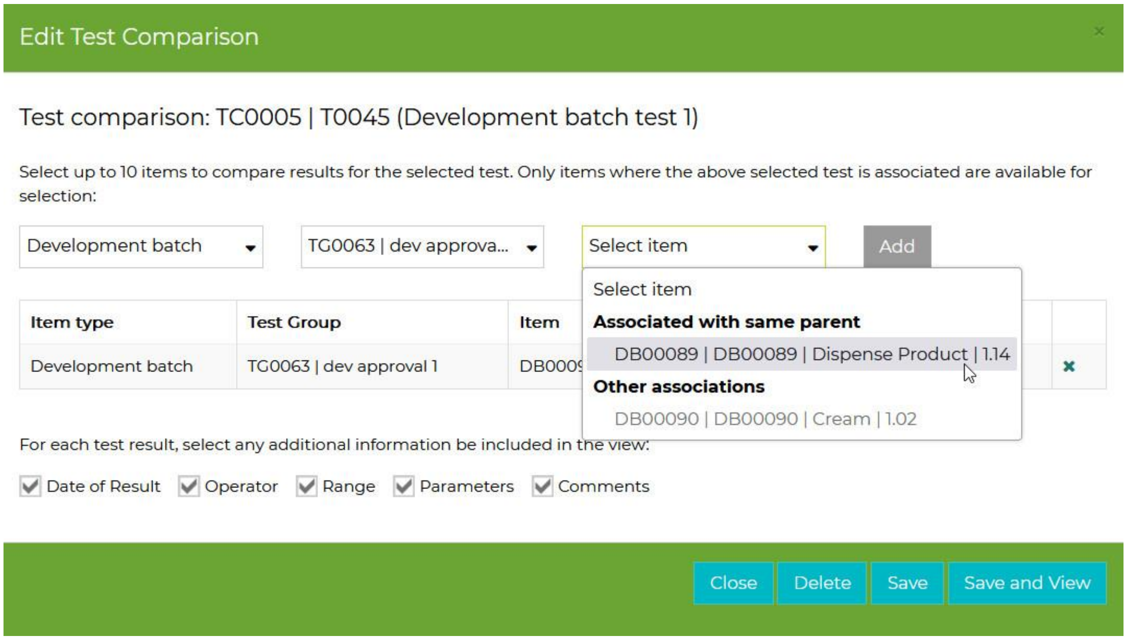
By default, the currently open item is selected as the first item to be associated with the stability test comparison view.

Item type	Test Group	Item	
Development batch	TG0075 | Photostability + Freeze -Thaw	DB00058 | DEV12345-2 | Bath Foam Demo | 1.04	✖

To add further items to the comparison, first select the item type:



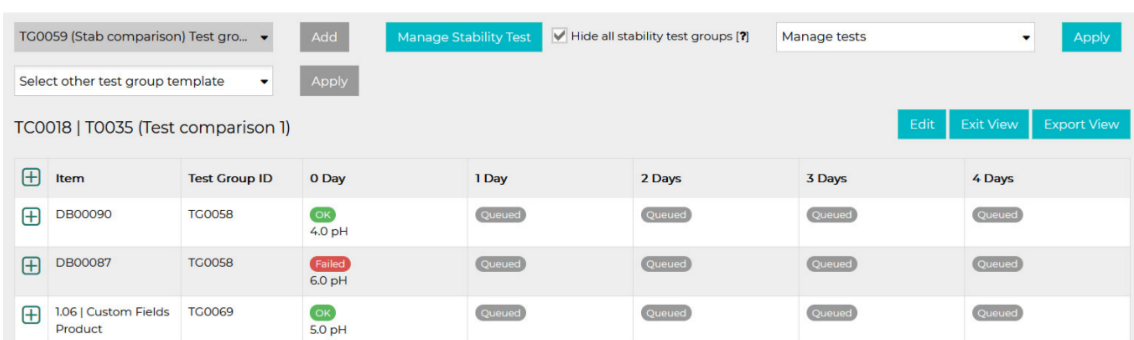
The presence of that same test in other stability tests for other items is detected. Select a test group in the adjacent menu to then see a list of available items which have the test present.



Click on 'Add' to add to the list of compared items. Repeat these steps to add further items to the test comparison view. You may add up to ten items to a test comparison view. Click on 'Save' or 'Save and View' to save your changes.

Note: Items added to a test comparison view are reciprocally linked. You can therefore open the stability test of another item in the view and access the same test comparisons as well as edit the view.

In the following example, we can see the same test being compared between two different stability test groups (TG0058 and TG0069) across three items – one formula and two development batches.



As explained previously, you can use the 'Edit' button to edit the test comparison view. This enables:

- Set which data should be included in the view
- Deletion of the test comparison view
- Selection or removal of items to compare

Use on the save buttons to update any changes.

The current test view data can be exported using the 'Export View' button.

Export stability test data

Stability test data can be exported in the same way as all other test groups. You may also export the stability test data as a simplified overview format, by clicking on 'Export Stability Tests'.

Example view of stability test report including numerical results and custom results codes:

TG0026 | RM Stability Group		**Start**	**1 Day**	**2 Days**	**3 Days**
pH Stab Group	pH STAB 1 T0027	28 Feb 2018	1 Mar 2018		
	pH STAB 2 T0028	OK DD 2.80 pH	OK DD 2.90 pH	Failed EE 3.10 pH	
	pH STAB 3 T0029	2 Mar 2018	3 Mar 2018	4 Mar 2018	5 Mar 2018

<u>Note</u>: The data in this report is only intended as an overview, showing the abbreviated results for each test at each interval in the test schedule. Detailed results which include any 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. Select the stability test group and click on 'Export Test Results'.

CoA Test Groups

A CoA test group can be used to manage testing for an item and to check its conformity with required specifications, such as viscosity, pH, specific gravity, bacterial content and solubility. A certificate of analysis (CoA) can also be generated.

The CoA test group can be applied to any of the following items:

- Raw materials
- Packaging items
- Development batches (R&D samples)
- Manufacturing orders

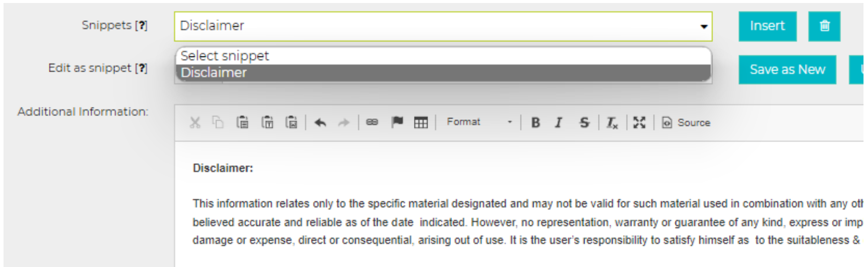
Note: The CoA is not available for formulas because it requires sampling and testing of a physical material rather than an abstract entity. It is recommended to use the development batches feature to produce a sample based on a formula version and to test the resultant sample for conformity with the specifications.

Build CoA test group

Under 'Tests/QA' in the 'Test Groups' tab, click on the 'Add CoA Test Group' button to build a new CoA test group.

Add the required tests in the order they should appear in the CoA.

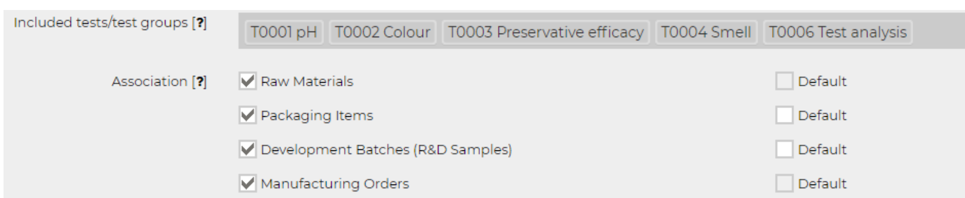
In the 'Header Details' enter any default text that should appear in the first section of the CoA, before the test data. In the 'Special Instructions' (e.g., storage instructions) and 'Additional Information' (e.g., legal disclaimer) fields, enter any default text, or use the snippets tool to add common phrases that you have saved. The content in all three of these fields can be further edited in the item's QA test configuration stage, prior to entering the test results and 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 to select, open the CoA test group that is currently set to 'default' for any item type, uncheck that option and it will be then available to assign to a different CoA Test Group.

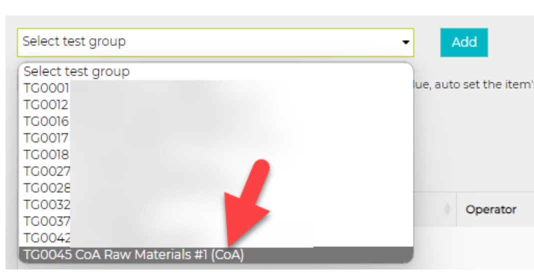
Two item types are currently unavailable since a CoA test group is already assigned:



Click on 'Save' to save the CoA Test Group.

Apply CoA to item

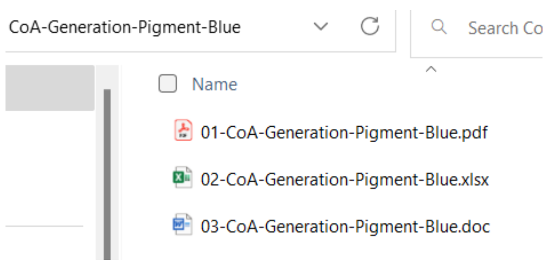
In an item's QA tab, select the CoA test group. Test groups of the type 'CoA' are displayed in the list with (CoA) appended to the test group title.



Click on 'Add' to add the selected test group. Configure the tests and enter the test results as explained earlier in this section.

Generate CoA report

To generate the CoA, a CoA test group must be associated with the item's QA. Click on 'Export CoA' to export the data for CoA test group as a certificate of analysis (CoA). A zip folder will be downloaded, with the report available in .pdf, .xlsx and .doc formats.



The .pdf version report will include any company logo (as uploaded by an admin user in the Product Manager settings).

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Certificate of Analysis
(Representative Sample Certificate)

Product Name: **Pigment Blue**
Batch/Lot Number:
Expiration Date / BBE:

Product Name:
Batch/Lot Number:
Expiration Date / BBE:

Analytical Tests	Specification	Analysis
Aspect		OK Creaming, Oil separation
Color		OK
Smell		OK
pH		OK 3.54 pH
ph (DB)		- pH
Appearance		OK

Disclaimer:

This information relates only to the specific material designated and may not be valid for such material used in combination with any other materials or in any other process. Such information is to be the best of the company's knowledge and believed accurate and reliable as of the date indicated. However, no representation, warranty or guarantee of any kind, express or implied, is made as to its accuracy, reliability or completeness and we assume no responsibility for any loss, damage or expense, direct or consequential, arising out of use. It is the user's responsibility to satisfy himself as to the suitableness & completeness of such information for his own particular use.

Note: If you require greater control of the final format of the CoA, it is recommended to open the .doc version to make any further changes.

QA Statuses

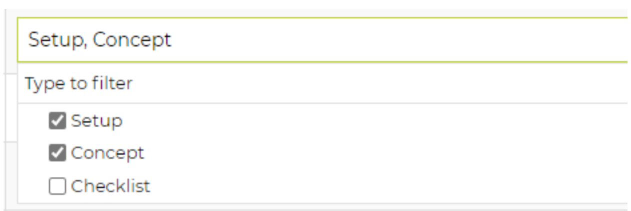
For each type of item, the status 'Approved' performs a special role and it's availability for selection can be blocked by any incomplete or failed tests or checklist items, as described earlier in this section of the guide. If the item is not in 'Approved' status this can prevent certain actions being taken. For example, only approved formulas can be set to production mode or selected for creating a manufacturing order. Raw material batches must be set to 'Approved' to be available for dispense in manufacturing orders.

Default and custom QA status options

In the 'Custom Settings' tab when logged in as an admin user you can configure the required behavior for all default and any available custom QA statuses, for each item type.

Select an item type such as 'Projects' to view the statuses.

Under 'Select View Only' tabs, click to select any tabs in the project that should be locked if that QA status is currently applied to the item:



<u>Note</u>: Locking of tabs for an item may also be triggered by other conditions. For example, if a raw material is used in a manufacturing order, the 'Composition' tab will be locked. A user may also only be granted permission to view data in certain tabs based on the department settings.

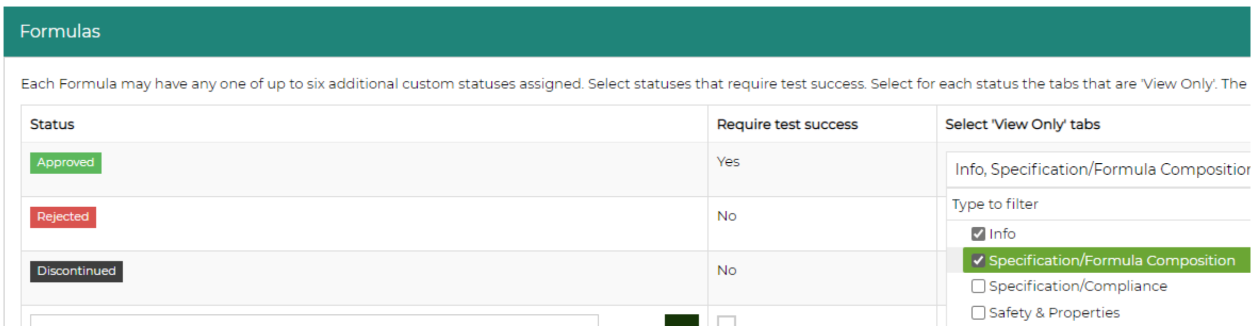
In the 'Custom Settings' tab when logged in as an admin user, you can also set up to six custom statuses for each item type. Each status has a default color for the badge that is displayed once that status is selected.

