Oracle® Agile Product Lifecycle Management for Process

Data Administration Toolkit Guide

Feature Pack 4.3

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Agile Product Lifecycle Management for Process Data Administration Toolkit Guide, Feature Pack 4.3

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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 Feature 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.
italic	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.

1

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 4.5 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 4.5 + latest service pack 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

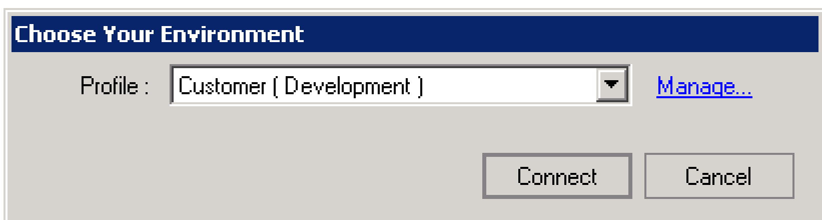
To download the toolkit:

1. Download the Feature_Pack_4.3.zip file to your local computer.
2. Locate the Apps\DataAdminToolkit folder to wherever is convenient on your local computer.

To start the toolkit:

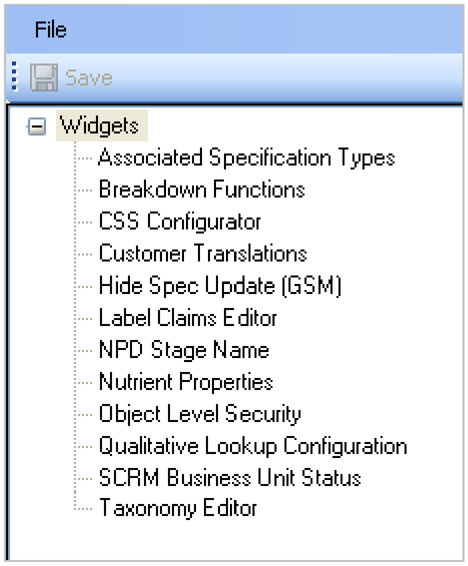
1. Navigate to the \bin directory.
2. Double-click **DataAdminToolkitShell.exe** to start the program. The Choose Your Environment dialog box displays.

Figure 1–1 Choose Your Environment dialog box



3. Select **Customer (Development)** from the Profile drop-down list. By default you will use "CUSTOMER" as your DB schema for Data Admin Toolkit so the generated scripts will write to the CUSTOMERTRANSLATIONITEMVALUES table. 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

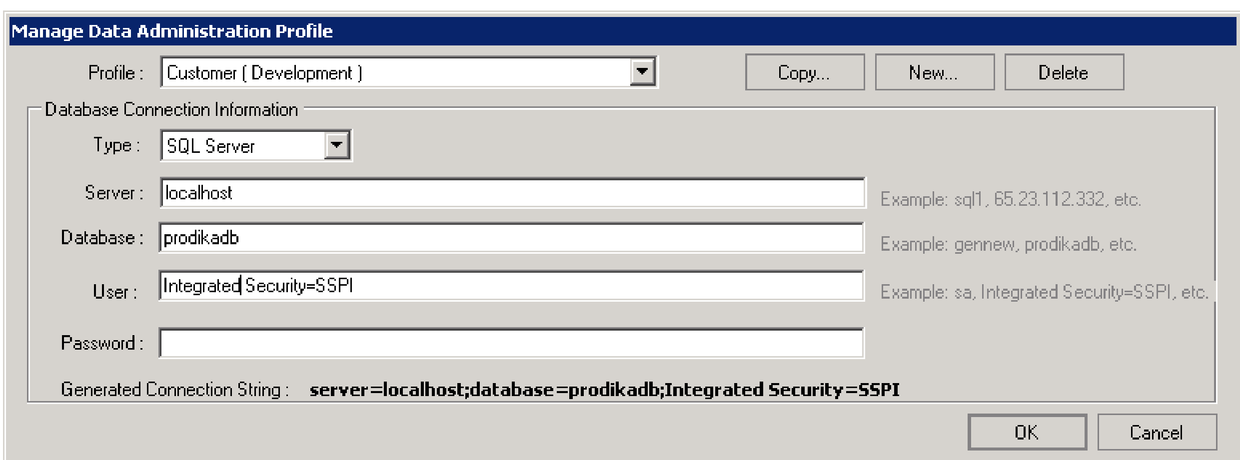


Managing Connection Profiles

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. Choose 'Customer (Development)' as the default profile, so the generated scripts will write to CUSTOMERTRANSLATIONITEMVALUES table.

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.

2

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
  - 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, 6.2, 6.2.1, 6.2.2
Breakdown Functions	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
CSS Configuration	6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
Customer Translations	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
Hide Spec Update (GSM)	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
Label Claims Editor	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2

Table 2–1 Widget and version listing

Widget	Supported in Version
NPD Stage Name	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
Nutrient Properties	6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
Object Level Security	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
Qualitative Lookup Configuration	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
SCRM Business Unit Status	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2
Taxonomy Editor	6.0, 6.1, 6.1.1, 6.2, 6.2.1, 6.2.2

Usage Guidelines

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

- 6.2.0.x releases are supported in Feature Pack 4.x
- 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. **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.

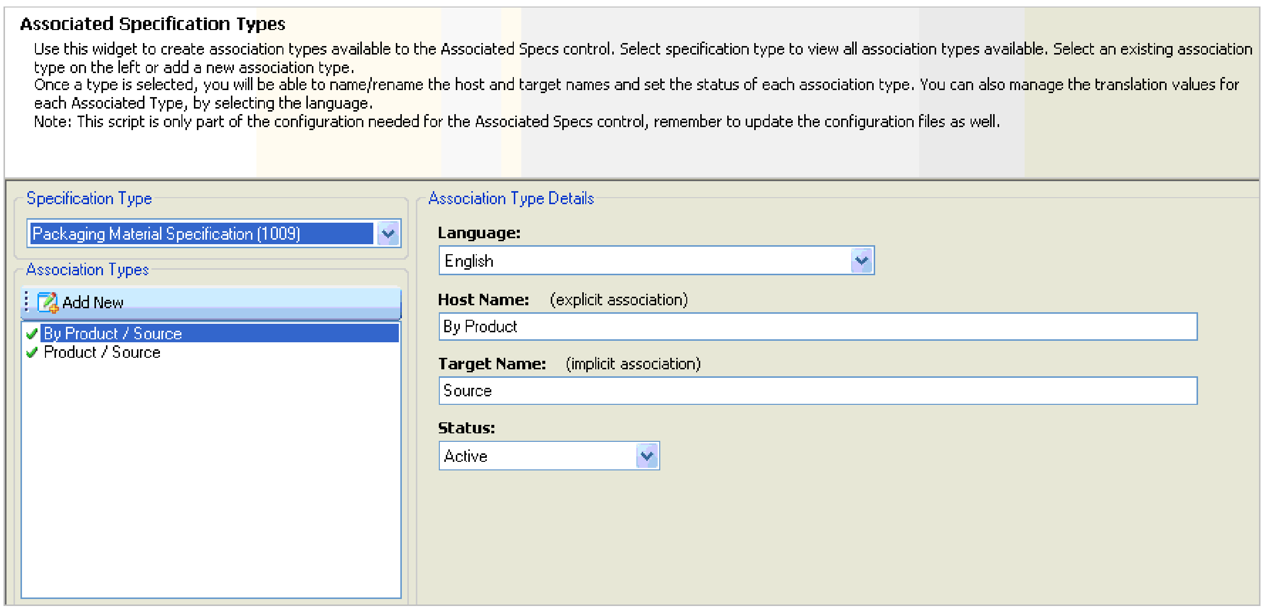
Associated Specification Types

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



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.

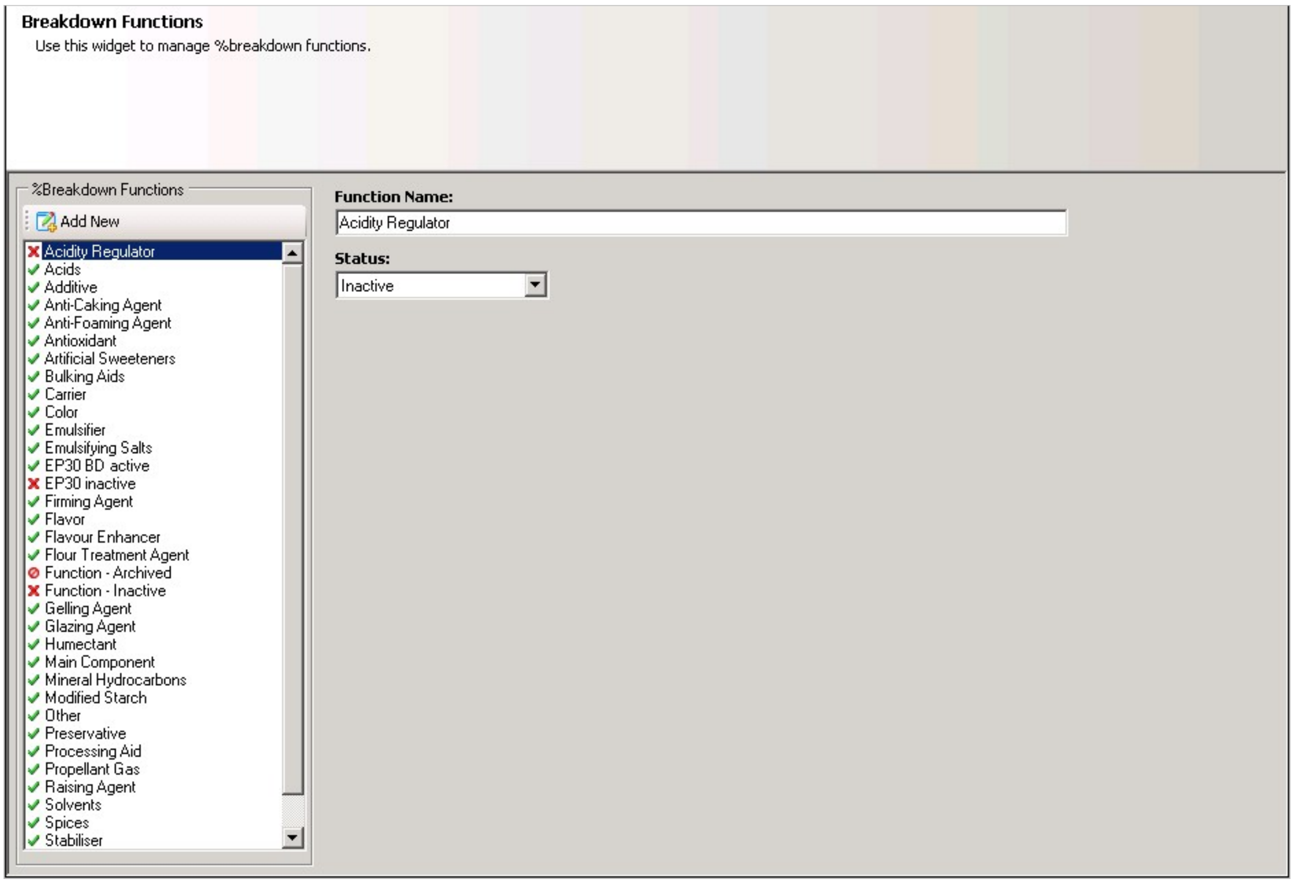
Breakdown Functions

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.

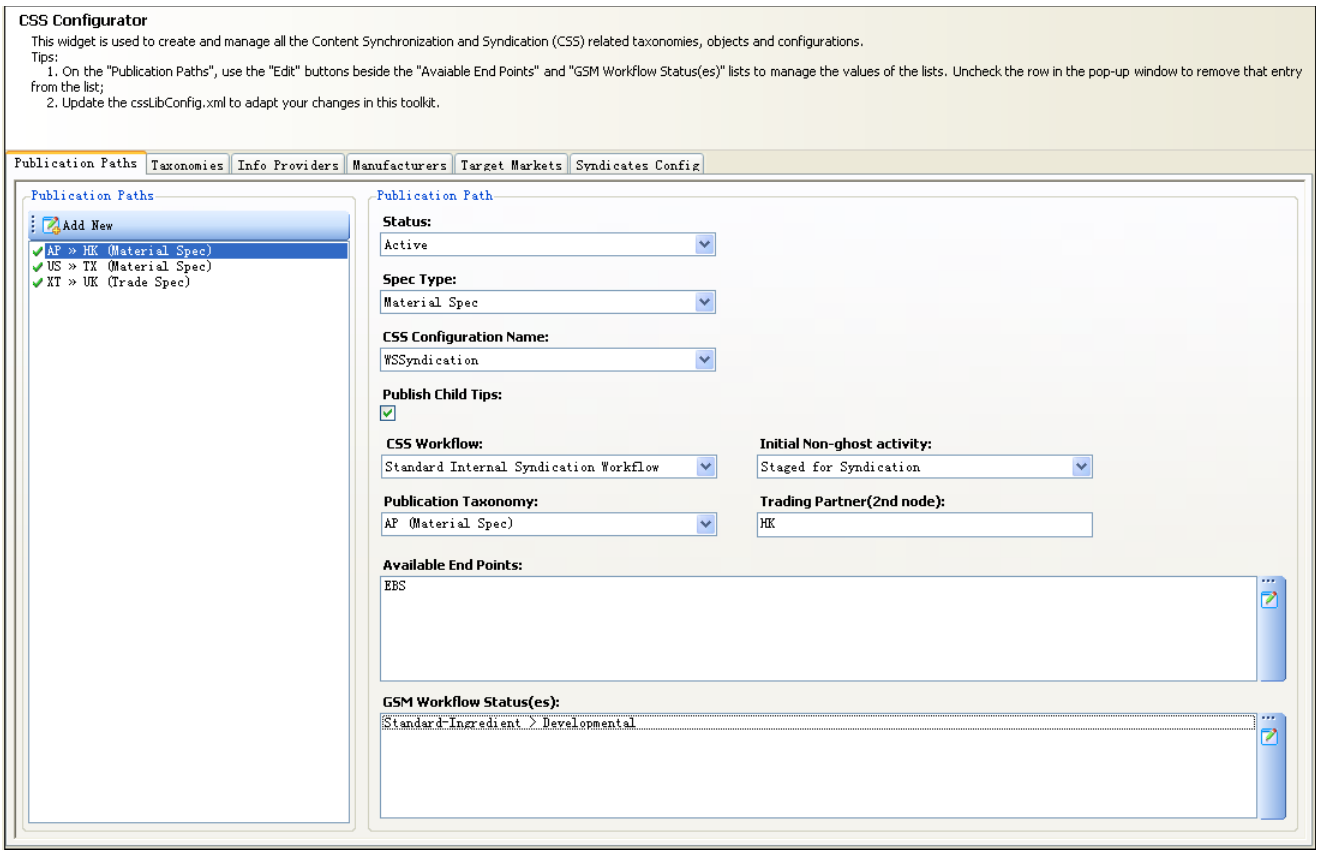
CSS Configuration

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



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.

