

**Oracle® Agile Product Lifecycle Management for
Process**

Data Administration Toolkit Guide

Extensibility Pack 3.11

E57858-01

November 2014

Copyright © 1995, 2014, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

Preface	v
Audience	v
Variability of Installations	v
Documentation Accessibility	v
Software Availability	vi
Related Documents	vi
Conventions	vii
1 Introducing the Data Administration Toolkit	
Overview	1-1
System Requirements	1-2
Installing the Toolkit	1-2
Managing Connection Profiles	1-3
Adding a Profile	1-4
Copying a Profile	1-4
Deleting a Profile	1-4
Restoring Connection Profiles	1-5
2 Using the Data Administration Toolkit	
Supported Versions	2-1
Usage Guidelines	2-2
Using the Widgets	2-2
Associated Specification Types	2-4
Breakdown Functions	2-5
CSS Configuration	2-6
Taxonomies Tab	2-8
Info Providers Tab	2-9
Manufacturers Tab	2-10
Target Markets Tab	2-11
Syndicates Config Tab	2-12
Customer Translations	2-13
Initial Setup	2-13
Using the Widget	2-13
Hide Spec Update (GSM)	2-19
Label Claims Editor	2-20

Managing Rules and Rulesets	2-22
Overview	2-23
Rulesets	2-23
Rules	2-23
NPD Stage Name.....	2-26
Nutrient Properties	2-27
Object Level Security	2-31
Qualitative Lookup Configuration	2-34
SCRM Business Unit Status	2-36
Supplier Portal Administrators.....	2-37
Taxonomy Editor.....	2-38

Preface

The *Oracle Agile Product Lifecycle Management for Process Data Administration Toolkit Guide* defines the requirements for using the Data Administrator Toolkit as well as instructions for using the widgets to make changes.

This Preface contains these topics:

- [Audience](#)
- [Variability of Installations](#)
- [Documentation Accessibility](#)
- [Software Availability](#)
- [Related Documents](#)
- [Conventions](#)

Audience

This user guide is intended for Agile PLM for Process administrators.

Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Software Availability

Oracle Software Delivery Cloud (OSDC) provides the latest copy of the core software. Note the core software does not include all patches and hot fixes. Access OSDC at:

<http://edelivery.oracle.com>

Related Documents

For more information, see the following documents in the Oracle Agile Product Lifecycle Management for Process Extensibility Pack documentation set:

- *Agile Product Lifecycle Management for Process Web Services Guide*
- *Agile Product Lifecycle Management for Process Extensibility Guide*
- *Agile Product Lifecycle Management for Process Print Extensibility Guide*
- *Agile Product Lifecycle Management for Process Custom Section Denormalization Guide*
- *Agile Product Lifecycle Management for Process Extended Attribute Denormalization Guide*
- *Agile Product Lifecycle Management for Process Reporting Guide*
- *Agile Product Lifecycle Management for Process Navigation Configuration Guide*
- *Agile Product Lifecycle Management for Process Extended Attribute Calculation Guide*
- *Agile Product Lifecycle Management for Process Custom Portal Implementation Guide*
- *Agile Product Lifecycle Management for Process Product Quality Management Extensibility Guide*
- *Agile Product Lifecycle Management for Process Extensible Column Guide*
- *Agile Product Lifecycle Management for Process Release Notes.* Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

<http://www.oracle.com/technetwork/documentation/agile-085940.html#plmprocess>

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introducing the Data Administration Toolkit

This chapter describes the Data Administration Toolkit, and provides system requirements and installation instructions. The following topics are included:

- [Overview](#)
- [System Requirements](#)
- [Installing the Toolkit](#)
- [Managing Connection Profiles](#)

Overview

The Data Administration Toolkit provides a secure place to host data administration components that need to change infrequently, are highly complex, or are not provided in the Oracle Agile Product Lifecycle Management for Process web interface. Use the toolkit to safely enhance past versions of Oracle Agile Product Lifecycle Management for Process in a streamlined manner without modifying the core software.

The toolkit produces SQL code instead of making live updates to a database. Benefits to this method include the following:

- The SQL that is produced is safe; it is written with the appropriate surrounding conditions to prevent multiple attempts at running the toolkit and to prevent duplicate records from being created.
- The SQL that is produced can then be run against the appropriate database by users with the proper rights/permissions in a controlled manner at the appropriate off-cycle time.

Note: Users should resist the urge to edit the SQL produced since they run the risk of corrupting the product.

The toolkit functionality comes in the form of widgets. Several widgets are available depending on which version of Oracle Agile Product Lifecycle Management for Process you are using. See "[Supported Versions](#)" on page 2-1 for a list of widgets that are available for each version. In the future, more widgets will be added based on customer feedback and the need for specific support.

Note: You must have Microsoft .Net 3.5 installed on your system to run the toolkit. See "[System Requirements](#)" on page 1-2 for more information.

System Requirements

Make sure your system meets the following requirements before attempting to run the Data Administration toolkit.

- You must have Microsoft .Net 3.5 installed.
- 32-bit OS customers must install the 32-bit Oracle client. 64-bit OS customers must install the 64-bit Oracle client.
- You must have network access to the database which you are attempting to access.

Installing the Toolkit

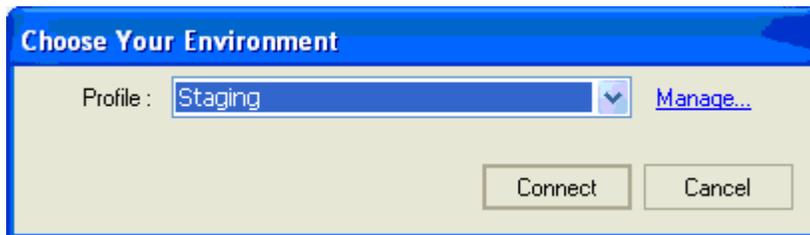
To download the toolkit:

1. Download the Extensibility_Pack_3.11.zip file to your local computer.
2. Locate the Apps\DataAdminToolkit folder to wherever is convenient on your local computer.

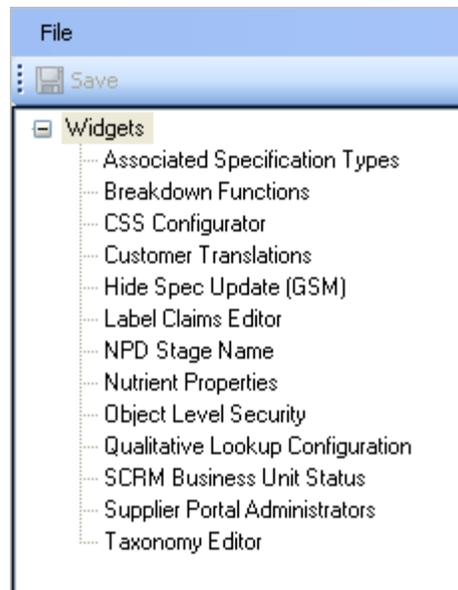
To start the toolkit:

1. Navigate to the \bin directory.
2. Double-click **DataAdminToolkitShell.exe** to start the program. The Choose Your Environment dialog box displays.

Figure 1-1 Choose Your Environment dialog box



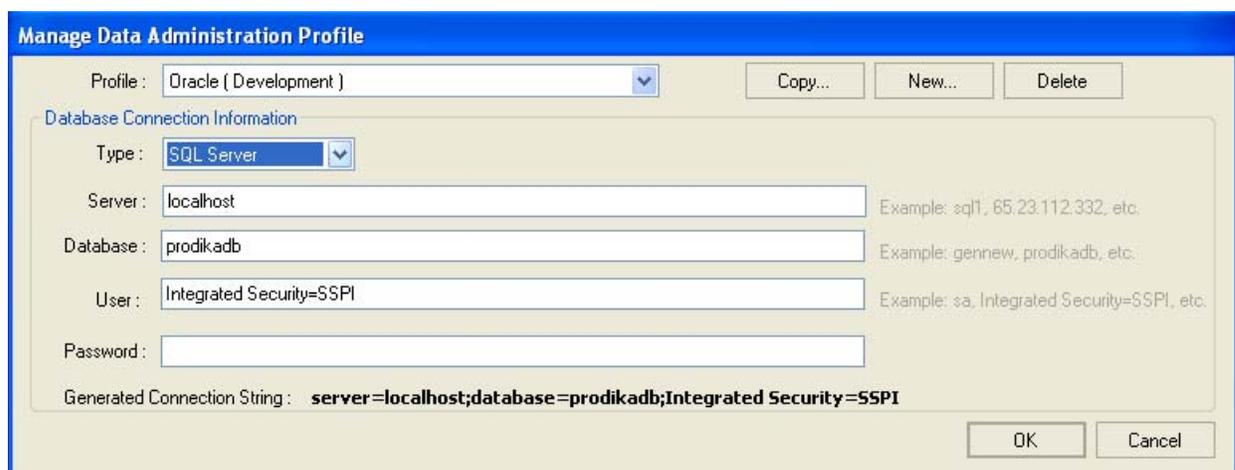
3. Select a profile from the Profile drop-down list. If you do not find the option you want, click **Manage** to create a profile. You create profiles for each environment, as described in "[Managing Connection Profiles](#)" on page 1-3.
4. Click **Connect**. The Data Administration toolkit displays the main page, which lists the available widgets based on the version of the database to which you are connected.

Figure 1–2 Main page

Managing Connection Profiles

You can set up different connection profiles to match your various environments. For example, if three environments exist, such as test, training, and production, you can create three separate profiles.

To manage a profile, click the **Manage** link from the Choose Your Environment dialog box. The Manage Data Administration Profile dialog box displays.

Figure 1–3 Manage Data Administration Profile dialog box

Key fields include:

Profile—Name of the environment as defined in the CustomerSettings.config file as the Customer_Context element.

Type—Select a type of server from the drop-down list.

Server—Name of the server as defined in the environmentvariables.config file for the Product Lifecycle Management for Process web applications. This field is not available if 'Oracle' is selected as Type.

Database—Name of the database as defined in the environmentvariables.config file.

User—Name of the database user account used to connect to the database for the given environment.

Password—Name of the database password used to connect to the database for the given environment.

The Generated Connection String field displays the provided values for the Server, Database, User, and Password fields. The string is the actual value used to connect to the database and should match the string used in the environmentvariables.config file.

Adding a Profile

To add a new profile:

1. Click **New**. The Manage Customer Context dialog box displays with blank fields.
2. Enter values for the Customer and Environment (using a value that will be informative to you) for the new profile in the relevant text fields.
3. Click **OK**.
4. Make entries in the **Server**, **Database**, **User**, and **Password** fields as described above.
5. Click **OK**.

Copying a Profile

To copy an existing profile:

1. Select a profile to copy from the **Profile** drop-down list. The Manage Data Administration Profile dialog content refreshes to reflect the chosen profile.
2. Click **Copy**. The Manage Customer Context dialog displays with the same Customer value. This value may be changed or left as-is.
3. Enter a value for the copied environment in the **Environment** field.
4. Make changes to the **Server**, **Database**, **User**, and **Password** fields as needed. See the description of these values above.
5. Click **OK**.

Deleting a Profile

To delete a profile:

1. Select a profile to delete from the **Profile** drop-down list. The Manage Data Administration Profile dialog content refreshes to reflect the chosen profile.
2. Click **Delete**.
3. You will be presented with a confirmation before the profile is deleted. Select **Yes** to permanently remove the profile or **No** to cancel the deletion.

Restoring Connection Profiles

The configuration for connection to a database environment is stored in the settings directory of the Data Administration toolkit.

To copy the connection configuration from one Data Administration Toolkit installation to another, perform the following actions:

1. Go to the settings directory at the root of where the Data Administration Toolkit was installed.
2. Copy the OracleDataAdminToolkit_EnvironmentSettings.dat file found in this directory to the new installation.

Using the Data Administration Toolkit

This chapter describes how to use the widgets included in the Data Administration Toolkit. Topics include:

- [Supported Versions](#)
- [Using the Widgets](#)
 - [Associated Specification Types](#)
 - [Breakdown Functions](#)
 - [CSS Configuration](#)
 - [Customer Translations](#)
 - [Hide Spec Update \(GSM\)](#)
 - [Label Claims Editor](#)
 - [NPD Stage Name](#)
 - [Nutrient Properties](#)
 - [Object Level Security](#)
 - [Qualitative Lookup Configuration](#)
 - [SCRM Business Unit Status](#)
 - [Supplier Portal Administrators](#)
 - [Taxonomy Editor](#)

Supported Versions

The following table identifies which widgets are supported for the various versions of Oracle Agile Product Lifecycle Management for Process. In the future, more widgets will be added based on customer feedback and the need for specific support.

Table 2–1 *Widget and version listing*

Widget	Supported in Version
Associated Specification Types	6.0, 6.1, 6.1.1
Breakdown Functions	6.0, 6.1, 6.1.1
CSS Configuration	6.1, 6.1.1
Customer Translations	6.0, 6.1, 6.1.1
Hide Spec Update (GSM)	6.0, 6.1, 6.1.1

Table 2–1 Widget and version listing

Widget	Supported in Version
Label Claims Editor	6.0, 6.1, 6.1.1
NPD Stage Name	6.0, 6.1, 6.1.1
Nutrient Properties	6.1, 6.1.1
Object Level Security	6.0, 6.1, 6.1.1
Qualitative Lookup Configuration	6.0, 6.1, 6.1.1
SCRM Business Unit Status	6.0, 6.1, 6.1.1
Supplier Portal Administrators	6.0, 6.1, 6.1.1
Taxonomy Editor	6.0, 6.1, 6.1.1

Usage Guidelines

Use the following guidelines when working with the Data Administration Toolkit:

- 6.1.1.x releases are supported in Extensibility Pack 3.x.
- 6.1.0.x releases are supported in Extensibility Packs 2.6 and 2.7
- 6.1.0.0 releases are supported in Extensibility Pack 2.5.
- Only 6.0.x releases are supported in Extensibility Pack 2.4.1.