You may update a text label for a status that you have created, but if the status is already in use for any item in your account, you cannot leave the label blank, otherwise an error will be displayed, prompting you to enter a title.

Select ‘Require test success’ if selection of the status should be conditional that all tests are passed or are not blocking.

Select any tabs that should be locked (read only) if the custom status is applied to the item (see above).

For default statuses, the ‘Require test success’ options cannot be modified and the default behavior is indicated by ‘Yes’ or ‘No’. It is still possible to set preferences for which tabs are locked for any of these statuses.



QA: Projects (Market Briefs)

A project’s approval status is set in the ‘Approve’ tab of the project.

Statuses are:

- Open (default)
- Approved
- Closed

You can also configure up to six custom statuses.

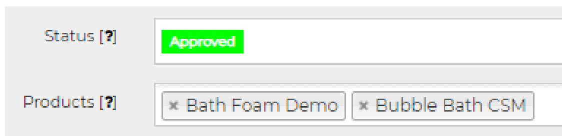
When the project is complete, the project can be set to ‘Closed’ or to another custom status that you set.

Only authorized project manager users may change a project’s status or assign products to a project. To authorize users, an admin user 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 all project details have been finalized with all stakeholders, an authorized user can set the project to 'Approved' in the 'Approve' tab.

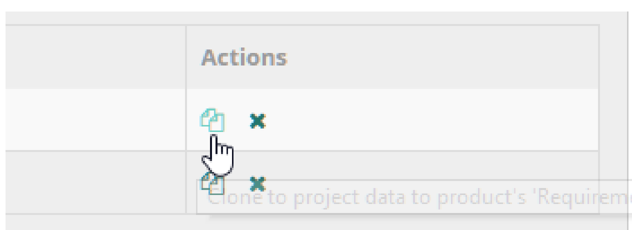
Once a project is set to 'Approved', the authorized user can select any products to associate with the project, by clicking in the following field:



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 disassociated 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: 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.

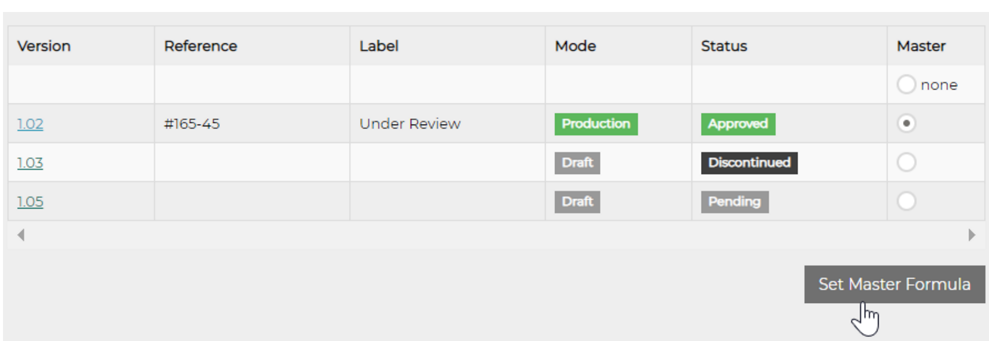
Statuses are the following:

- Pending (default)
- Approved
- In Development
- Discontinued

You may also configure up to six custom statuses.

Set the master formula

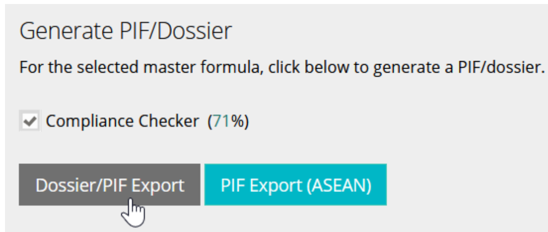
In the 'approve' tab of the product, you can select one formula associated with the product as a master formula. Click on 'Set Master Formula' to apply the selection.



A master formula has the following functions:

Compliance Checker

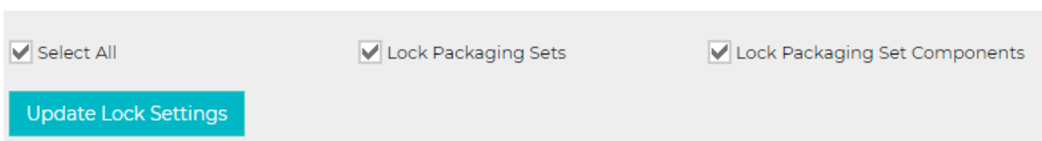
You can activate the Compliance Checker and export the Dossier/PIF regardless of the mode or status.



The formula is marked as 'Master' across the application for easier identification.

Master formula can be locked

You can lock the 'master' formula tabs to prevent from editing. These settings override any permissions applied in the department settings and are valid for all users. In the 'Approve' tab of the product, once a master formula is selected you can use the following checkboxes to lock the product tabs from editing. These settings restrict editing, even if the logged in user has rights to access the tabs. Click on the 'Update Lock Settings' button to apply the settings.

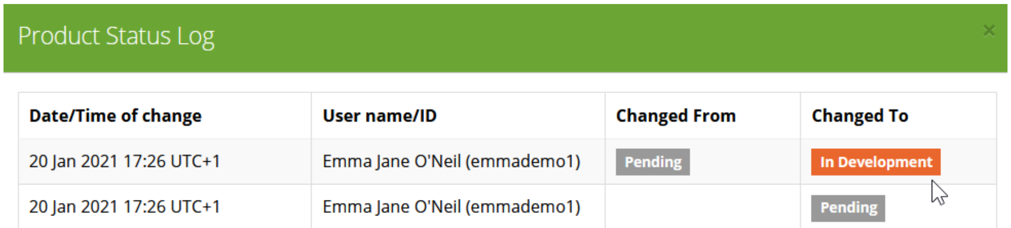


You can lock each of the 'Product' tabs, and the tabs of the following product related items:

- Formula
- Raw Materials
- Packaging

Note: 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.

Click on the 'Log' action to show history approval data for a product.


Product Status Log

Date/Time of change	User name/ID	Changed From	Changed To
20 Jan 2021 17:26 UTC+1	Emma Jane O'Neil (emmademo1)	Pending	In Development
20 Jan 2021 17:26 UTC+1	Emma Jane O'Neil (emmademo1)		Pending

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, used in the batch tickets.

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:

Formula mode

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 when in the formula view.

The role of the 'Production' mode is as follows:

- Auto activation of the *Compliance Checker*
- Only production mode formulas may be selected for manufacturing
- A product information file (PIF) may be generated

Formula QA statuses

Both 'Draft' and 'Production' mode formulas may have either of the following QA statuses applied:

- Pending (default)
- Approved
- Rejected
- Discontinued

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.

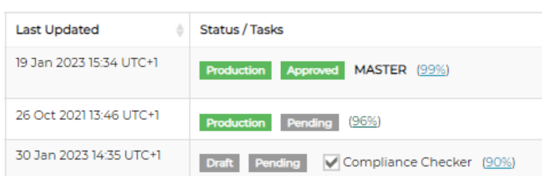
Discontinued

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 manufacturing.

Approved

This status is important 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.**

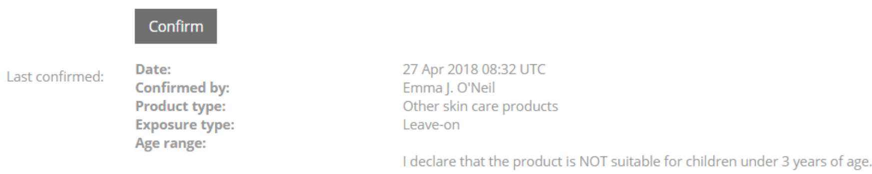
The status of each formula is displayed in the product list, in the 'Status/Tasks' column. Click on the [+] next to a product title, to view the formulas and statuses:



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 Compliance Checker 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:

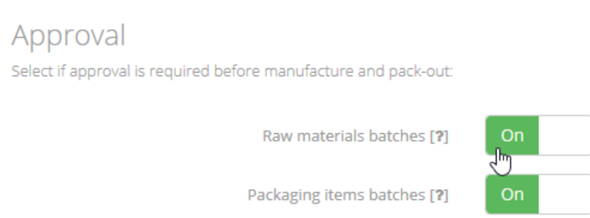
A user confirmation log is stored, allowing you to view a history of when each confirmation was actioned and by whom. Click on 'View user confirmation log' to open this panel:

Formula User Confirmation Log

Date	Confirmed by	Product type	Exposure type	Age range	Suitable for under 3's?
27 Apr 2018 08:33 UTC	Emma J. O'Neil	Body care products	Leave-on	21 to 89	I declare that the product is NOT suitable for children under 3 years of age.
27 Apr 2018 08:33 UTC	Emma J. O'Neil	Body care products	Leave-on	21 to 89	I declare that the product is NOT suitable for children under 3 years of age.

QA: Raw Materials and Packaging Items

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.



Default statuses for both item types are as follows:

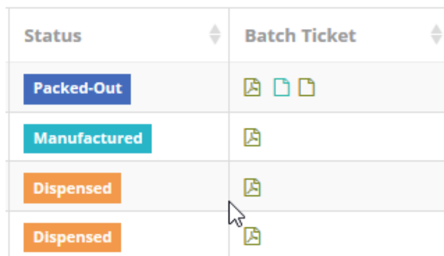
- Quarantined (default)

- Approved
- Rejected
- Destruct

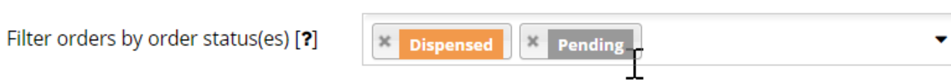
Up to six custom statuses may be configured for each item type.

QA: Manufacturing Orders

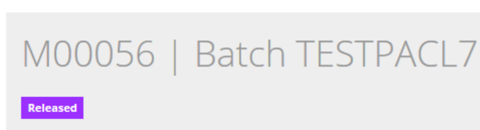
Manufacturing order statuses are either assigned automatically at certain stages of the manufacturing process or are set manually. The status of each order is displayed in the 'Status' column of the manufacturing orders list as follows:



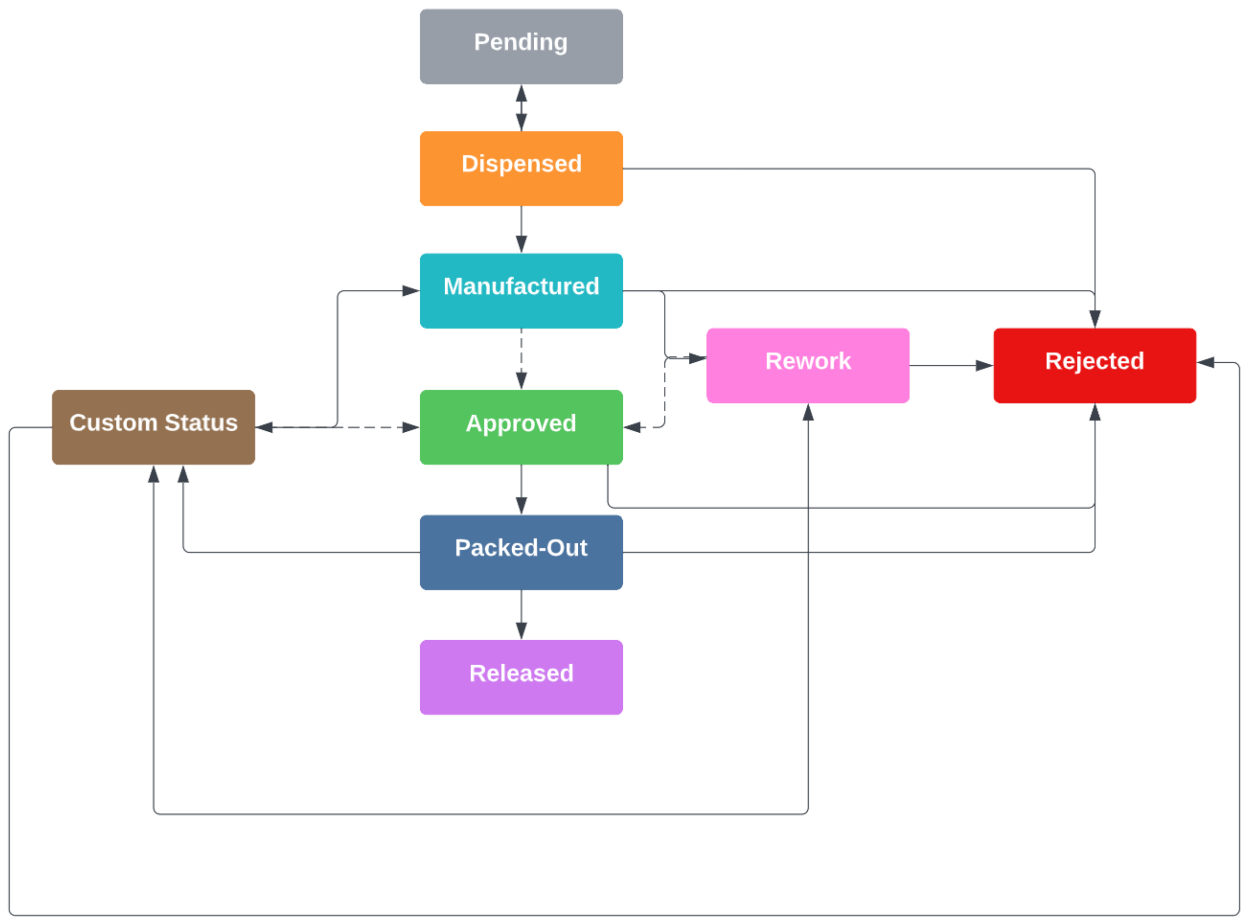
In the orders list, you can filter orders by any combination of statuses:



In the order view, you can also view the status underneath the manufacturing order number:



Manufacturing order statuses are as follows. A dashed line implies a conditional relationship, such as requiring that tests are not blocking.



