Agile Product Lifecycle Management for Process

Content Synchronization and Syndication User Guide

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Agile Product Lifecycle Management for Process, Release 6.0.0.6

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CONTENTS

About This Manual

Agile Product Lifecycle Management for Process Documentation vii
TTY Access to Oracle Support Services vii
Agile Training Aids vii
Accessibility of Code Examples in Documentation vii
Accessibility of Links to External Web Sites in Documentation vii
Audience viii
Variability of Installations viii
Where to Find Information viii
Document Conventions ix

Chapter 1 Introduction

The Content Synchronization and Syndication Application 1-1
Publication Targets 1-1
Workflows 1-1
CSS Configuration 1-1
Touch Points with Other Applications 1-2
Global Specification Management 1-2
Workflow Administration 1-2

Chapter 2 Using Content Synchronization and Syndication

What are Publications (TIPs)? 2-1
Internal Publications 2-1
External Publications 2-2
Workflow 2-2
Extended Attributes 2-2
Validations 2-2
Message Generators 2-2
Message Transporters 2-2
Message Reconcilers 2-2
Action Items 2-3
Creating New Publications in GSM 2-4
Trade Item Page 2-6
Summary Tab 2-6
Summary Information Section 2-6
Extended Attributes Section 2-7
Adding Extended Attributes 2-7
Attribute Overrides Section 2-9
Catalog Responses Section 2-10
Signatures/Approval Tab 2-11
Validation 2-12
Validating a Publication 2-12
Workflow 2-13
Mass Workflow Tab 2-14
Mass Publications 2-16
Mass Tip Creation 2-16
Summary Information Section 2-17
Specification(s) Section 2-17

About This Manual

Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site: http://www.oracle.com/technetwork/documentation/agile-085940.html contains the latest versions of the Agile PLM for Process PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the Agile PLM for Process documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Reader™ version 7.0 or later. This program can be downloaded from the Adobe Web site: http://www.adobe.com/.

If you need additional assistance or information, please go to http://metalink.oracle.com or phone 1.800.233.1711 for assistance.

Before calling Oracle Support about a problem with an Agile PLM for Process manual, please have the full part number, which is located on the title page.

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Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide.*

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

Where to Find Information

Consult the table below to find specific information from the relevant Agile Product Lifecycle Management for Process information source.

Table 1: Agile Product Lifecycle Management for Process documentation topics, by source

Information type	CSS User Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile Product Lifecycle Management for Process		●		●		
Cache management		●				
Content synchronization and syndication	●					
Core data management		●				
Creating specifications				●		
Custom data management		●				
Extended attributes	●	●		●		
Feature requests					●	●
Group management		●				
Installing Agile Product Lifecycle Management for Process				●		●
Known issues			●			
Resolved issues			●			
Publications	●					
System-based roles		●				

Table 1: Agile Product Lifecycle Management for Process documentation topics, by source (continued)

Information type	CSS User Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Technical support					●	
Trade item publications	●					
Using the CSS application	●			●		

Document Conventions

The following formatting elements appear in Agile Product Lifecycle Management for Process documentation.

Element	Meaning
Helvetica Condensed, 9 pt. bold type	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
`9 pt. monospace font`	Code samples
`10 pt. monospace font`	File names or directory names
Blue italic font	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
Note Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
Caution! Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
Important Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.

CHAPTER 1

Introduction

This chapter presents an overview of Content Synchronization and Syndication and describes a few basic features. Topics in this chapter include:

- *The Content Synchronization and Syndication Application*
- *Touch Points with Other Applications*

The Content Synchronization and Syndication Application

Content Synchronization and Syndication (CSS) publishes, or syndicates, a subset of Global Specification Management (GSM) specification data to external or downstream systems from Agile PLM for Process. CSS typically syndicates this data using an XML-based format. CSS supports several distribution methods. It allows syndication of a subset of GSM specification data to distributed enterprise systems, trading partners, and industry exchanges, such as 1Sync.

CSS syndicates GSM specification data to downstream systems based on specific configurable publication targets.

Publication Targets

CSS is integrated into the process of developing publishable specifications within GSM. As specifications are developed, they can be syndicated to configured publication target systems. These publications, or target destinations, can be internal or external systems. Additionally, CSS syndication message requests, or publications, can be tied to a workflow.

Workflows

These publication workflows can be integrated with GSM specification workflows. This integration allows a publication to move to a different state in the workflow automatically when the specification the publication is tied to reaches a customer-defined state in the specification workflow. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information on CSS workflows.

CSS Configuration

For information about configuring CSS, see the *Agile Product Lifecycle Management for Process Content Synchronization and Syndication Configuration Guide*.

For general information on using Agile Product Lifecycle Management for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

Touch Points with Other Applications

Use Content Synchronization and Syndication (CSS) in conjunction with the Global Specification Management (GSM) application to syndicate specification data.

Global Specification Management

You can create and manage CSS publications on the following Global Specification Management (GSM) specifications:

- Trade specifications
- Formulation specifications
- Ingredient specifications
- Packaging material specifications
- Printed packaging specifications

See *Creating New Publications in GSM* on page 2-4, or for more information, refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Workflow Administration

CSS workflows can be created using the Workflow Administration (WFA) application. Refer to the A*gile Product Lifecycle Management for Process Administrator User Guide* for more information.

CHAPTER 2

Using Content Synchronization and Syndication

This chapter describes the capabilities and applied uses of the Content Synchronization and Syndication product. It includes the following topics:

- *What are Publications (TIPs)?*
- *Creating New Publications in GSM*
- *Trade Item Page*
- *Validation*
- *Workflow*

What are Publications (TIPs)?

Publications are preconfigured objects that define the final destination of the data being syndicated. These publications are referred to as TIPs, or Trans-active Item Publications.

Use publications to send specification data to internal and external systems using a standard output structure. You can configure publications to tailor the transport mechanism, message, and TIP workflow to fit your individual needs.

Internal Publications

Internal publications refer to systems that reside at the same company, such as an ERP or other back-end system. You can create internal publications for supported specification types. You can configure publications for trade and formulation specifications so that select pieces of the trade and formulation hierarchies are syndicated. You can choose which components of the hierarchy you wish to publish and create the publications all at once, and you can select what specifications to publish down to the top level formulation specification. If a top level formulation specification is selected, the entire hierarchy below will be syndicated automatically.

External Publications

External publications refer to systems outside of the company. An example of an external syndication is 1Sync, or any other Global Data Synchronization Network (GDSN) compliant data pool. External syndications only create a publication on the specification you specifically request. It is a configuration option to automatically create publications on child specifications based on workflow rules if you determine that is a requirement.

The following sections define many of the configurations that are available to tailor publications to meet your specific needs.

Workflow

Publication workflows are built to assist in the management of publications. Publication workflows give you the ability to configure actions like email notifications, permissions, transitions, and statuses for publications.

Publication workflows are associated with GSM workflows to create a more automated syndication environment. This feature enables a publication to transition in the workflow automatically when the specification it is tied to reaches a particular workflow state. Workflows can be created using Workflow Administration (WFA).

Extended Attributes

Extended attributes can be added to publications.

Validations

You can define different validation rules to run against a publication using validators. Validators are software components that are “plugged in” through a configuration file. This feature enables you to perform validation on a publication before sending the data to a target system.

Message Generators

You can configure publications to use different message formats for each publication. This feature enables different message structures to be provided based on where the data is destined.

Message Transporters

You can define different transport options for configured publication paths. This feature enables messages to be delivered based on the transport requirements of the target system.