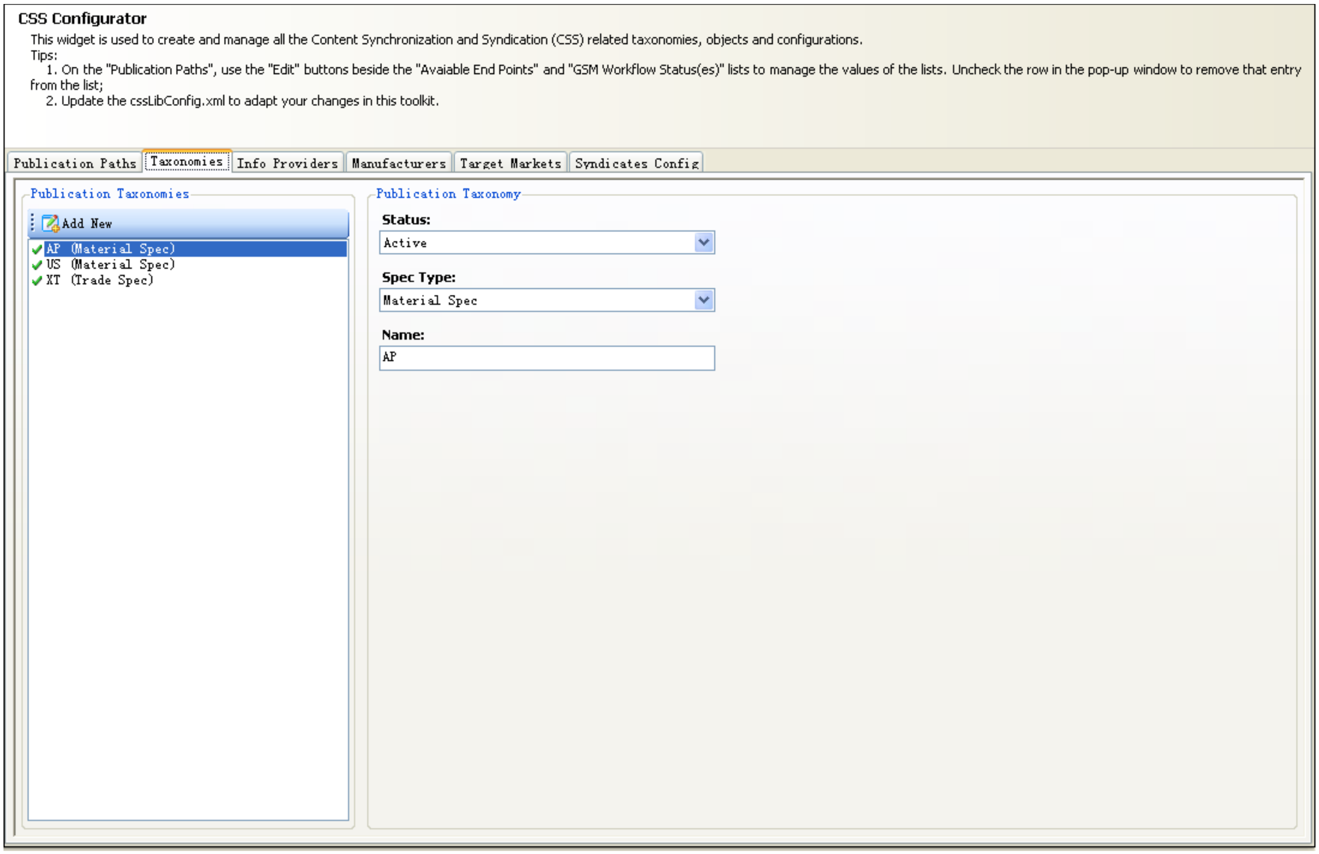
GSM Workflow Statuses—Select a GSM workflow status for the specification type chosen in the Spec Type field. This status is used to trigger a TIP for syndication. The listing shows the workflow name and the status name. Click the edit icon to refresh the workflow status list.

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_HOME>/config/Extensions:

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

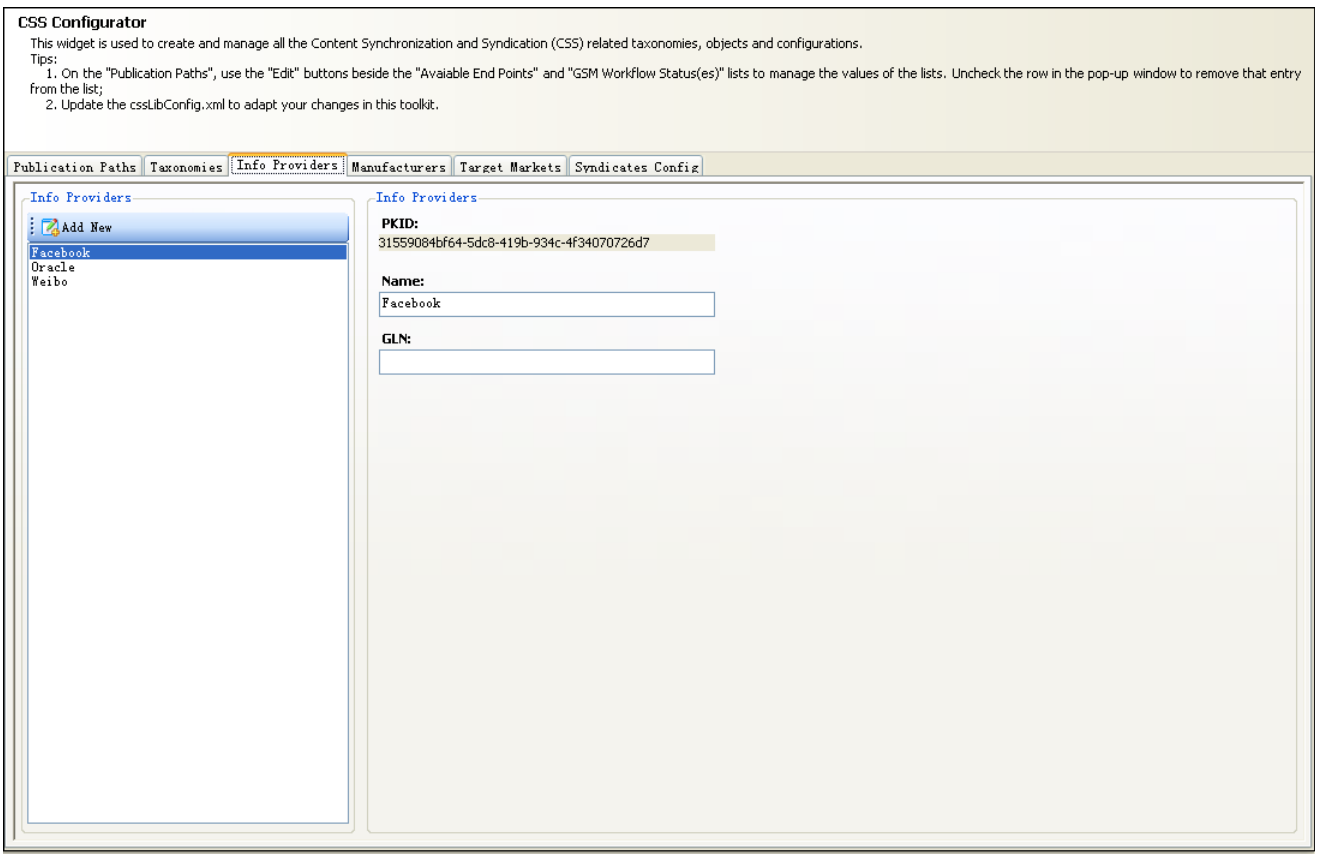
b. The name of a taxonomy corresponds to Market ID of a Target Market defined in the Target Market tab.

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>
```

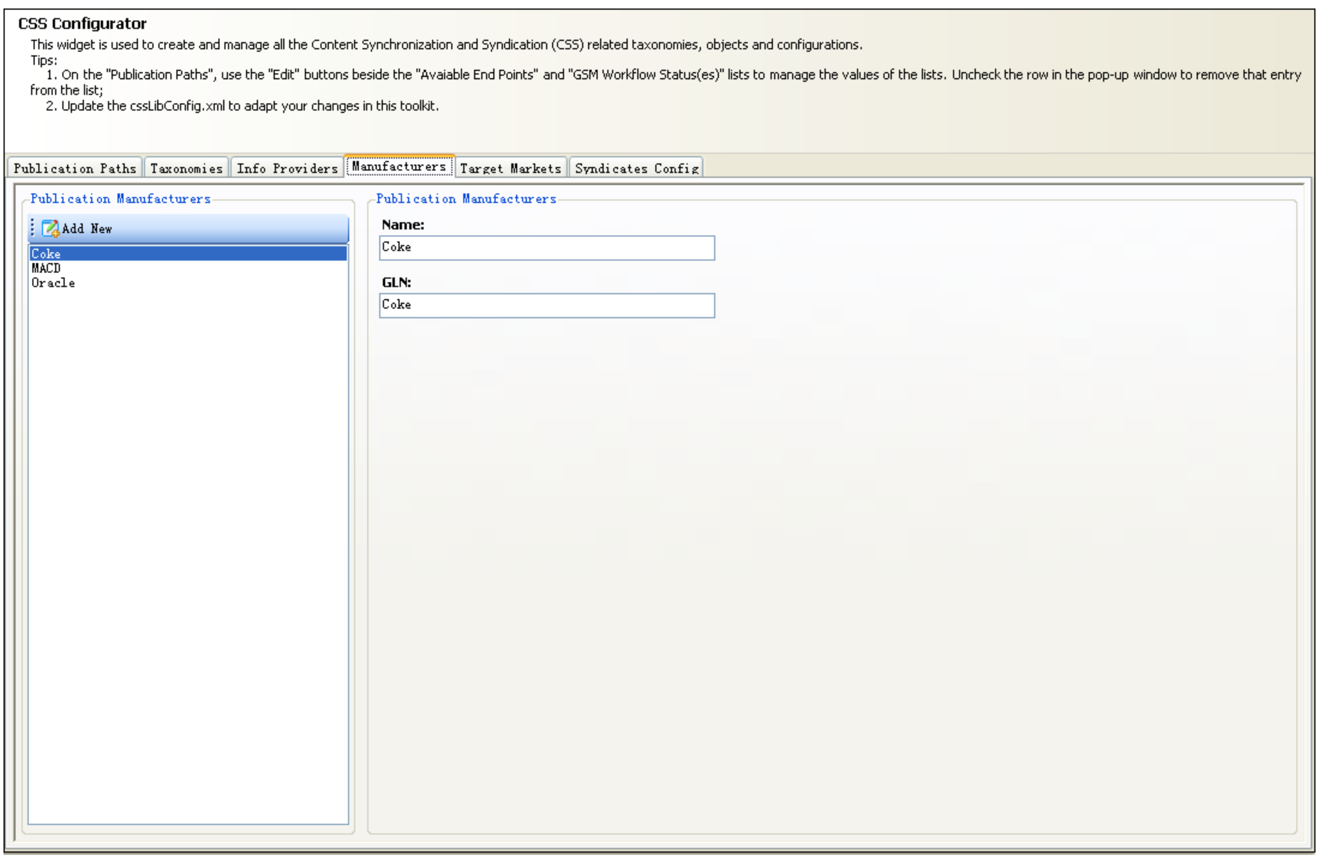
Name—Name of the information provider.

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:

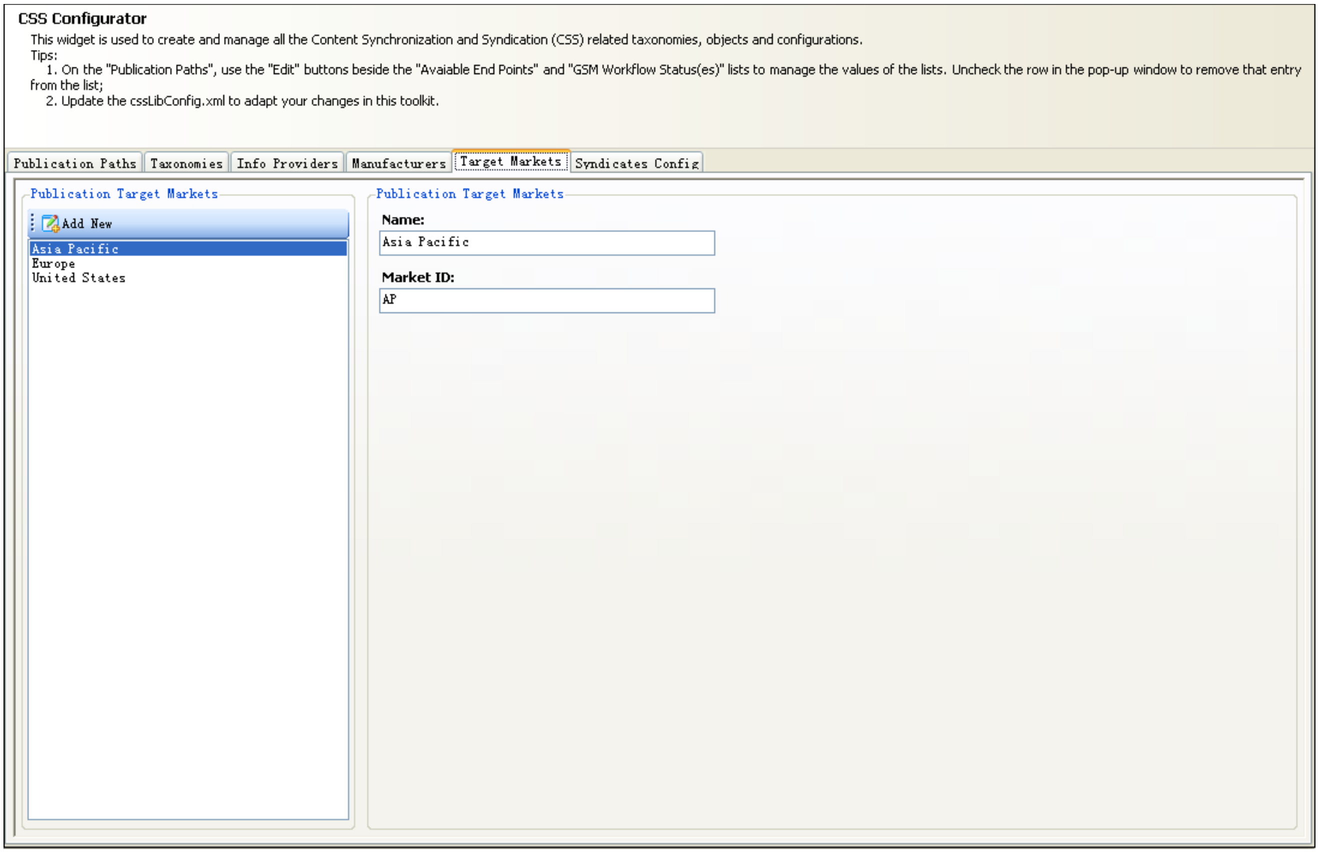
Name—Name of the manufacturer.

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 corresponds to a value of the "key" attribute of "MapItem" node configured in the following section of "cssLibConfig.xml" which is located in <P4P_HOME>/config/Extensions:

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

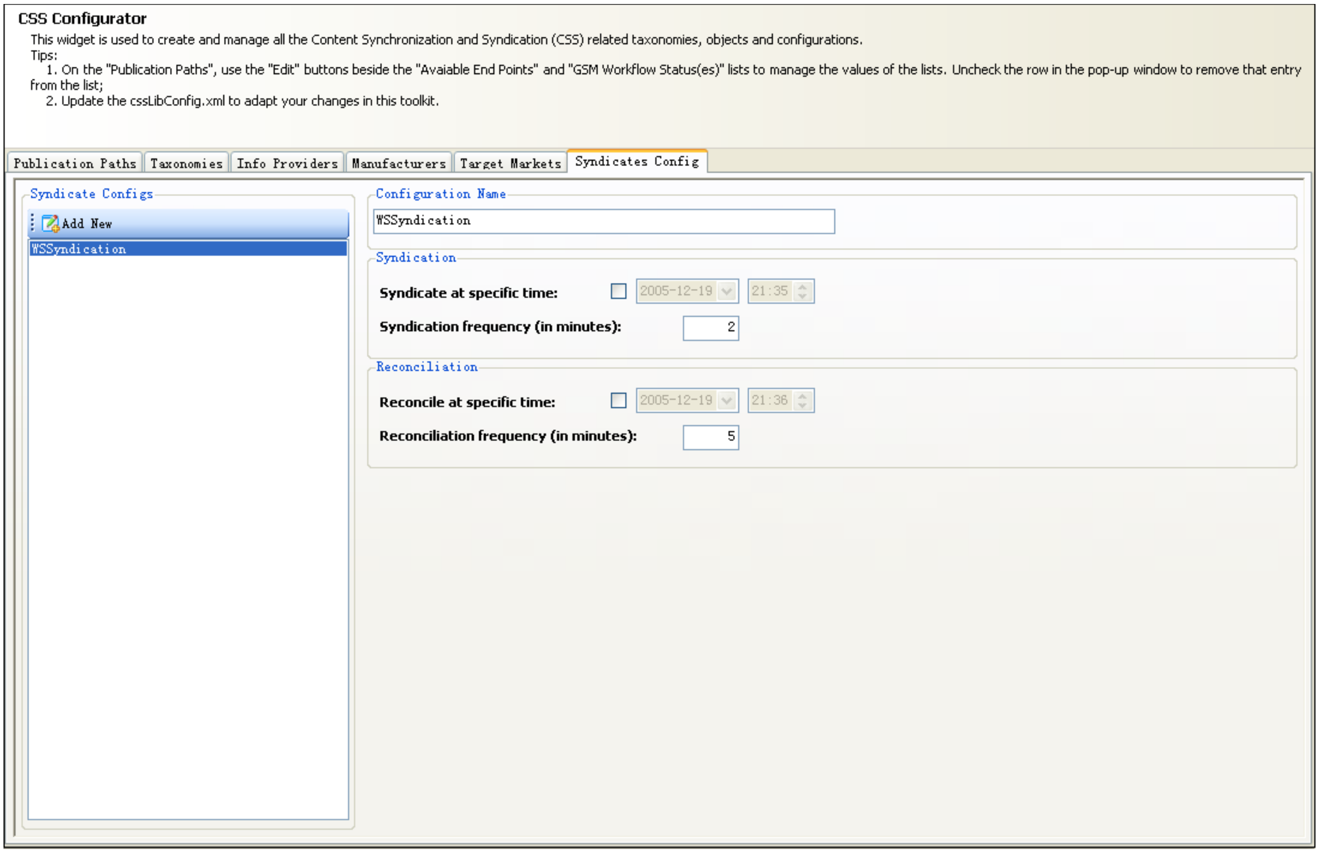
b. The Market ID should corresponds to the name of a Taxonomy defined in “Taxonomies” Tab.

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



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\CreateAndPopulateCustomerTran
slations.sql
\Scripts\Oracle\Utilities\CustomerTranslations\CreateAndPopulateCustomerTransla
tions.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>
```