Pending

The first status assigned automatically to a new manufacturing order. The order may be deleted. No custom statuses may be assigned. Tests can be configured in the 'Configure' or 'Approve' tabs.

Dispensed

Assigned automatically once the pending order has been dispensed. No custom status may be assigned. The dispense may be reversed, resetting the order to 'Pending' status. The dispense amounts may be adjusted in the 'Dispense' tab. Tests can still be added in the 'Approve' tab. The order may be deleted from the orders list, prompting the user to determine what should happen to any dispensed inventory.

Manufactured

Assigned manually in the 'Approve' tab once an order has been set to 'Dispensed'. Once status is 'Manufactured' the order may have a custom status assigned (see 'Custom statuses', below). Orders with this status may also be set to 'Rework'.

Once set to 'Manufactured' status, the batch ticket and dispense lists, along with other compliance documents are downloadable from the orders list as a batch protocol in .zip format. Tests can still be added in the 'Approve' tab.

Approved

Provided no tests are blocking, this status can be assigned manually in the 'Approve' tab once an order has been set to 'Manufactured' or any custom status. Tests may no longer be added to the order. The order may have a custom status assigned (see 'Custom statuses', below). Orders with this status may also be set to 'Rework'.

Rework

This status can be assigned to an order with status 'Manufactured', 'Approved' or a custom status. Selecting this status unlocks the 'Adjustments' function in the 'Dispense' tab, enabling an order to be re-processed.

Packed-Out

This status is automatically assigned once an order has reached the status 'Approved' and the pack out function (quick or full version) has been performed in the 'Pack-Out' tab. Tests may no longer be added to the order. The order may have a custom status assigned (see 'Custom statuses', below). The pack-out status may only be applied once to an order.

Released

Assigned manually in the 'Pack-Out' tab once an order has been set to 'Packed-Out'. This status cannot be reversed.

Rejected

Available to manually select in the 'Approve' tab. This status cannot be reversed.

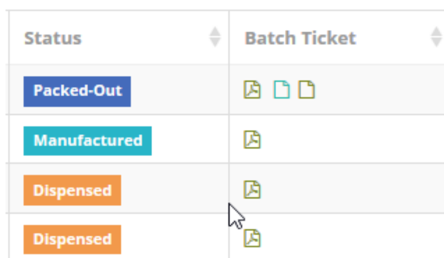
Custom statuses

Each manufacturing order may have any one of up to six additional custom statuses assigned, after the order has been set to the status 'Manufactured'. These statuses are configured by an admin user in the Product Manager settings under 'Custom Setting'.

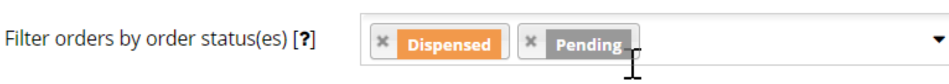
Enter a maximum of 15 characters for the custom status name. Select whether the status is only available for selection when all tests in the 'Approve' tab of the manufacturing order have been passed, skipped or OOS accepted.

QA: Development Batches

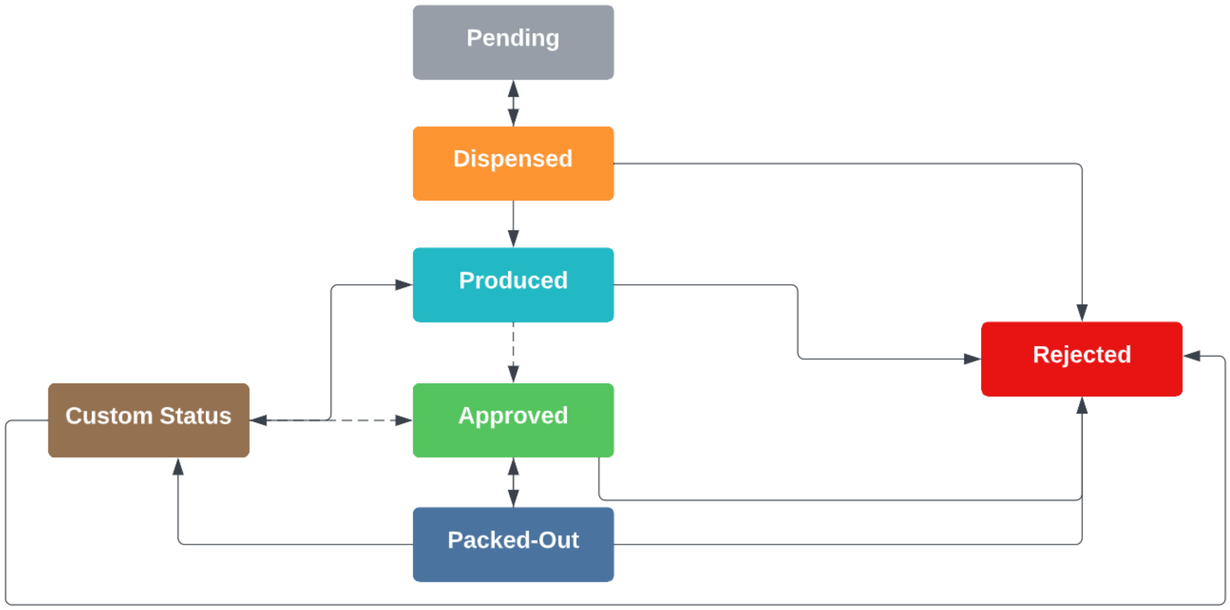
Development batch order statuses are either assigned automatically at certain stages of the sample development process or are set manually. The status of each order is displayed in the 'Status' column of the development batch orders list as follows:



In the orders list, you can filter orders by any combination of statuses:



Development batch order statuses are as follows. A dashed line implies a conditional relationship, such as requiring that tests are not blocking.



Pending

The first status assigned automatically to a new order. The order may be deleted. No custom statuses may be assigned. Tests can be configured in the 'Configure' or 'Approve' tabs.

Dispensed

Assigned automatically once the pending order has been dispensed. No custom status may be assigned. The dispense may be reversed, resetting the order to 'Pending' status. The dispense amounts may be adjusted in the 'Dispense' tab. Tests can still be added in the 'Approve' tab. The order may be deleted from the orders list, prompting the user to determine what should happen to any dispensed inventory.

Produced

Assigned manually in the 'Approve' tab once an order has been set to 'Dispensed'. Once status is 'Produced' the order may have a custom status assigned (see 'Custom statuses', below).

Once set to 'Produced' status, the batch ticket and dispense lists, along with other compliance documents are downloadable from the orders list as a batch protocol in .zip format. Tests can still be added in the 'Approve' tab.

Approved

Provided no tests are blocking, this status can be assigned manually in the 'Approve' tab once an order has been set to 'Produced' or any custom status. Tests may no longer be added to the order. The order may have a custom status assigned (see 'Custom statuses', below).

Packed-Out

This status is automatically assigned once an order has reached the status 'Approved' and the pack out function (quick or full version) has been performed in the 'Pack-Out' tab. Tests may no longer be added to the order. The order may have a custom status assigned (see 'Custom statuses', below). The pack-out status may only be applied once to an order.

If you are testing your sample batch along with packaging, after pack-out you may assign the status 'Approved' to approve the batch and packaging in combination. Alternatively, you may set the order to 'Rejected' or an appropriate custom status.

Rejected

Available to manually select in the 'Approve' tab. This status cannot be reversed.

Custom statuses

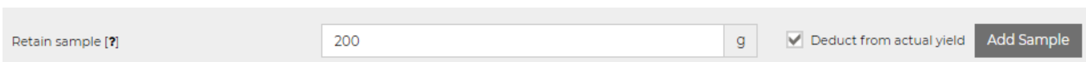
Each development batch order may have any one of up to six additional custom statuses assigned, after the order has been set to the status 'Manufactured'. These statuses are configured by an admin user in the Product Manager settings under 'Custom Settings'.

Enter a maximum of 15 characters for the custom status name. Select whether the status is only available for selection when all tests in the 'Approve' tab of the development batch order have been passed, skipped or OOS accepted.

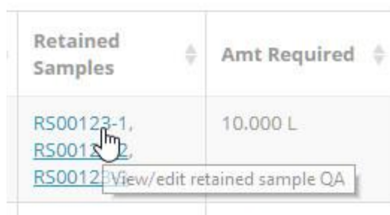
QA: Retained Samples

If you use Product Manager's manufacturing orders you can create retained samples which have their own QA applied, such as for stability testing. 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 manufacturing 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.



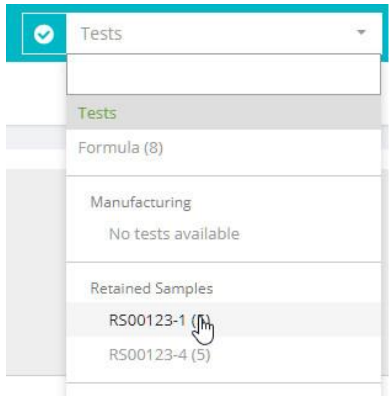
Click on 'Add Sample' to create the sample. To open a retained sample, click on a sample ID either in the 'Approve' tab of the manufacturing order or in the orders list, in the 'Retained Samples' column.



Test groups (including stability) associated with 'Retained Samples' QA workflow are available to select for 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 <u>up to the current date</u> 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.

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.



Customers and Customer Groups

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.

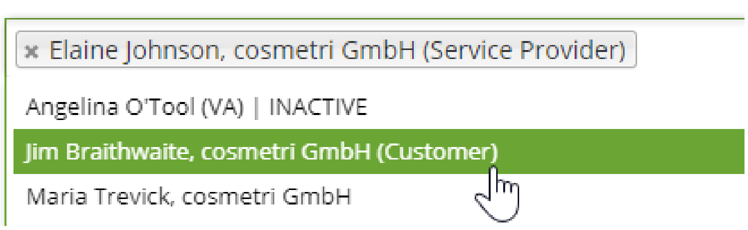
Customer management is ideal for service providers such as contract manufacturers, safety assessors and labs, offering the following advantages:

- customers can add, view and edit their own market briefs 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 of their data
- assign a customer manager for conducting communication with the customer
- reserve inventory for a customer's production

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.

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.

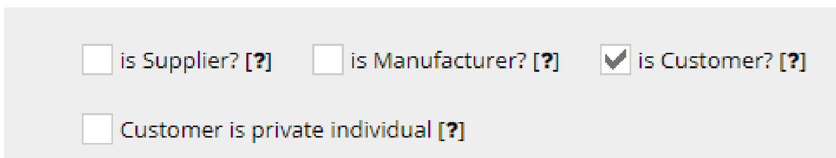
Customer users can easily be identified in Product Manager and are listed in any user list by their name and company and suffixed with '(Customer)'.



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:

Managing Customer Records

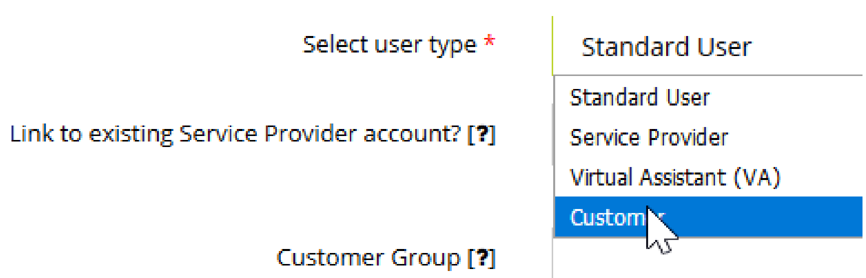
Customers are managed under the menu item 'Customers'. Click on 'Add New' to create a company record of the type 'Customer' which can then be associated with customer users that you add to your Cosmetri account. By default, the following 'is Customer' checkbox is selected. If the customer is also a supplier or manufacturer you can select multiple roles for any company record.