Using the Widgets

Use the widgets for generating scripts to manage information, as described below.

1. **Associated Specification Types**—Used to manage and create association types available for the Associated Specifications control.
2. **Breakdown Functions**—Used to manage % breakdown functions.
3. **CSS Configuration**—Used to automate the creation of CSS publication paths.
4. **Customer Translations**—Used to manage customer specific translation values.
5. **Hide Spec Update (GSM)**—Used to create a script that can be run to update the Hide Specs tag in WFA (Workflow Administration). This is for GSM workflow templates only.
6. **Label Claims Editor**—Used to manage label claims and label claim determination rules.
7. **NPD Stage Names**—Used to manage stage names in NPD.
8. **Nutrient Properties**—Used to create and manage nutrient items, data groups, and testing methods.
9. **Object Level Security**—Used to manage OLS security classifications, access levels, and secured object details..
10. **Qualitative Lookup Configuration**—Used to manage custom Qualitative Lookup categories for extended attributes.
11. **SCRM Business Unit Status**—Used to manage the business unit statuses list in SCRM.
12. **Supplier Portal Administrators**—Used to manage administrators for the Supplier Portal Admin application.

13. Taxonomy Editor—Used to manage taxonomies (NPD business units and NPD project type categories).

The widgets load automatically depending on which profile you select. Refer to ["Managing Connection Profiles"](#) on page 1-3 for instructions on managing profiles.

Associated Specification Types

Use the Associated Specification Types widget to create association types available to the Associated Specifications control. You can select an existing specification type to view all association types that are available. You can also add a new association type. For each type, you can name or rename the host and target names and set the status of each association type. You can also manage the translation values for each associated type by selecting a language.

To manage specification types:

1. Click the **Associated Specification Types** widget on the left widget tree. The widget content area refreshes to display the associated specification types widget.

Figure 2–1 Associated Specification Types widget

Associated Specification Types

Use this widget to create association types available to the Associated Specs control. Select specification type to view all association types available. Select an existing association type on the left or add a new association type. Once a type is selected, you will be able to name/rename the host and target names and set the status of each association type. You can also manage the translation values for each Associated Type, by selecting the language.
 Note: This script is only part of the configuration needed for the Associated Specs control, remember to update the configuration files as well.

Specification Type

Packaging Material Specification (1009)

Association Types

Add New

By Product / Source

Product / Source

Association Type Details

Language: English

Host Name: (explicit association)
By Product

Target Name: (implicit association)
Source

Status: Active

2. Select a specification type from the Specification Type drop-down list. If association types exist for the selected specification type, they are displayed in the Association Types list.
3. In the Association Types list, click **Add New** to create a new association type, or select an existing one.
4. Use the following fields to define the association type.
 - Language**—The language of the translation value.
 - Host Name**—The host name of the association type.
 - Target Name**—The target name of the association type.
 - Status**—The status of the association type. Valid values are Inactive, Active, and Archived.
5. Click **Save** to generate the output script.

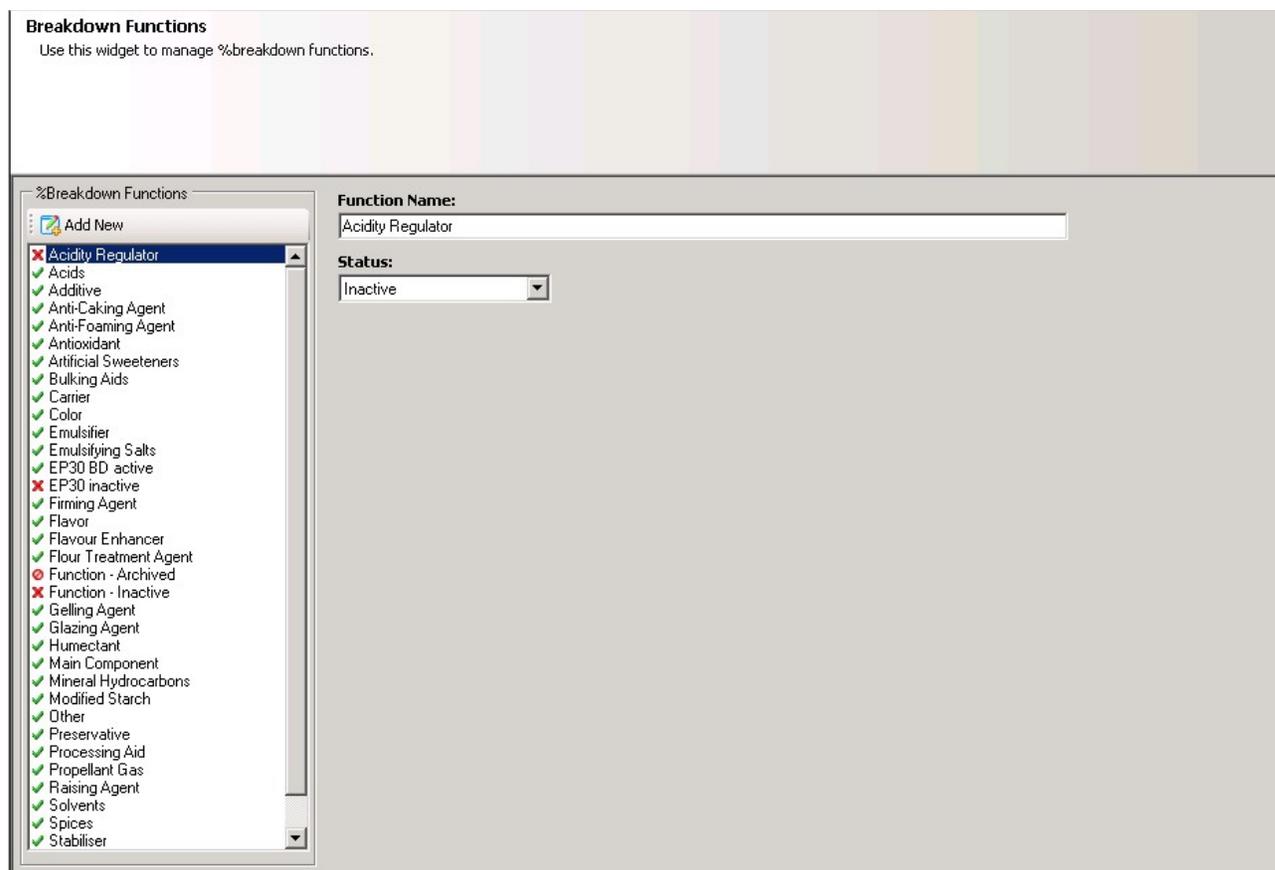
Breakdown Functions

Use the Breakdown Functions widget to manage the % breakdown's component function list.

To manage % breakdown functions:

1. Click the **Breakdown Functions** widget on the left widget tree. The widget content area refreshes and displays the % breakdowns functions for the selected profile.

Figure 2–2 Breakdown Functions widget



2. In the %Breakdown Functions list, click **Add New** to create a new function, or select an existing one.

3. Use the following fields to define the breakdown function.

Function Name—The name of the % breakdown function.

Status—The status of the % breakdown function. Valid values are Inactive, Active, and Archived.

4. Click **Save** to generate the output script.

CSS Configuration

Use the CSS Configuration widget to automate the creation of CSS publication paths. A CSS publication path defines part of the behavior that a CSS TIP will exhibit in Oracle Agile Product Lifecycle Management for Process. A unique publication path is defined based on its publication taxonomy (up to the 2nd level trading partner node) and the specification type.

To create a publication path:

1. Click the **CSS Configuration** widget on the left widget tree. The widget content area refreshes and displays the current publication paths.

Figure 2–3 CSS Configuration widget, Publication Paths tab

CSS Configurator
This widget is used to create and manage all the Content Synchronization and Syndication (CSS) related taxonomies, objects and configurations.
Tips:
1. On the "Publication Paths", use the "Edit" buttons beside the "Available End Points" and "GSM Workflow Status(es)" lists to manage the values of the lists. Uncheck the row in the pop-up window to remove that entry from the list;
2. Update the cssLibConfig.xml to adapt your changes in this toolkit.

Publication Paths | Taxonomies | Info Providers | Manufacturers | Target Markets | Syndicates Config

Publication Paths

- Add New
- AF >> HK (Material Spec)
- US >> TX (Material Spec)
- XT >> UK (Trade Spec)

Publication Path

Status: Active

Spec Type: Material Spec

CSS Configuration Name: WSSyndication

Publish Child Tips:

CSS Workflow: Standard Internal Syndication Workflow

Initial Non-ghost activity: Staged for Syndication

Publication Taxonomy: AF (Material Spec)

Trading Partner(2nd node): HK

Available End Points: EBS

GSM Workflow Status(es): Standard Ingredient > Developmental

2. Click **Add New**.
3. Define the publication path using the following fields:
 - Status**—The status of the publication path. Valid values are Inactive and Active.
 - Spec Type**—Select one of the following specification types: Trade, Material, Packaging, Printed Packaging, and Formulation.
 - CSS Configuration Name**—Name for this path configuration.
 - Publish Child Tips**—Check the box if any lower level item TIPs should be automatically published.
 - CSS Workflow**—Select a CSS workflow. Only active workflows are available for selection.

Initial Non-ghost Activity—Select a CSS workflow status. This list corresponds with the selection made in the CSS Workflow field.

Publication Taxonomy—Select a top-level trading partner node for the given specification type.

Trading Partner (2nd node)— Enter a name for the second level trading partner node. This node uniquely identifies the publication path.

Available End Points— Click the edit icon to Assign Retailers/End Points to this publication path. To add new end points, click the **Add New** button in the Available End Points dialog box.

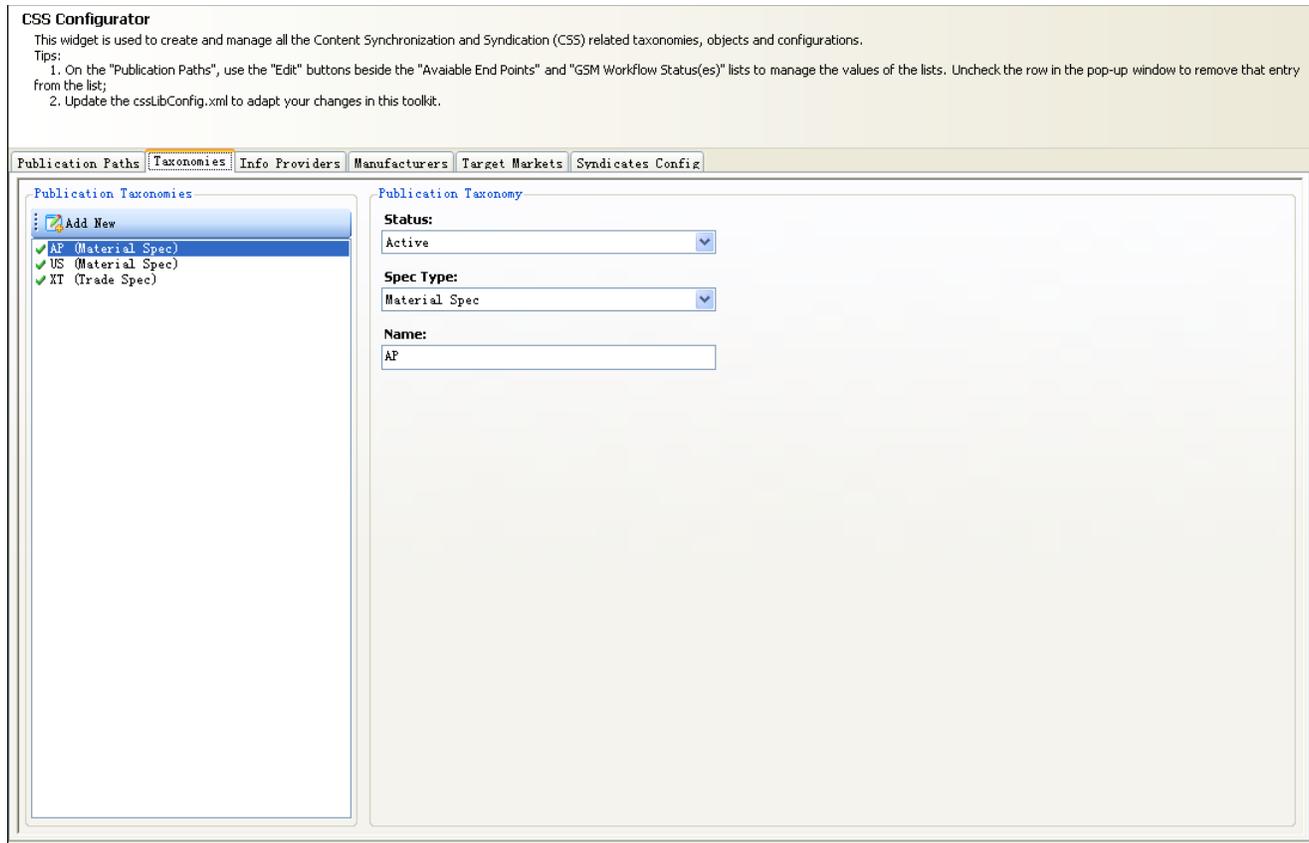
GSM Workflow Statuses—Select a GSM workflow status for the specification type chosen in the Spec Type field. This status is used to trigger a TIP for syndication. The listing shows the workflow name and the status name. Click the edit icon to refresh the workflow status list.

