



Checking Suitability in the CDT

Suitability Constraints are rules or compliance checks which can be targeted at parties including regions, customers, suppliers, even your own business, for example to reflect policies about ingredient use. Please click this [link](#) for more information about Suitability.

A new feature 'Checking Suitability upon Save & Check In in the CDT' (Composition Design Tool) is available from version 38326. It enables you to enforce check suitability when a user performs Save & Check In for a Raw Material or Formulation. The details associated with the item, for example the customer, application and dosage, are also used within the check. If the suitability check is successful, save and check in proceeds without any message. If the suitability check fails, a message is shown and the behaviour relates to the permissions.

There are new permissions to enforce a suitability check when a user performs 'Save & Check In'. The permissions are controlled by item class in Permissions on Formulations and Permissions on Raw Materials. You can configure if a user / role has enforced suitability checks, and if they are allowed to proceed to check in, after a failed result. The new permissions on raw materials and formulations are:

- Check Suitability at Save & Check In
- Permit Ignore Failed Suitability Check

Unlike other permissions, the Administrator does not automatically inherit these permissions.

Please Note: when user permissions are updated the user needs to log out for the permission change to take effect.

In this example User Rachel is manually assigned permissions to enforce Save & Check In on Formulations by item class. The same process can be applied in Manage a User's Permissions on Raw Materials.

The permissions given to Rachel are to **Check Suitability at Save & Check In**, and **Permit Ignore Failed Suitability Check**.

Manage a User's Permissions on Formulations														Save	Cancel											
s which the user (RACHEL) will be permitted to perform.																										
Description	Create		View		Update		View Composition		Update Composition		Scope		Assign New Code		Assign New Code If Known at Scope		Change Item Class		Delete		Instant Search		Suitability Check at Save & Check In		Permit Ignore Failed Suitability Check	
	Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit		Allow-Inherit	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

When this User adds a new or modifies a formulation and clicks Save & Check In, these permissions enforce the suitability check, but also allow the user to proceed if there is a failed suitability check. In this case, the following message is displayed: 'The formulation is not suitable, Continue to Save and Check In?'

Seq	Code	Name	Availability	Unit Price	Price Date	Concent
1	FPD-2011A-1771	Cedarwood oil, Texas		27.95	24/07/2019	
2	FPD-2011A-1947	Dipropylene glycol mor		12.65	24/07/2019	
3	FPD-2011A-1045	Galaxolide neat		32.4	24/07/2019	
4	FPD-2011A-1045	Galaxolide neat		32.4	24/07/2019	
5	FPD-2011A-2067	Geraniol		21.45	24/07/2019	
6	FPD-2011A-2068	Geranium oil Afr		35.76	24/07/2019	
7	FPD-2011A-2245					
8	FPD-2011A-2461					
9	FPD-2011A-2808					

FORMPAK
This formulation is not suitable. Continue to Save and Check In?
Yes No

If the user's permissions are amended to **Check Suitability at Save & Check In** only:

Description	Create Allow-Inherit	View Allow-Inherit	Update Allow-Inherit	View Composition Allow-Inherit	Update Composition Allow-Inherit	Scope Allow-Inherit	Assign New Code Allow-Inherit	Assign New Code If Known at Scope Allow-Inherit	Change Item Class Allow-Inherit	Delete Allow-Inherit	Instant Search Allow-Inherit	Suitability Check at Save & Check In Allow-Inherit	Permit Ignore Failed Suitability Check Allow-Inherit
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

When the user adds a new or modifies a formulation and clicks Save & Check In, it reports that the formulation is not suitable, and it will not allow the formulation to be saved.

Seq	Code	Name	Availability	Unit Price	Price Date	Concent
1	FPD-2011A-1771	Cedarwood oil, Texas		27.95	24/07/2019	
2	FPD-2011A-1947	Dipropylene glycol mor		12.65	24/07/2019	
3	FPD-2011A-1045	Galaxolide neat		32.4	24/07/2019	
4	FPD-2011A-				24/07/2019	
5	FPD-2011A-				24/07/2019	
6	FPD-2011A-				24/07/2019	
7	FPD-2011A-				24/07/2019	
8	FPD-2011A-2461	Orange oil, sweet		41.1	24/07/2019	
9	FPD-2011A-2808	dl-Citronellol		16.98	24/07/2019	

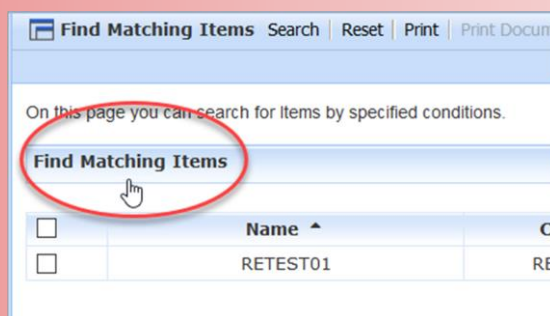
FORMPAK
This formulation is not suitable, you cannot Save and Check In
OK

When OK is clicked, the user is returned to the formulation, and the user can use 'Interim Save' which will appear in the User's Work in Progress.

Please click this [link](#) to see our Training Plan on Compliance Management & Understanding Suitability.

Mini Tip

When searching in Find Matching Items or Check Item Suitability, once your results are displayed, you can click the Page Title to take you back to your existing search criteria.



To see previous 'Tip of the Month' articles, please see [here](#).

All of our training and support material can be accessed from our **Support Centre**. The Support Centre is available 24/7 and is a great resource to use at your convenience. It includes:

- Over 100 training and support articles
- Links to training videos
- Quick Start Guides

- The Formpak Training Matrix

The Support Centre can be accessed on the Home screen of Formpak software or via the following link:
https://www.formpak-software.com/Support_Centre/Pages/Support_Centre.html

Our **Support Team** are available:
Monday - Thursday: 8:30 - 17:00 (GMT)
Friday: 8:30 - 16:00 (GMT)

Email: support@formpak-software.com
Telephone: +44 (0) 1235 250 020

The Formpak **Help Centre** is included directly in Formpak software, just press the 'Help' button to access it. The Formpak Help Centre offers explanations for each function of the application as well as a glossary of the technical terminology used.

View our **YouTube** channel with lots of helpful guides and information about Formpak
<https://www.youtube.com/user/FormpakSoftware/videos>