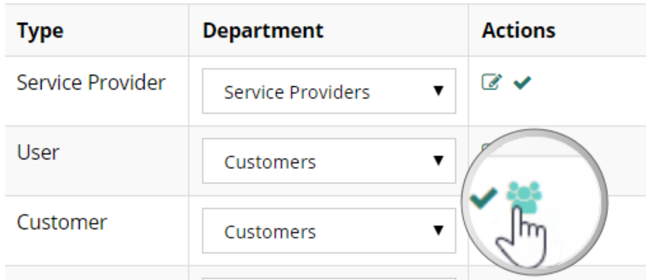
Select 'Customer is private individual' if you need to enter a first name and last name for the customer, instead of a company name.

Customer User Type

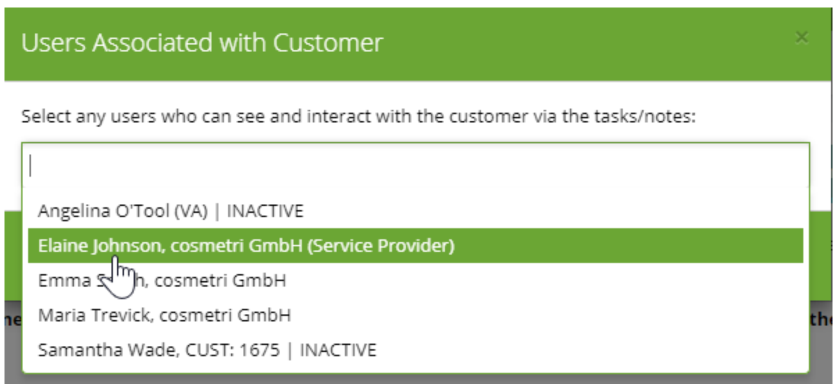
Log in as an admin user of your Cosmetri account so that you can access the 'Users & Seats' tab under 'Global Settings'. Create a new customer user, by selecting 'Customer' as the user type.



Once created, click on the following icon to manage the users who are able to see that Customer:



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.



Customer Groups

As well as organizing your products by categories, you can also associate each project (market brief) and product to a customer group. This is useful for companies managing products for different customers or for multiple product lines or brands. Configuring customer groups enables you to assign which users can view these projects and products.

To access the customer settings, click on the menu item 'Customers/Customer Groups'.

<u>Note</u>: It is recommended to restrict customer users from accessing the customers page by selecting 'Hide' for that option in the 'Departments' global settings.

Click on 'Add New' to create your first customer group. Enter a title for the group and then click in 'Products' to select which products should belong to that group. **You can only add a product to one group**.

Note: Once you create your first customer group and wish to use these to control which users can access which products, it is important that ALL products are assigned to a group. **Non-assigned products will be visible to all users!**

As you add products to groups and save each group you'll be alerted if any products are currently unassigned

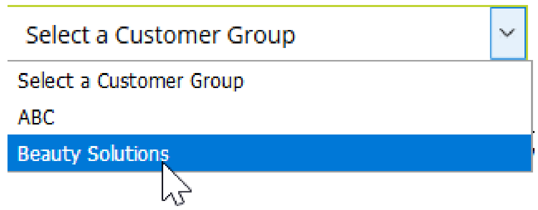
Now select the users you wish to have access to that group:

Add an optional comment for the group and then click on 'Save':

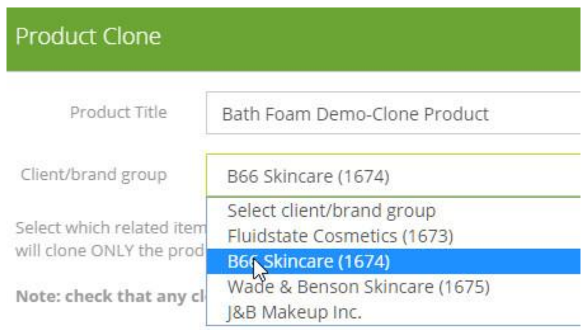
Note: If you later add a new user to your account, remember to add them to any customer groups, otherwise they will not be able to access any products.

To assist you, an admin user can select any user in the 'Users & Seats' tab of the global settings and directly assign the required customer groups to that user.

In the main products list, you can now view your products by customer using the following menu:



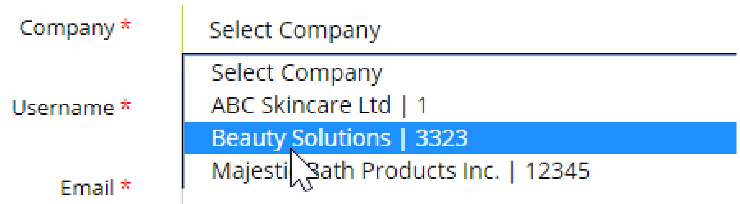
Once the first customer group has been created, adding a new product will require that you assign this to a customer group before saving is possible. If you clone a product, you will be prompted to assign the cloned version to a customer group.



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).

Enter a first name, username and email address for the customer user.

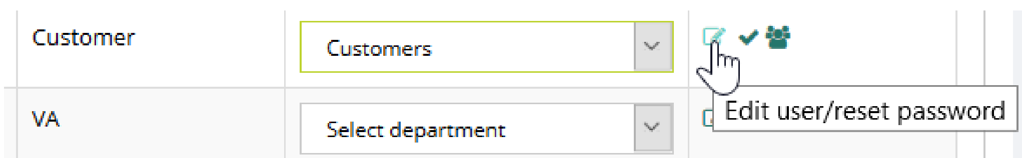
Select an existing company to associate with the customer. Only companies of the type 'Customer' are available for selection.



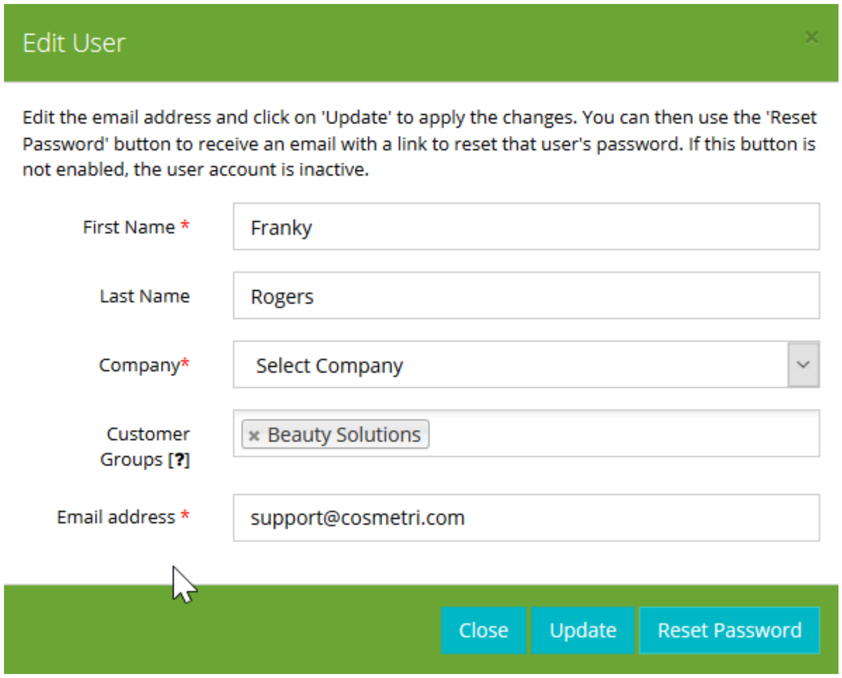
If no such company record exists, click on 'Add' to create the record:

Click on 'Add User' to create the user. The customer will automatically receive an email with an activation link to securely set their password and login to the software.

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

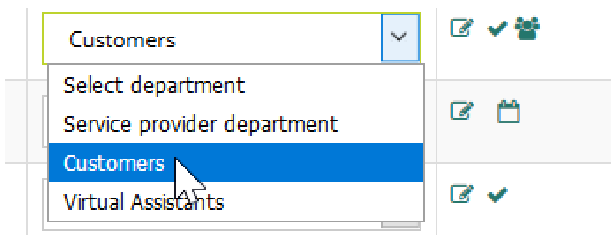
Use the 'Departments' settings to determine which areas of Product Manager your customer can view and edit, as well as important functions they may perform.

We recommend that you create a 'Customers' Department which usually would provide only limited access, such as to the 'Projects' feature 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:



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:

- Customer logs in to Product Manager as a customer user and adds a new project.
- Under the tab 'Concept' they describe their requirements.
- Customer then adds a custom task for the project, requesting the customer manager to check the new project.

- 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.
- Authorized user creates one or more products for association with the project and adds these to the customer group associated with the customer.
- Authorized user approves the project and associates this with one or more the products set in step 5.
- Authorized user may clone the project data to the 'Requirements' tab of any associated product.
- R&D further refine the details in each product's 'Requirements' tab, as the basis for R&D, to develop the customer's formula and samples.
- 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.
- R&D develop samples for customer using the development batches feature. The sample IDs in Product Manager can be selected in the 'Requirements' tab for reference.

Service Providers

Introduction

Cosmetri Product Manager can be used as a secure collaboration platform, enabling you to work together with your team as well as any service providers, such as a contract manufacturer, safety assessor, laboratory or even your suppliers. By using the same tools, data standards and workflows, you can collaborate more securely and efficiently.

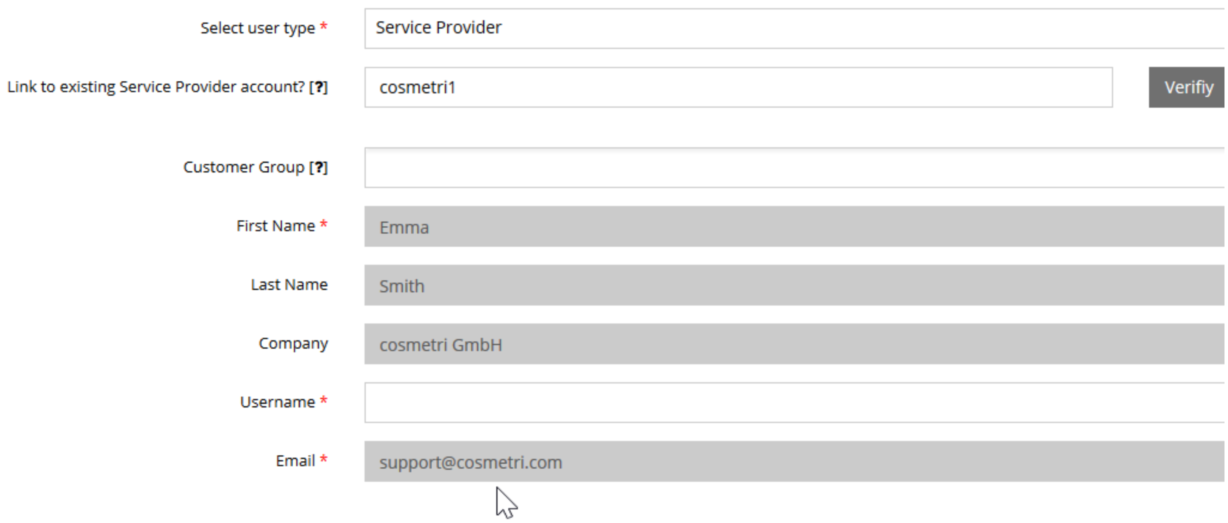
You can grant a service provider access to your Cosmetri account, assign them tasks or reminders and even have them log their worked hours in their timesheet.

A service provider has a special type of Cosmetri user account which must be approved by Cosmetri., subject to an additional fee. This account enables the service provider to securely log in and out of any of their customer accounts they have been granted to, as well as see a status of their tasks, notes and tests assigned to them.

Grant Access to a Service Provider

If you wish to grant your service provider access to your Cosmetri account and the service provider already uses Product Manager, ask them for their Cosmetri primary admin username. In the 'Users & Seats' settings under 'Select user type', select 'Service Provider', then enter the service provider's username and then click on 'Verify':

If the username is an authorized service provider account, the form below will then be populated with the service provider's details:



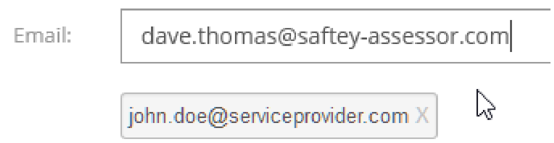
Enter a unique **username** for the account that you will create, which is then linked with the service provider's account. If you have already setup at least one customer group, select any group(s) that the service provider should have permission to view. Clicking on 'Add User' will create the user account. Your service provider will receive an email notifying them that you have granted access to your account and instruct them to authorize the new account and create a password.

Note: You will require an available user seat to add the service provider as a user.

Invite Service Provider

If you wish to use Cosmetri Product Manager to securely collaborate with your service provider and they do not yet use Product Manager, you can easily invite them to join. Click on the main menu item 'Team/Service Providers' and enter any email addresses of service providers who you would like to invite. If you do not see this menu item, check that the admin has granted your department permission to access that page.

Press enter or return on your keyboard to enter multiple email addresses and then on 'Invite' to send the email invitations.



Each recipient will receive an email from Cosmetri instructing them in how to create a service provider account and link to you.

Setting Permissions and Access

Service providers logged in to your account will not be able to access the following pages:

- Customers
- Team/Service Providers

If you wish to restrict which products your service provider can access, set any customer groups accordingly.

To further restrict which content and functions are accessible to the service provider, an admin user can assign them to a department.