4. Click **Save** to generate the output script.
5. Continue defining the publication paths using the following tabs:
 - [Taxonomies Tab](#)
 - [Info Providers Tab](#)
 - [Manufacturers Tab](#)
 - [Target Markets Tab](#)
 - [Syndicates Config Tab](#)

Taxonomies Tab

Use this tab to define taxonomies for the publications.

Figure 2–4 CSS Configuration widget, Taxonomies tab



This tab includes the following fields:

Status—Status of the taxonomy. Choices are:

- (✓)—Active item
- (✗)—Inactive item

Spec Type—Type of specification tied to the taxonomy. Choices are:

- Formulation Spec
- Material Spec
- Packaging Spec
- Printed Packaging Spec
- Trade Spec

Name—Name of the taxonomy. This value should follow the rules below:

- a. The name of a taxonomy corresponds to a value of the "key" attribute of "MapItem" node configured in the following section of `cssLibConfig.xml` which is located in `<P4P_HOEM>/config/Extensions`:

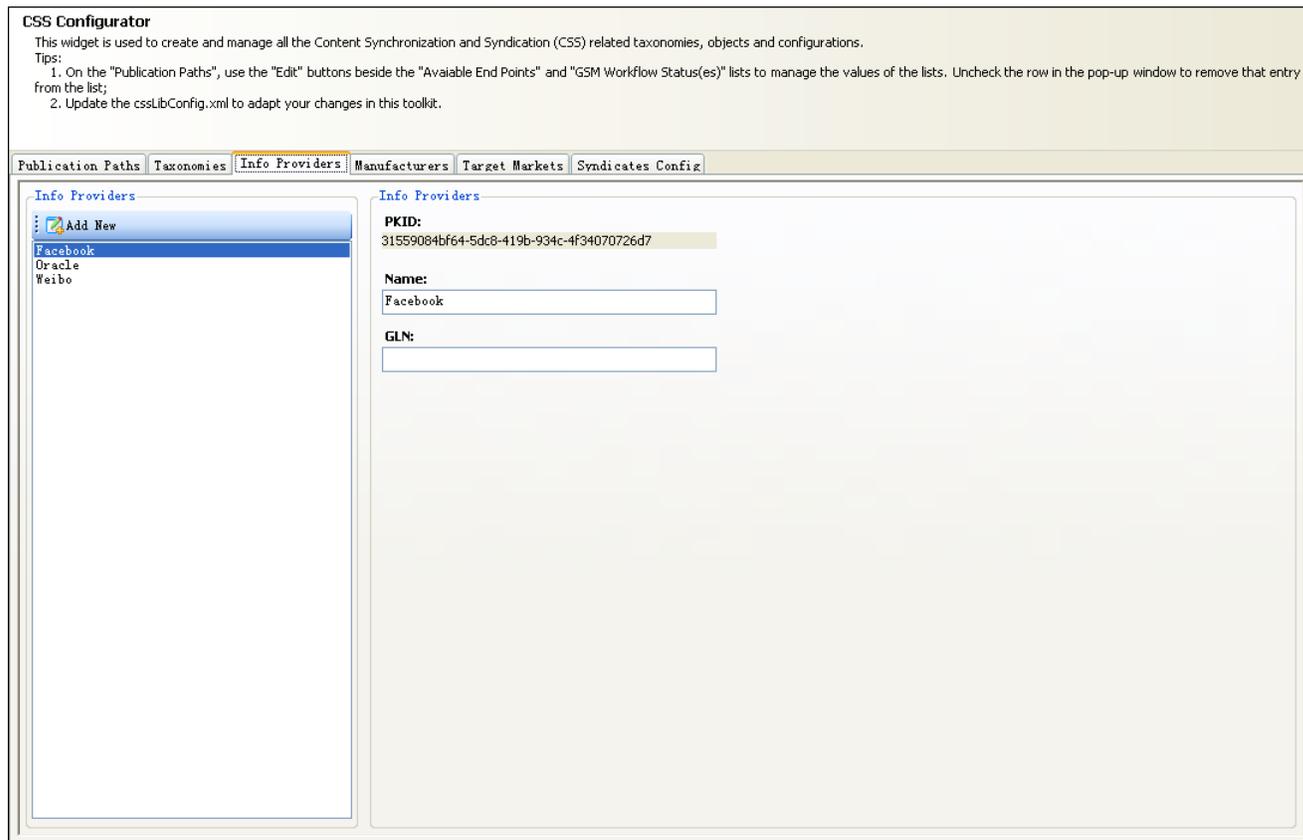
```
<InfoProviderMap>
  <MapItem key="..." value="3155..." />
  ...
</InfoProviderMap>
```

- b. The name of a taxonomy corresponds to Market ID of a Target Market defined in the Target Market tab.
- c. No more than 2 characters.

Info Providers Tab

Use this tab to define information providers for the publication path.

Figure 2-5 CSS Configuration widget, Info Providers tab



This tab includes the following fields:

PKID—Pkid of the provider. This is defined by the system and cannot be changed in the toolkit. This should be updated in the configuration as follows:

In `cssLibConfig.xml` which is located in `<P4P_HOME>/config/Extensions`, update the "value" attribute of one "MapItem" node to the PKID defined here. The node should be included in the following section:

```
<InfoProviderMap>
  <MapItem key="..." value="3155..." />
  ...
</InfoProviderMap>
```

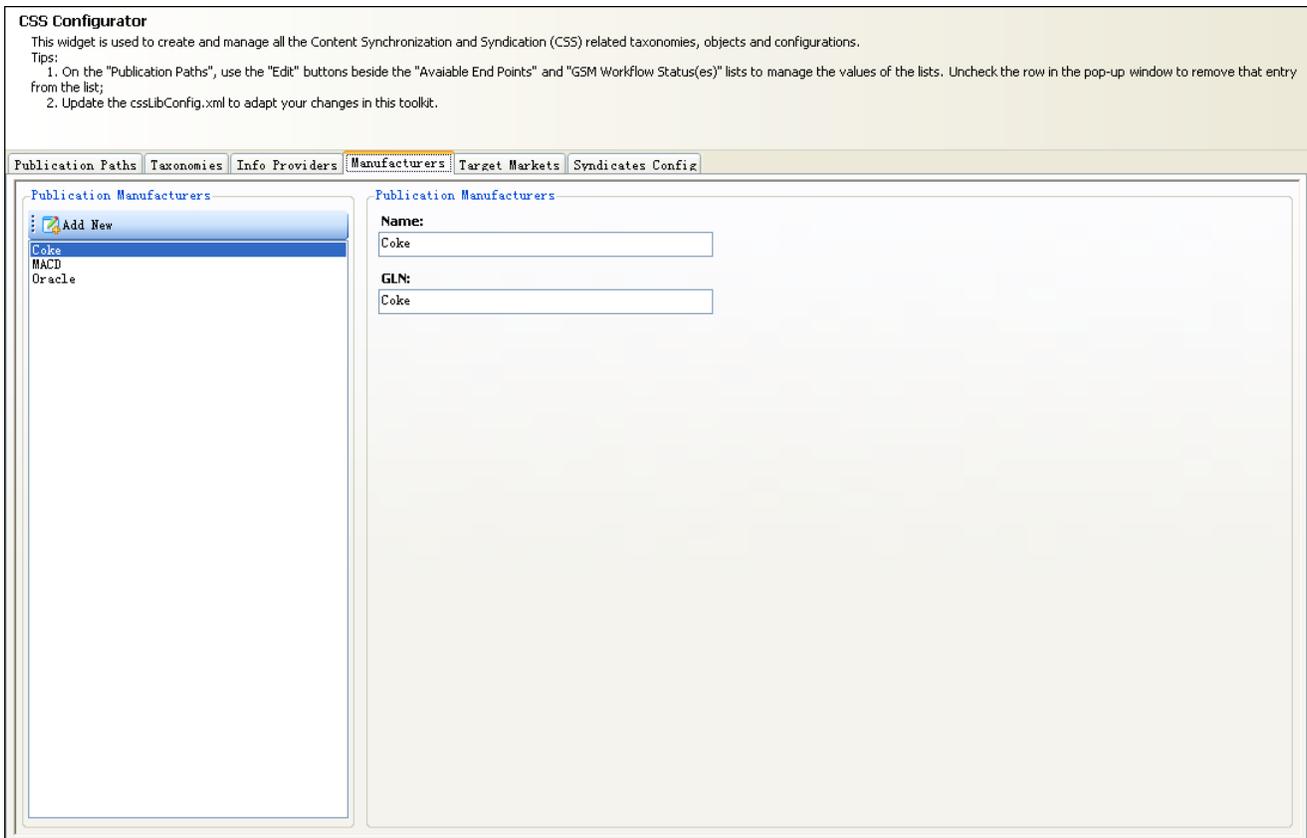
Name—Name of the information provider.

GLN—For Global Data Synchronization Network (GDSN) compliant target systems, the Global Locator Number (GLN) of the information provider.

Manufacturers Tab

Use this tab to define publication manufacturers.

Figure 2–6 CSS Configuration widget, Manufacturers tab



This tab includes the following fields:

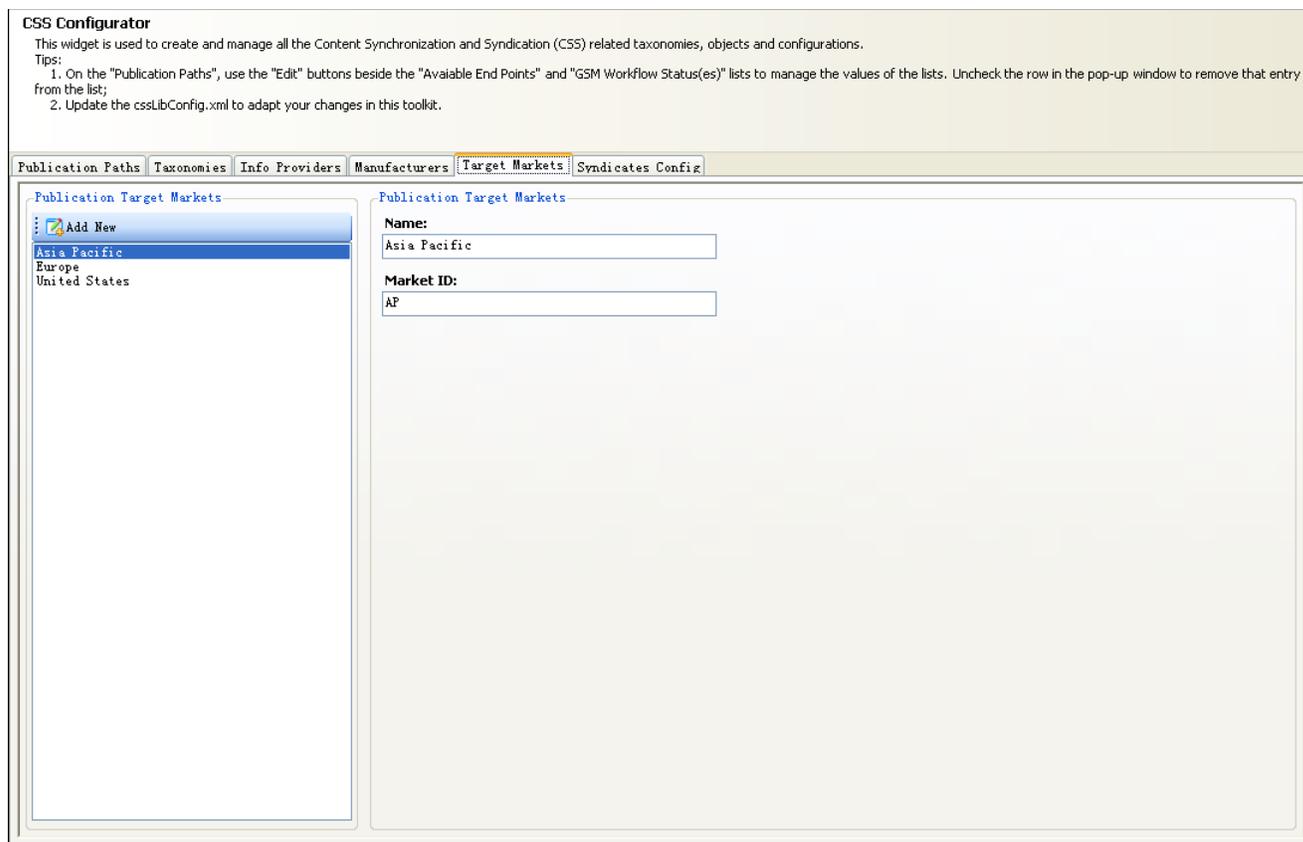
Name—Name of the manufacturer.

GLN—For Global Data Synchronization Network (GDSN) compliant target systems, the Global Locator Number (GLN) of the manufacturer.

Target Markets Tab

Use this tab to define target markets for the publication.

Figure 2–7 CSS Configuration widget, Target Markets tab



This tab includes the following fields:

Name—Name of the target market.

Market ID—ID of the target market. This value must follow the rules below:

- a. The Market ID should correspond to a value of the "key" attribute of "MapItem" node configured in the following section of "cssLibConfig.xml" which is located in <P4P_HOEM>/config/Extensions:

```
<InfoProviderMap>
  <MapItem key="..." value="3155..." />
  ...
</InfoProviderMap>
```

- b. The Market ID should correspond to the name of a Taxonomy defined in "Taxonomies" Tab.
- c. No more than 2 characters.

Syndicates Config Tab

Use this tab to define the syndication configuration, and set syndication and reconciliation times.

Figure 2–8 CSS Configuration widget, Syndicates Config tab

CSS Configurator
This widget is used to create and manage all the Content Synchronization and Syndication (CSS) related taxonomies, objects and configurations.