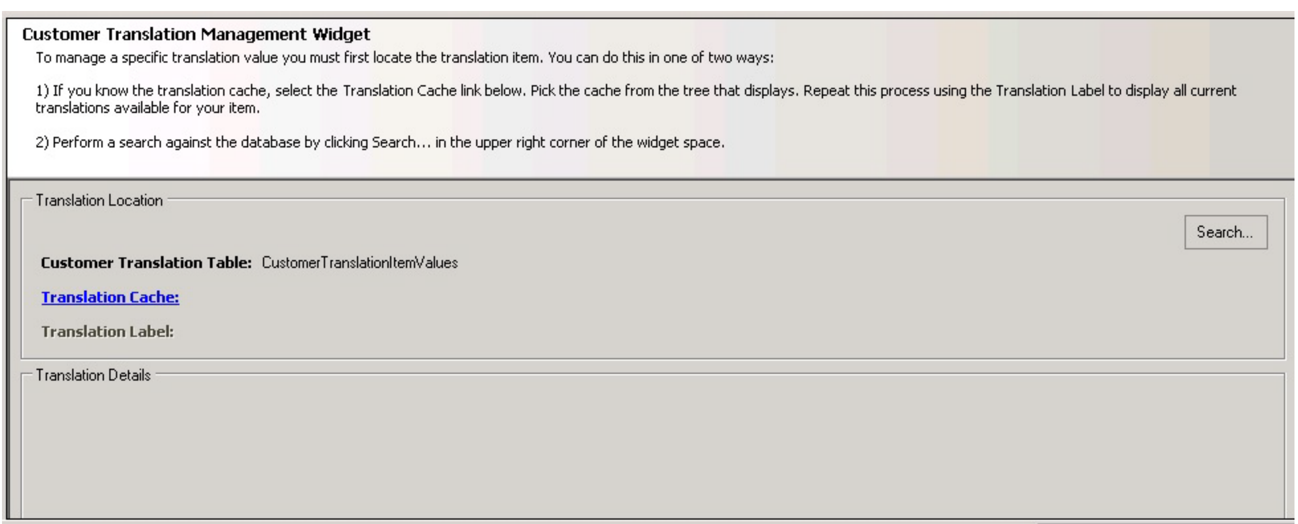
Using the Widget

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:

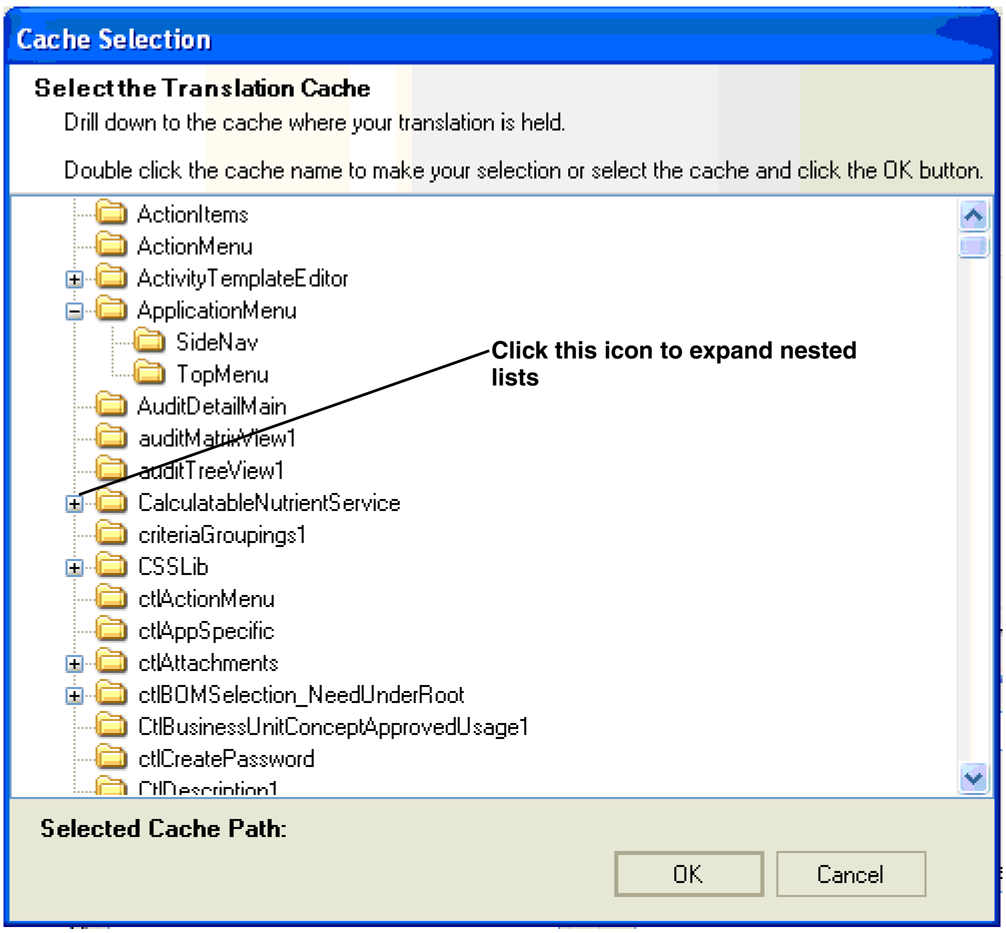
Customer Translation Table—Name of the customer translation table.

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.

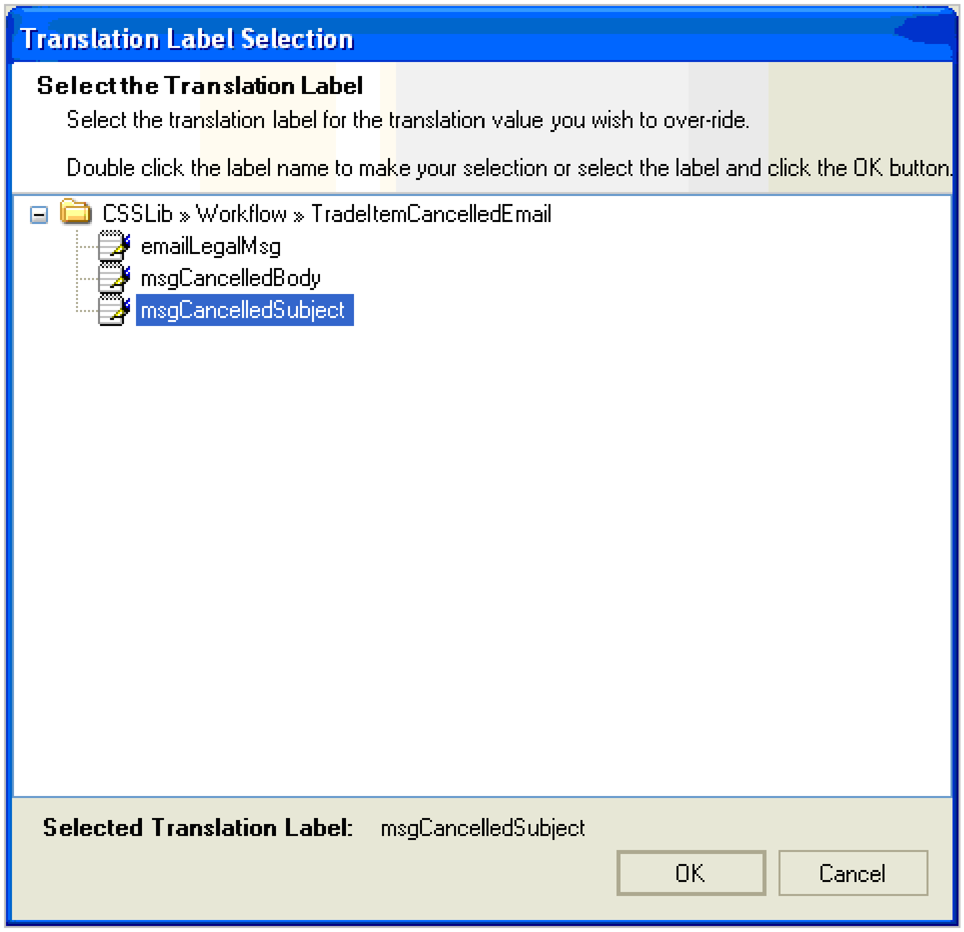
Figure 2–10 Cache Selection dialog box



3. Select the translation cache by double-clicking or by selecting the cache and clicking **OK**. Your selection displays in the Translation Cache field.