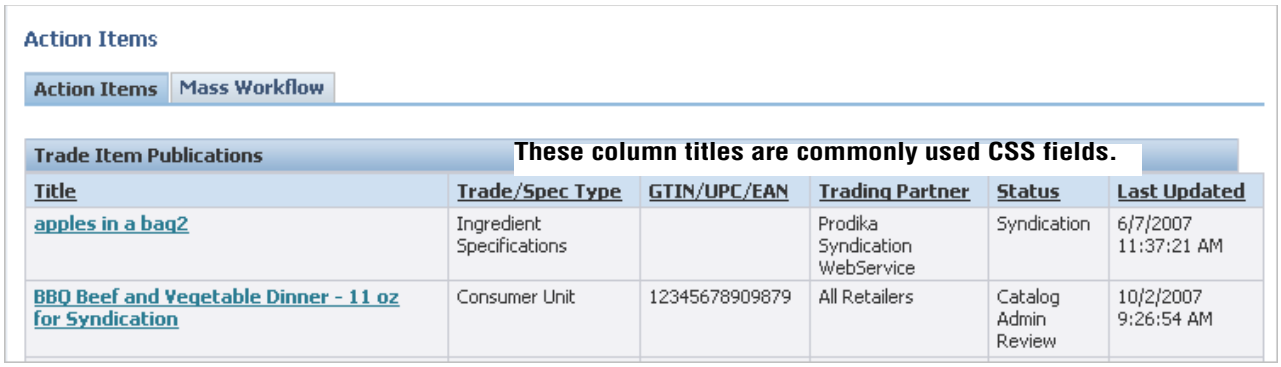
Message Reconcilers

You can define different reconciler options for each publication path. This feature enables different message conversations to be handled and reconciled accordingly.

Action Items

The Action Items page displays a list of all publications that identify you as the current owner. To access the Action Items page, click **CSS > Action Items** from the left navigation panel. You can open a publication by clicking the linked title in the first column. To re-sort the contents of the page, click on the linked column title you wish to sort by and the contents of the Action Items page will be re-sorted.

Figure 2-1: Action Items, CSS



For information on the Mass Workflow tab, refer to *Mass Workflow Tab* on page 2-14.

Creating New Publications in GSM

Single publications for supported specifications are not created from the CSS application. Publications (TIPs) are actually created on the CSS tab of specifications in GSM. Once created, these publications can be managed on the CSS tab of the specification or they can be managed inside the CSS application. Publications are validated in GSM. Refer to *Validation* on page 2-12 for more details. For more information on GSM, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide.*

To create a new publication:

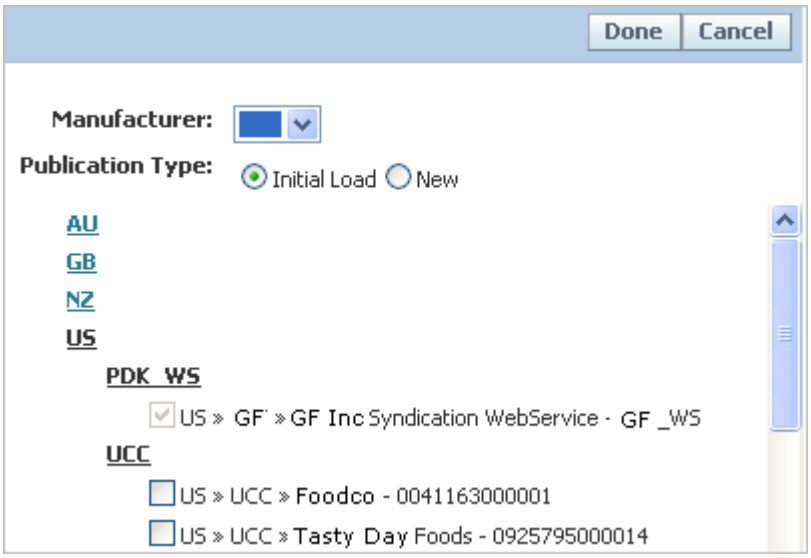
1 Click the **CSS** tab on the specification to be syndicated, as shown in figure 2-2 below.

Figure 2-2: CSS tab, trade specification



2 Click **Add New**. The publications requirements dialog box displays, as figure 2-3 shows below:

Figure 2-3: Publications requirements



3 Specify the following required data:
- **Manufacturer**—Defines the source of the data being syndicated. For Global Data Synchronization Network (GDSN) compliant target systems, this is the Global Locator Number (GLN) of the information provider.
- **Publication Type**—Used for GDSN compliant target systems. Typically this is used to tell retailers if it is the first time they have received this product information or if they already have it and should update their information.
- **Publication Path**—Defines the destination for the syndicated data. Publications are organized by target market. Target market is a GDSN term used to indicate the country where the trade item is available for sale. For example, the US and Canada are two different target markets.

Note This information resides on the Summary tab of the saved publication. See figure 2-5, *Summary tab,* on page 2-6 for more information.

4 Click **Done**. GSM creates the publication.

5 Click **Save**. The publication will now be included in the publication table on the CSS tab of GSM, as figure 2-4 shows below. The default starting status for publications depends on the configuration of the publication workflow. For more information on publication workflows, see *Workflow* on page 2-13.

Figure 2-4: Initial publications



To work with the newly created publication, click the publication link in the Trading Partner column. Clicking the link opens a dialog box in the CSS application.

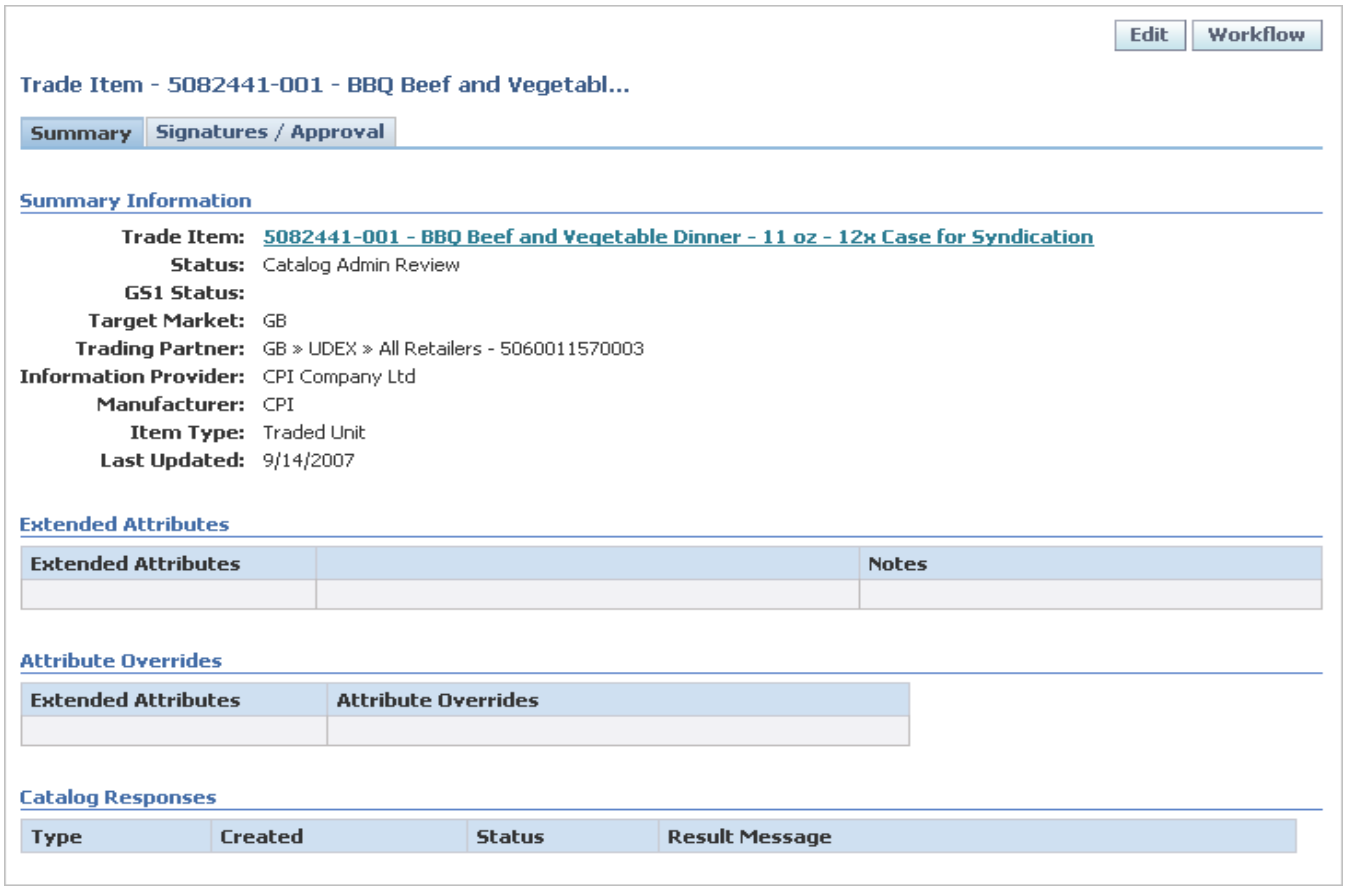
Note You cannot view publications with a current status of "Draft". Statuses are controlled and updated automatically by the publication workflow.