Tips:
1. On the "Publication Paths", use the "Edit" buttons beside the "Available End Points" and "GSM Workflow Status(es)" lists to manage the values of the lists. Uncheck the row in the pop-up window to remove that entry from the list;
2. Update the cssLibConfig.xml to adapt your changes in this toolkit.

Publication Paths | Taxonomies | Info Providers | Manufacturers | Target Markets | **Syndicates Config**

Syndicate Configs

- Add New
- WSSyndication

Configuration Name
WSSyndication

Syndication

Syndicate at specific time: 2005-12-19 21:35

Syndication frequency (in minutes): 2

Reconciliation

Reconcile at specific time: 2005-12-19 21:36

Reconciliation frequency (in minutes): 5

This tab includes the following fields:

Configuration Name—Defines one suit of the behaviors of how the syndication and reconciliation service work. The value should be configured as the child node name of the "CssConfigurations" element in the cssLibConfig.xml. The user can make additional configurations in that configuration file.

Syndicate at specific time—Check the box to indicate the path is syndicated at a set time. Use the date and time fields to specify the syndication date and time.

Syndication Frequency (in minutes)—Defines how often a syndication attempt occurs.

Reconcile at specific time—Check the box to indicate the path is reconciled at a set time. Use the date and time fields to specify the reconciliation date and time.

Reconciliation frequency (in minutes)—Defined how often a reconciliation attempt occurs.

After making changes to all tabs, click **Save** to generate the output script.

Customer Translations

Use the Customer Translations widget to override standard customer translations.

Initial Setup

Prior to running this widget for the first time, you must do the following:

1. Execute the CreateAndPopulateCustomerTranslations.sql script located in either the Oracle or SqlServer directory:

```
\Scripts\SqlServer\Utilities\CustomerTranslations\CreateAndPopulateCustomerTranslations.sql
\Scripts\Oracle\Utilities\CustomerTranslations\CreateAndPopulateCustomerTranslations.sql
```

2. Add the following to the CustomerSettings.config file, in the CustomerSettings/Core/Prodika/Managers node:

```
<TranslationManager configChildKey="key">
  <config key="CUSTOMER_CONTEXT" value="customer"
    configAttributeOverrideBehavior="Replace" configOverrideModifier="IsLocked"
  />
</TranslationManager>
```

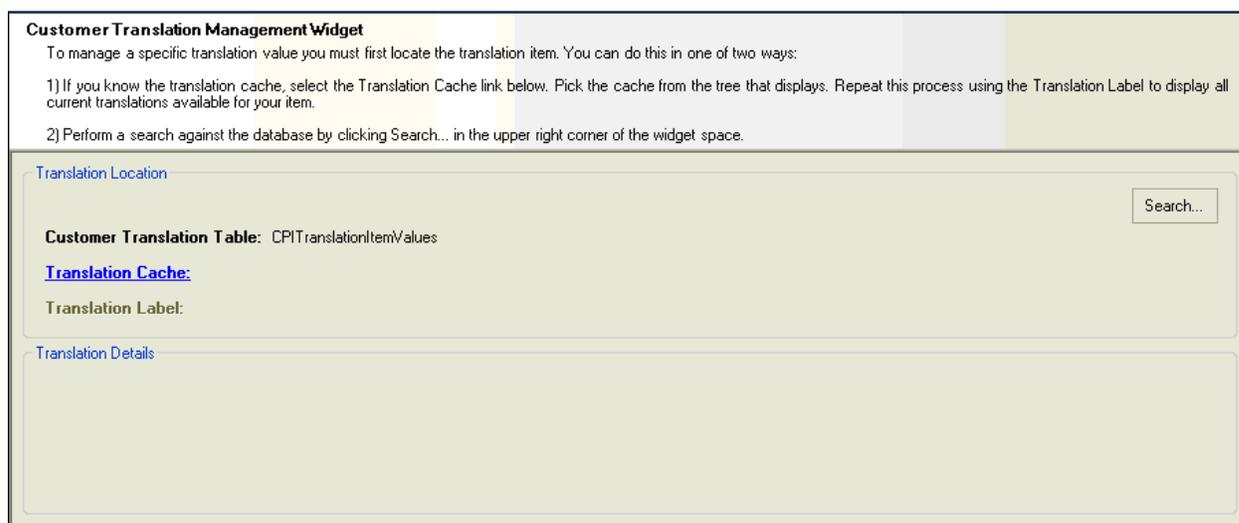
Using the Widget

To use the Customer Translations widget, you search for a translation term by either browsing by cache and translation label or by performing a search against the whole database.

To browse for a customer translation:

1. Click the **Customer Translations** widget on the left widget tree. The widget content area refreshes to display the customer translation widget.

Figure 2–9 Customer Translations widget



The following fields are displayed:

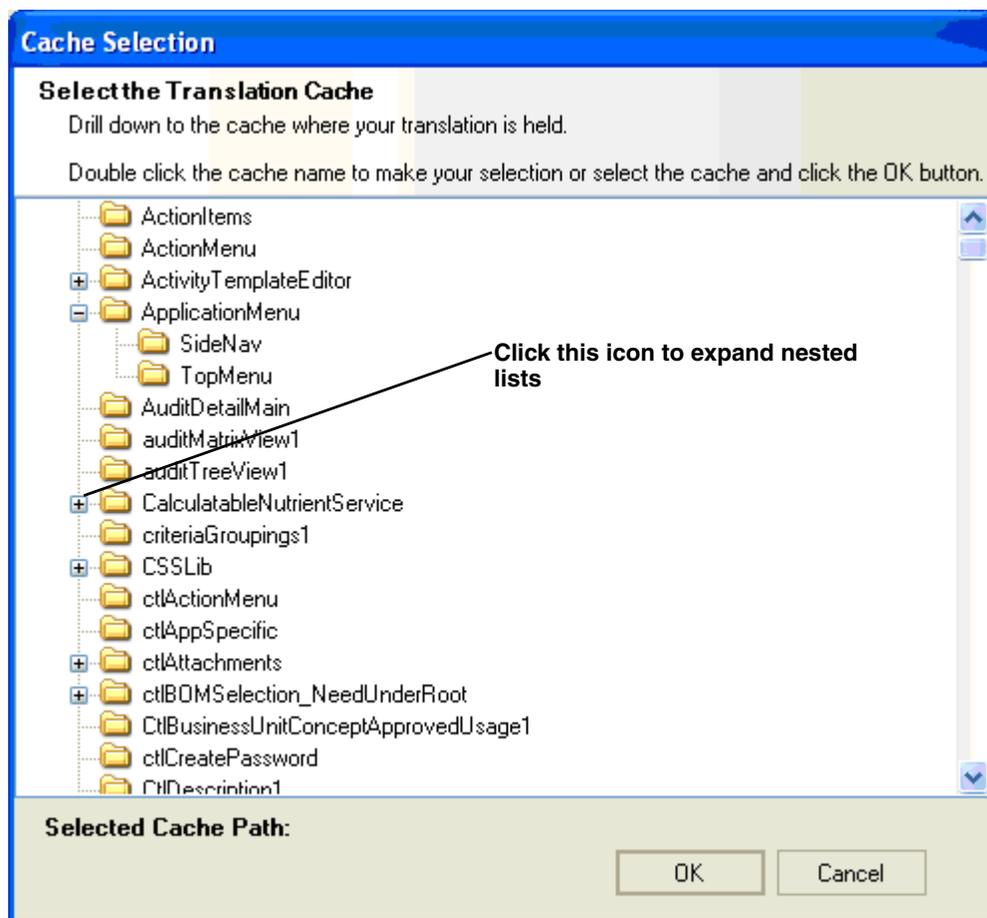
Customer Translation Table—Name of the customer translation table.

Translation Cache—A link to display all caches within the database and the name of the selected translation cache (if one has been selected).

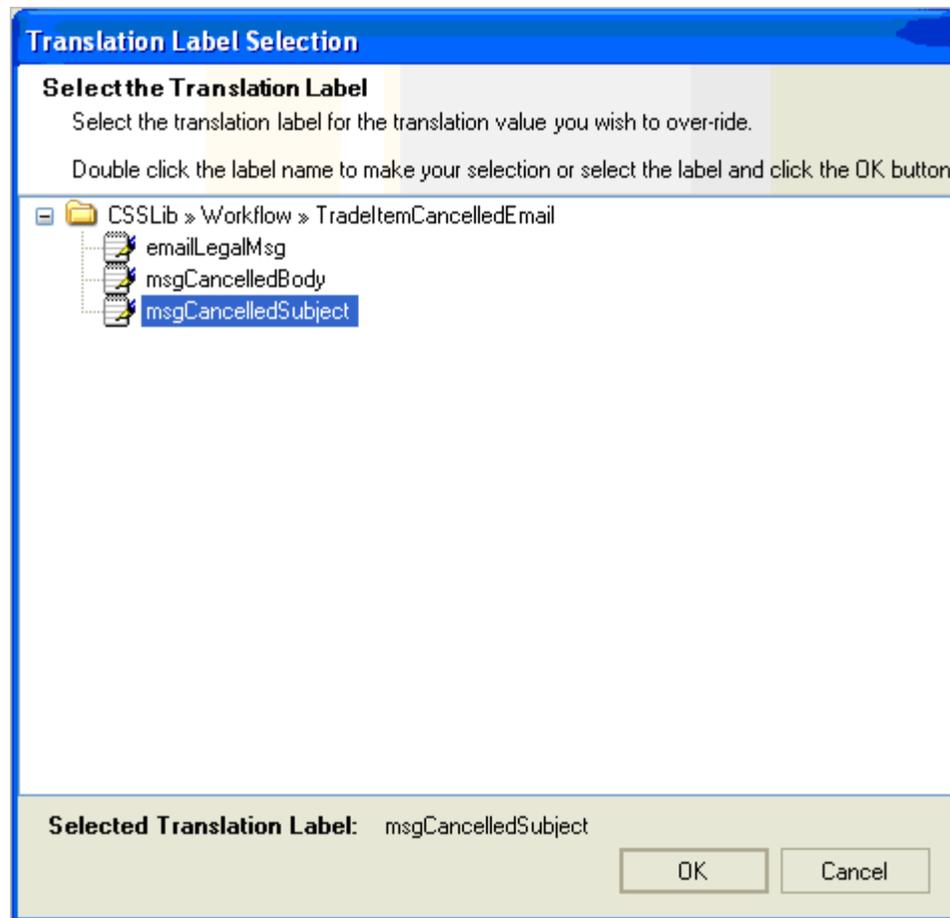
Translation Label—A link to display all translation items within the database that reside under the Translation Cache selected from the link directly above it and the name of the selected translation label (if one has been selected).

2. Click **Translation Cache** link. The Cache Selection dialog box displays.

Figure 2–10 Cache Selection dialog box



3. Select the translation cache by double-clicking or by selecting the cache and clicking **OK**. Your selection displays in the Translation Cache field.
4. Click **Translation Label**. The Translation Label Selection dialog box displays available translation labels based on the cache that you selected.

Figure 2–11 Translation Label Selection dialog box

5. Select a label by double-clicking or by selecting the label and clicking **OK**. Your selection displays in the Translation Label field. The customer translations for the cache and label that you selected are displayed in a table at the bottom of the page.

Figure 2–12 Translation Label field

Customer Translation Management Widget
To manage a specific translation value you must first locate the translation item. You can do this in one of two ways:

- 1) If you know the translation cache, select the Translation Cache link below. Pick the cache from the tree that displays. Repeat this process using the Translation Label to display all current translations available for your item.
- 2) Perform a search against the database by clicking Search... in the upper right corner of the widget space.

Translation Location Search...

Customer Translation Table: CPITranslationItemValues

Translation Cache: ActivityTemplateEditor » ctiExpirationTracker

Translation Label: lblSessionWarning

Translation Details

Language	Default	Override	Display
ENGLISH	Session will timeout, causing loss of any unsaved data.	This is an Override	This is an Override
FRENCH	la session interrompra a perte les données pas mémorisées		la session interrompra a perte les données pas mémorisées
SPANISH	Finalizará el tiempo de la sesión, con la pérdida de los datos que no se hayan guardado.		Finalizará el tiempo de la sesión, con la pérdida de los datos que no se hayan guardado.
PORTUGUESE	Acabou o tempo para esta sessão , vai perder todos os dados não guardados		Acabou o tempo para esta sessão , vai perder todos os dados não guardados
ITALIAN	La sessione terminerà' causando la perdita dei dati non salvati		La sessione terminerà' causando la perdita dei dati non salvati
GERMAN	Session wird unterbrochen mit Verlust der nicht gespeicherter Information		Session wird unterbrochen mit Verlust der nicht gespeicherter Information
DUTCH	de sessie zal onderbroken worden met verlies van niet opgeslagen gegevens		de sessie zal onderbroken worden met verlies van niet opgeslagen gegevens
POLISH	Sesja zakończy się powodując utratę niezapisanych danych		Sesja zakończy się powodując utratę niezapisanych danych
SPANISHMEXICO	La sesion terminara su tiempo, causando perdida de la data no salvada		La sesion terminara su tiempo, causando perdida de la data no salvada
SPANISHCOSTARICA	La sesion terminara su tiempo, causando perdida de la data no salvada		La sesion terminara su tiempo, causando perdida de la data no salvada
SPANISHVENEZUELA	La sesion terminara su tiempo, causando perdida de la data no salvada		La sesion terminara su tiempo, causando perdida de la data no salvada
KOREAN			

The Translation Details table includes the following fields:

Language—The language for the translation displayed in the row.

Default—The standard translation that ships with the default database.

Override—The customer translation that is used to override the standard translation.

Display—The translation as it displays in the user interface. The value that you enter in the Override field displays in this field; otherwise, the default translation displays.

6. Enter the customer translation in the Override field. Multi-line is supported in Extensibility Pack 3.7 and future releases.
7. Click **Save** to generate the output script.