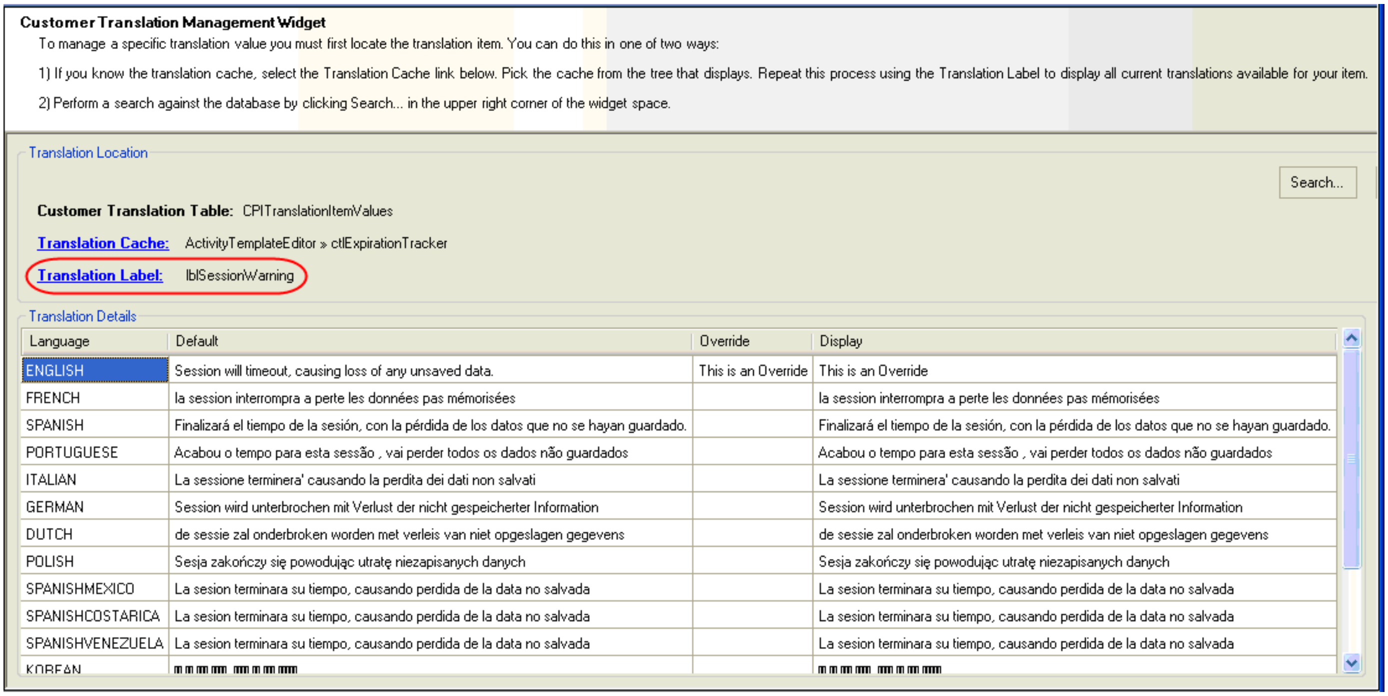
4. Click **Translation Label**. The Translation Label Selection dialog box displays available translation labels based on the cache that you selected.

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



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.

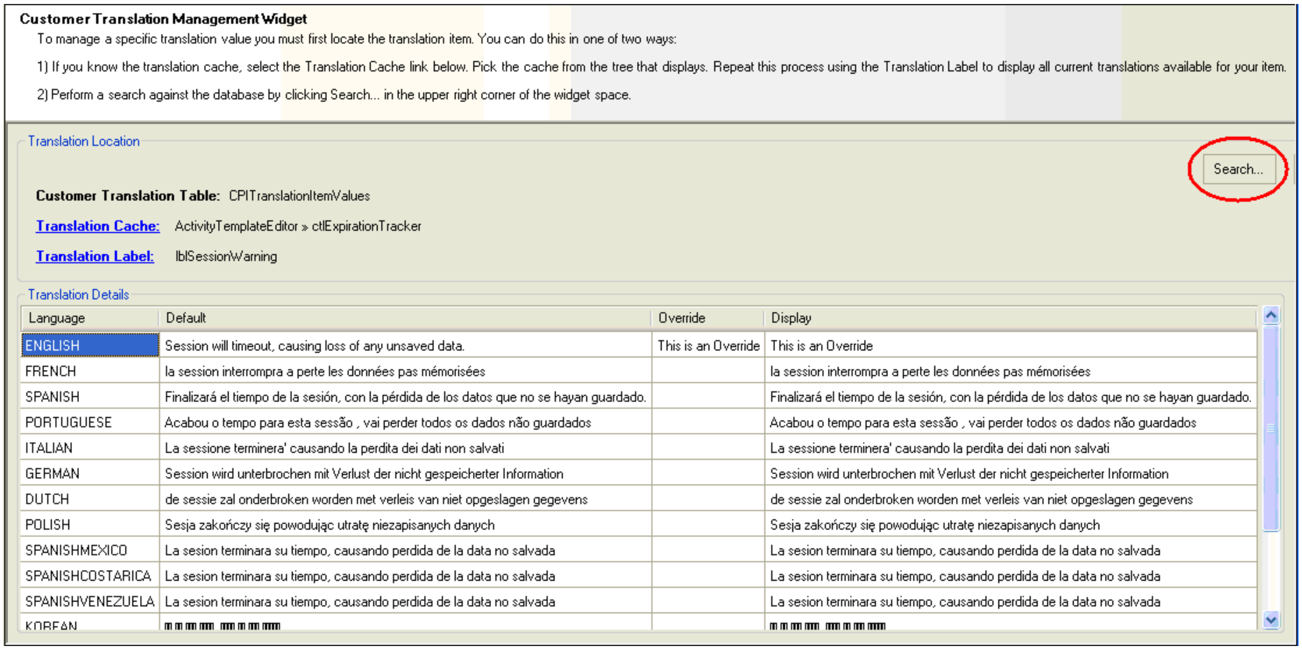
Display—The translation as it displays in the user interface. The value that you enter in the Override field displays in this field; otherwise, the default translation displays.

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:

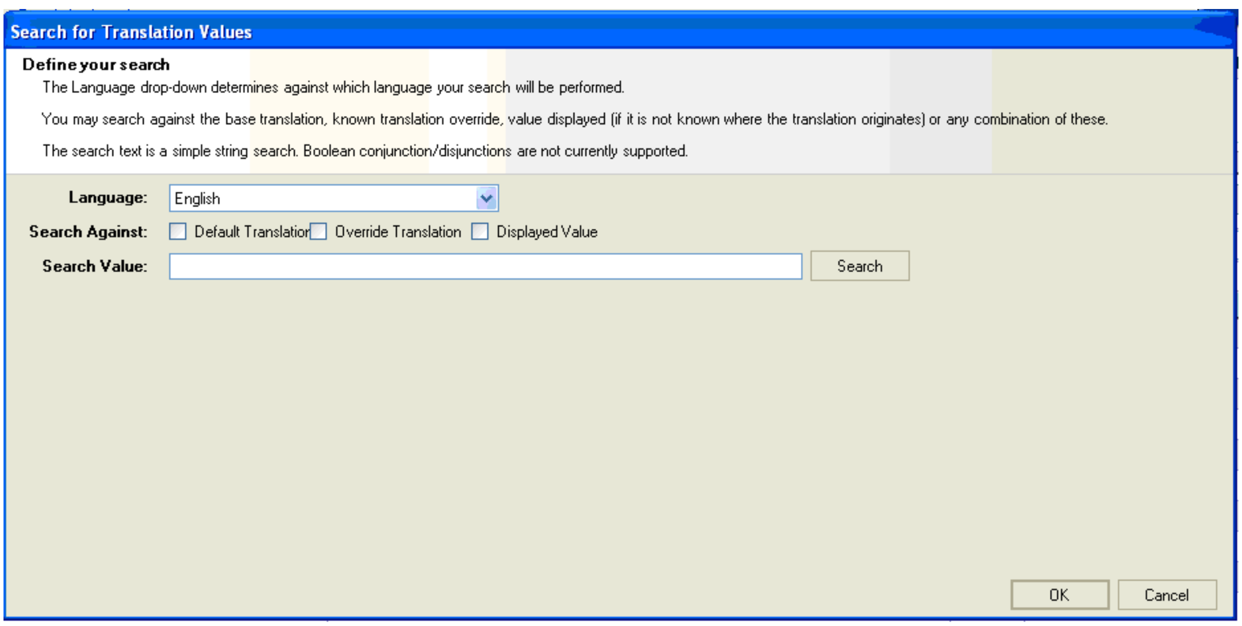
1. Click the **Customer Translations** widget on the left widget tree. The widget content area refreshes to display the customer translation widget.
2. Click the **Search** button, displayed at the top right of the widget content area, as shown below.

Figure 2–13 Search button



The Search for Translation Values dialog box is displayed.

Figure 2–14 Search for Translation Values dialog box



3. Define your search using the fields below:

   Language—The translation language to search against. 'English' is the default.

   Search Against—The type of translation to search against. You can select any combination. Available choices are:

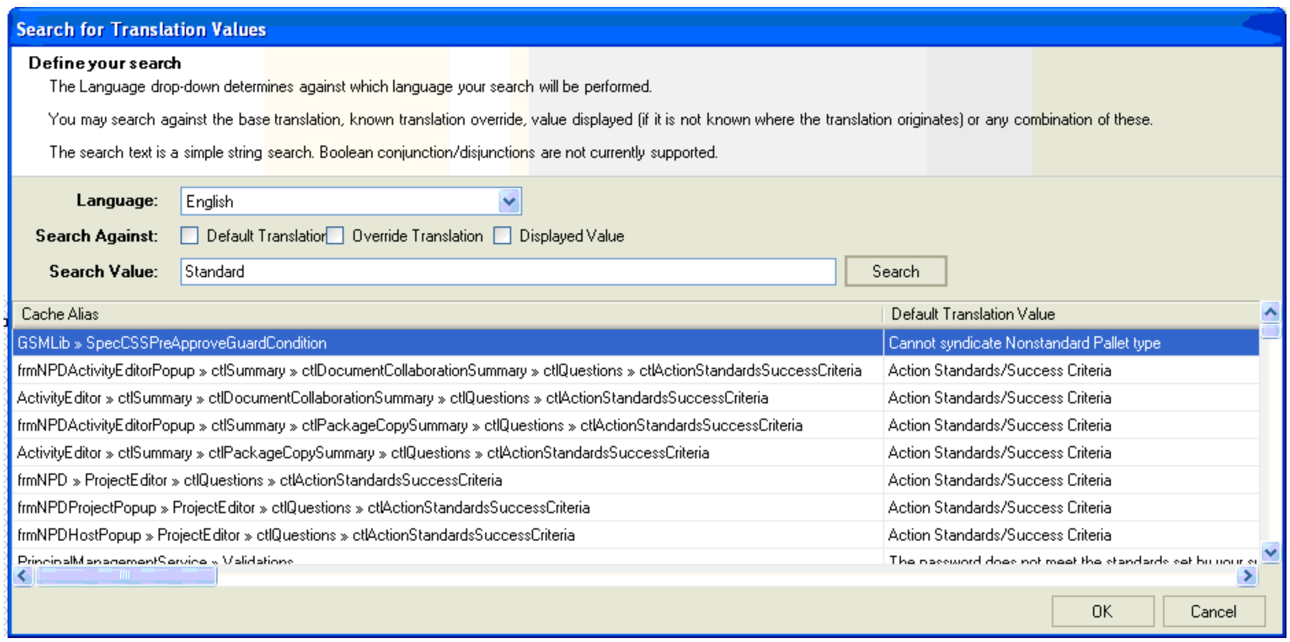
   - **Default Translation**—The standard translation. This is assumed if no other value is selected.

- **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



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.

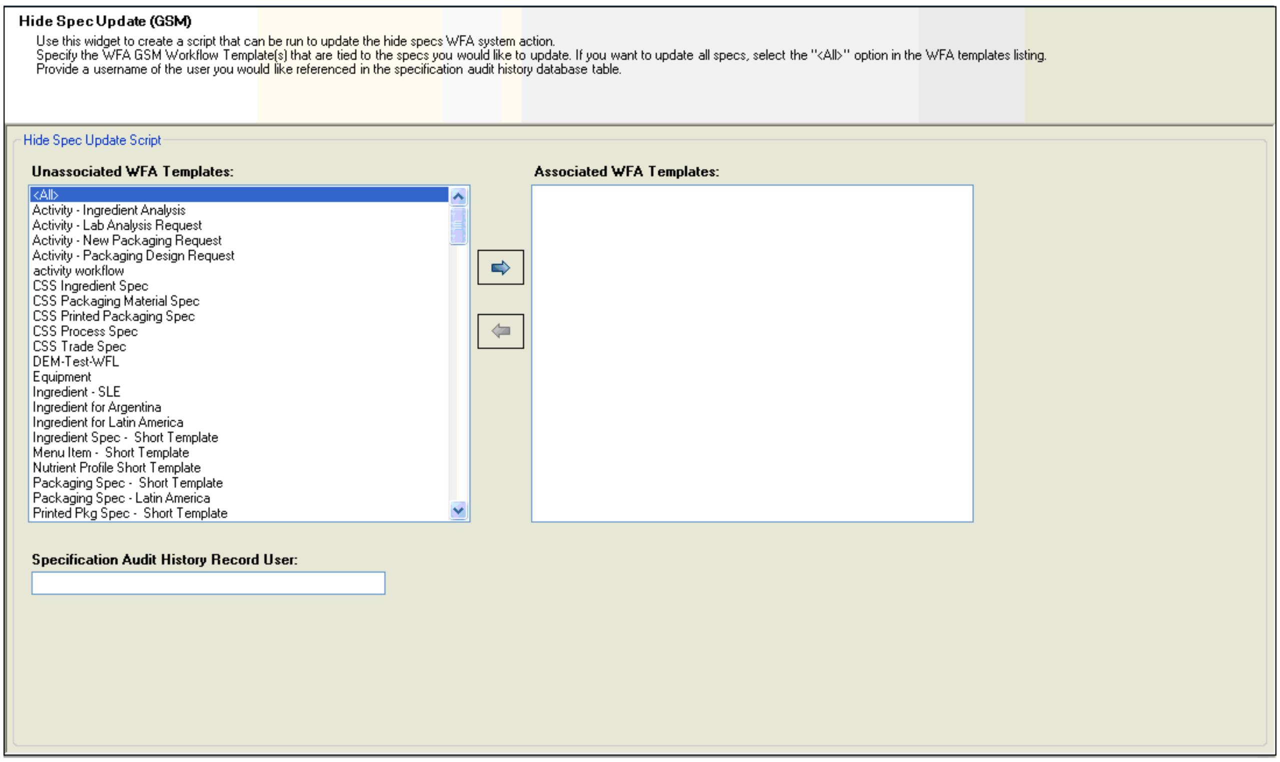
Hide Spec Update (GSM)