Trade Item Page

Summary Tab

Once the initial publication is created, it expands into the Trade Item page in CSS, shown in figure 2-5 below. You can also access this page by clicking a hyperlinked title in the CSS Action Items list.

Figure 2-5: Summary tab



The Summary tab includes the following sections:

- Summary Information
- Extended Attributes
- Attribute Overrides
- Catalog Responses

Summary Information Section

The Summary Information section of a publication displays the key information that was entered initially as well as the following information:

- **Status**—The status of the publication based on the CSS workflow it is tied to.
- **GS1 Status**—Used for publications destined for 1Sync and is the status of the addition of this specification to the global registry.

- **Item Type**—If applicable, this is pulled from the item type field on the trade specification.
- **Last Updated**—Last date the publication was updated.

Extended Attributes Section

Use extended attributes on publications to capture publication specific data and enhance the data being sent to a particular destination. Figure 2-6 shows the Extended Attributes section.

Figure 2-6: CSS Extended Attributes section in edit mode

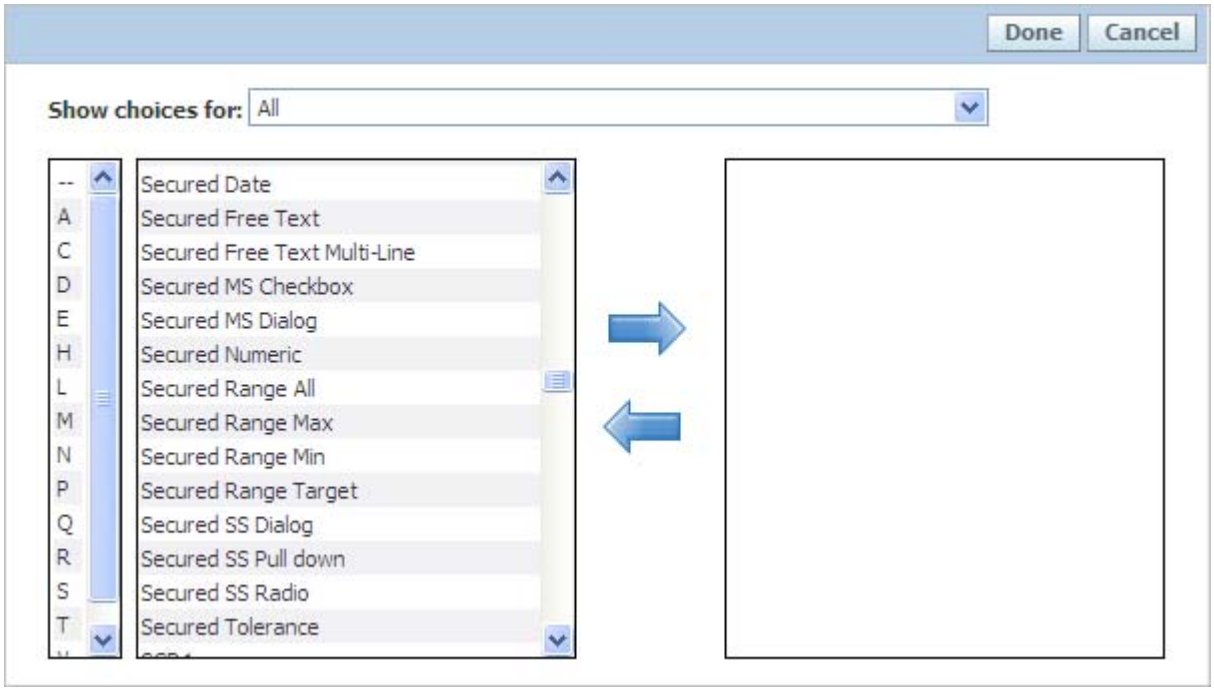


Note The publication must be in edit mode to add extended attributes. To put the publication in edit mode, click **Edit**.

Adding Extended Attributes

Click **Add New** in the Extended Attributes section. A dialog box opens, as shown in figure 2-7 below.

Figure 2-7: Extended attributes dialog box



Select the attribute to add and then click the add selected data icon ( ). Select more than one attribute by holding down the **Shift** or the **Control** key on your keyboard and clicking the mouse on the attributes to include. Remove attributes from the list by clicking on the attribute name in the right column and clicking the remove selected data icon ( ).

Once you have selected all the attributes to add, click **Done** to return to the publication page. The selected attributes are added to the list, as figure 2-8 shows below. You can now define the values for the extended attributes.

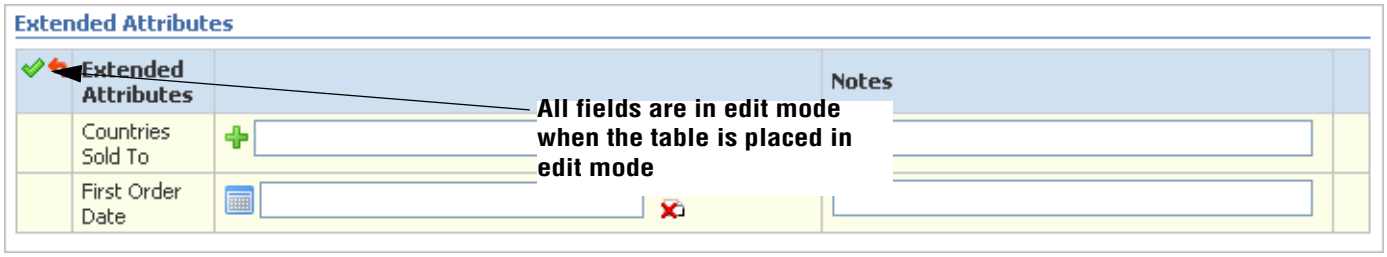
Figure 2-8: Extended Attributes list



There are two ways to add values to the extended attributes. You can edit each row individually or edit the entire extended attributes grid.