To search for a customer translation:

1. Click the **Customer Translations** widget on the left widget tree. The widget content area refreshes to display the customer translation widget.
2. Click the **Search** button, displayed at the top right of the widget content area, as shown below.

- **Override Translation**—The known translation override.
- **Displayed Value**—The value displayed. Use this option if you do not know where the translation originates (i.e.; the text you are searching against may exist in a record from the standard translations or the custom translations).

Search Value—The actual text value against which the search is performed. This is a required field. The field supports a simple string search; Boolean conjunctions/disjunctions are not currently supported. If you do not specify a value, an error message will display.

4. Click **Search**. Translation values matching the criteria that you entered display at the bottom of the screen. Each row represents a record within the database where its translation value matches your criteria.

Figure 2–15 Search for Translation Values dialog box

Cache Alias	Default Translation Value
GSMLib » SpecCSSPreApproveGuardCondition	Cannot syndicate Nonstandard Pallet type
frmNPDActivityEditorPopup » ctISummary » ctIDocumentCollaborationSummary » ctIQuestions » ctIActionStandardsSuccessCriteria	Action Standards/Success Criteria
ActivityEditor » ctISummary » ctIDocumentCollaborationSummary » ctIQuestions » ctIActionStandardsSuccessCriteria	Action Standards/Success Criteria
frmNPDActivityEditorPopup » ctISummary » ctIPackageCopySummary » ctIQuestions » ctIActionStandardsSuccessCriteria	Action Standards/Success Criteria
ActivityEditor » ctISummary » ctIPackageCopySummary » ctIQuestions » ctIActionStandardsSuccessCriteria	Action Standards/Success Criteria
frmNPD » ProjectEditor » ctIQuestions » ctIActionStandardsSuccessCriteria	Action Standards/Success Criteria
frmNPDProjectPopup » ProjectEditor » ctIQuestions » ctIActionStandardsSuccessCriteria	Action Standards/Success Criteria
frmNPDHostPopup » ProjectEditor » ctIQuestions » ctIActionStandardsSuccessCriteria	Action Standards/Success Criteria
PrincipalManagementService » Validations	The password does not meet the standards set by your c...

5. Select a translation value and click **OK** or you may also double-click a row.
6. The table includes the following fields:

Language—The language for the translation displayed in the row.

Default—The standard translation that ships with the default database.

Override—The customer translation that is used to override the standard translation.

Display—The translation as it displays in the user interface. The value that you enter in the Override field displays in this field; otherwise, the default translation displays.

7. Enter the customer translation in the Override field. Multi-line is supported in Extensibility Pack 3.7 and future releases.
8. Click **Save** to generate the output script.

Hide Spec Update (GSM)

Use the Hide Spec Update widget to create a script that can be run to update the hide specs Workflow Administration (WFA) system action. This updates system actions for GSM workflows only.

To create a script:

1. Click the **Hide Spec Update (GSM)** widget on the left widget tree. The widget content area refreshes and displays WFA templates.

Figure 2–16 Hide Spec Update (GSM) widget

Hide Spec Update (GSM)

Use this widget to create a script that can be run to update the hide specs WFA system action. Specify the WFA GSM Workflow Template(s) that are tied to the specs you would like to update. If you want to update all specs, select the "<All>" option in the WFA templates listing. Provide a username of the user you would like referenced in the specification audit history database table.

Hide Spec Update Script

Unassociated WFA Templates:

- <All>
- Activity - Ingredient Analysis
- Activity - Lab Analysis Request
- Activity - New Packaging Request
- Activity - Packaging Design Request
- activity workflow
- CSS Ingredient Spec
- CSS Packaging Material Spec
- CSS Printed Packaging Spec
- CSS Process Spec
- CSS Trade Spec
- DEM-Test/WFL
- Equipment
- Ingredient - SLE
- Ingredient for Argentina
- Ingredient for Latin America
- Ingredient Spec - Short Template
- Menu Item - Short Template
- Nutrient Profile Short Template
- Packaging Spec - Short Template
- Packaging Spec - Latin America
- Printed Pkg Spec - Short Template

Associated WFA Templates:

Specification Audit History Record User:

2. Select the workflow templates that are tied to the specifications you want to update. Use the right arrow icon to move the templates from the Unassociated WFA Templates column to the Associated WFA templates column. To select all templates, move the All option to the Associated WFA Templates column.
3. In the Specification Audit History Record User field, enter the username of the user to reference in the specification's Audit History database table. As you type letters, user names matching your entry are displayed to the right of the field, as shown below.

Figure 2–17 Specification Audit History Record User field

Specification Audit History Record User:

clark (Brown, Clark)

4. Click **Save** to generate the output script.

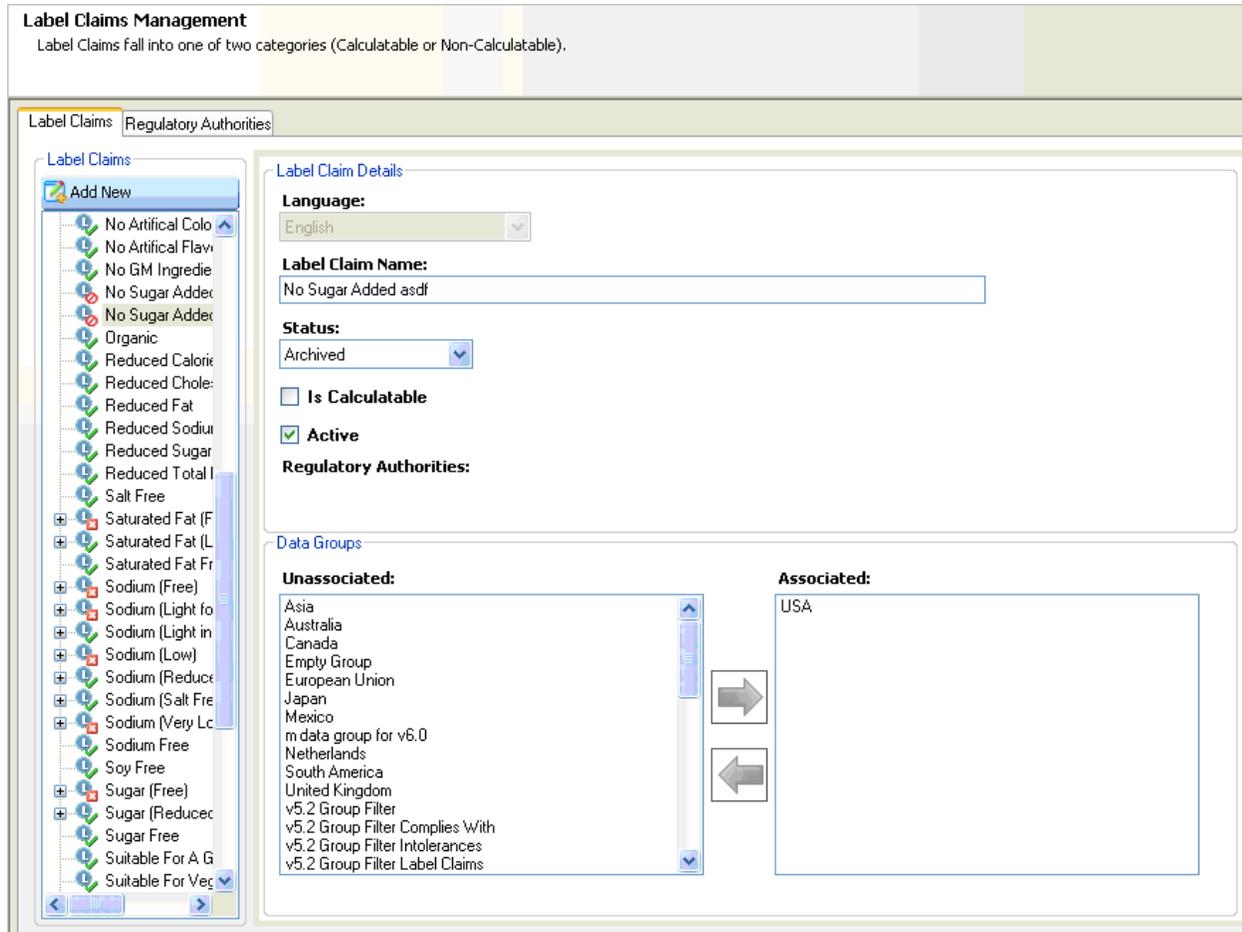
Label Claims Editor

Use the Label Claims Editor widget to manage label claim determination rules and label claim items. Non-calculatable label claim items can also be managed within the ADMN application.

To manage label claim determination rules:

1. Click the **Label Claims Editor** widget on the left widget tree. The widget content area refreshes and displays the label claims for the selected profile.

Figure 2–18 Label Claims Management widget



Unique icons represent various objects and statuses for label claims, as defined below:

Icon	Description
	Active label claim
	Archived label claim
	Inactive label claim
	Active ruleset
	Inactive ruleset

Icon	Description
	Active rule
	Inactive rule

- Click **Add New** in the Label Claims section on the left of the widget content area to create a new label claim, or select an existing label claim.
- In the Label Claim Details section, use the following fields to define the label claim.

Language—The language for the label claim.

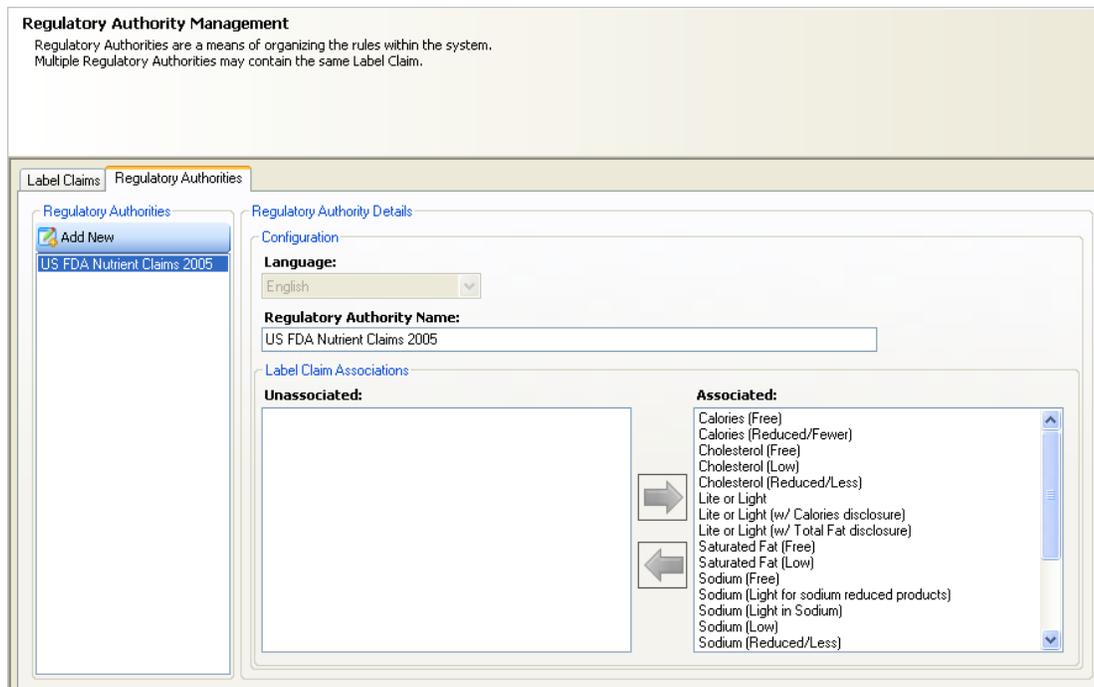
Label Claim Name—The name of the label claim item. This is the value that will be selected by the user and saved on the specification.

Status—The status of the label claim item. Valid values are Inactive, Active, Archived, and System.

Is Calculatable—Check to indicate the label claim is calculatable. If selected you will need to provide calculation scripts for label claim determination rules. See "[Managing Rules and Rulesets](#)" on page 2-22 for more information.

Active—Check to indicate the label calculations are active. When this is selected and it is calculatable, the label claim will be included in the label claims determination popup.

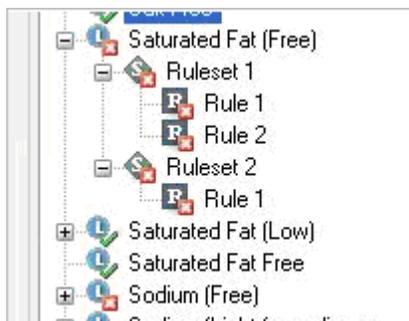
- In the Data Groups section, define which data groups the label claim will be categorized in by moving data groups to the Associated column. The data group is a selection filter available to the user when they assign label claim values to a specification.
- Click the **Regulatory Authorities** tab. The widget content area refreshes and displays which regulatory authority group the label claim exists in. The regulatory authority group is selected by the user when performing label claim determination. The user will select a group of claims to determine through calculations. For example, you can have an NLEA Health and Nutrient Content Claims group and an American Heart Association Heart-Healthy group, etc. Each group will contain specific label claims and determination rules regulated by those agencies.

Figure 2–19 Regulatory Authorities tab

6. Use the following fields to define the regulatory authority:
 - Language**—The language for the label claim.
 - Regulatory Authority Name**—The name of the regulatory authority.
7. In the Label Claim Association section, define associated label claims by moving label claims to the Associated column. When a regulatory authority has no label claims associated to it, it will not appear to the user in the drop-down list inside the label claims determination popup.
8. If your claim is calculatable, you need to add rulesets to your claims. See ["Managing Rules and Rulesets"](#) on page 2-22 for more information.
9. Click **Save** to generate the output script.