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



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

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

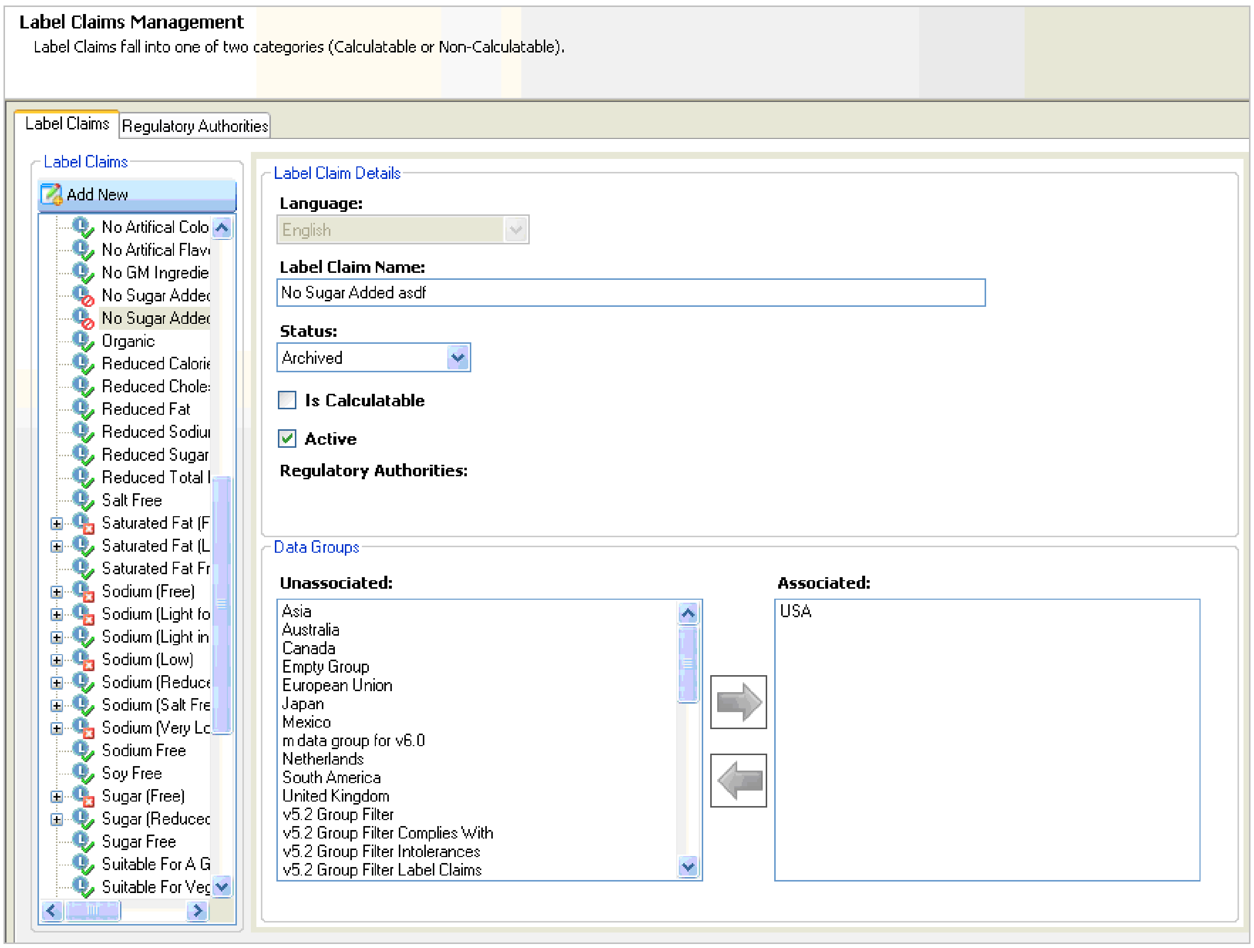
Label Claims Editor

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

To manage label claim determination rules:

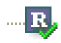
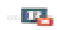
1. Click the **Label Claims Editor** widget on the left widget tree. The widget content area refreshes and displays the label claims for the selected profile.

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

2. 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.
3. In the Label Claim Details section, use the following fields to define the label claim.

   Language—The language for the label claim.

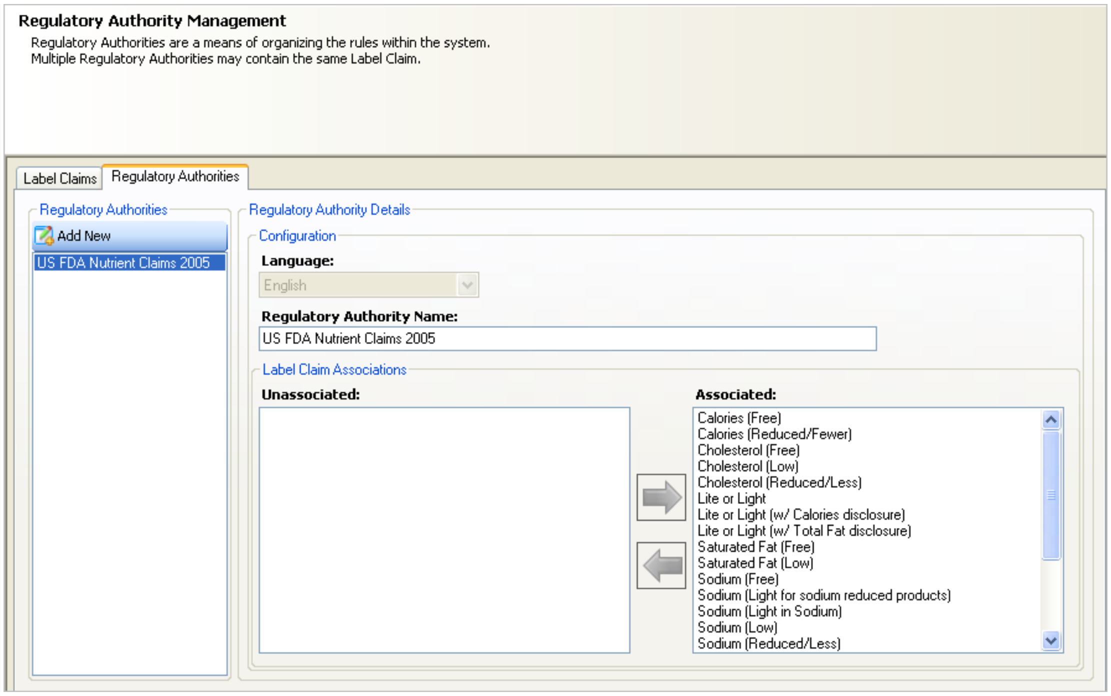
   Label Claim Name—The name of the label claim item. This is the value that will be selected by the user and saved on the specification.

   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 calculable. 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 calculable, the label claim will be included in the label claims determination popup.
4. 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.
5. 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.

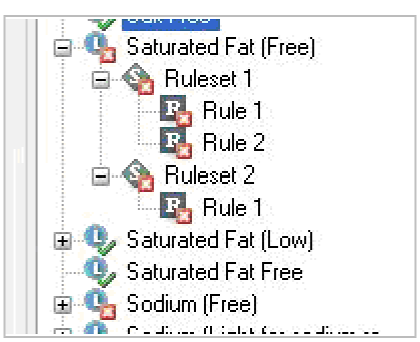
8. If your claim is calculable, you need to add rule sets to your claims. See "Managing Rules and Rulesets" on page 2-22 for more information.

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

Managing Rules and Rulesets

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

Figure 2–20 Structure of rules and rule sets



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.

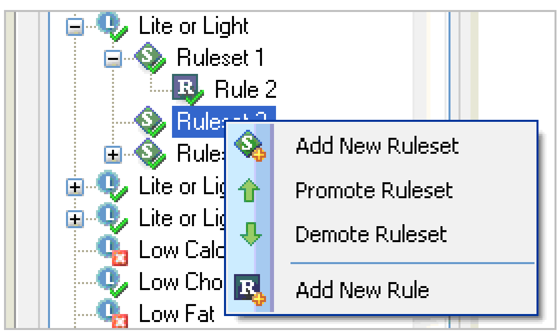
Rule sets

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

Figure 2–21 Right-click menu

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

Figure 2–22 Right-click menu



Rules

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

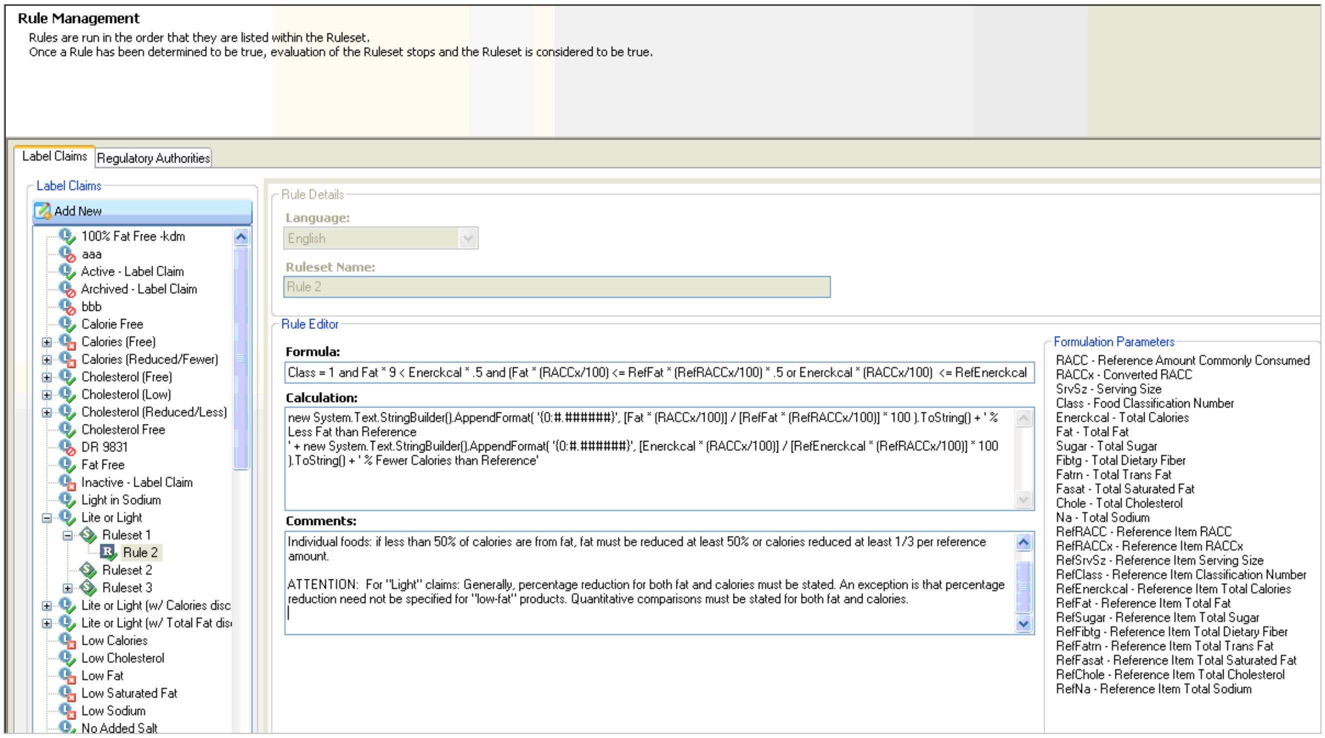
Field	Description
Formula	Represents a statement to be evaluated by the system for matching. This is the calculation that will return true or false. This is written in jscript. The formulation parameters section is available as a reference for which variables can be used inside your script. Example: `Class = 1 and Fat * 9 < Enerckcal * .5 and (Fat * (RACCx/100) <= RefFat * (RefRACCx/100) * .5 or Enerckcal * (RACCx/100) <= RefEnerckcal  * (RefRACCx/100) * .66666)`

Calculations	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:
	`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	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.
	If the active nutrient profile does not include a classification, no comments will be displayed to the user for this label claim. Example:
	`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.`

The figure below shows a rule and defined fields:

Figure 2–23 Rule and defined fields



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.

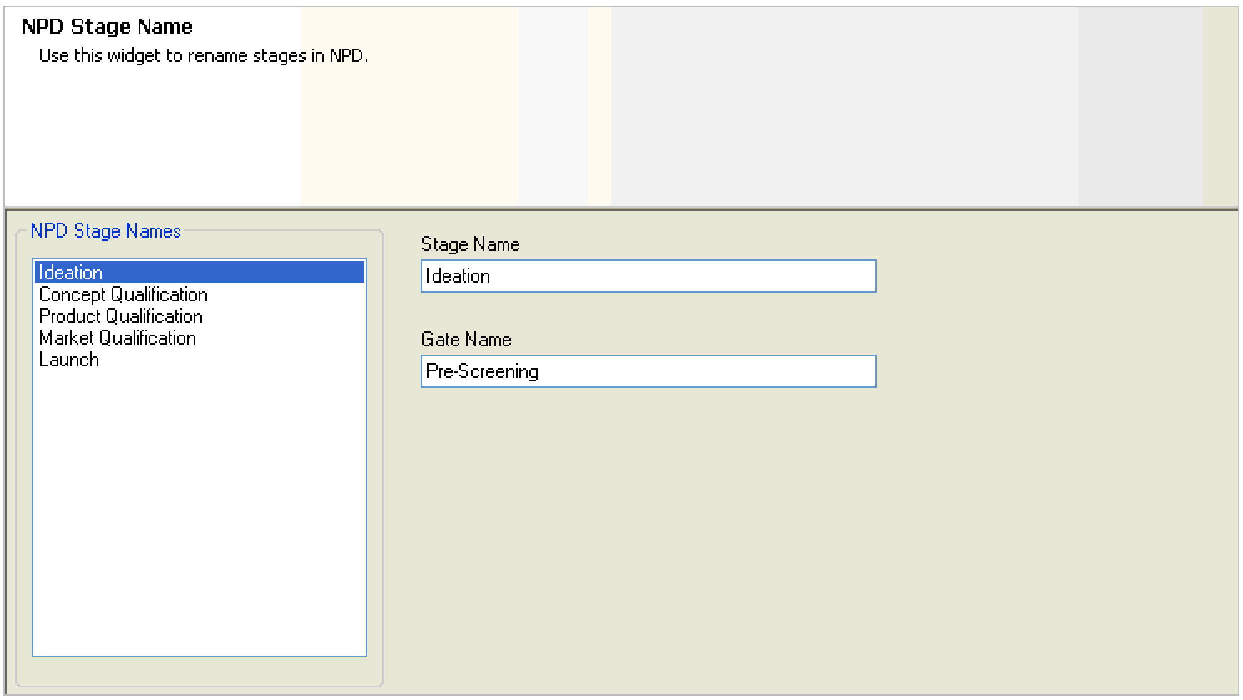
NPD Stage Name

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



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.