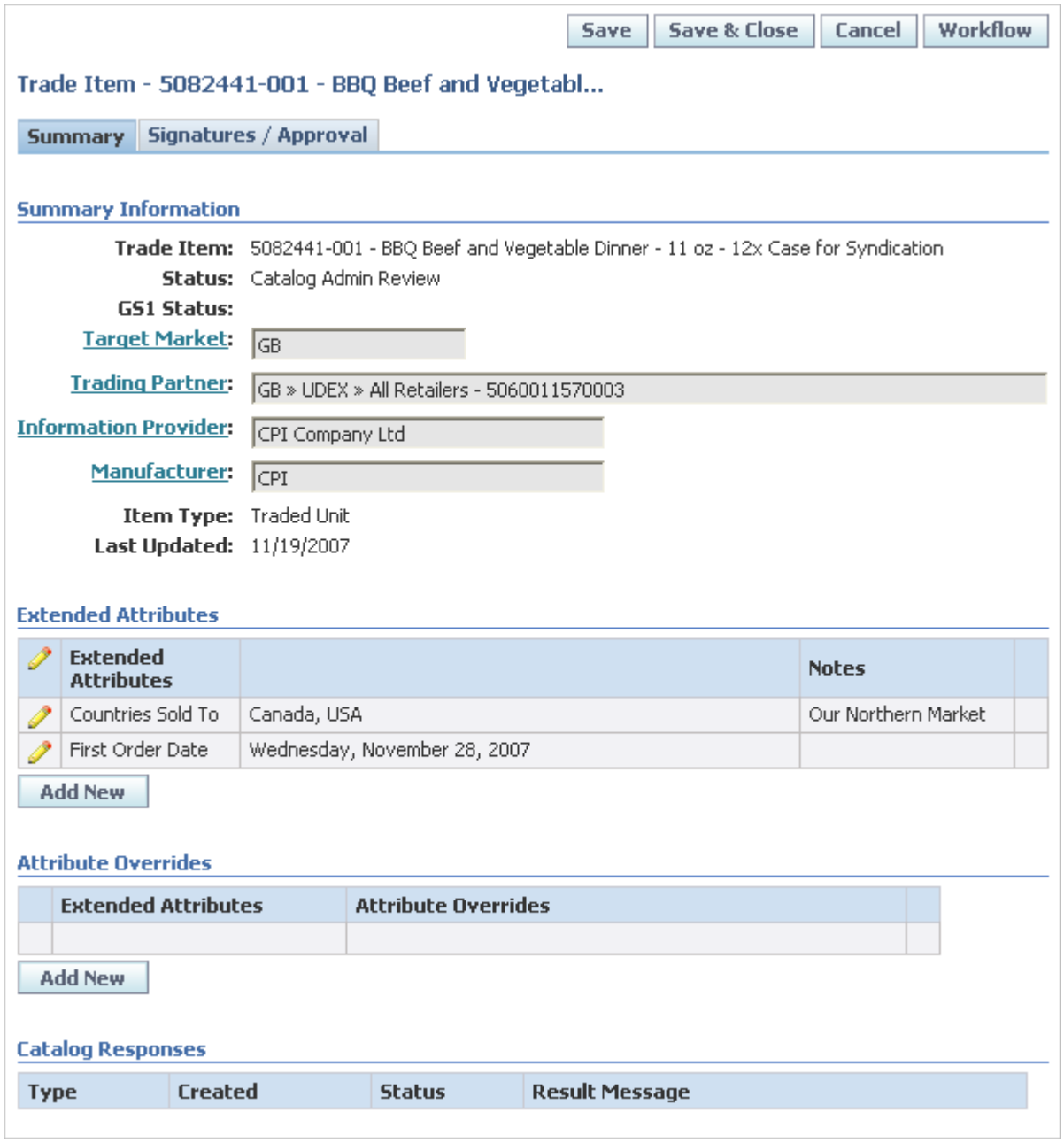
- To edit an individual row, select the edit icon ( ) on the left side of the row you want to edit. Add the desired value and any notes. Click the apply changes icon ( ) to confirm your change.
- To edit the entire grid, click the edit icon ( ) in the top left corner of the grid and all extended attribute values will be available for editing. Once you have entered the desired values and notes, click the apply changes icon ( ) to confirm your changes. Figure 2-9 shows the edit grid option.

Figure 2-9: Extended Attributes grid in edit mode



After you have entered the desired extended attribute information, click **Save** to save your data on the publication.

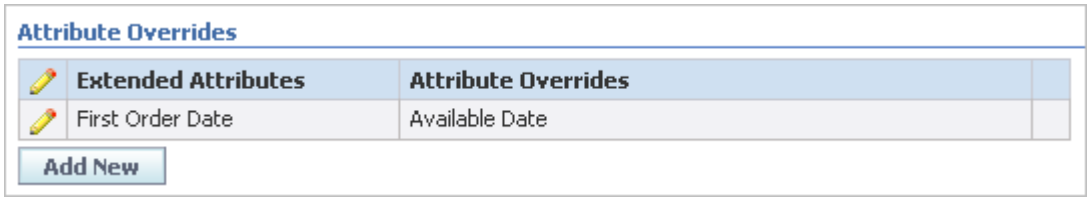
Figure 2-10: CSS Summary page



Attribute Overrides Section

Use the Attribute Overrides section to override related specification data with extended attribute data that exists on the publication.

Figure 2-11: Attribute Overrides section



The attributes that may be overridden are configurable by data type. The following are the trade specification attribute overrides that are preconfigured within the system:

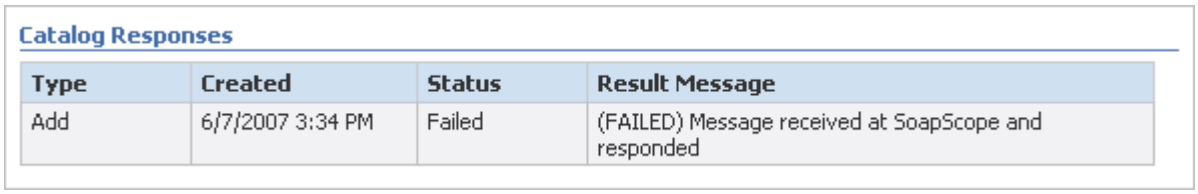
- Available Date—Date
- Case Gross Weight—Numeric
- Net Weight—Numeric
- Case Height—Numeric
- Case Length—Numeric
- Case Width—Numeric
- Case Volume—Numeric
- Each Height—Numeric
- Each Length—Numeric
- Each Width—Numeric
- Each Volume—Numeric
- Product Name—Free Text
- Layers per pallet—Numeric
- Cases per layer—Numeric
- Pallet Gross Weight—Numeric
- Pallet Net Weight—Numeric
- Pallet Height—Numeric
- Pallet Length—Numeric
- Pallet Width—Numeric
- Pallet Volume—Numeric

Catalog Responses Section

The Catalog Responses section gives details about what type of messages were created and their individual status, as shown in figure 2-12 below. It is possible to have multiple statuses inside of a given publication status.