Managing Rules and Rulesets

When a label claim is set as calculatable, claim determination rules need to be added. Calculations are added by adding rulesets. A ruleset is a group of rules. Notice in the figure below how rulesets and rules are listed underneath each label claim.

Figure 2–20 Structure of rules and rulesets

Overview

Rule sets and rules are sorted by sequence number that drives the order upon which they are evaluated. Each rule set is evaluated by analyzing each rule's formula. The system uses an OR mechanism for determination which means that as soon as one formula returns true, the rule set is successful. If the result of the evaluated rule set is successful, the system then evaluates the calculation script of the first rule whose formula evaluated to true. When there is a successful rule set evaluation, the system assumes that it passed the label claim and will stop evaluating further. If no rule sets are successful, it will assume that label claim failed.

Rulesets

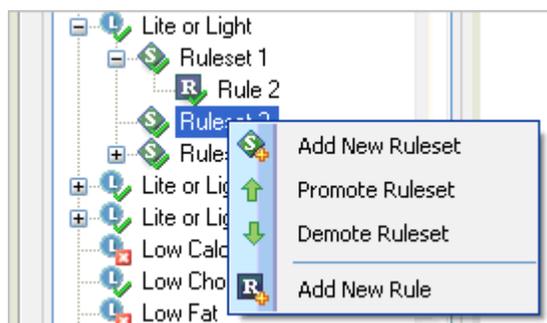
To create a ruleset, right-click on the label claim and click **Add New Ruleset**, as shown below.

Figure 2–21 Right-click menu



The ruleset name is system defined as "Ruleset X" with X being the sequence of the ruleset. The sequence of the ruleset specifies the order the rulesets are evaluated. For example, the rules within ruleset 1 will be evaluated first. If none of the rules in that ruleset return true then the system will move to Ruleset 2 and so on. To re-sequence a ruleset, right-click and select **Promote Ruleset** or **Demote Ruleset** to move the ruleset into the new position. All rules contained within that ruleset will be moved with it.

Figure 2–22 Right-click menu



Rules

Each ruleset contains one or more rules. To create a rule, right-click on the ruleset and select **Add New Rule**. Each rule contains the following fields:

Field	Description
Formula	<p>Represents a statement to be evaluated by the system for matching. This is the calculation that will return true or false. This is written in jscript. The formulation parameters section is available as a reference for which variables can be used inside your script. Example:</p> <pre>Class = 1 and Fat * 9 < Enerckcal * .5 and (Fat * (RACCx/100) <= RefFat * (RefRACCx/100) * .5 or Enerckcal * (RACCx/100) <= RefEnerckcal * (RefRACCx/100) * .66666)</pre>
Calculations	<p>Represents a statement that will be evaluated and returned when the formula evaluates to true. This will be displayed to the end user during label claim determination. Example:</p> <pre>new System.Text.StringBuilder().AppendFormat('{0:#####}', [Fat * (RACCx/100)] / [RefFat * (RefRACCx/100)] * 100).ToString() + ' % Less Fat than Reference ' + new System.Text.StringBuilder().AppendFormat('{0:#####}', [Enerckcal * (RACCx/100)] / [RefEnerckcal * (RefRACCx/100)] * 100).ToString() + ' % Fewer Calories than Reference'</pre>
Comments	<p>Represents comments associated with the rule. These comments are displayed to the user when label claim determination rules are run. If the active nutrient profile contains a classification (Main Dish, Individual Food Item, etc.), the system will look at each comment and if it starts with matching classification name and ":" it will include the comment.</p> <p>If the active nutrient profile does not include a classification, no comments will be displayed to the user for this label claim. Example:</p> <p>Individual foods: if less than 50% of calories are from fat, fat must be reduced at least 50% or calories reduced at least 1/3 per reference amount.</p> <p>ATTENTION: For "Light" claims: Generally, percentage reduction for both fat and calories must be stated. An exception is that percentage reduction need not be specified for "low-fat" products. Quantitative comparisons must be stated for both fat and calories.</p>

The figure below shows a rule and defined fields:

Figure 2-23 Rule and defined fields

Rule Management
 Rules are run in the order that they are listed within the Ruleset.
 Once a Rule has been determined to be true, evaluation of the Ruleset stops and the Ruleset is considered to be true.

Label Claims | Regulatory Authorities

Label Claims

Add New

- 100% Fat Free -kdm
- aaa
- Active - Label Claim
- Archived - Label Claim
- bbb
- Calorie Free
- Calories (Free)
- Calories (Reduced/Fewer)
- Cholesterol (Free)
- Cholesterol (Low)
- Cholesterol (Reduced/Less)
- Cholesterol Free
- DR 9831
- Fat Free
- Inactive - Label Claim
- Light in Sodium
- Lite or Light
- Ruleset 1
- Rule 2
- Ruleset 2
- Ruleset 3
- Lite or Light (w/ Calories disc
- Lite or Light (w/ Total Fat dis
- Low Calories
- Low Cholesterol
- Low Fat
- Low Saturated Fat
- Low Sodium
- No Added Salt

Rule Details

Language: English

Ruleset Name: Rule 2

Rule Editor

Formula:
 $Class = 1 \text{ and Fat} * 9 < Enerckcal * .5 \text{ and } (Fat * (RACCx/100)) \leq RefFat * (RefRACCx/100) * .5 \text{ or Enerckcal} * (RACCx/100) \leq RefEnerckcal$

Calculation:
 new System.Text.StringBuilder().AppendFormat('{0}#####', [Fat * (RACCx/100)] / [RefFat * (RefRACCx/100)] * 100).ToString() + ' %
 Less Fat than Reference'
 * + new System.Text.StringBuilder().AppendFormat('{0}#####', [Enerckcal * (RACCx/100)] / [RefEnerckcal * (RefRACCx/100)] * 100
).ToString() + ' % Fewer Calories than Reference'

Comments:
 Individual foods: if less than 50% of calories are from fat, fat must be reduced at least 50% or calories reduced at least 1/3 per reference amount.
 ATTENTION: For "Light" claims: Generally, percentage reduction for both fat and calories must be stated. An exception is that percentage reduction need not be specified for "low-fat" products. Quantitative comparisons must be stated for both fat and calories.

Formulation Parameters

- RACC - Reference Amount Commonly Consumed
- RACCx - Converted RACC
- SrvSz - Serving Size
- Class - Food Classification Number
- Enerckcal - Total Calories
- Fat - Total Fat
- Sugar - Total Sugar
- Fibfg - Total Dietary Fiber
- Fatrn - Total Trans Fat
- Fasat - Total Saturated Fat
- Chole - Total Cholesterol
- Na - Total Sodium
- RefRACC - Reference Item RACC
- RefRACCx - Reference Item RACCx
- RefSrvSz - Reference Item Serving Size
- RefClass - Reference Item Classification Number
- RefEnerckcal - Reference Item Total Calories
- RefFat - Reference Item Total Fat
- RefSugar - Reference Item Total Sugar
- RefFibfg - Reference Item Total Dietary Fiber
- RefFatrn - Reference Item Total Trans Fat
- RefFasat - Reference Item Total Saturated Fat
- RefChole - Reference Item Total Cholesterol
- RefNa - Reference Item Total Sodium

The sequence of the rule specifies the order the rules are evaluated. For example, the rule 1 will be evaluated before rule 2. To re-sequence a rule, right-click and select **Promote Ruleset** or **Demote Ruleset** to re-position the rule. All formulas, calculations, and comments will be carried over with the rule.

NPD Stage Name

Use the NPD Stage Names widget to rename stage names in the New Product Development (NPD) application. The stage name will be updated everywhere it appears in the UI.

To manage stage names:

1. Click the **Stage Name** widget on the left widget tree. The widget content area refreshes and displays the existing stage names for the selected profile.

Figure 2–24 NPD Stage Name widget

The screenshot shows the 'NPD Stage Name' widget interface. At the top, the title 'NPD Stage Name' is followed by the instruction 'Use this widget to rename stages in NPD.' Below this, the main content area is divided into two sections. On the left, a list titled 'NPD Stage Names' contains five items: 'Ideation', 'Concept Qualification', 'Product Qualification', 'Market Qualification', and 'Launch'. 'Ideation' is selected and highlighted in blue. On the right, there are two text input fields. The first is labeled 'Stage Name' and contains the text 'Ideation'. The second is labeled 'Gate Name' and contains the text 'Pre-Screening'.

2. Select a stage name, and then use the following fields to rename it.
Stage Name—The name used for the stage of the NPD project.
Gate Name—The name used for the Gate name of the NPD project.
3. Click **Save** to generate the output script.

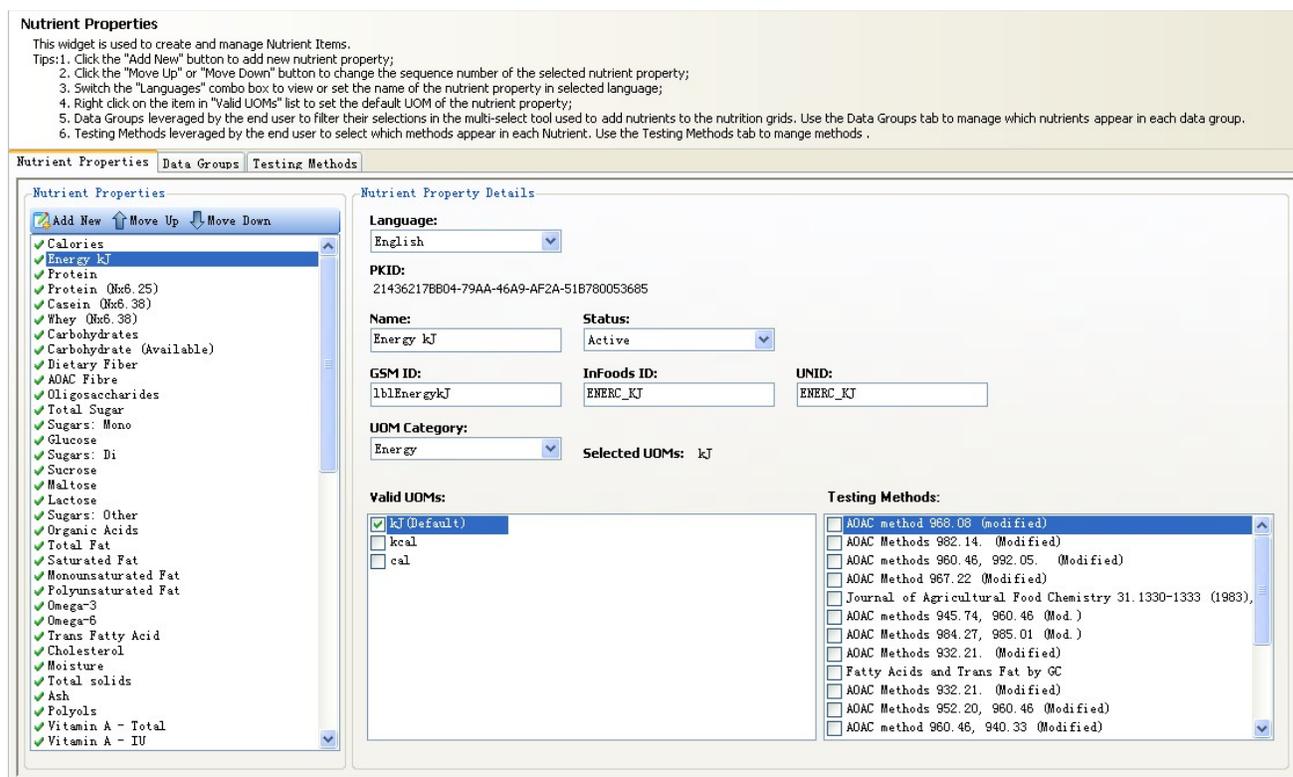
Nutrient Properties

Use the Nutrient Properties widget to create and manage nutrient items. You can also use this tool to associate nutrients to specific data groups and to manage testing methods.

To create nutrient properties:

1. Click the **Nutrient Properties** widget on the left widget tree. The widget content area refreshes and displays three tabs: Nutrient Properties, Data Groups, and Testing Methods.
2. Select the **Nutrient Properties** tab in the main widget content area. The widget content area refreshes and displays current nutrient properties.

Figure 2–25 Nutrient Properties widget



3. Click **Add New** to create a new nutrient property, or select an existing one.
4. Select a language from the **Language** drop-down list. "English" is the default.
5. Use the following fields to define the nutrient property:

PKID—Pkid of the nutrient item. This is defined by the system.

Name—UI name displayed in the nutrient items list. This name should be unique across nutrients.

Status—Status of the nutrient item. This status controls whether the nutrient item appears in the UI. For example, if you want to hide a nutrient item in the system, set this to "Inactive".

GSM ID—Unique ID used by GSM. This must be unique across all nutrients.

InFoods ID—ID used when referencing nutrients with calculated extended attributes. This must be unique across all nutrients.