If you at any time need to revoke access of the service provider to your account, click on the following icon in the 'Actions' column of the 'Users' tab in your Global Settings:

Virtual (Remote) Assistant Users

Introduction

Virtual or remote assistants enable you to affordably extend your team and boost the efficiency and productivity of your business. You can hire your own remote assistants, adding them as special 'VA' users to your Cosmetri account. You'll be able to share data with them securely and control precisely what 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.

Some of the common tasks that can be performed by your remote assistant include:

- Data entry in Product Manager - such as formulas, suppliers and raw materials
- Request and enter information from suppliers e.g., prices, safety and product data
- Tag and upload SDS and CoA documents

Tips for Working with Your VA

- 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.

- 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 for Product Manager and ensure the VA has everything they require to work effectively on these.

- Communication is key

Schedule regular online meetings and communicate clearly. How often do you need to check in with each other? Who will be the main contact person in your company for your VA and how and when can they stay in contact with each other?

- 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 work or clarification from you.

- 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.

- Provide adequate supervision and reviews

Every staff member, whether working remotely or from 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.

- 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 a termination clause, vacations, handling of secure information and any agreed codes of practice.

- 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 VA. 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.

- Use the built-in Product Manager tasks manager

We recommend using Product Manager's tasks 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.

- Share your data and documents securely via Product Manager

For product and compliance-related documents, we recommend using Product Manager to securely share these. 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 CV 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 VA users 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: For each VA user, you will require an available user seat in your Product Manager plan.

To add a VA user, in the Product Manager main settings under 'Users & Seats' next to 'Select user type' select 'Virtual Assistant (VA)'.

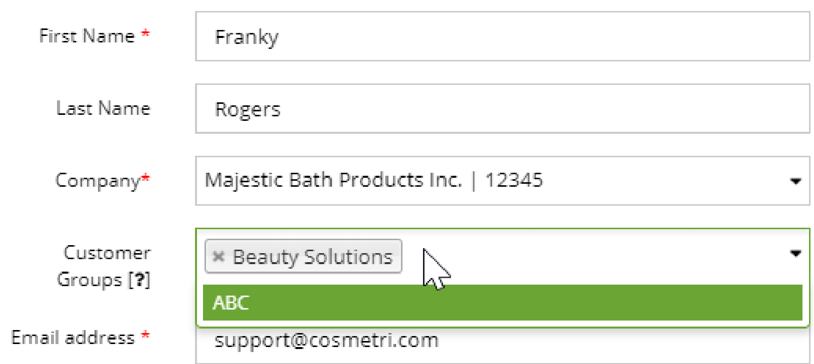
Configure department for VA user

You can associate the VA 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.

Assign customer groups for 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. These settings work in conjunction with any department you create for the VA, enabling fine control of permissions for the logged in VA user.

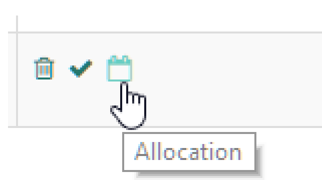
You can also assign any customer groups directly while adding the new VA user, or while editing their user settings, under the settings tab 'Users & Seats'.



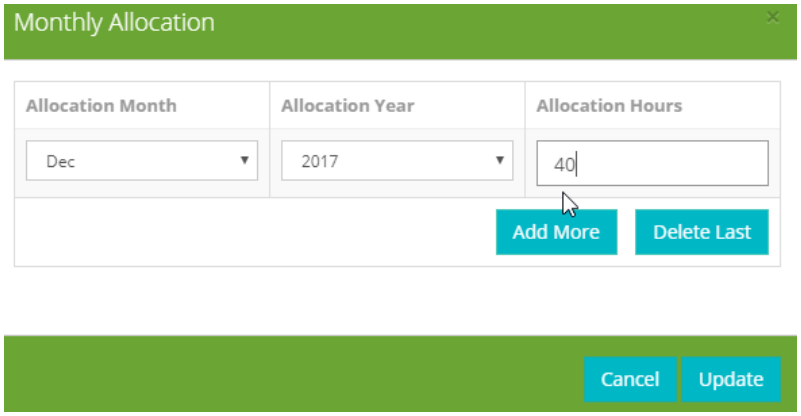
Important! You must associate the VA user with the correct department to ensure that the access settings are applied, prior to them logging in to Product Manager. It is advisable to temporarily apply a department setting and any customer groups to one of the user accounts you have access to, to check that you have correctly configured the Department. Do this before you assign a new user and log in to check that the correct permissions have been applied.

Manage VA hours and work log

An admin user can login and set the monthly hours allocated for each VA user. Go to the 'Users & Seats' tab and for the VA user, click on the following action:

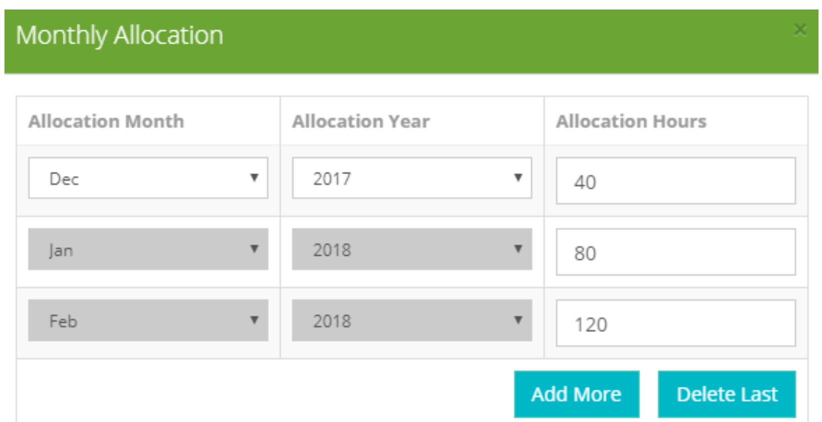


By default, the current month and year are selected. You can change this setting to enter an allocation for a future month.



After selecting the required month and year, enter the number of hours allocated to the VA under 'Allocation Hours'. Click on 'Update' to apply.

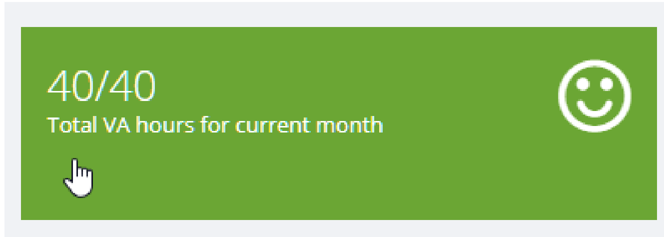
If you wish to enter allocations for multiple months in the future, click on the 'Add More' button.



<u>Note</u>: Entering 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.

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 admin.

VA time sheet and activity reports

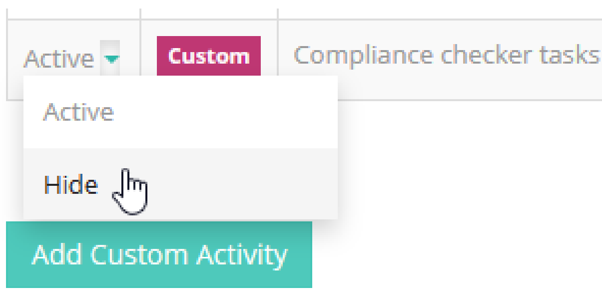
If your VA is granted access to your Product Manager account, you can generate detailed reports for any chosen timeframe, showing the hours worked by your VA and the tasks and activities undertaken.

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 track their activities.

Custom activities are ideal for ongoing routine work, that tends not be assigned as individual custom tasks in Product Manager. Examples could include 'Checking due tests, 'Contacting suppliers' or 'Uploading SDS documents. 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:

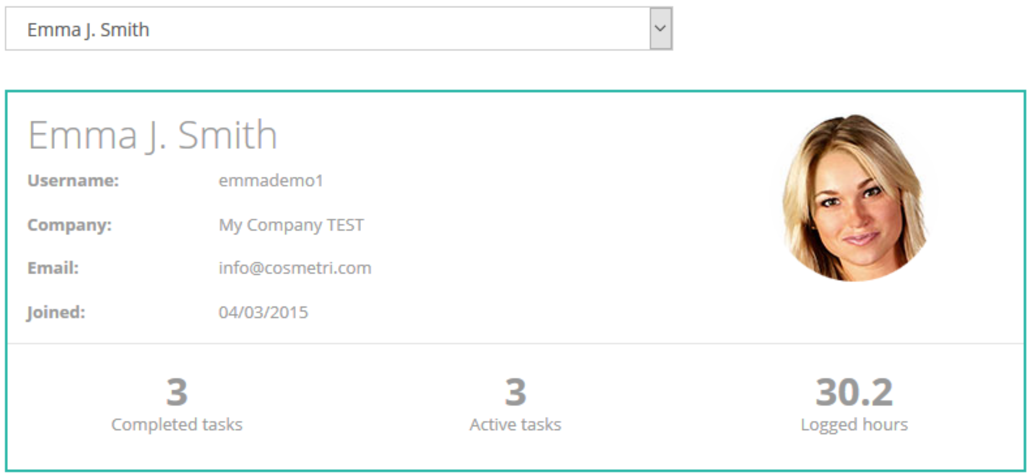


Only **custom tasks** assigned to the VA will be visible in their time sheet. Auto-generated tasks generated by the Compliance Checker are not included. If you wish to have your VA enter time spent on these tasks, we recommend that you create a custom activity such as 'Compliance checker tasks'. If you require more descriptive activities for your reports, use a title such as 'Compliance checker tasks – Lux II Skin Cream'.

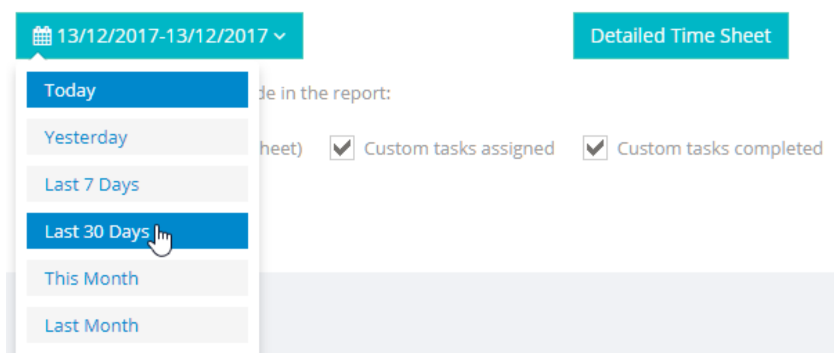
Activity reports

Under the menu item 'Team/Activity Reports', you can view a summary of your VA's 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

Report Builder

Introduction

Product Manager's reporting tool enables you to build custom report templates from a wide range of ingredient, raw material and product-related fields. Queries can be built, and reporting templates saved using preferred column headers to display the data in your required format. You can the run these report queries and generate the report

Access the reporting tool under 'Reports' in the main menu.

Select a tab to access the Reporting Tool page related to the required item type.

- Ingredients
- Raw Materials
- Products

Configure Report

The reporting tool has two sections. In the upper section build the conditions on which the results will be based. To build a condition, select a data field from the drop-down menu.

Each selected data field has associated built in conditions, as follows:

Text field

Contains, does not contain

Lists, multi-select lists

Includes, does not include

Dates

Between, not between

Numeric values

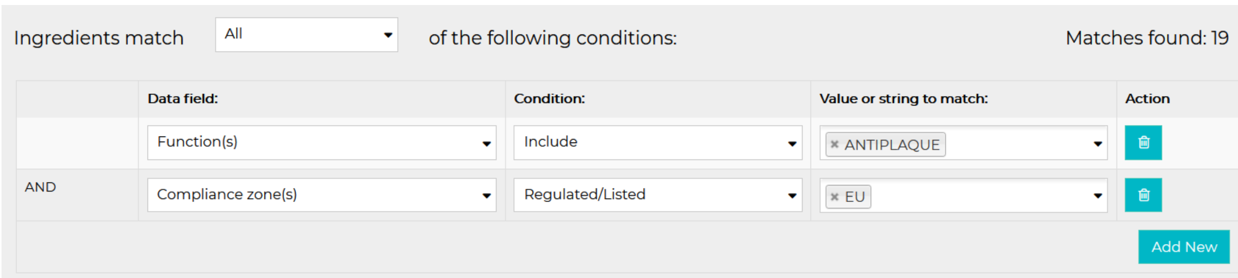
< (less than), >< (between), > (greater than)

Select the required condition and enter a value or string to match. Add further conditions by clicking on the ‘Add New’ button.

Set the required match types ‘all’ or ‘any’ for the selected conditions.