For instance, when CSS sends trade specification data to 1Sync, a single publication will typically have three unique messages generated. It will generate an Add, Modify, and Publish message. Within the message conversation with 1Sync, independent information on each of those messages is returned. The Catalog Responses section displays this information.

Figure 2-12: Catalog Responses section



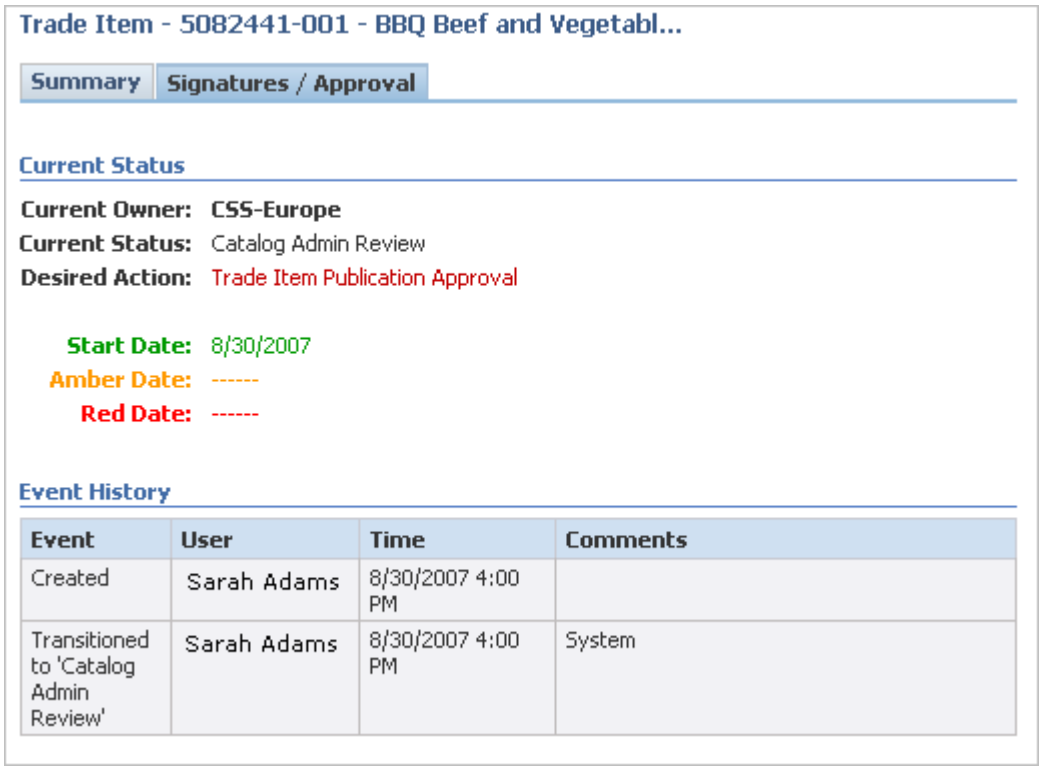
The Catalog Responses section includes the following columns:

- **Type**—The type of transaction within the publication corresponding to a unique message generator.
- **Created**—The date and time the message was generated.
- **Status**—The status of the unique message.
- **Result Message**—The message sent back from the target system if applicable. If a publication fails, the result message supplies supporting information on why it failed.

Signatures/Approval Tab

The Signatures/Approval tab shows the information that relates to the CSS workflow tied to this publication, as figure 2-13 shows on the next page. This information is generated by the system and cannot be changed.

Figure 2-13: Signatures/Approval tab



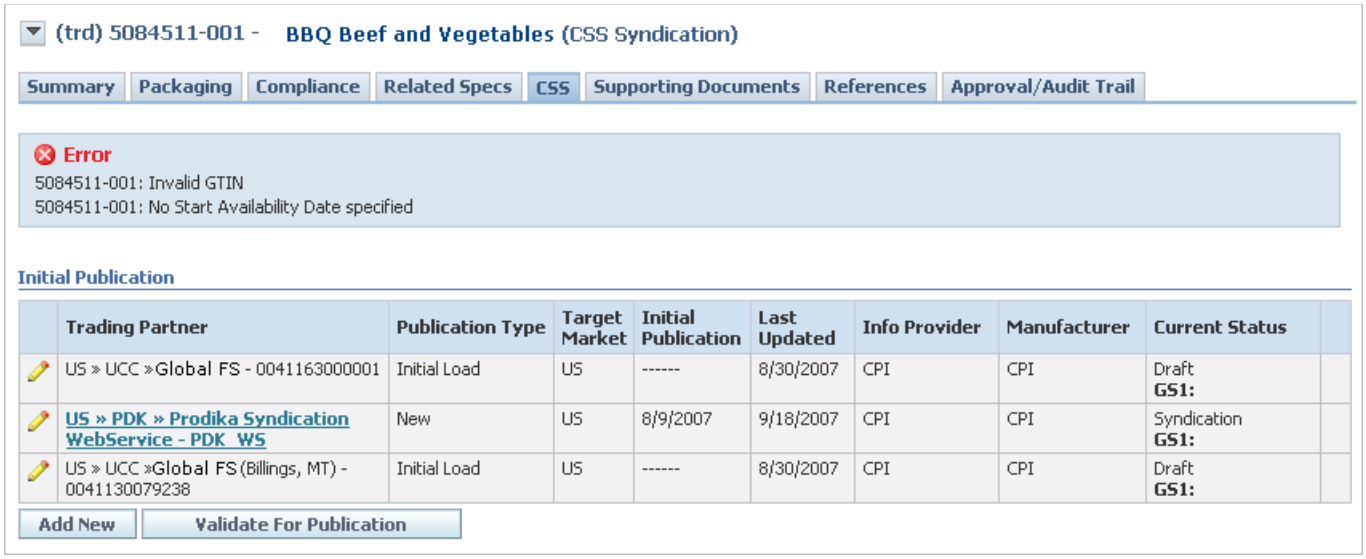
Validation

Once a publication has been created on a specification, you can run pre-configured validations against it. Doing so will tell you if there are any problems with the data before sending it to the destination defined on the publication.

Validating a Publication

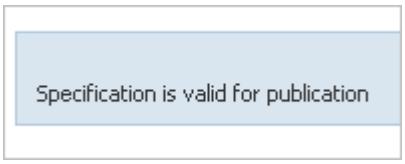
To validate a publication, click **Validate For Publication** on the CSS tab of the specification in GSM. When you validate a publication, the validation rules defined for that publication will be investigated against the related specification data. If there is more than one publication on a specification, the validation rules configured for the publications will be run and the error messages that exists will display at the top of the CSS tab, as figure 2-14 shows below. You can tell which specification is causing the error condition because the error messages contain the specification number.

Figure 2-14: Validate for Publication and sample error message



Once all of the errors are resolved and the validation routine passes, a message that states that the publication is valid for publication is displayed, as figure 2-15 shows below.