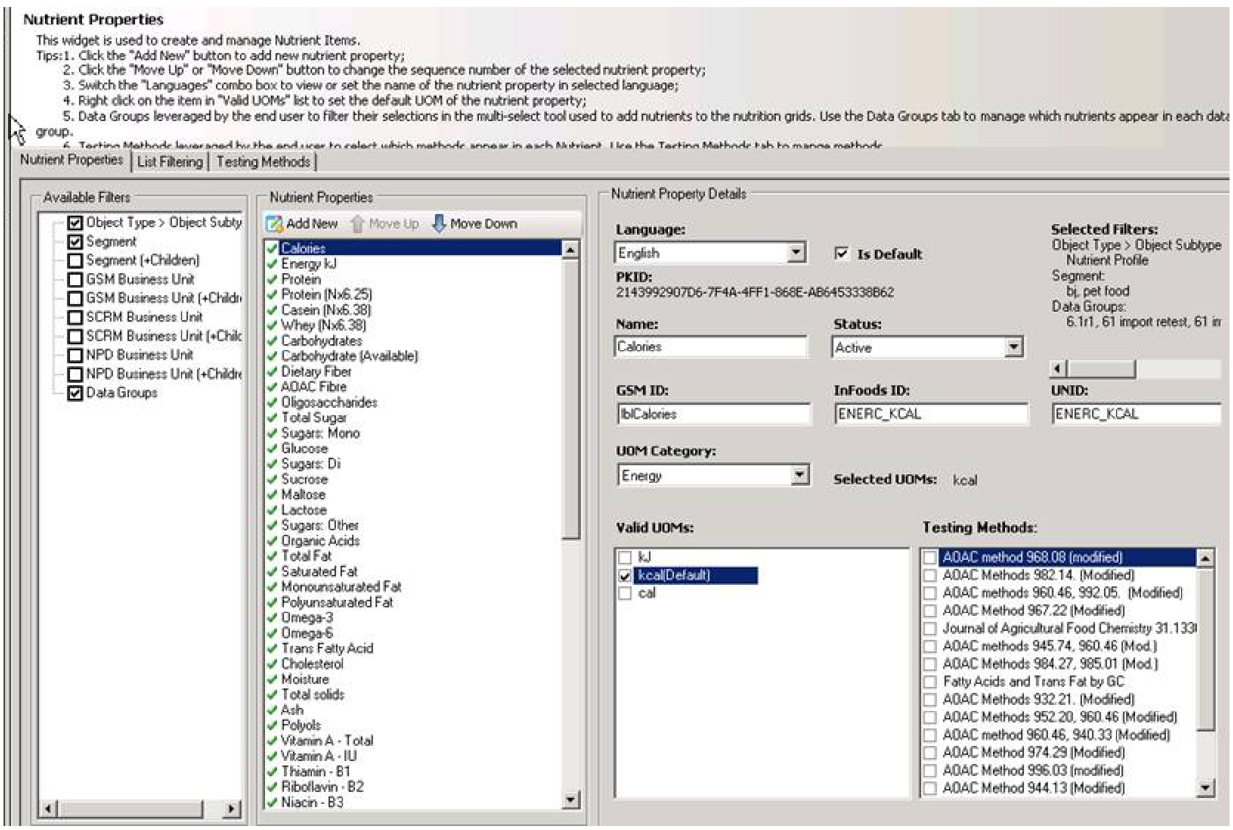
Nutrient Properties

Use the Nutrient Properties widget to create and manage nutrient items. You can also use this tool the 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, List Filtering, 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. If the selected language should be default, check the **Is Default** field.

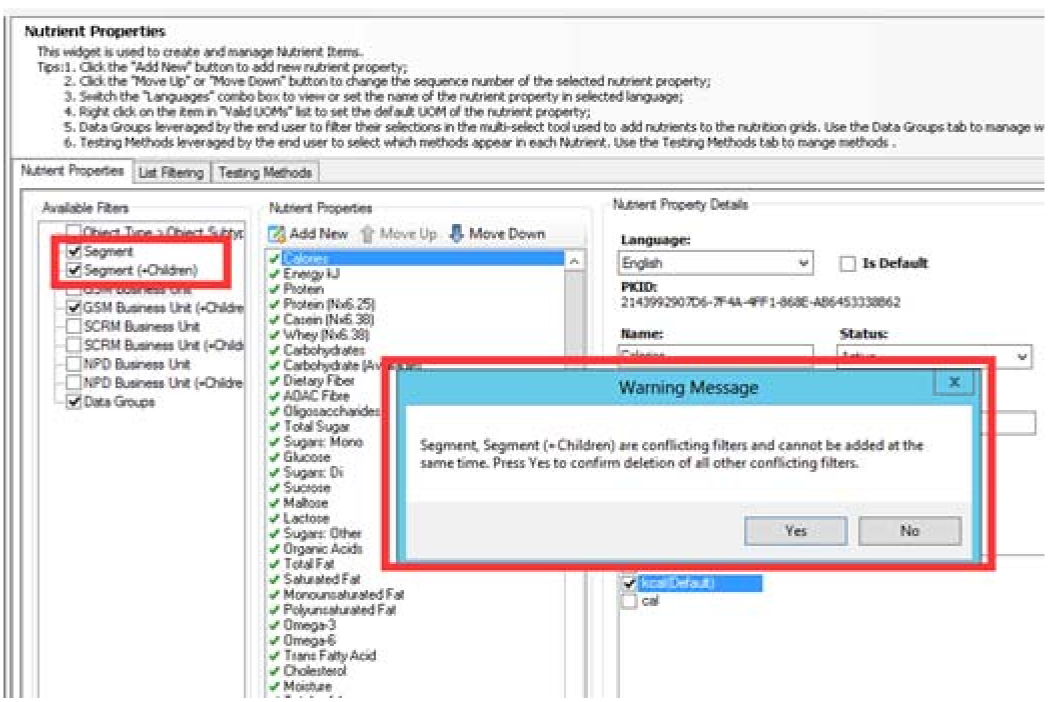
   The **Available Filters** field shows available filters for the nutrient list. Your selections in this field determine which filters appear in the nutrient items on the List Filtering tab. Available choices are:

   - Object Type > SubType
   - Segment - Exact Match
   - Segment - Plus Children
   - GSM Business Unit - Exact Match

- GSM Business Unit - Plus Children
- SCRM Business Unit - Exact Match
- SCRM Business Unit - Plus Children
- NPD Business Unit - Exact Match
- NPD Business Unit - Plus Children
- Data Groups

Note: For segment and business, once selected, when checking other types of the same attribute a pop-up with warning message will display urging you to resolve the filter conflict. For example if the Segment is selected, then the Segment(+ Children) is checked, a pop-up with warning message *"Segment, Segment (+Children) are conflicting filters and cannot be added at the same time. Press Yes to confirm deletion of all other conflicting filters."* If you click **Yes** in the pop-up, the Segment (+Children) is selected, and Segment is unchecked. If you click **No**, the Segment is still checked.

Figure 2–26 Sample Duplicate Filter Warning Message



6. 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.

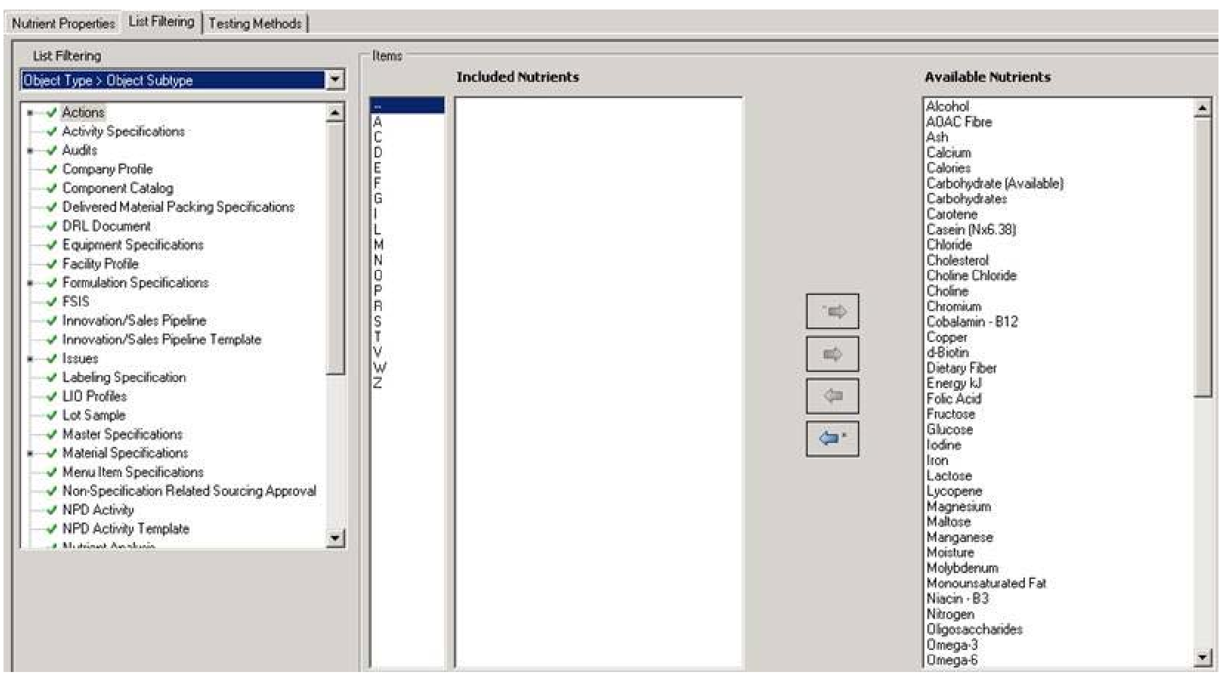
UNID—Unique ID used by the system. This must be unique across all nutrients.

7. Select a unit of measure (UOM) from the **UOM Category** drop-down list. Valid UOMs matching that category display in the Valid UOMs field.
8. 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.
9. Associate testing methods for the nutrient item by checking the corresponding checkboxes in the **Testing Methods** field.
10. Right-click on a valid UOM to set the default UOM of the nutrient property.
11. Click **Save** to generate the output script.

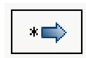
To associate nutrient properties to existing data groups:

1. Select the **List Filtering** tab. The widget content area refreshes and displays current list filters. Choices are determined by the available filters selected on the Nutrient Properties tab.

Figure 2–27 Nutrient Properties widget, List Filtering tab

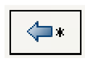


2. Select an available filter from the drop-down list in the **List Filtering** field. Available filters are based on your selection on the Nutrient Properties tab.
3. Use the **List Filtering Nodes** (unlabeled) field to select nodes for the filter. Available nodes are based on your selection in the List Filtering field.
4. 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:

 Removes all nutrients from the Included Nutrients list

 Removes selected nutrient from the Included Nutrients list

 Moves selected nutrient to the Included Nutrients list

 Moves all nutrients to the Included Nutrients list

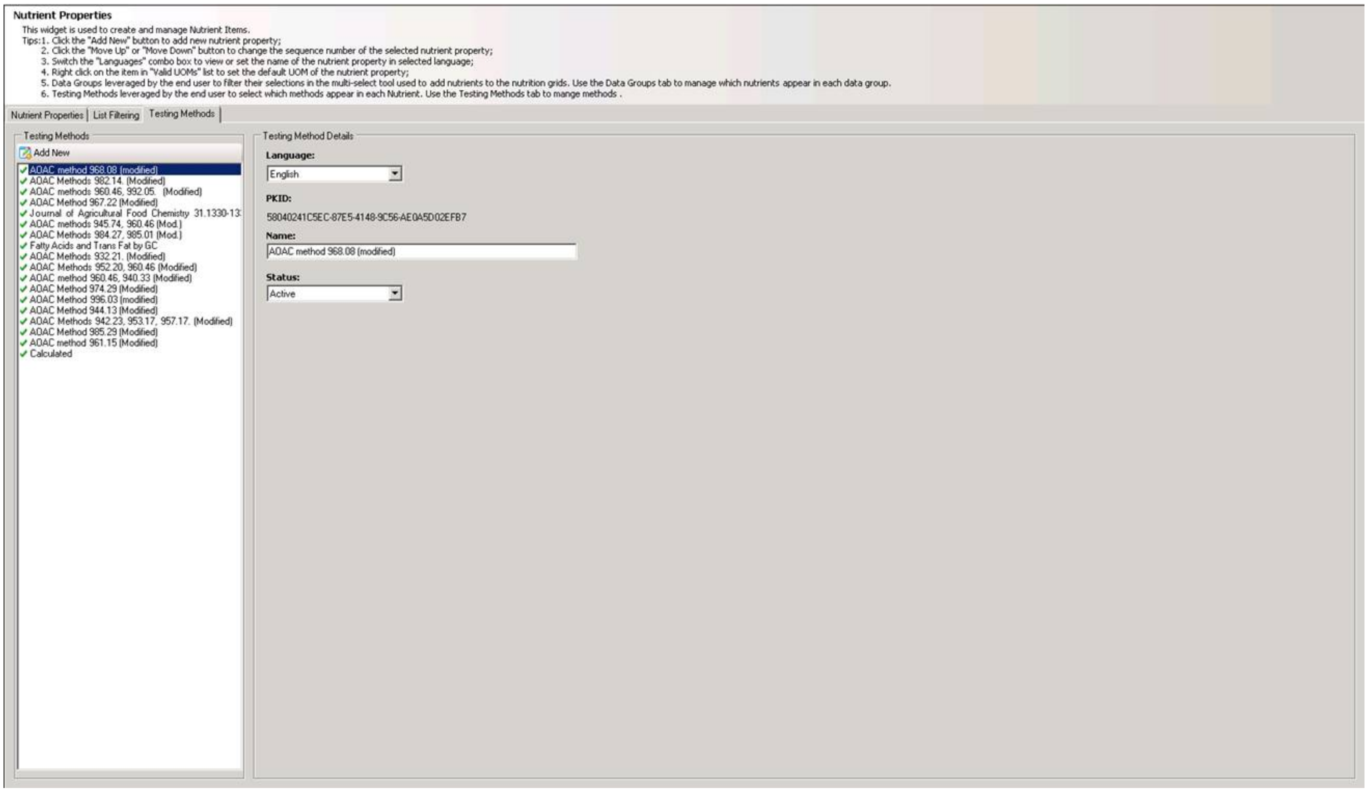
You can also use the Items field to filter the items in the Included Nutrients list. For example, after moving all items to the Included Nutrients field, checking **N** in the Items list leaves only items beginning with “N” in the Included Nutrients list.

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

To manage testing methods:

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

Figure 2–28 Testing Methods tab



2. Click **Add New** to create a new testing method, or select an existing one.
3. Select a language from the **Language** drop-down list. “English” is the default.
4. 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.