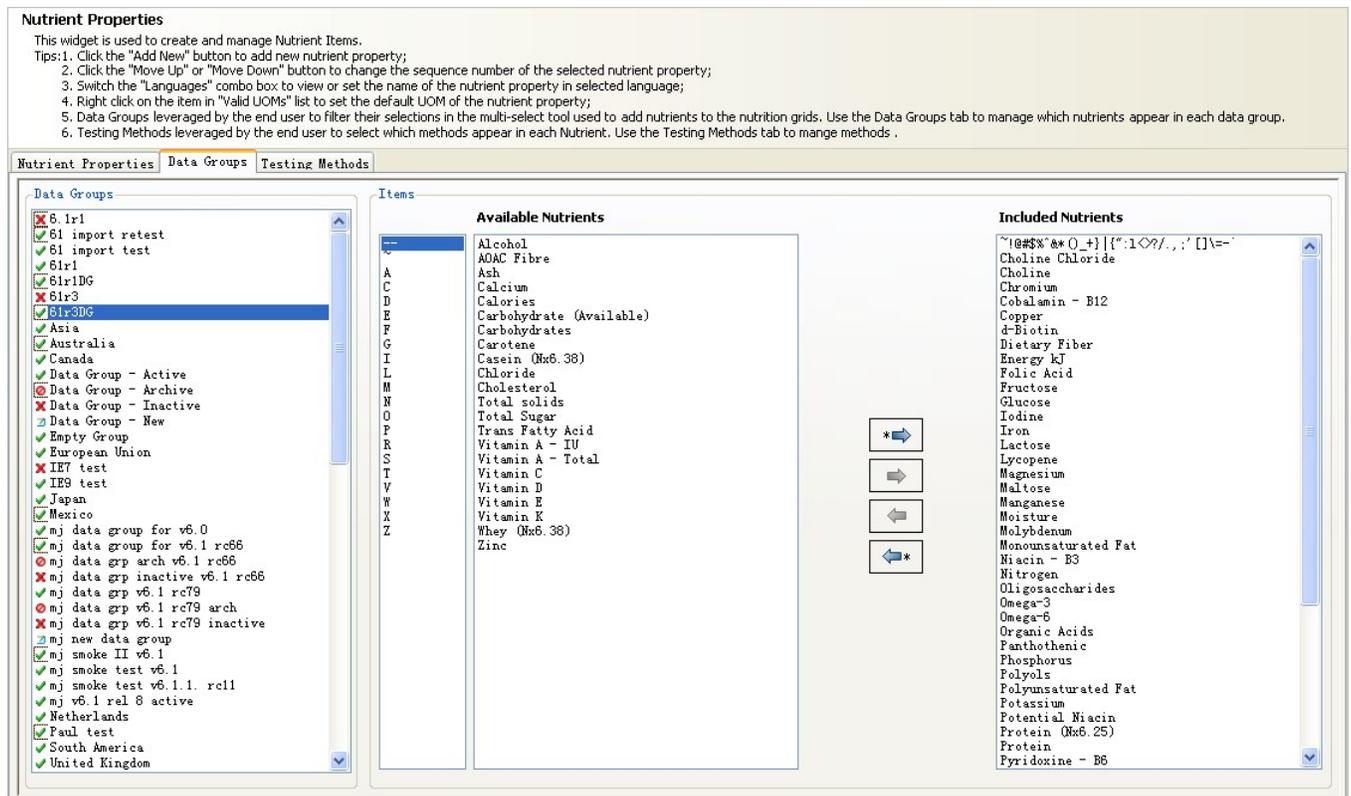
UNID—Unique ID used by the system. This must be unique across all nutrients.

6. Select a unit of measure (UOM) from the **UOM Category** drop-down list. Valid UOMs matching that category display in the Valid UOMs field.
7. In the Valid UOMs field, select the UOMs that you would like associated with the nutrient item. These appear in the Selected UOMs field. UOMs across multiple categories can be added as well. For example, you can add **RE** which is in the Retinol Equivalent category and **IU** which is in the International Units category.
8. Associate testing methods for the nutrient item by checking the corresponding checkboxes in the **Testing Methods** field.
9. Right-click on a valid UOM to set the default UOM of the nutrient property.
10. Click **Save** to generate the output script.

To associate nutrient properties to existing data groups:

1. Select the **Data Groups** tab. The widget content area refreshes and displays current data groups.

Figure 2–26 Data Groups tab



- To define what nutrients to include in the data group, move nutrients into the Included Nutrients list. Use the following icons to move choices between the Available Nutrients list and the Included Nutrients list:



Moves all nutrients to Included Nutrients list



Moves selected nutrient to Included Nutrients list



Removes selected nutrient from the Included Nutrients list



Removes all nutrients from the Included Nutrients list

- Click **Save** to generate the output script.

To manage testing methods:

- Select the **Testing Methods** tab. The widget content area refreshes and displays current testing methods.

Figure 2–27 Testing Methods tab

Nutrient Properties
This widget is used to create and manage Nutrient Items.
Tips: 1. Click the "Add New" button to add new nutrient property;
2. Click the "Move Up" or "Move Down" button to change the sequence number of the selected nutrient property;
3. Switch the "Languages" combo box to view or set the name of the nutrient property in selected language;
4. Right click on the item in "Valid UOMs" list to set the default UOM of the nutrient property;
5. Data Groups leveraged by the end user to filter their selections in the multi-select tool used to add nutrients to the nutrition grids. Use the Data Groups tab to manage which nutrients appear in each data group.
6. Testing Methods leveraged by the end user to select which methods appear in each Nutrient. Use the Testing Methods tab to manage methods.

Nutrient Properties | **Data Groups** | **Testing Methods**

Testing Methods

Testing Method Details

Language:
English

PKID:
58040241C5EC-87E5-4148-9C56-AE0A5D02EFB7

Name:
ADAC method 968.08 (modified)

Status:
Active

Testing Methods list:

- ADAC method 968.08 (modified)
- ADAC Methods 982.14 (Modified)
- ADAC methods 960.46, 992.05 (Modified)
- ADAC Method 967.22 (Modified)
- Journal of Agricultural Food Chemistry 31
- xjTestingMethod_rc8_InActive
- ADAC methods 945.74, 960.46 (Mod.)
- ADAC Methods 984.27, 985.01 (Mod.)
- ADAC Methods 932.21 (Modified)
- Fatty Acids and Trans Fat by GC
- xjTestingMethod_rc8_Archived
- ADAC Methods 932.21 (Modified)
- ADAC Methods 952.20, 960.46 (Modified)
- xjTestingMethod_rc8_Active
- ADAC method 960.46, 940.33 (Modified)
- ADAC Method 974.29 (Modified)
- ADAC Method 996.03 (modified)
- ADAC Method 944.13 (modified)
- ADAC Methods 942.23, 953.17, 957.17 (Mod)
- ADAC Method 985.29 (Modified)
- Inactive tm
- xjTestMethodActive
- ADAC method 961.15 (Modified)
- Calculated

- Click **Add New** to create a new testing method, or select an existing one.
- Select a language from the **Language** drop-down list. "English" is the default.
- Use the following fields to define the testing method:

PKID—Pkid of the testing method. This is defined by the system.

Name—UI name displayed in the testing method list.

Status—Status of the testing method. This status controls whether the testing method appears in the UI. For example, if you want to hide a testing method in the system, set this to "Inactive".

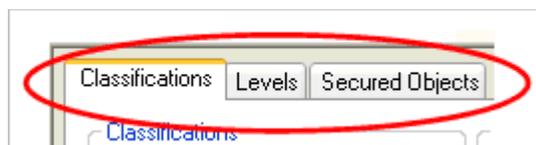
5. Click **Save** to generate the output script.

Object Level Security

Use the Object Level Security widget to manage classifications, access levels, and secured objects details.

Click the **Object Level Security** widget from the widget tree on the left side of the main window. The widget content area refreshes and displays three tabs: Classifications, Levels, and Secured Objects.

Figure 2–28 Tabs



To manage classifications:

1. Click the **Object Level Security** widget on the left widget tree. Select the **Classifications** tab in the main widget content area. The widget content area refreshes and displays current classifications.

Figure 2–29 Classifications tab

Object Level Security Management Widget
This widget provides a means of managing three security related elements:

- 1) Classifications - what is tied to an object within the system based on Secured Object Type.
- 2) Access Levels - the level of access required to view/edit a given specification or entity within the system.
- 3) Secured Object Type - the object type(s) within the system to which the Classification is tied.

Classifications
Levels
Secured Objects

Classifications

⋮ Add New

- Attachments -- Contextual
- Attachments -- NonContextual
- Design Section
- MSDS
- Non Contextual (Custom Sections)
- Non Contextual Design Attribute
- Non-Spec Sourcing Approval
- Package Compatibility
- Package Compatibility Section
- SDM Attachments -- NonContextual
- Spec-Related Sourcing Approval
- Supplier Analytics
- Tariff Code
- Transportation
- Transportation Section

Classification Details

Title:
Design Section

Secured Object:
Custom Sections

Contextual:

Associated Levels

- Bottler Purchased (100)
- Label Declared (200)
- Classified (300)
- Restricted (400)
- Highly Restricted (500)

2. Click **Add New** to create a new classification, or select an existing classification.
3. Use the following fields to define the classification:
 - Title**—The title of the classification.
 - Secured Object**—The secured object type to which the classification is associated.

Contextual—Indicates whether contextual security exists for the secured object.

Associated Levels—Access levels that are associated with the classification. Access levels are automatically assigned based on the contextual flag. All non-contextual classifications will contain the No Access (0) and Has Access (100) classifications. Contextual classifications will contain all active levels.

4. Click **Save** to generate the output script.

To manage security levels:

1. Click the **Object Level Security** widget on the left widget tree. Click the **Levels** tab in the main widget content area. The widget content area refreshes and displays current security levels.

Figure 2–30 Levels tab

Object Level Security Management Widget
This widget provides a means of managing three security related elements:

- 1) Classifications - what is tied to an object within the system based on Secured Object Type.
- 2) Access Levels - the level of access required to view/edit a given specification or entity within the system.
- 3) Secured Object Type - the object type(s) within the system to which the Classification is tied.

Classifications | **Levels** | Secured Objects

Levels

- Add New
- No Access (Categorical) (0)
- No Access (Global) (0)
- Bottler Purchased (100)
- Has Access (100)
- Label Declared (200)
- Classified (300)
- Restricted (400)
- Highly Restricted (500)

Level Details

Title:
No Access (Categorical) (0)

Level Value:
0

Sort Order:
0

Is Active:

2. Click **Add New** to create a new security level, or select an existing level.
3. Use the following fields to define the level. All fields are required.

Title—The title of the security level.

Level Value—The value assigned to the security level. Use low numbers for a lower security level, and higher numbers for a more restricted level.

Sort Order—The order that the security level should display in the user interface.

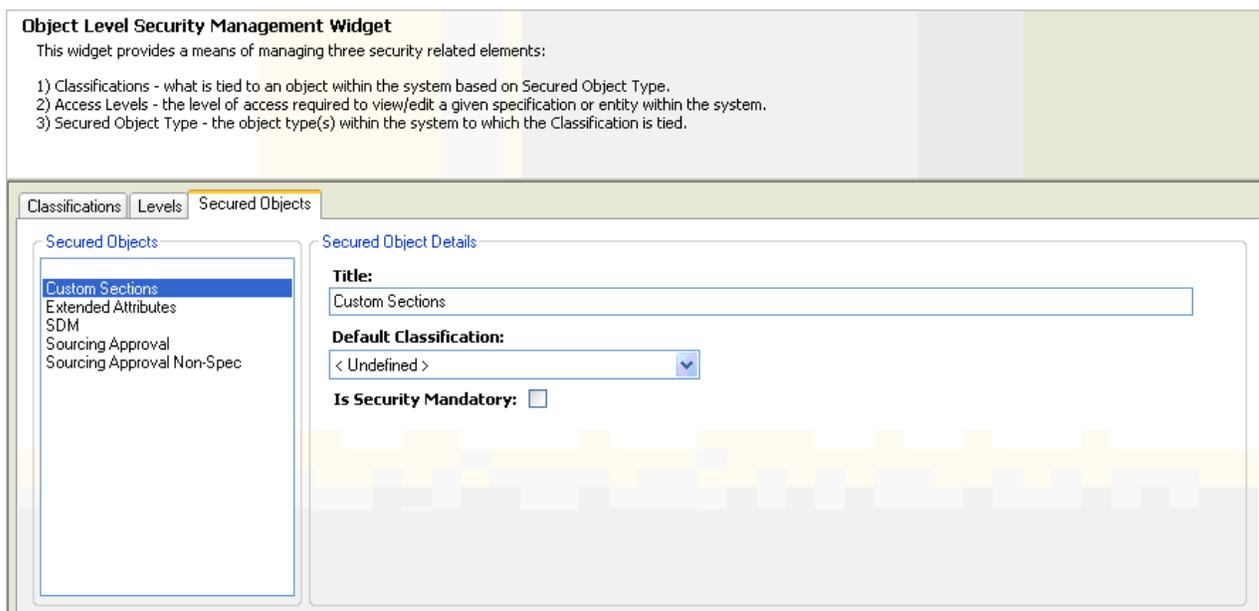
Is Active—Indicates whether the security level is active. When the active flag is removed from an access level, the widget will automatically de-associate that access level from all contextual classifications.

4. Click **Save** to generate the output script.

To manage secured object types:

1. Click the **Object Level Security** widget on the left widget tree. Click the **Secured Objects** tab in the main widget content area. The widget content area refreshes and displays current secured object types. This area is used to adjust the details of a secured object type. New secured object types can not be created.

Figure 2–31 Secured Objects tab



2. Select an existing secured object.
3. Use the following fields to define the object:
 - Default Classification**—The default classification associated with the secured object type. This field is optional. For example, when a user creates a custom section in ADMN, this is the value the classification drop-down will be defaulted to when the user creates a new custom section.
 - Is Security Mandatory**—Indicates whether the object must be secured. For example, if flagged, every time a custom section is created in ADMN a security classification selection will be required by the user.
4. Click **Save** to generate the output script.

Qualitative Lookup Configuration

Use the Qualitative Lookup Configuration widget to manage qualitative lookup lists that may be used by extended attributes. You can create new lists or manage currently existing ones. This is intended as a supplement to the currently available Web Service for mass qualitative lookup imports.

To manage Qualitative Lookups:

1. Click the **Qualitative Lookup Configuration** widget on the left widget tree. The widget content area refreshes and displays the current qualitative lookup lists in the main widget content area.