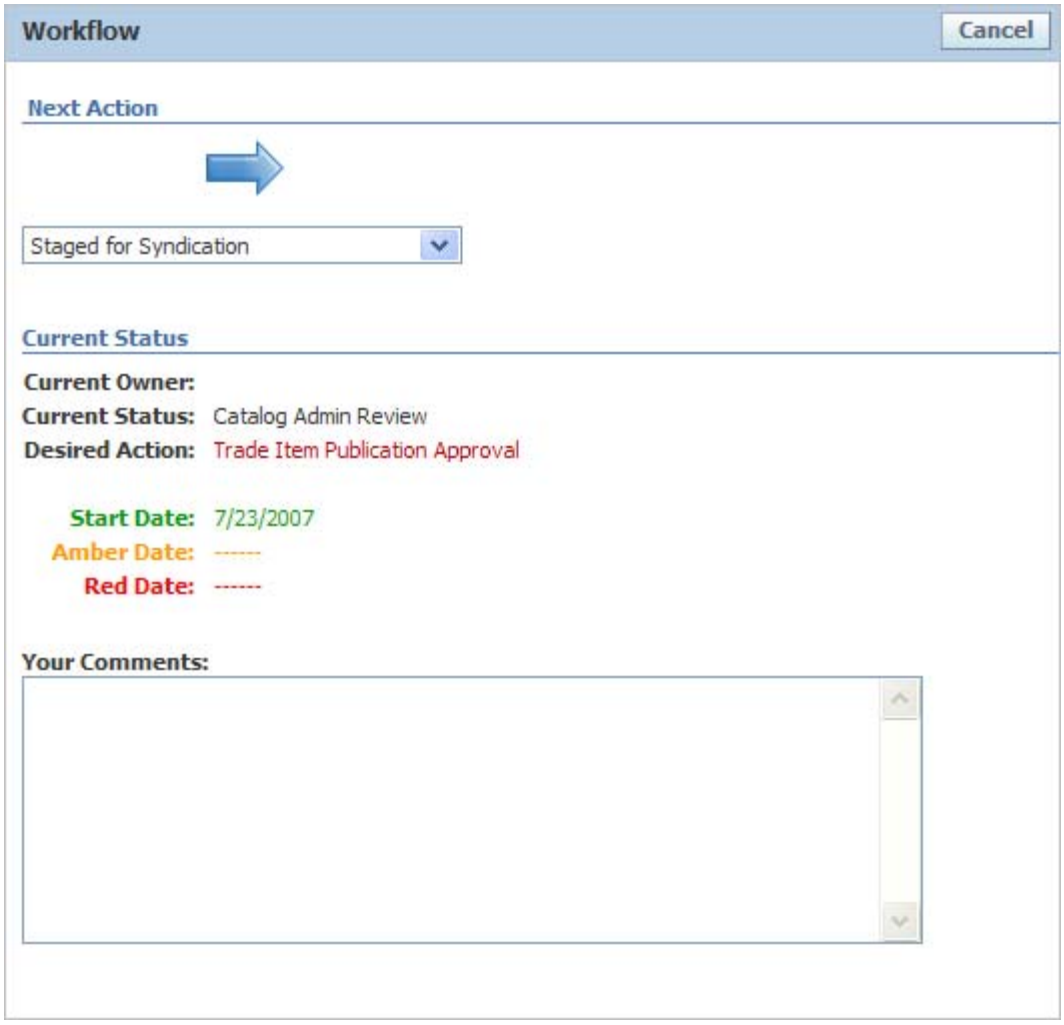
Figure 2-15: Valid Specification



Workflow

Once a publication is validated, you can advance it to a publishable state and send it to the recipient defined in the publication. To workflow an individual publication, click the Trading Partner link on the CSS tab of the GSM specification. This action opens the publication in a CSS dialog box. To advance the publication, click **Workflow.** A workflow dialog box displays, as shown in figure 2-16 below.

Figure 2-16: Workflow dialog box



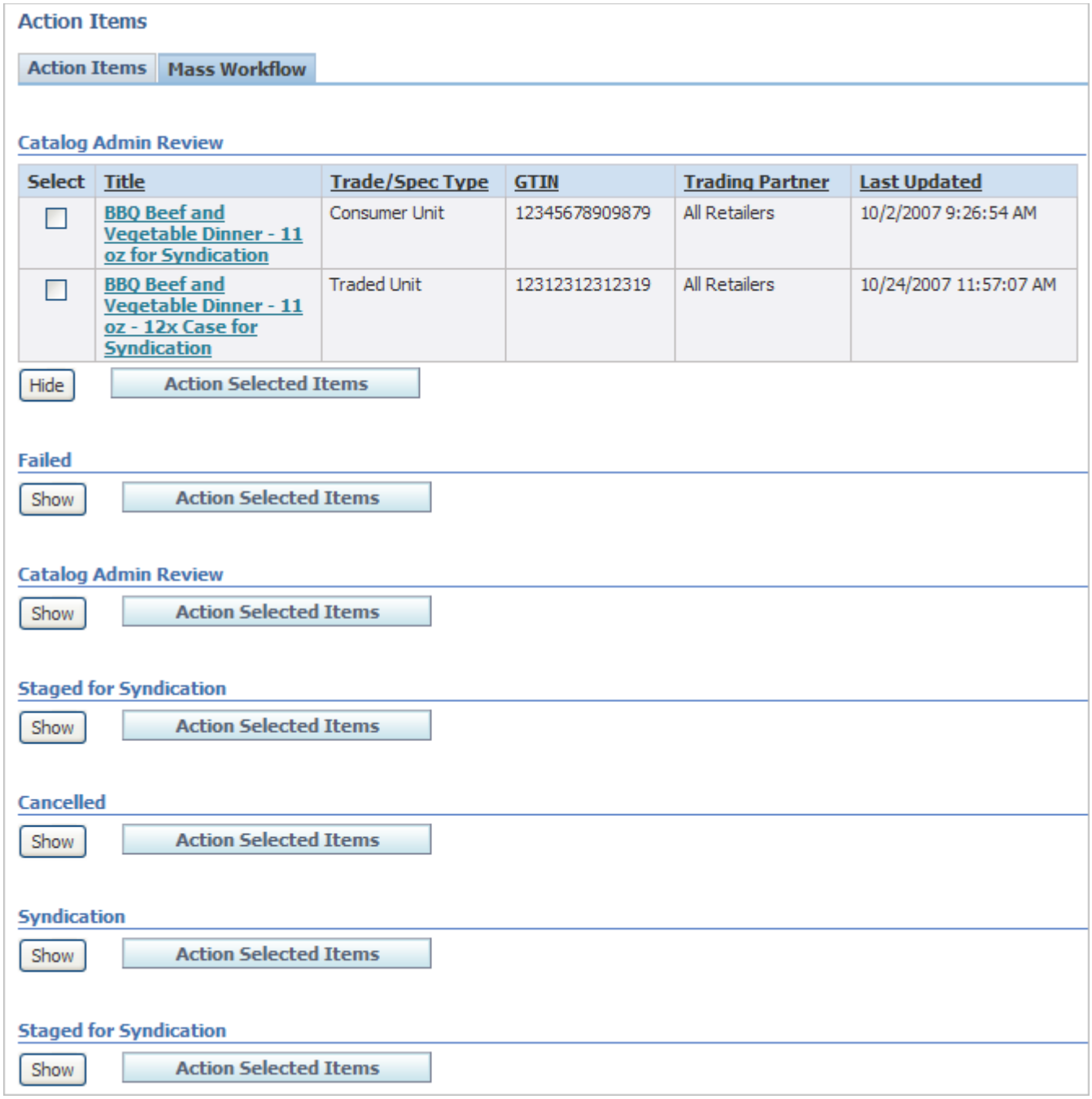
Select the appropriate workflow status from the drop-down list and then click the move step forward icon ( ) to push the publication forward in the workflow. If an appropriate reverse transition has been defined and you want to move the publication backwards in the workflow, select the appropriate workflow status from the drop-down list and then click the move step back icon ( ).