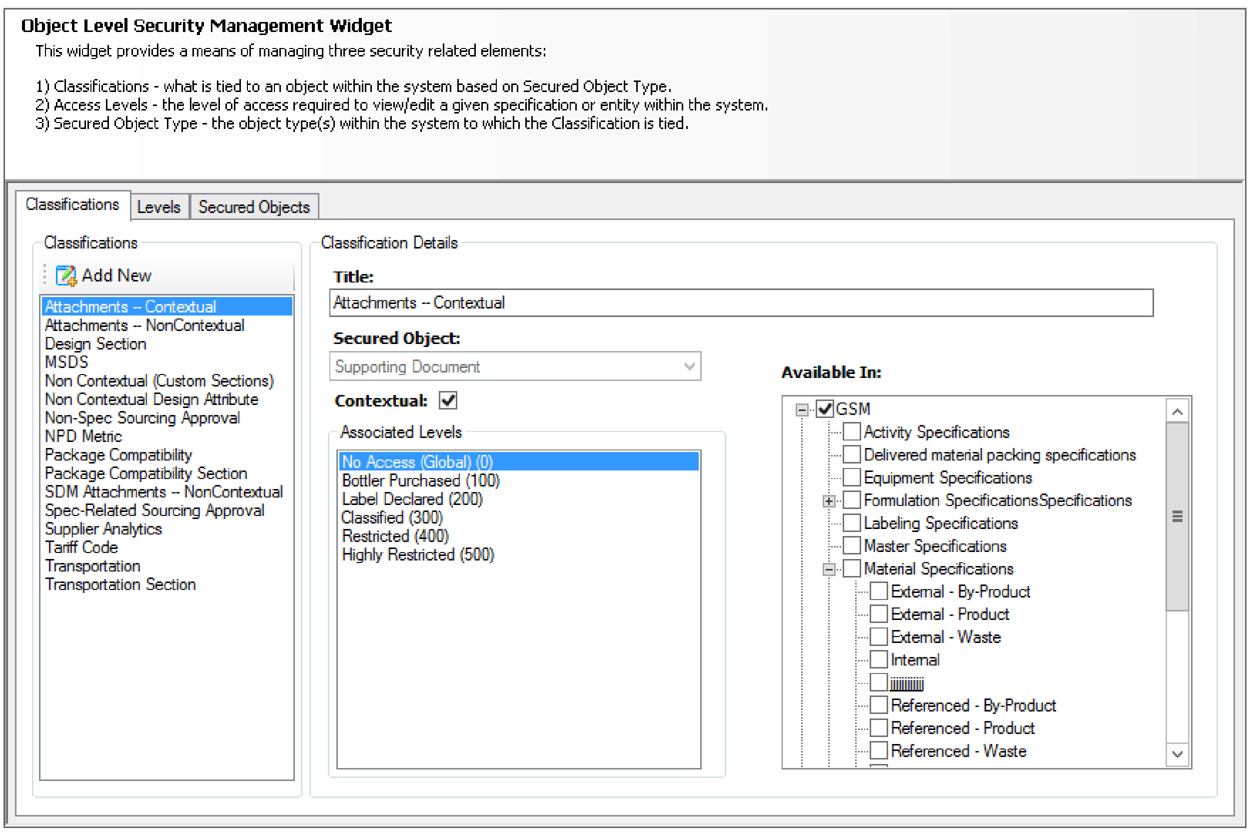
Click the **Object Level Security** widget from the widget tree on the left side of the main window. The widget content area refreshes and displays three tabs: Classifications, Levels, and Secured Objects.

Figure 2–29 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 2–30 Classifications tab



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.

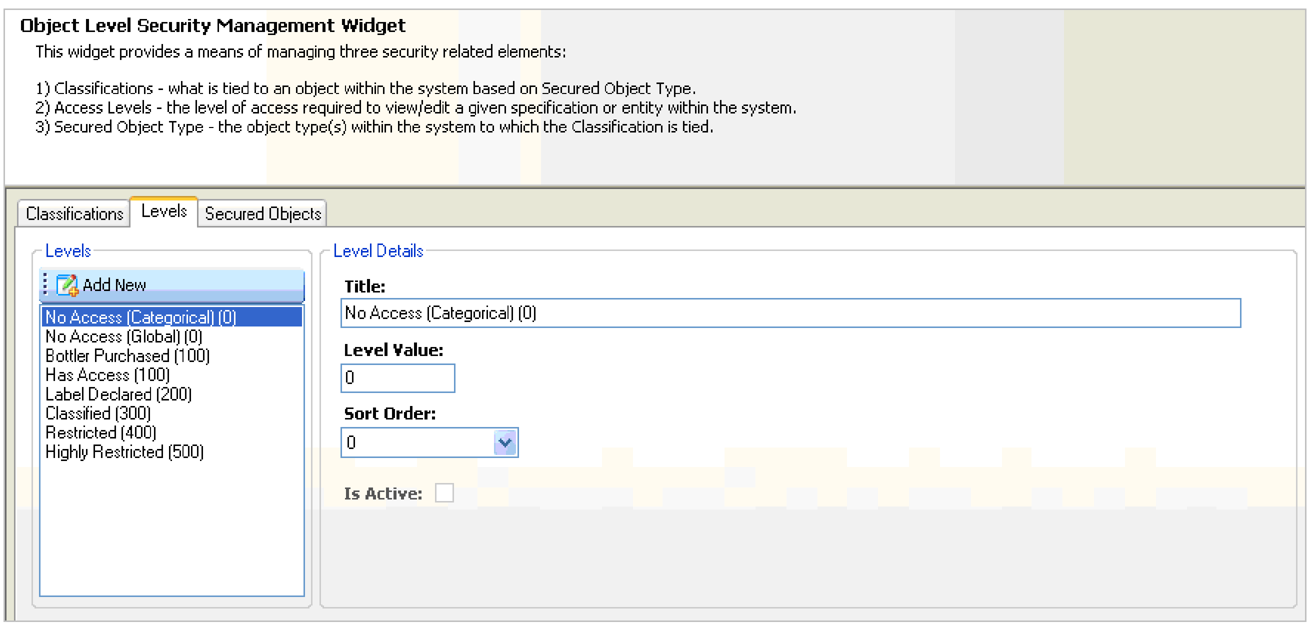
Available In—This grid only displays when **Supporting Document** is selected in the Secured Object drop-down. Select the Available In checkboxes to control the visibility of the security classifications in PLM for Process.

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 2–31 Levels tab



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.

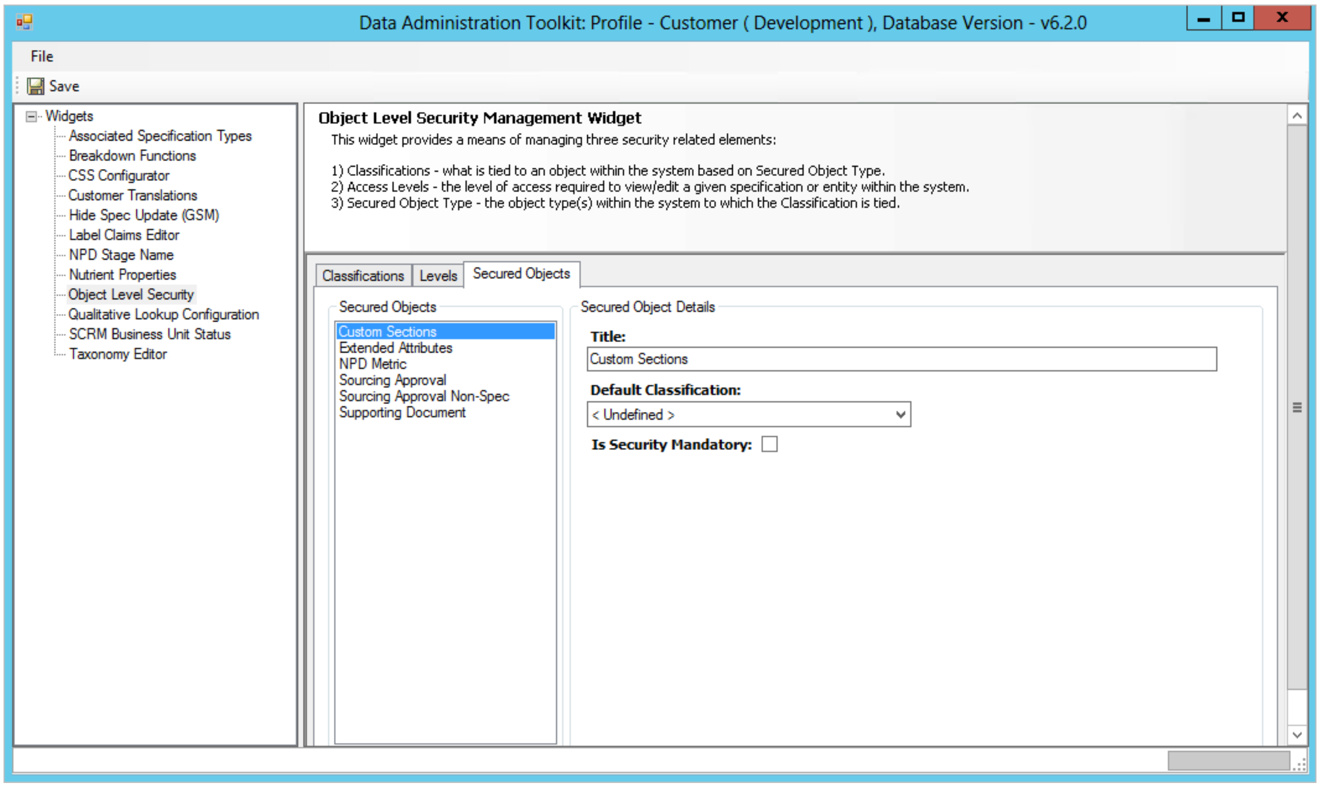
   Sort Order—The order that the security level should display in the user interface.

   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 2–32 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

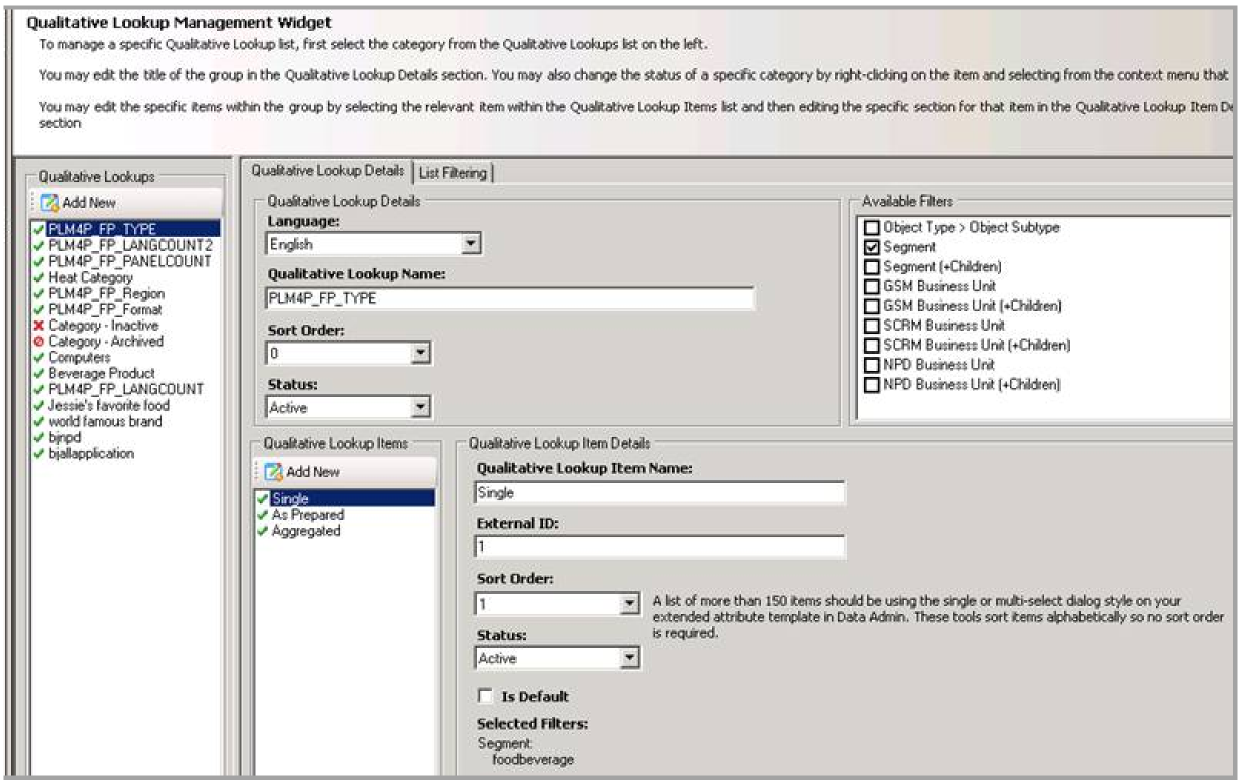
Use the Qualitative Lookup Configuration widget to manage qualitative lookup lists that may be used by extended attributes. You can create new lists or manage currently existing ones. This is intended as a supplement to the currently available Web Service for mass qualitative lookup imports.

To manage Qualitative Lookups:

1. Click the **Qualitative Lookup Configuration** widget on the left widget tree. The widget content area refreshes and displays two tabs: Qualitative Lookup Details and List Filtering.

2. Select The Qualitative Lookup Details tab. The widget content area refreshes and displays the current qualitative lookup lists in the main widget content area.

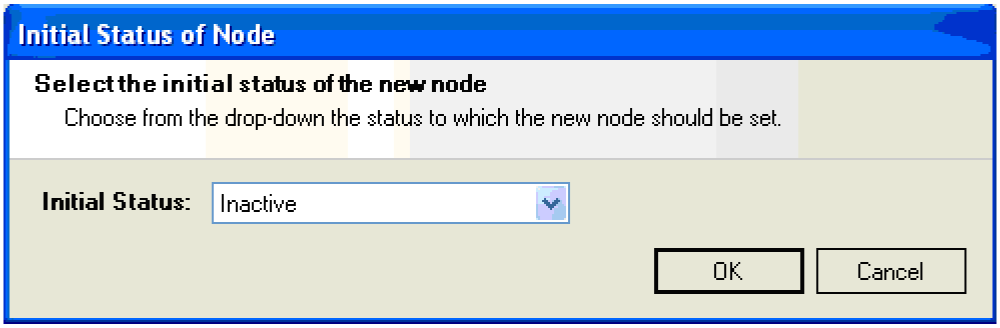
Figure 2–33 Qualitative Lookup Configuration widget, Qualitative Lookup Details tab



3. 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.