Figure 2–32

Qualitative Lookup Management Widget

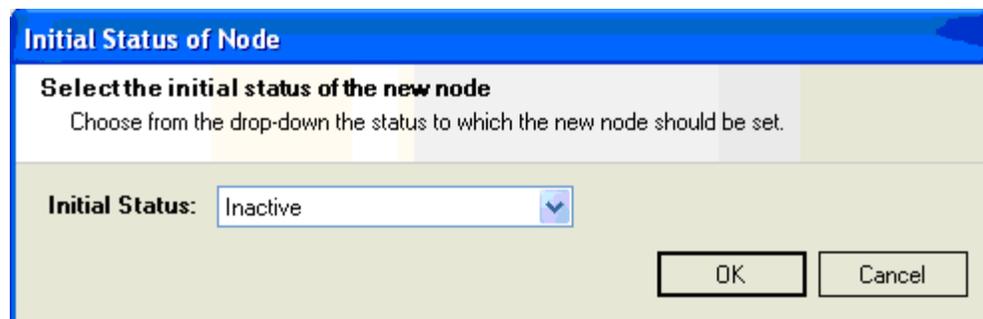
To manage a specific Qualitative Lookup list, first select the category from the Qualitative Lookups list on the left.

You may edit the title of the group in the Qualitative Lookup Details section. You may also change the status of a specific category by right-clicking on the item and selecting from the context menu that appears.

You may edit the specific items within the group by selecting the relevant item within the Qualitative Lookup Items list and then editing the specific section for that item in the Qualitative Lookup Item Details section.

2. Click **Add New** in the Qualitative Lookups section on the left of the widget content area to create a new qualitative lookup list, or select an existing qualitative lookup list.
3. When creating a new qualitative lookup or qualitative lookup item, you will be presented with an initial status dialog box. Select the status you wish the new node to assume upon creation, and then click **OK**.

Figure 2–33 Initial Status of Node dialog box



4. Use the following fields to define the qualitative lookup list. All fields are required.

Field—Description

Language—The language of the Name Qualitative Lookup list and items you are editing for the selected qualitative lookup list.

Qualitative Lookup Name—The name that will be displayed in the UI for the selected language.

Sort Order—The order in which the selected qualitative lookup list will appear in the UI.

Status—The status of the qualitative lookup list.

5. For each Qualitative Lookup list there are 0...N number of lookup items associated with it. Click **Add New** in the Qualitative Lookup Items section to the right of the list displaying the currently selected qualitative lookup list within the widget content area to create a new qualitative lookup list item, or select an existing qualitative lookup list item.
6. Use the following fields to define the qualitative lookup item. All fields are required.

Field—Description

Qualitative Lookup Item Name—The name that will be displayed in the UI for the selected language.

External ID—A cross reference value that maps to an external system.

Status—The status of the qualitative lookup item.

Sort Order—The order in which the selected qualitative lookup item will appear within the list of other qualitative lookup items in the UI.
7. Click **Save** to generate the output script.

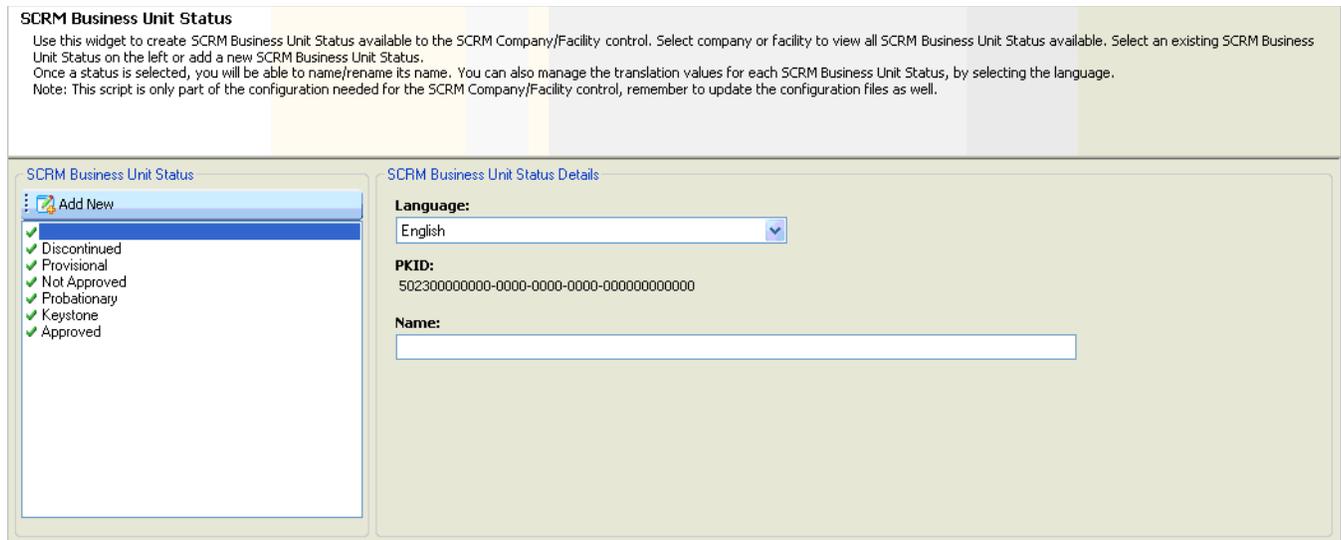
SCRM Business Unit Status

Use the SCRM Business Unit Status widget to manage the status list available when selecting a business unit on a company and facility in SCRM.

To manage SCRM business unit statuses:

1. Click the **SCRM Business Unit Status** widget on the left widget tree. The widget content area refreshes and displays the current status list in the main widget content area.

Figure 2–34 SCRM Business Unit Status widget



2. Click **Add New** in the SCRM Business Unit Status section on the left of the widget content area to create a new status, or select an existing status from the list.
3. Use the following fields to define the status.
 - Language**—The language of the status.
 - Name**—The name displayed for the status in the UI for the selected language.
 - PKID**—The PKID for the business unit status. This value is for informational purposes only and cannot be changed. This PKID is used when configuring secured statuses for SCRM BU security.
4. Click **Save** to generate the output script.

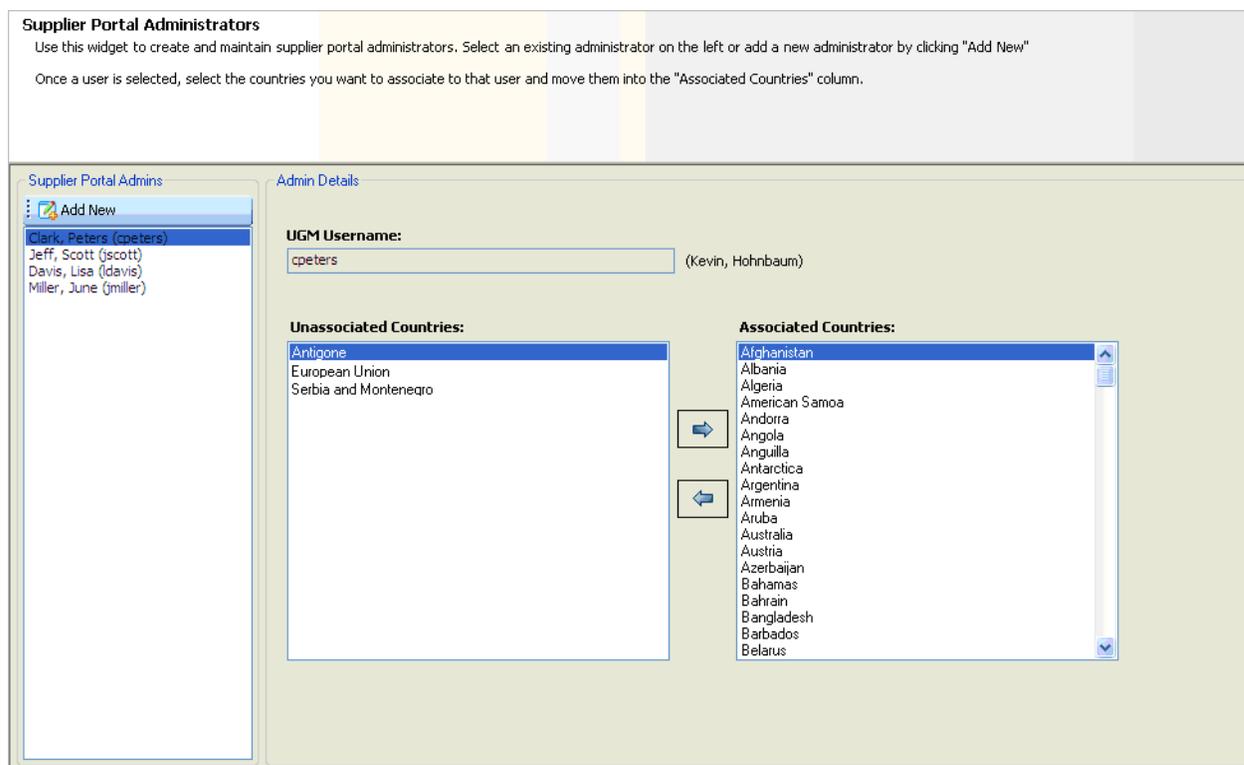
Supplier Portal Administrators

Use the Supplier Portal Administrators widget to create and maintain administrators for Supplier Portal Administration. Supplier Portal administrators are users who are allowed to approve, reject, and manage the details around supplier portal registrants. UGM users need to be associated to the countries they will be managing. For example, if user A is associated with the United States, User A will be able to manage supplier registrants whose addresses include the value of United States. User A will not be able to see or manage registrants whose addresses include the value of Canada.

To manage Supplier Portal administrators:

1. Click the **Supplier Portal Administrators** widget on the left widget tree. The widget content area refreshes and displays the current Supplier Portal administrator list in the main widget content area.

Figure 2–35 Supplier Portal Administrators widget



2. Click **Add New** in the Supplier Portal Admins section on the left of the widget content area to create a new administrator, or select an existing administrator from the list.
3. When creating a new administrator, enter a username in the UGM Username field. As you type letters, user names matching your entry are displayed to the right of the field.
4. For the selected administrator, define associated countries by moving countries to the Associated Countries column.
5. Click **Save** to generate the output script.

Taxonomy Editor

Use the Taxonomy Editor widget to manage taxonomies. You can add child and sibling nodes, and change statuses.

Note: This widget should only be used if an external ID needs to be set for NPD Business Units or NPD Project Type Categories. Everything else can be done using the Data Admin > NPD option in Oracle Agile PLM for Process.

To manage taxonomies:

1. Click the **Taxonomy Editor** widget on the left widget tree. The widget content area refreshes and displays the taxonomies for the selected profile.

Figure 2–36 Taxonomy Editor widget

Taxonomy Editor Widget
To manage a taxonomy, navigate to the node within the taxonomy. There are four actions you may perform against the selected Taxonomy:

- 1) Manage the translation values for the taxonomy node, including the name & the alias. To modify a different language, select the language from the given drop-down.
- 2) Manage the External System cross-reference values.
- 3) Manage the status of the taxonomy node.
- 4) Manage the taxonomy tree by adding new nodes as either children (lower level) or siblings (same level).

Taxonomy
NPD Project Type Categories

Taxonomy Node Details

Language:
English

Name:
[Text Input Field]

Alias:
[Text Input Field]

Status:
Inactive

External System Cross-reference:
[Text Input Field]

2. Select a taxonomy type from the Taxonomy drop-down list. The widget content area refreshes to show taxonomies for the selected type.

Figure 2–37 Taxonomy drop-down

Taxonomy Editor Widget

To manage a taxonomy, navigate to the node within the taxonomy. There are four actions you may perform against the selected Taxonomy:

- 1) Manage the translation values for the taxonomy node, including the name & the alias. To modify a different language, select the language from the given drop-down.
- 2) Manage the External System cross-reference values.
- 3) Manage the status of the taxonomy node.
- 4) Manage the taxonomy tree by adding new nodes as either children (lower level) or siblings (same level).

Taxonomy
NPD Business Unit

Taxonomy Nodes
v521 NPD BU top

Taxonomy Node Details

Language:
English

Name:
v521 NPD BU top

Alias:
v521 NPD BU top

Status:
Active

External System Cross-reference:

3. Select a taxonomy to edit, or right-click on a taxonomy to display a submenu containing additional choices:
 - **Add Child Node**—Adds a new child node to the currently selected node.
 - **Add Sibling Node**—Adds a new sibling node at the same level as the selected node.
 - **Make Active**—Gives the selected node an active status (✓).
 - **Make Inactive**—Gives the selected node an inactive status (✗).
 - **Mark as Archived**—Gives the selected node an archived status (🚫).

Figure 2–38 Submenu

Taxonomy Editor Widget

To manage a taxonomy, navigate to the node within the taxonomy. There are four actions you may perform against the selected Taxonomy:

- 1) Manage the translation values for the taxonomy node, including the name & the alias. To modify a different language, select the language from the given drop-down.
- 2) Manage the External System cross-reference values.
- 3) Manage the status of the taxonomy node.
- 4) Manage the taxonomy tree by adding new nodes as either children (lower level) or siblings (same level).

Taxonomy
NPD Business Unit

Taxonomy Nodes
v521 NPD BU top
v521 NPD BU middle
v521 NPD BU bottom

Taxonomy Node Details

Language:
English

Name:
v521 NPD BU bottom

Alias:
v521 NPD BU

Status:
Active

External System Cross-reference:

4. Use the following fields to define the taxonomies:

Language—The language of the Name and Alias you are editing for the taxonomy node.

Name—The name displayed for the taxonomy node in the UI for the selected language.

Alias—The alias displayed for the taxonomy node in the UI for the selected language. You can auto-generate the alias by clicking **Generate**.

Status—The status of the taxonomy node.

5. Click **Save** to generate the output script.