Micros Supply Chain myCreations

Administration Guide

Release 1.9.0

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Micros Supply Chain myCreations Administration Guide, Release 1.9.0

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Preface

Oracle Retail Administration Guides are designed so that you can view and understand the application's behind-the-scenes processing, including such information as the following:

- Key system administration configuration settings
- Technical architecture
- Functional integration dataflow across the enterprise
- Batch processing

Audience

This document is intended for administrators of Micros Supply Chain myCreations.

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Related Documents

For more information, see the following documents in the Micros Supply Chain myCreations Release 1.9.0 documentation set:

- *Micros Supply Chain myCreations Release Notes*
- *Micros Supply Chain myCreations User Guide*

For information on the Micros Supply Chain myCreations applications, see the following documents:

- *Micros Supply Chain myCreations myProduct User Guide*
- *Micros Supply Chain myCreations myProject User Guide*
- *Micros Supply Chain myCreations mySupplier User Guide*

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- Detailed step-by-step instructions to re-create
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- Screen shots of each step you take

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When you install the application for the first time, you install either a base release (for example, 1.9.0) or a later patch release (for example, 1.9.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

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(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this web site within a month after a product release.

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 Introduction

> **Note:** The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout the existing documentation set.

Micros Supply Chain myCreations is an integrated suite of applications designed to meet all aspects of sourcing, developing, and protecting retailer brands. The suite provides solutions for product development, compliance, quality, and traceability. It is designed specifically for retail, food service, and manufacturing businesses to develop and protect their brands, manage their suppliers, and ensure full end-to-end product lifecycle management.

The suite is composed of the following applications:

- myLibrary enables the issue, receipt, and acceptance of policies, guidelines, and key working documents.
- myProduct supports the development of products and production specifications.
- myProject supports the development of project briefs, plans, and workflow management.
- mySupplier enables the identification, selection, and approval of suppliers.

> **Note:** Technologist is the default name for that Retailer role across the entire product suite. Each portal may configure an alternative to suit their business, if required.

Admin Functions

To access the Admin functions, select the Admin option from myCompany. The Admin - System Control tab opens. The available options are shown in the left pane. For an example, see Figure 1–1.

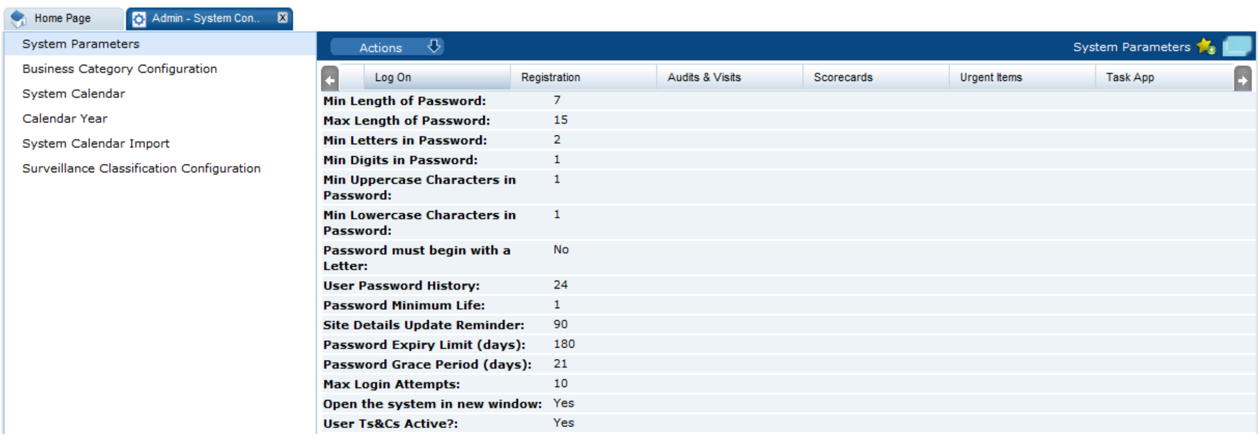
Access to the Admin functions is controlled by Authority Profiles. A user may not have access to all the Admin functions described in this guide.