Mass Workflow Tab

The Mass Workflow tab in CSS enables you to move multiple publications from one status in the workflow to another.

When you first access the Mass Workflow tab, there are compressed lists of publications that are grouped by status, as shown in figure 2-17 below.

Figure 2-17: Mass Workflow tab



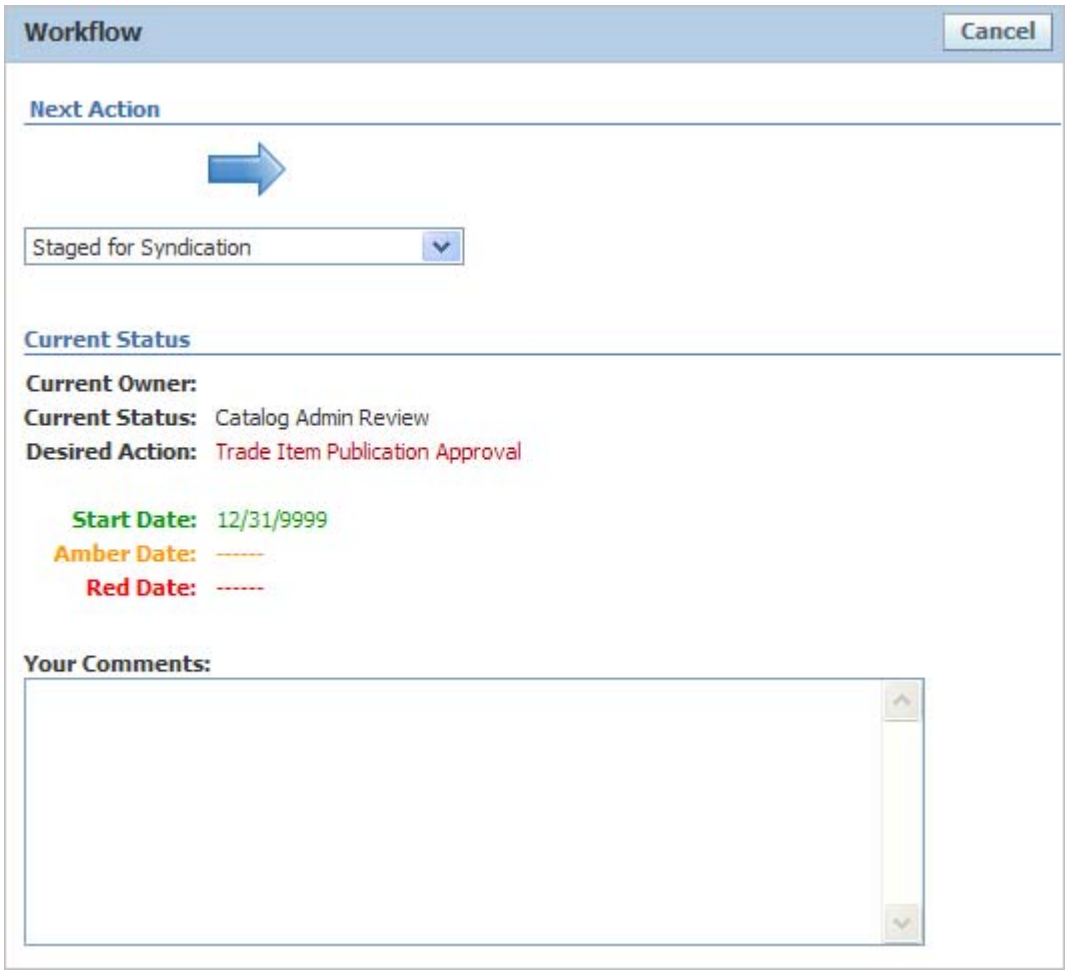
Every unique status in the workflow that has a publication identifying you as the owner will show on this page. Initially, all of the publications within the groups are hidden. Open the list of publications that are in a particular status by clicking **Show**. This expands all of the publications you own in that status, as shown in figure 2-18 below. Click **Hide** to compress the list.

Figure 2-18: Available publications, Show selected



Next, select the individual publications you want to move from one status to the next. To do this, select the check box next to the publication you want to move. Once you have selected all of the publications within the status you want to move, click **Action Selected Items**. A workflow dialog box displays, as figure 2-19 shows below.

Figure 2-19: Workflow next action



Select the appropriate workflow status from the drop-down list, enter comments associated with this workflow transition and then click the move step forward icon ( ) to initiate the workflow process. Once you have initiated the workflow, the Mass Workflow page automatically updates.

Mass Publications

Mass publications give you the ability to syndicate multiple trade specifications to a single publication. Mass publications are created in CSS.

Mass Tip Creation

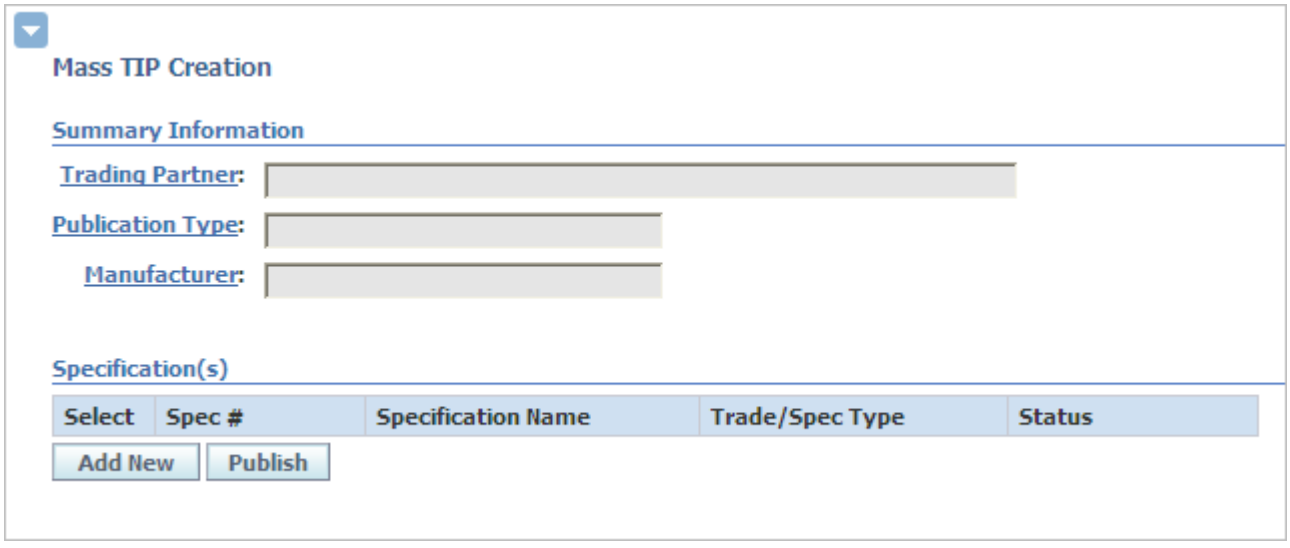
To create a mass publication, click **New** on the search page, as figure 2-20 shows below. This feature is only available for trade specifications.

Figure 2-20: Trade Item Publications



Mass publications are composed of two sections shown in figure 2-21 below: Summary Information and Specification(s).