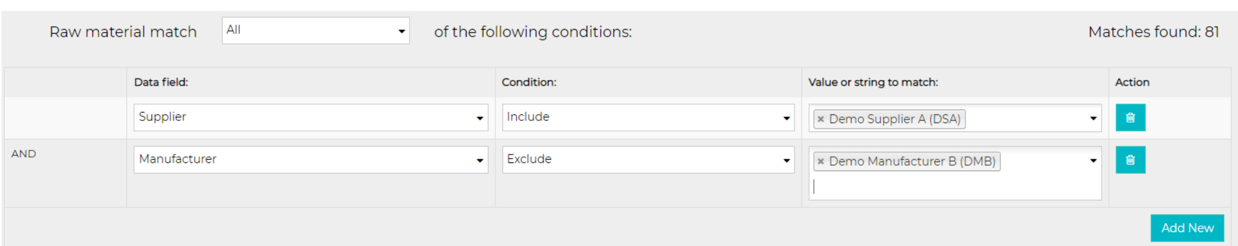
Example #1

All ingredients with ‘antiplaque’ function, that are listed in the EU have the following conditions configured:



Example #2

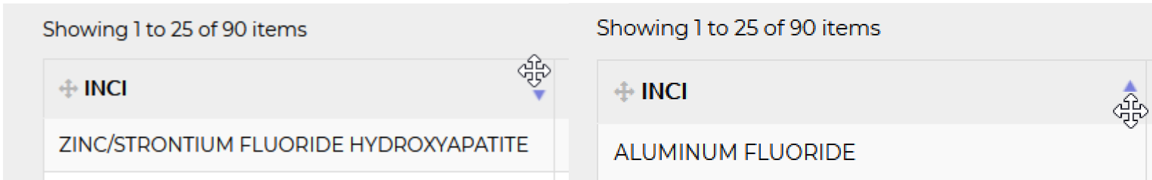
All raw materials where the supplier is ‘Demo Supplier A’ and the manufacturer is not ‘Demo Manufacturer B’, configure the following conditions:



The ‘Matches found’ counter is automatically updated each time a condition is added or removed.

In the lower section, select the required column headers. The first seven columns are included in the exported .pdf file. The other columns will only be displayed in the .xlsx report. Click on ‘Add New’ to add further column headers or click on the delete action to delete columns.

Click on the ‘Populate Report’ button to display the report based on the conditions and column headers. Drag-and-drop the column headers to re-order the columns.



Click on the arrow next to the column headers to sort alphanumerically, depending on the data type present in the column.

Export report

Once the report is populated, it is possible to export it. Two versions are included in the exported folder: xlsx and .pdf.

Before exporting the ‘Raw Materials’ report, determine how the data should be displayed in the exported .xlsx file. Select the ‘Nested’ radio-button, to show each raw material only once, and group the ingredients to the raw material they belong to. Select the ‘In one row’ radio button, to show all the column headers in one row. In this case the raw material data will repeat for each ingredient reported in the raw material composition.

Save report template

Report Templates make it easy to perform routine reporting tasks. Once the report is populated, it is possible to save it as a template. All saved report templates are accessible under ‘Reports/Templates’ in the main menu.

Templates can be further edited or cloned to create template variations.

To save a report as a template. click on the ‘Save Template’ button, and a pop-up will be displayed. The type is auto selected, depending on the data the report is based on. Add a name for the template or select an already existing template to overwrite it.

Publish and Share Data

Introduction

Product Manager enables secure sharing of certain Product Manager data and documents between Cosmetri accounts. This can be useful for example, when affiliated companies have separate accounts.

Note: For compliance and traceability reasons, tasks, QA statuses and other compliance-related actions are not published with items.

Publishing an item means that it becomes available for import by a specified Cosmetri account. Published data therefore is never published directly to another account and requires the consent of the user of that account, who must choose to import any available data. The same applies to any updates published for an already imported item. The user will see a notification that a new version is available and may choose to import the updated version.

An item that has already been imported by a user will remain in their Product Manager account, even if you later remove that user e.g., in a publish group.

Data is published by a user with 'Service Provider' status (publisher) and is then available for import by a designated Cosmetri account, as set by the publisher. Publishers can also release updates to published data.

Note: Cosmetri must assign 'Service Provider' status to your Cosmetri account and grant that account publishing rights. This status incurs additional fees. Please contact Cosmetri support for further details (support@cosmetri.com).

The following types of data can be published and imported:

- Raw materials
- Products and formulas
- Packaging sets and their packaging items
- Test groups and tests

As a publisher, you can use Product Manager for the following example cases:

Example use case: service provider

As a service provider such as a contract manufacturer or formulator, you can build products/formulas, raw materials, test groups and packaging sets and publish them for import by a customer. 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 Product Manager account. Once imported, these can be further customized by the authorized service provider by logging into the customer's account from their 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 Product Manager account for product lifecycle management (PLM), manufacturing and batch traceability.

Example use case: educators

Teachers and trainers can publish course 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 building formulas, 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.

Example use case: manufacturers and suppliers

Manufacturers and suppliers can publish their raw material and packaging information to gain exposure for their products. They may also publish free formulations or demo packaging sets which showcase innovative uses for their raw materials or packaging. A special invitation-only group for high-value customers can provide these customers with access to exclusive material. Raw material costs may be published as well as links to further information, such as product pages on the supplier's 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. For example, any 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 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 belonging to a **publishing group**, with **group publishing rights**

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 main menu 'Publish Data'.

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:

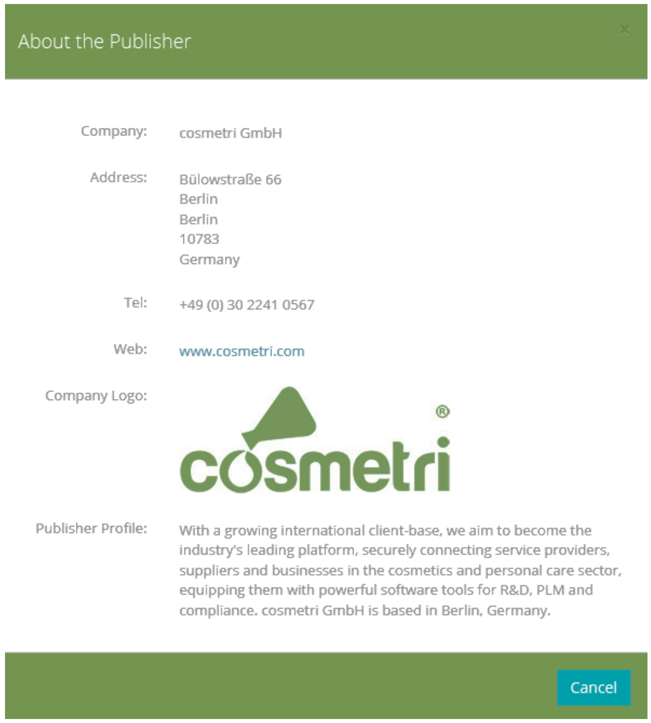
- is false, inaccurate, misleading, or fraudulent
- is harmful, threatening, abusive, harassing, tortious, defamatory, vulgar, obscene, libelous, invasive of another's privacy, hateful, or racially, ethnically, or otherwise objectionable
- contains malicious software or code, software viruses or any 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 details and identity use the data associated with your Cosmetri account and cannot be changed. This is the data entered in the 'Company' tab of your account settings, which can be edited by an admin user of your account.

Note: If you are granted publishing rights by a group administrator of one of the publishing groups you belong to, you can also create a publisher profile.

Any user with rights to import data that you publish 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 menu item 'Publish Data/My Publisher Profile'.

Enter your description to a max. of 1,000 characters. Click on 'Save' to apply your changes.

Suppliers and Manufacturers

Published raw materials (including those published as components of a product/formula) and packaging items, require a company record to be associated with the manufacturer, as set in the item's '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 published company will be imported into the user's account, including all company contact details. <u>It is therefore important that you enter the</u>

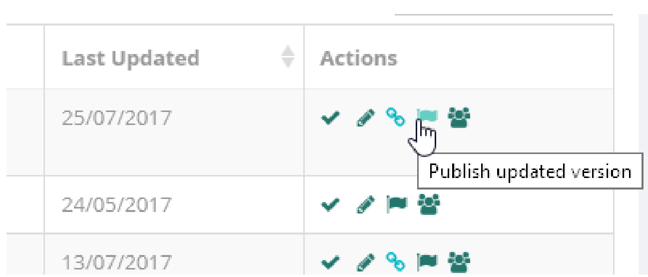
details for the company that you wish to publish, exactly as you wish them to appear in the user's account, once imported.

Upon first time import of an item associated with a company, the company record is also imported to the user's account. Subsequent items which use the same company record for either the 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. Any duplicates can be managed by the user post-import.

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.

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 tests and test groups, the user will be able to identify imported items when viewing that item as well as the current version in use.

Note: 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.

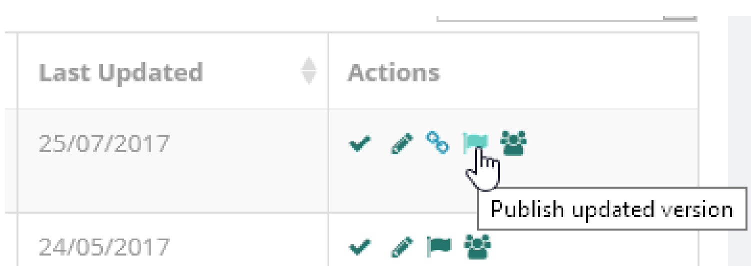
Updating publish settings for published items

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'



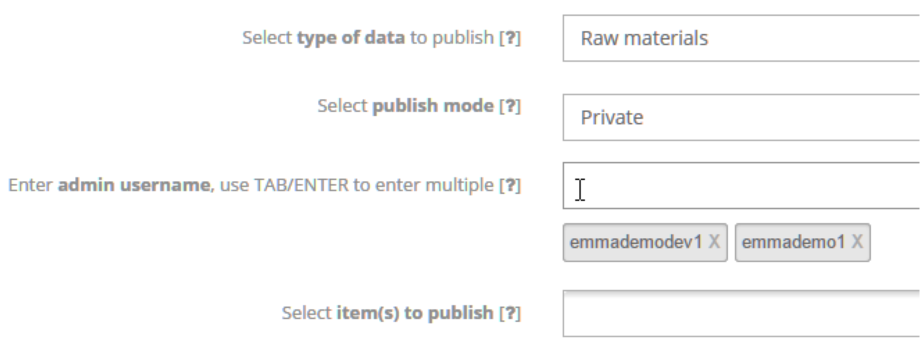
Depending on the item type, a popup will open, enabling update of the publish settings for the item. Any changes to these settings will apply to any previous published version which has not yet been imported by a user. To apply the publish settings, a user will need to update/import that item after the changes have been published as an updated version.

Publish Modes

Data in Product Manager may be published in the following modes:

Private

Enter one or more Cosmetri admin usernames who will be able to see your data available for import. This requires that you know the exact username of the main administrator user for that account. Depending upon your browser, use the tab or enter/return key to enter multiple usernames:



Group

Publishers may apply to have one or more publish groups added 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 customers.

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.

There are two types of publishing group:

Private groups

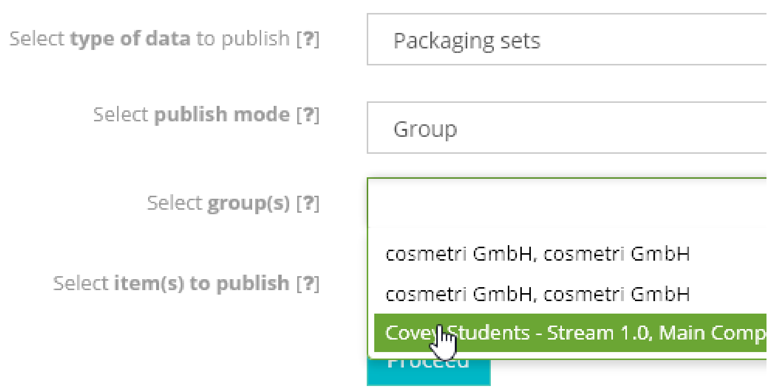
Members of the group clicking on the group profile cannot see a list of members of that group.

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 granted a publishing group by Cosmetri and are logged in as an admin user 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:

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 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 email address set by Cosmetri 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/username. 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 an optional URL in this field. URL requires http:// or https://

Telephone
Enter an optional telephone number for contacting the group admin.

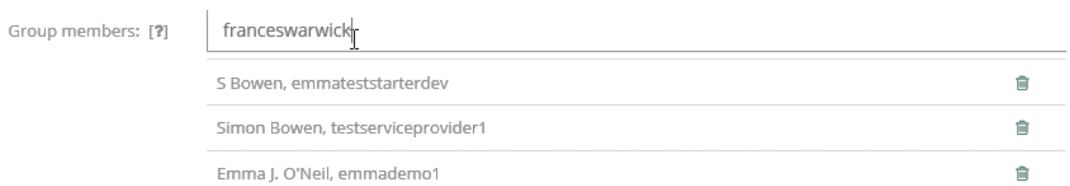
Group description

Enter a description for the group. You may use the WYSIWYG editor to format your text.

Group members

Enter the primary admin account usernames of the Cosmetri accounts that are to be included in the publishing group. Only these 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.