4. 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 2–34 Initial Status of Node dialog box



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

   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.

   Available Filters—The available filters for the qualitative lookup list. Your selections in this field determine which filters appear in the lookup items on the List Filtering tab. Available choices are:

   - Object Type > SubType
   - Segment
   - Segment - Plus Children
   - GSM Business Unit
   - GSM Business Unit - Plus Children
   - SCRM Business Unit
   - SCRM Business Unit - Plus Children
   - NPD Business Unit
   - NPD Business Unit - Plus Children

   Note: For Segment and Business Unit, once selected, the other type of the same attribute turns grey and is not available for selection. For example, if 'Segment' is selected, then 'Segment - Plus Children' appears in grey and cannot be selected.

6. 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.

7. Use the following fields to define the qualitative lookup item. All fields are required.

   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.

   Sort Order—The order in which the selected qualitative lookup item will appear within the list of other qualitative lookup items in the UI.

   Status—The status of the qualitative lookup item.

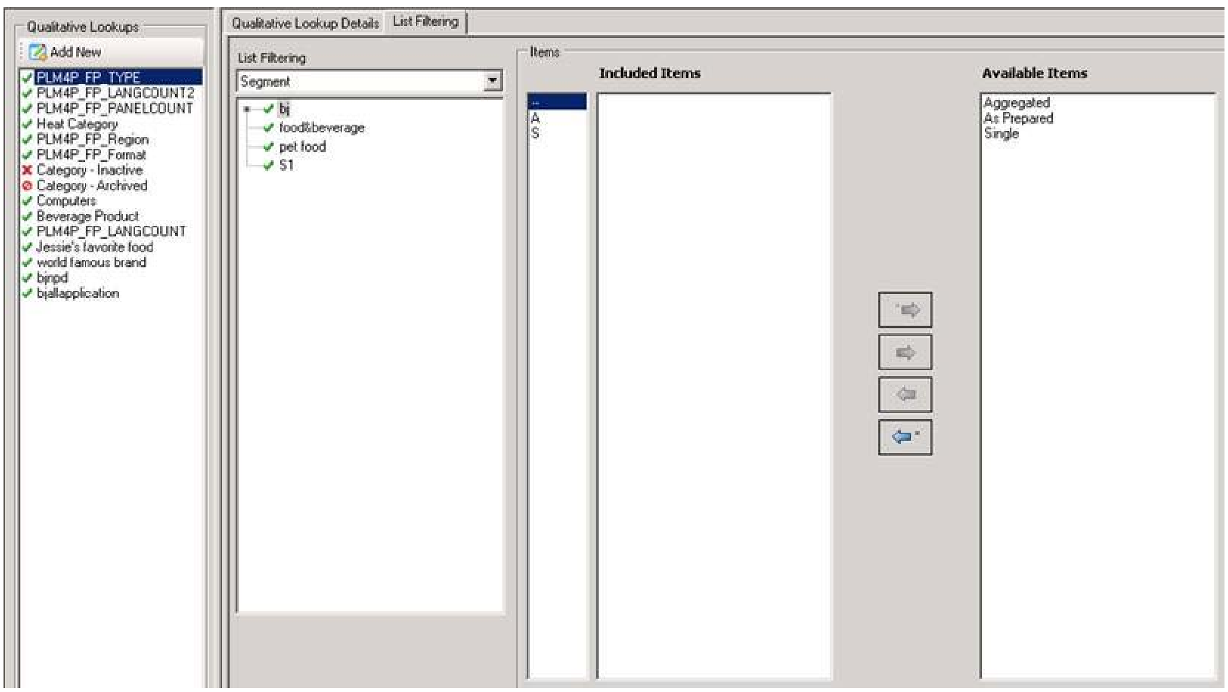
   Is Default—Select if the qualitative lookup should be the default.

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

To associate list filters to the qualitative lookup item:

1. Select the **List Filtering** tab. The widget content area refreshes and displays current list filters. Choices are determined by the available filters selected on the main details tab.

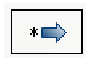
Figure 2–35 Qualitative Lookup widget, List Filtering tab



2. Select an available filter from the drop-down list in the **List Filtering** field. Available filters are based on your selection on the Qualitative Lookup Details tab.

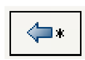
3. Use the **List Filtering Nodes** field to select nodes for the filter. Available nodes are based on your selection in the List Filtering field.

4. To define what items to include in the filter, move items into the **Included Items** list. Use the following icons to move choices between the **Available Items** list and the Included Items list:

    Removes all items from the Included Items list

    Removes selected items from the Included Items list

    Moves selected item to the Included Items list

    Moves all items to the Included Items list

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

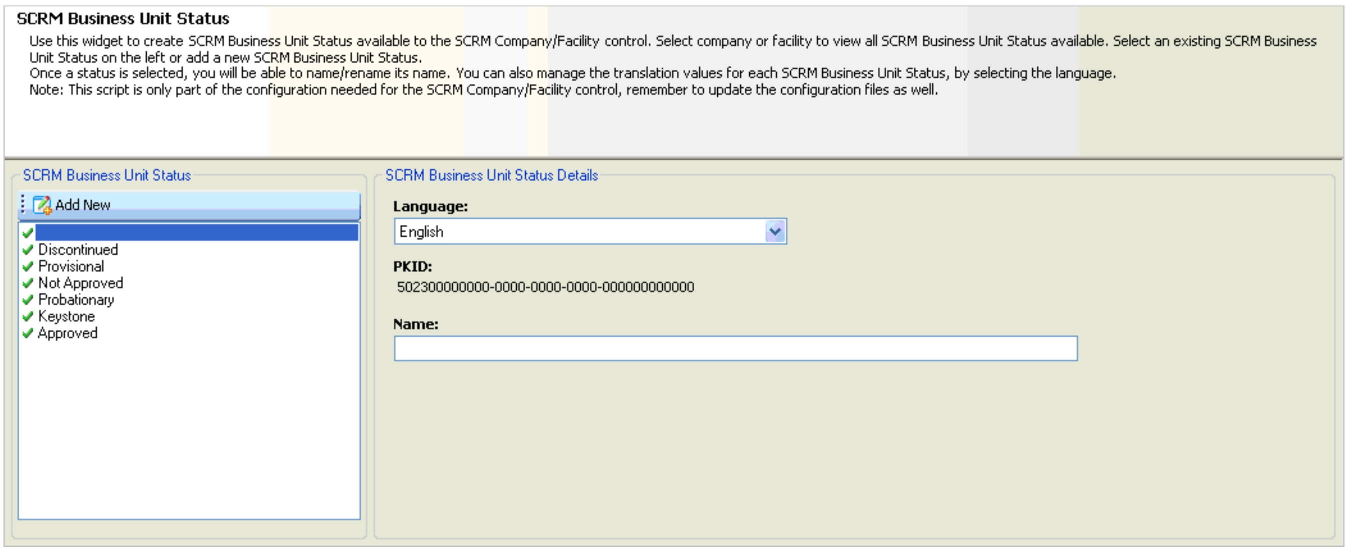
SCRM Business Unit Status

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 2–36 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.

Taxonomy Editor

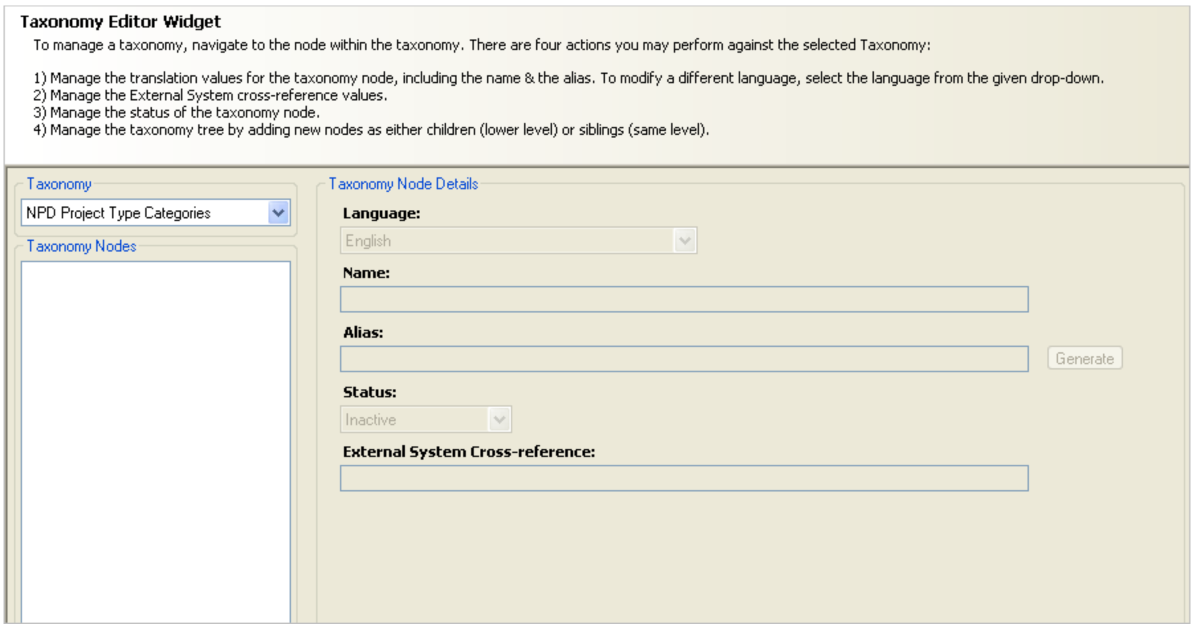
Use the Taxonomy Editor widget to manage taxonomies. You can add child and sibling nodes, and change statuses.

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:

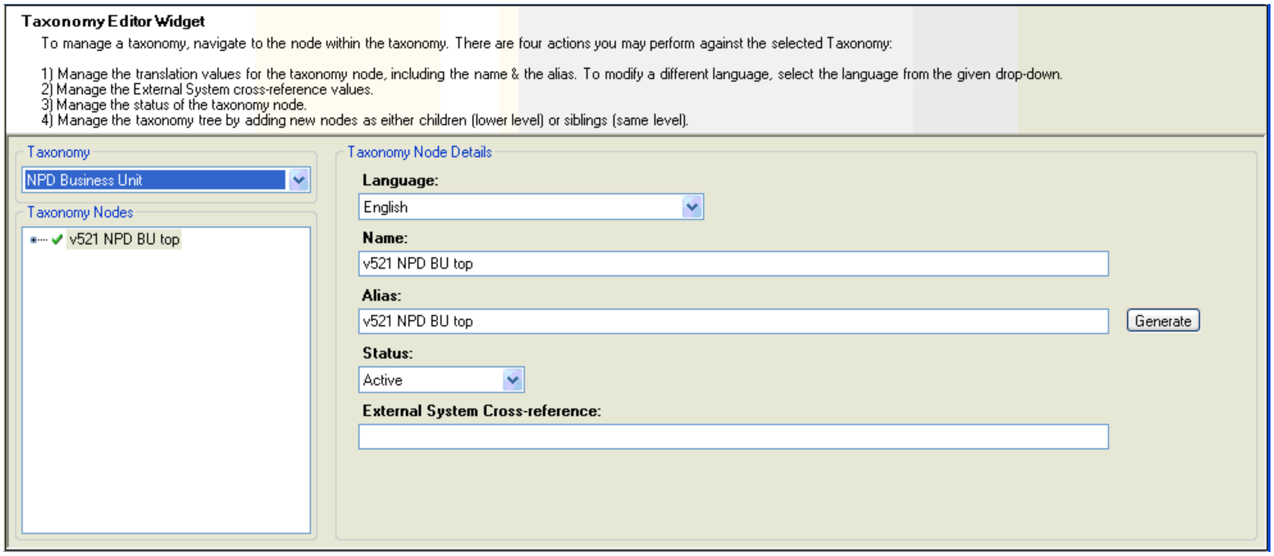
1. Click the **Taxonomy Editor** widget on the left widget tree. The widget content area refreshes and displays the taxonomies for the selected profile.

Figure 2–37 Taxonomy Editor widget



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

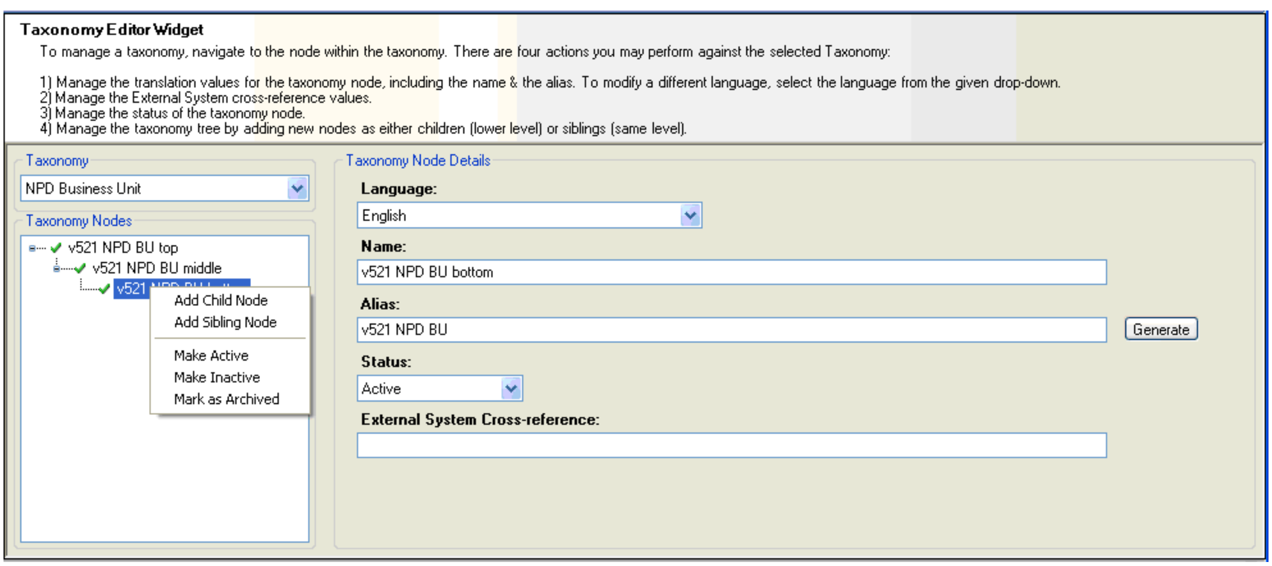
Figure 2–38 Taxonomy drop-down



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 2–39 Submenu



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.