Figure 2-21: Mass TIP Creation



Summary Information Section

Use the Summary Information section to add information that will help define the publication for the group of specifications being syndicated:

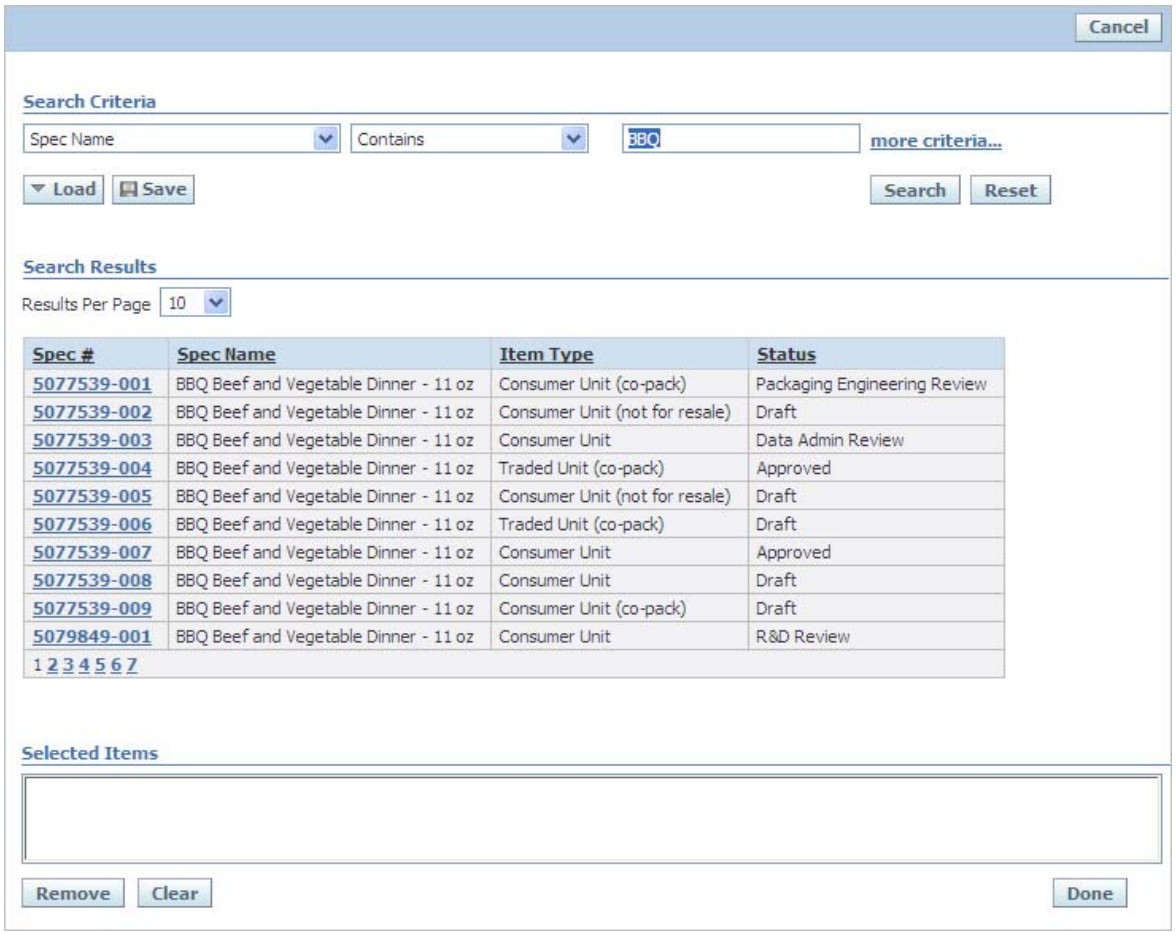
- **Trading Partner**—Defines the destination for the data being syndicated. As discussed on page 2-1, these can be internal or external. Publications are organized by target markets. Target market is a GDSN term used to define areas of the world.
- **Publication Type**—Publication type is typically used for GDSN syndications. It tells retailers if this is the first time they have received this product information or if they already have it and should update their information.
- **Manufacturer**—Defines who the data being syndicated is coming from. For GDSN syndications, this is the information provider's Global Locator Number (GLN).

Specification(s) Section

Use the Specification(s) section to add the trade specifications to syndicate.

To add trade specifications, click **Add New** and use the search page to select the trade specifications to publish, as shown in figure 2-22 below.

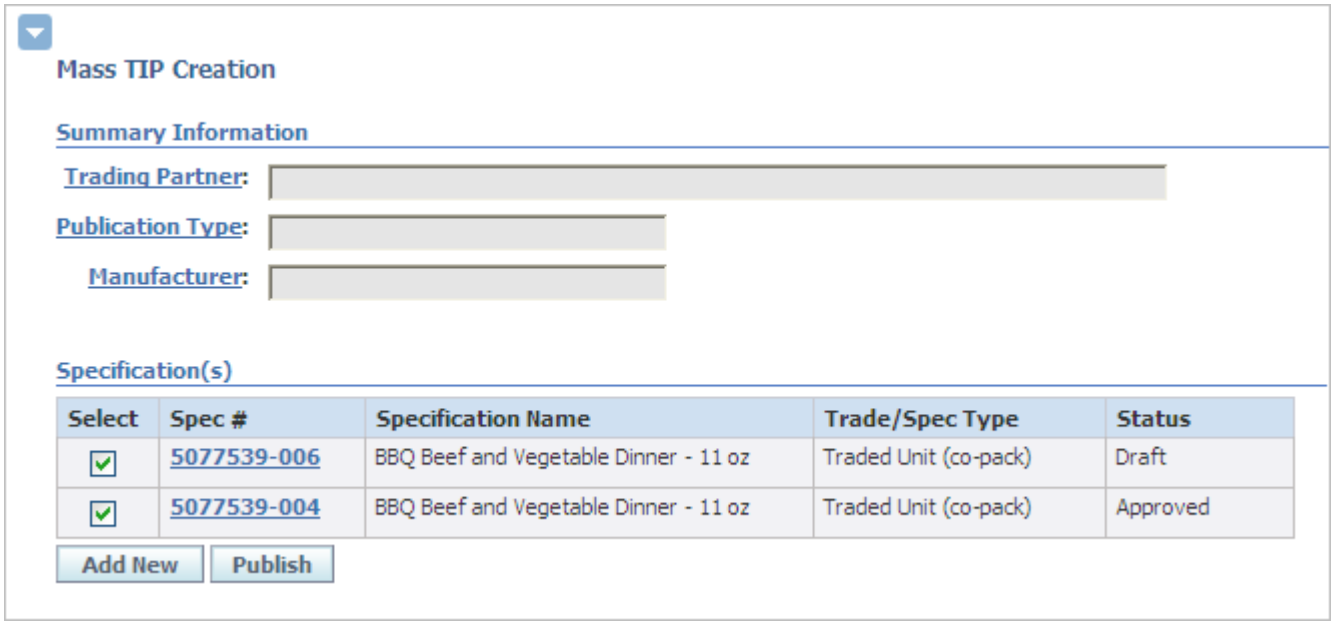
Figure 2-22: Search Criteria



Once you select all of the specifications to publish, click **Done**. The selected specifications are returned to the specifications section of the mass publication.

Once you find the specifications you are looking for, select the individual specifications to publish. To do this, select the check box next to each specification, as figure 2-23 shows below. If the check box next to the specification is grayed out, that specification has already been published to the target system you selected and is no longer available for publication.

Figure 2-23: Mass TIP Creation Publishing



Once you select all of the specifications you want to publish, click **Publish**. The system creates publications to the selected trading partner on all of the specifications selected. You will still need to perform workflows on the publications as usual.