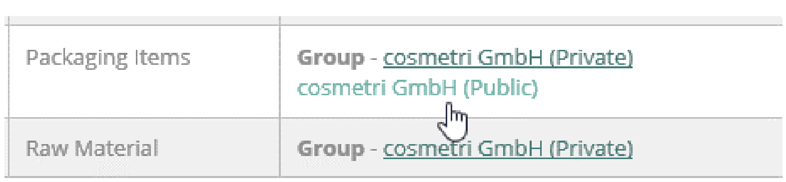
Depending on the browser type, use the tab or enter/return key to enter multiple usernames:



Group member publishing rights

Under this setting you can select which members 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 an admin user belonging to the group will be able to access the publishing menu. Members granted publishing rights will only be able to publish to members of the same group. They will therefore need to know each group member's primary account admin username. This is possible by clicking on the group name for any public group, as follows:



To set the publishing rights for the group, select one of the following options:

Group administrator only:

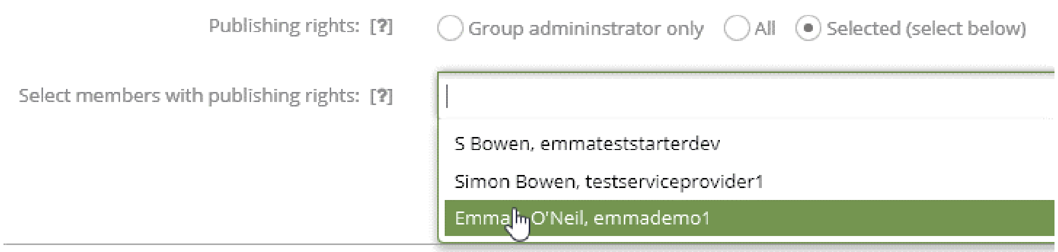
Only the group admin can publish data to the group.

All:

All members of the group can publish to the entire group or to any individual member of the group, including the group admin.

Selected:

Only selected members of the group can publish to the entire group or to any individual member of the group, including the group admin. To select members, click in the field to view a list of the group members and click to add.



Publish an Item

The following section describes how different items are published, how to publish updates and change who can import published items.

Publish: 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 in the raw material view, 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. The same options apply as described in this section, with each raw material publish setting configurable at the publish stage.

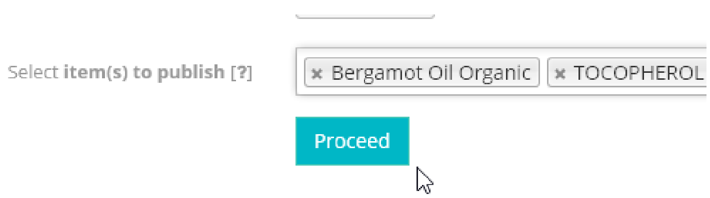
Under 'Publish Data', select 'Raw Materials' as the type of data.

Select the **publish mode** and users/groups.

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.

You can select multiple items:



Click on 'Proceed' to go to the next step.

The selected raw materials are now displayed, with some additional publishing settings available. Click on the item in the 'Item' column to open the item in a new browser tab to edit the publish settings. 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.

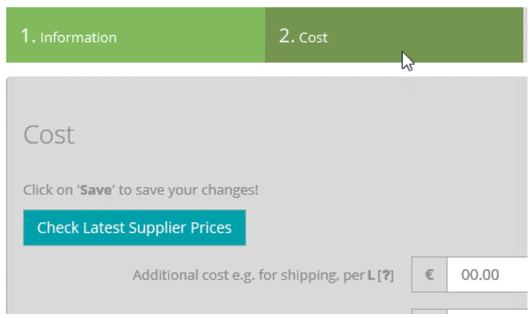
Company

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.

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 'Costs' tab, enabling the user to click directly to the webpage.

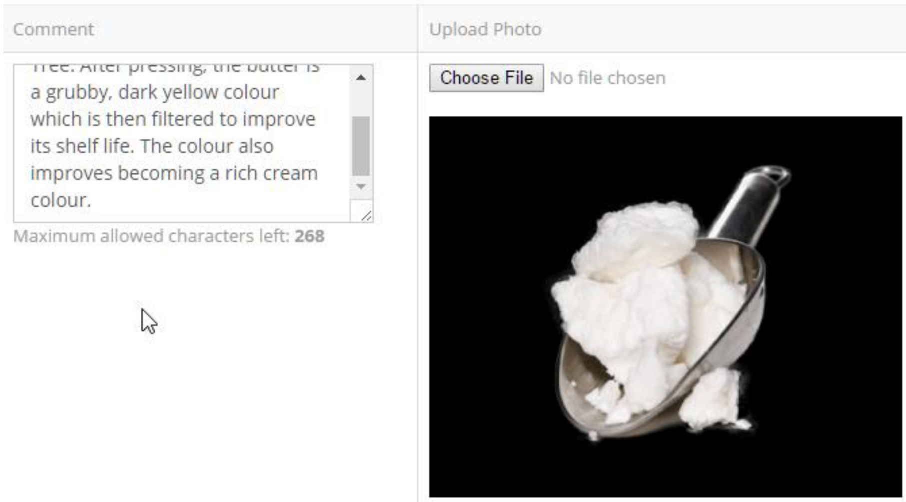


Check the 'Do not display costs' checkbox if you prefer not to publish any costs in the 'Costs' tab of the raw material parent.

Note: 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 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. 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.

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 avoiding potential compliance issues.

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.

Publish: Products and formulas

A product and a selected formula version may be published along with the associated raw materials (as 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 in the importer's account of all QA and compliance type actions by an authorized user logged into the account.

The following data is published:

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 blank
- Packaging – all data

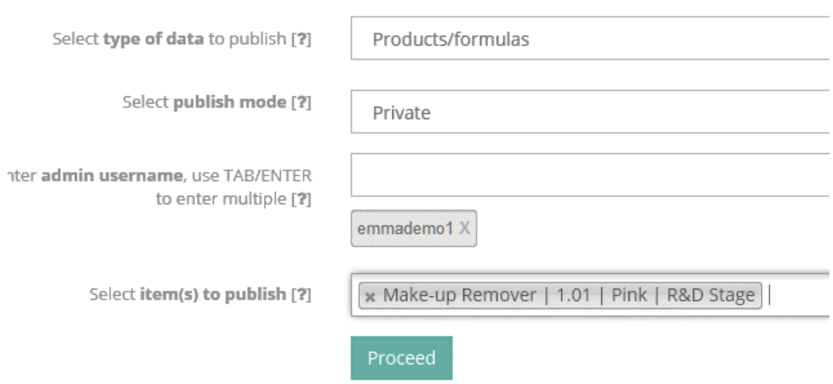
- Unit Sizes - all data
- Docs – all data and documents, including any document comments
- Approve – no data

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

Steps to Publish a Product/Formula

Under 'Publish Data', select 'Products/formulas' as the **type of data**:



Select the **publish mode** and users/groups.

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. 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.

Versioning and updates

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.

Item	Version	Current Version	Version Comments	Update
Euxyl PE 9010	1.01	1.02		☑

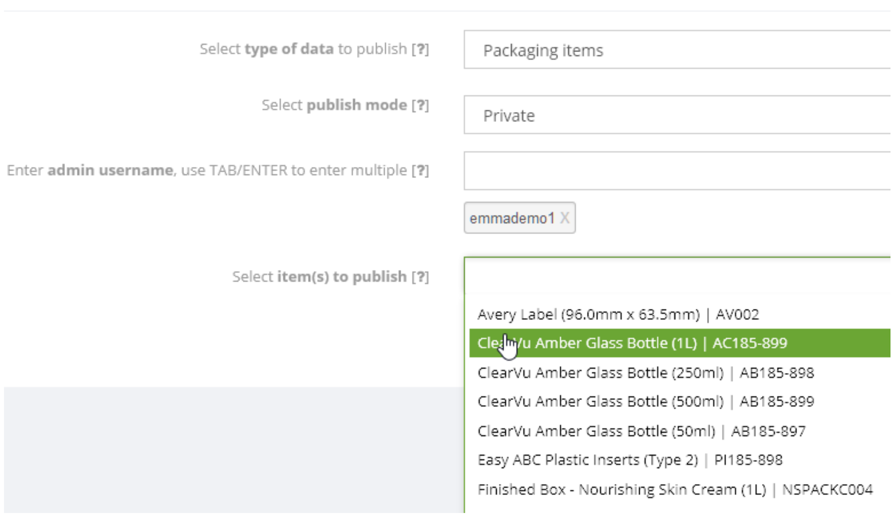
☐ I accept the user terms of use for import of third-party data in cosmetri

Note: 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 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.

Under 'Publish Data', select 'Packaging Item' as the **type of data**:



Select the **publish mode** and users/groups.

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.

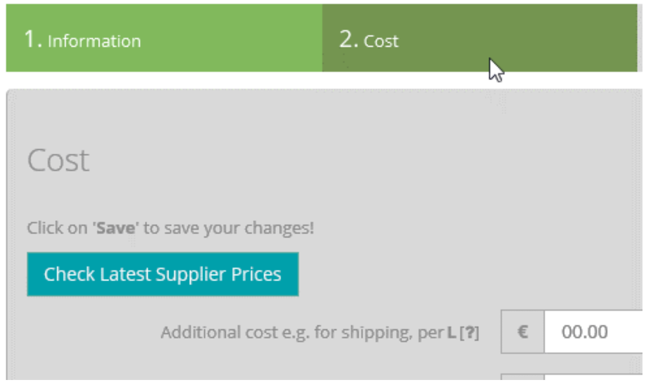
Company

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.

Note: 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:

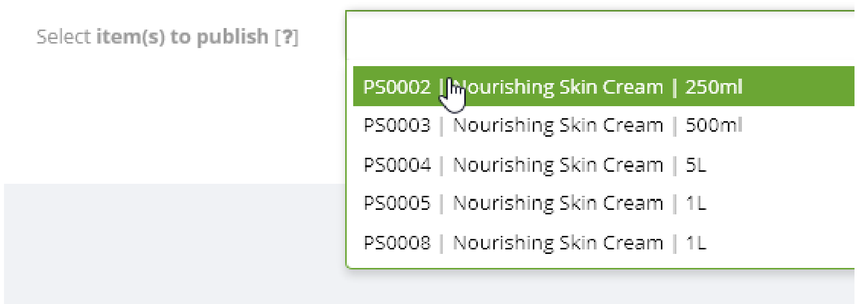
You will be required to confirm your acceptance of the terms of use for third-party publishing. Once you confirm, the 'I Agree – Proceed' button will be activated. Click this to complete the publication.

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.

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 <u>one</u> 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 the provided checkbox if you do not wish to publish any comments associated with the packaging set:

URL

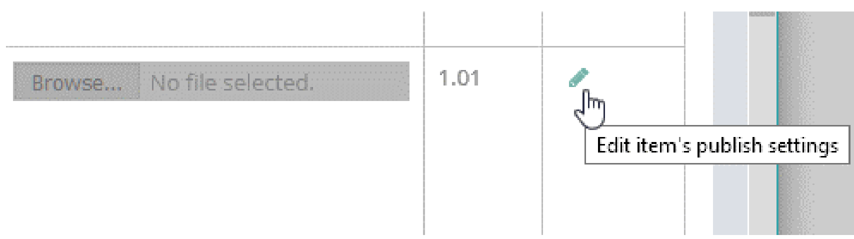
Enter an optional URL to provide the user with additional information about the packaging set. The URL must begin with http:// or https://

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.

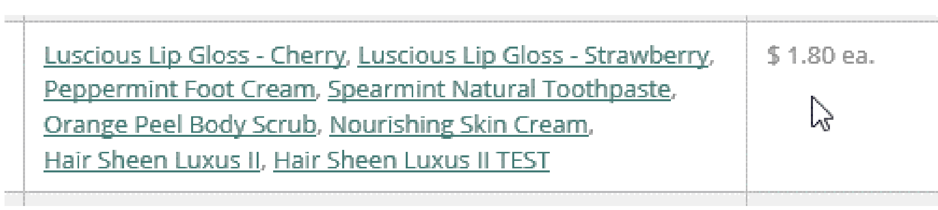
Below the packaging set publishing options, each associated packaging item is displayed. Please refer to the previous section of this chapter, for instructions on entering packaging item publishing options.

If a packaging item associated with the packaging set has previously been published, click on the following action to edit the current publishing preferences. If you wish users who have already imported this item to be able to update their version to reflect these changes, you need to publish a new version which they can import.