System Parameters

System parameters are used to manage the functionality of features and modules. To access the system parameters, select the System Control option from the Admin drop-down list. Select System Parameters from the left pane. The System Parameters page appears. Each subtab shows the system parameters available to maintain a specific feature or module. Figure 1–1 shows an example of the System Parameters page for the Log On subtab.

In each of the following chapters, a System Parameters section is included if system parameters are available for that feature or module. A table shows the specific system parameters, listed by subtab, used for that feature or module.

Figure 1–1 System Parameters Page



UIM Date Offsets

Where items appear based on dates, an offset may be configured to make the item appear a number of days before or after the actual event. This can be used to warn the user of the upcoming event or allow for a grace period. This functionality is available for the entire suite.

Calendar

To access the system calendar options, select the System Control option from the Admin drop-down list. The following options are available in the left pane:

- System Calendar
- Calendar Year
- System Calendar Import

System Calendar

The System Calendar defines the retailer's financial year, period, and week for a given date:

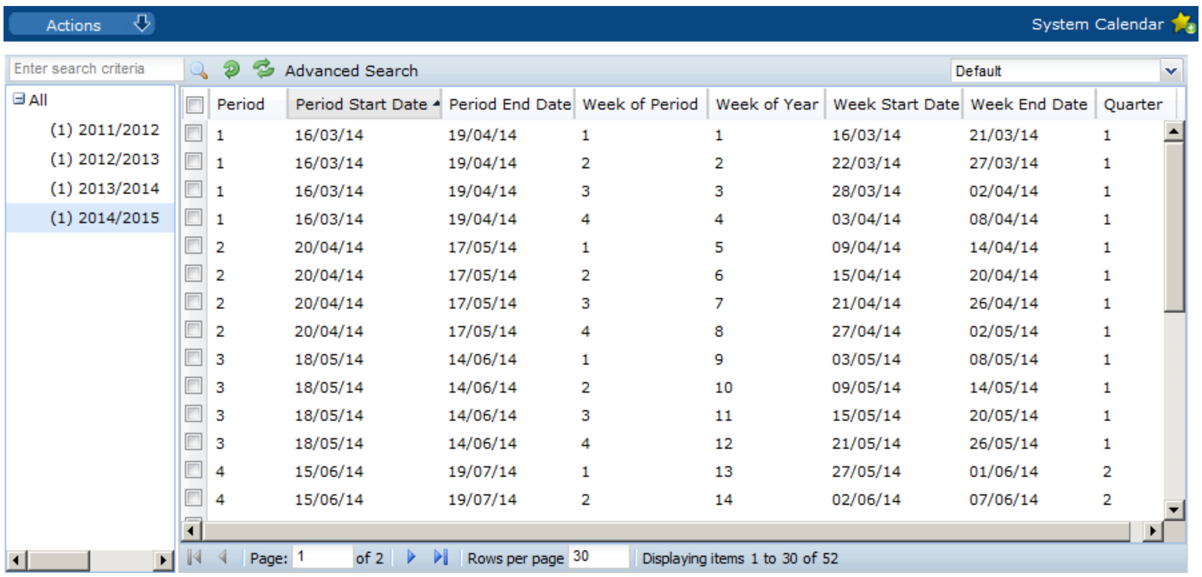
- The Financial Year is the key of the calendar record. It must be unique.
- Each week is given a number, starting from 1, and start and end dates.

  The first week's start date is the given start date. The subsequent week’s start dates are allocated based on the day the week starts. The end date is the day before the next week's start date, other than the last week which ends on the given end date.
- The number of weeks is divided by the given number of periods to get the number of weeks in each period. This is used to set each period's start and end dates accordingly. The first and last periods may have irregular start or end dates, respectively, depending on the given data range. If the number of weeks is not

exactly divisible by the number of periods, the result is rounded and the final period adjusted accordingly.

- Period is the key for each entry within the calendar record. It must be unique, that is, there can only be a single period 1, period 2, and so on.
- Each period's quarter number is based on the Q2, Q3, and Q4 week numbers. Q1 starts on week 1. Each period has a period number, period start and end dates, quarter number, and a list of weeks, each with a week number and start and end dates.

Figure 1–2 System Calendar Page

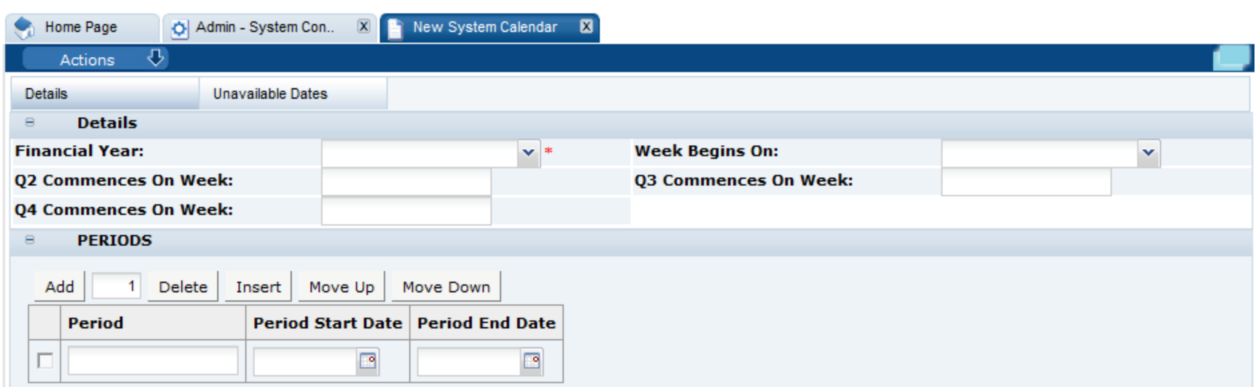


To edit the System Calendar, select a row and then select the Edit action. The row opens in edit mode. For an example of this page, see Figure 1–3

To add a new entry:

1. Select the New action. The New System Calendar tab opens.

Figure 1–3 New System Calendar Page



2. In the Details section:
   - Financial Year: Select the financial year from the drop-down list. This field is mandatory.

- Week Begins On: Select the first day of the week from the drop-down list.
- Q2 Commences on Week, Q3 Commences on Week, and Q4 Commences on Week: Each field defines the start of a quarter. For each quarter, enter the number of the week in the year on which that quarter starts.

3. In the Periods section: For each period, enter the period number and select the start and end dates.
4. In the Unavailable Dates subtab, dates to be treated as non-working days can be added to the calendar. For example, a holiday such as New Year's Day could be added. For each unavailable date:
   a. Name: Enter the name in the default language. This field is mandatory. Enter any translations.
   b. Date: Enter a date or click the icon to select a date.
   c. Comments: Enter any comments.
5. Select the Save action.

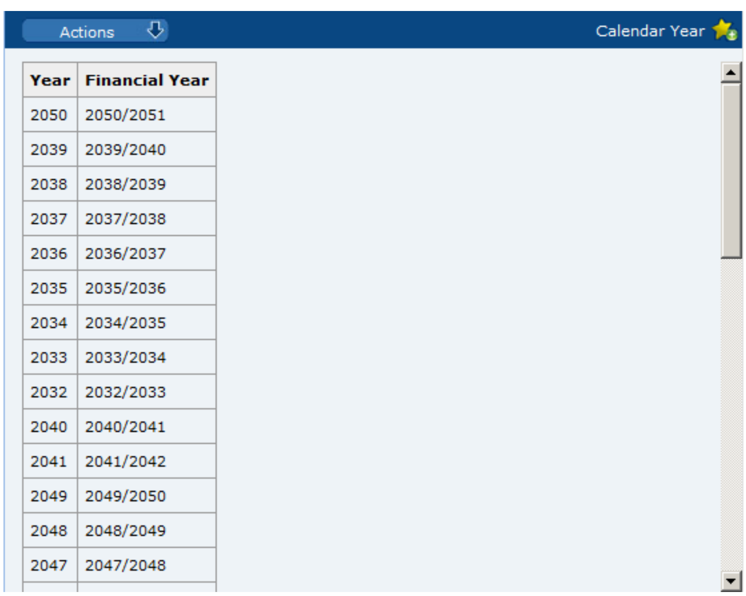
Calendar Year

The Calendar Year page lists the years available for selection when creating a new System Calendar. The years are maintained as a simple keyword list.

To edit the list, select the Edit action. The list opens in edit mode. You can edit any of the entries.