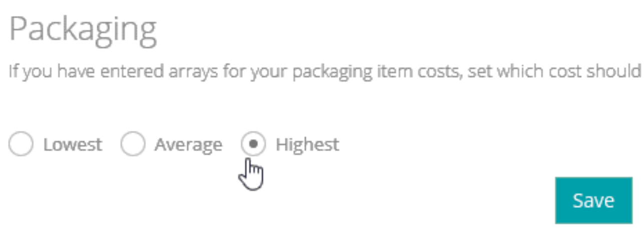


Packaging set costs

If you publish costs for each packaging item in your packaging set, the total cost for the set is shown as follows:



This cost may be shown differently in the user's version, if the following global setting differs to yours:



We recommend therefore, that you provide clear instructions as to the optimal setting a user should use, to ensure consistency of packaging set costs when cost arrays are used. 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

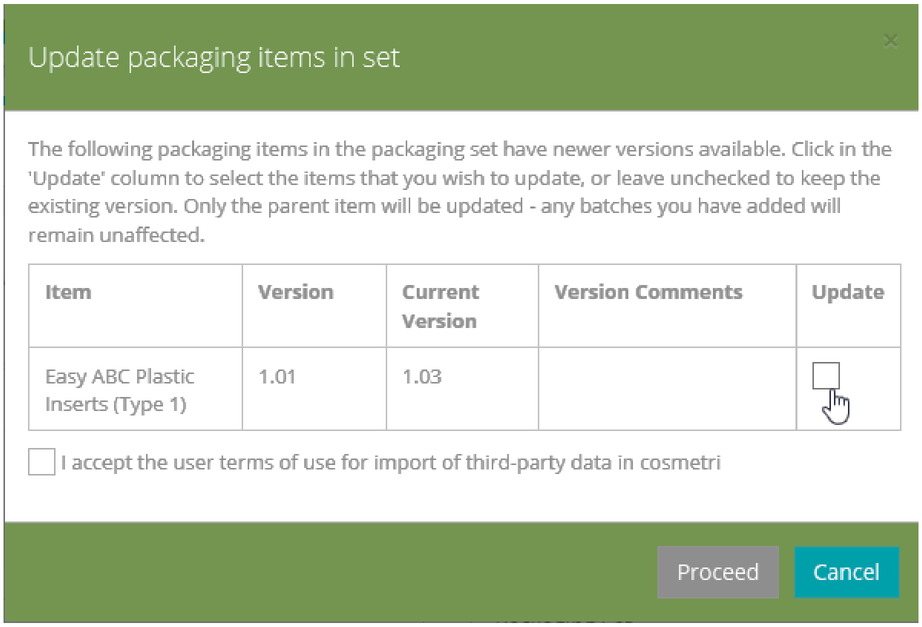
Packaging item

Updating a single packaging item in the user's account will cause the parent version to be over-written. Any changes made by the user since the previous import/update will be lost. 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 imports the new packaging set version, they are alerted to any updated version of an associated packaging item and prompted for what action to take:



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:

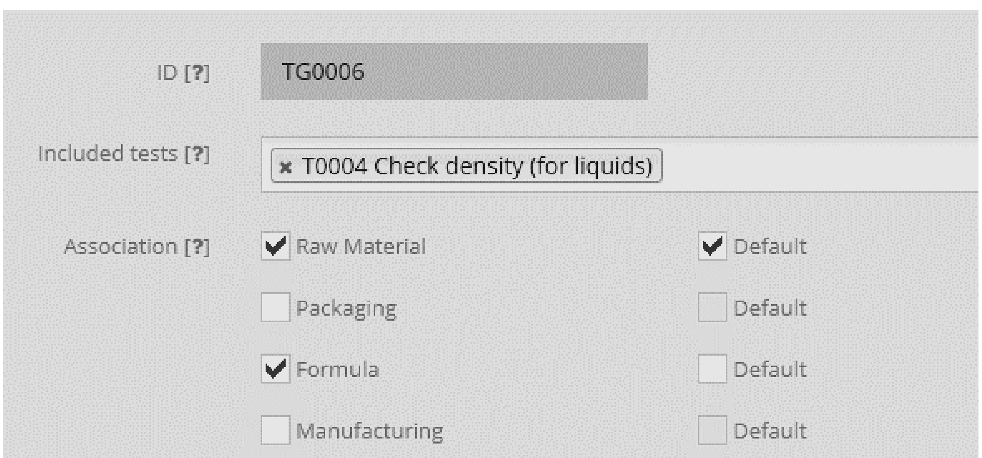
Packaging set is imported by user as <u>new set</u> and assumes <u>next available</u> ID e.g., PS0007 and is titled 'PACKAGING SET A (v.1.02)'

- Packaging item A -> parent 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

Tests and test groups can be published. If a test group is published, all associated tests will be included.

Any associations for the test group will be published, but for the '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.



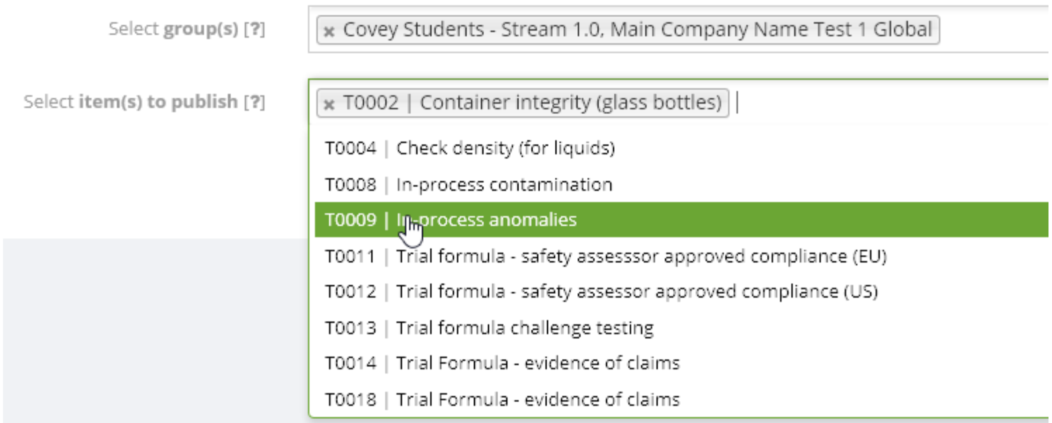
Steps to publish tests

Under 'Publish Data', select 'Tests' as the **type of data**:

Select the **publish mode** and users/groups.

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:



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. 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.

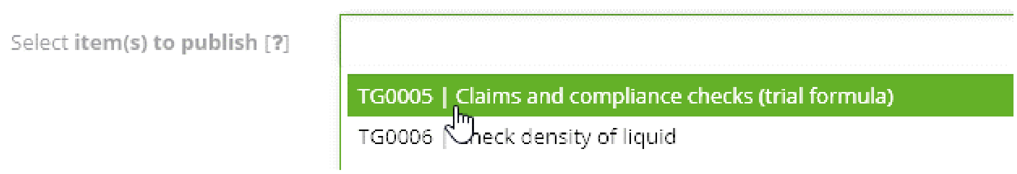
Steps to publish a test group

The following steps are required to publish a test group. <u>This includes publication of all tests in the group</u>. 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.

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

If a test or test group is already in-use any new version will be imported as a new 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).

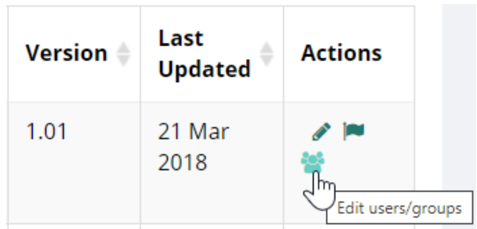
T0019 (v.1.03)	pH
T0020	In-process contamination
T0021 (v.1.02)	In-process contamination

As publisher, we recommend that you use the version comments/change log to inform the user of any recommendations, if they have imported a previous version.

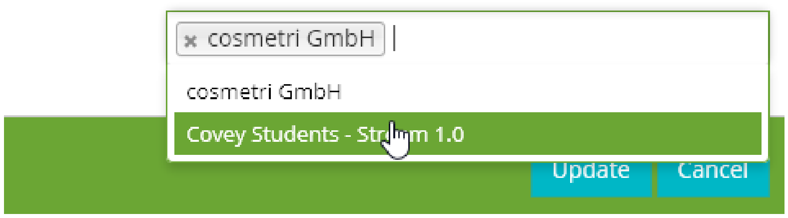
IDs for tests and test groups are re-assigned according to the next available ID in the user's account, e.g., if a publisher's test group has ID TG0008 and the user has five test groups in their account with the last set having the ID TG0005, the newly imported test group will assume the ID TG0006.

Updating users and groups for a published item

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:



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 primary admin username of the Cosmetri account that you wish to grant access. Standard users of the account will not be recognized.



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 contract manufacturer), course teacher or supplier to contact Cosmetri support (support@cosmetri.com) to request authorization to publish data using the Cosmetri secure platform.

If your service provider is responsible for approving an imported item published by them, you can grant them access to your account to complete any data and QA steps. If your service provider has entered test data in their Product Manager account, they can upload the exported test report document (as PDF) to the item, and it will be imported.

The following types of data can be published and imported:

- Raw materials
- Products and formulas
- Packaging sets and their packaging items
- Test groups and tests

Publishing an item means that it becomes available for import by a specified Cosmetri account. Published data therefore is never published directly to another account and requires the consent of the user of that account, who must choose to import any available data. The same applies to any updates published for an already imported item. The user will see a notification that a new version is available and may choose to import the updated version.

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.

Import Data

To import shared data, click on the menu item '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.

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:

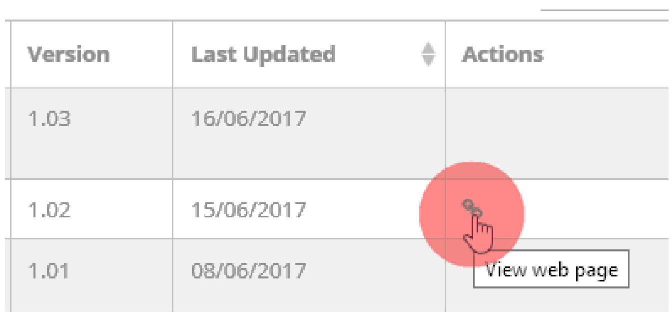
- Item
- Type
- Mode
- Publisher
- First Published

- 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.

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:



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 admins 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 the group's admin 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.

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.

To only view items with available updates, click on the 'Show only new updates' checkbox.

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 display or hide the supplier.

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 company record i.e., they will not be imported as duplicates. Once the company record has been created it will not be further updated.

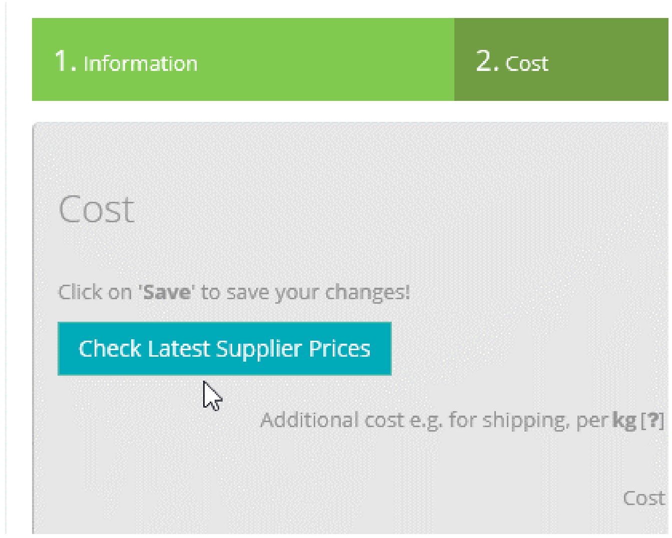
Note: Under 'Companies' you can manage your company records, including merging associated items and deleting any duplicate company records.

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.



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 imported as components of a product/formula.

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.

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'. Therefore, any testing and approval must be performed once the item has been imported.

Depending on the settings set by the publisher, the following data may be 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 blank
- Packaging – all data
- Unit Sizes - all data
- Docs – all data and documents, including any document comments
- Approve – 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.

Item	Version	Current Version	Version Comments	Update
Euxyl PE 9010	1.01	1.02		☑

Import: Packaging Items and Packaging Sets

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, from which you can create batches. The handling of suppliers and manufacturers is the same as per raw materials.

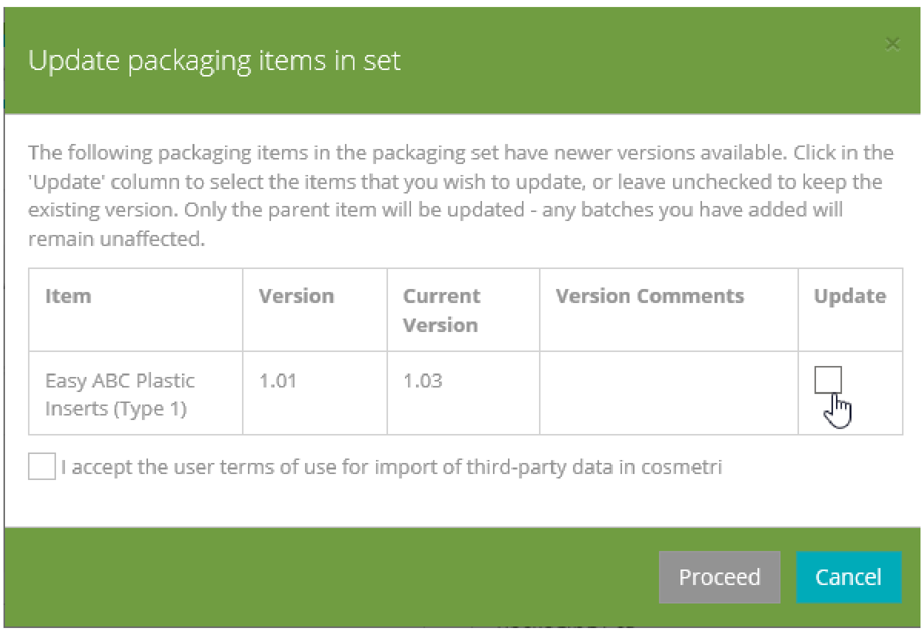
Updating: Packaging items and packaging sets

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

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 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 contract manufacturer) can for example, create standard test groups for your workflow, which you can import and use.

Updating: Tests and test groups

If a test or test group is already in-use any new version will be imported as a new 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).

IDs for tests 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.

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