To add a new entry, click **Add**. An entry is added to the list. Enter the year and financial year. To reposition an entry in the list, select the entry and then click **Move Up** or **Move Down**.

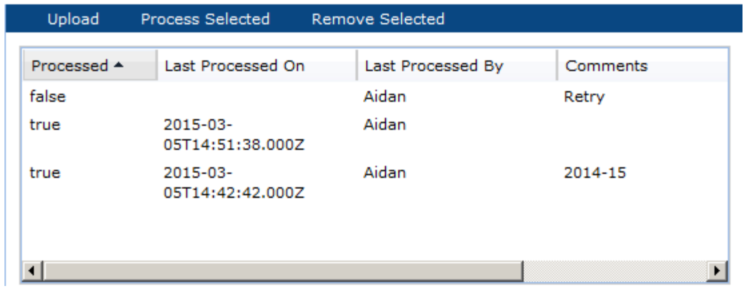
Figure 1–4 Calendar Year Page



System Calendar Import

An import facility is provided to load the system calendar from a CSV file.

Figure 1–5 System Calendar Import Page



The following actions are available on this page:

- Upload: The user is prompted, with the standard file selector, to attach a file to be processed. When a CSV file has been uploaded, it has false in the Processed column.
- Process Selected: Select the file to be processed. If the selected file validation is successful, the contents are added as system calendar entries. When a CSV file has been processed, it has true in the Processed column.
- Remove Selected: Select the file to be deleted. The user is prompted to confirm the deletion. The System Calendar is not affected in any way by the deletion; only the list entry is removed from the import area.

  Previously imported and processed versions are retained until selected for deletion.

2
Managing User Access

This chapter describes how user access to Micros Supply Chain myCreations is managed. Retailer users who are assigned the User Administrator Authority Profile can create and edit users.

The following topics are covered in this chapter:

- Overview of User Security
- Managing User Roles
- Managing Users
- System Parameters

Overview of User Security

Following are the components of user security for Micros Supply Chain myCreations:

- Access rights are defined in the Permissions Rules spreadsheet.
- Authority Profiles are grouped into Authority Profile Groups.
- A role is comprised of Authority Profiles which assign the access rights.
- A user is assigned roles.
- A user may also be assigned individual Authority Profiles.

The system differentiates between internal (retailer) users and external (supplier) users, and controls the respective access to data and functionality based on implicit rules and configurable permissions rules. The permissions and implicit rules are applied wherever data or functionality is accessed: access to records, contents of list views and embedded lists, pick-list contents, wizard screens, and so on.

Implicit Rules

The system has a set of hard-coded rules that control fundamental access to data and functionality, such as, a supplier can only access their own data and the retailer has visibility to all suppliers' data.

Permissions Rules

The actual rules for each Authority Profile's access to the system (create, read, update, delete) are defined in the Permission Rules spreadsheet. The permissions can be defined at record, page, field-set, or field level, allowing access to be granted to entire records down to a more granular field-level where necessary. The permissions are also applied to grant access to menu options and actions, and can be set to take records' status into account.

Authority Profiles

Authority Profiles are the lowest form of control over functionality. Authority Profiles are sets of permissions that together set a level of access to specific areas of the application, both data and functionality, and can be set at the function, record, page, field-set, or field level. The permissions for each Authority Profile are defined in the Permissions Rules spreadsheet.

Each Authority Profile record has a unique name, unique code, and a mandatory default description. A description can also be provided for each of the supported languages. The system comes with default sets of retailer and supplier authority profiles.

One or more Authority Profiles are assigned to a role to define its access rights. This enables new roles to be introduced without having to change the Permissions Rules spreadsheet.

The following are examples of Authority Profiles:

- Configuration Editor
- Audit Administrator
- News Administrator
- Library Reader

Authority Profile Groups

Authority profiles are grouped to set an order of precedence so that if a user has a number of conflicting authority profiles, such as Audit Reader and Audit Editor, the user is always assigned the highest level of access.

For example, the Product Technologist role may contain the News Reader authority profile as standard. If a particular Product Technologist user is granted the News Administrator role to give the user the rights to also publish news items, there would be a resulting clash between News Reader and News Administrator when the system determines the permissions. Authority profile groups therefore facilitate giving the News Administrator precedence over News Reader.

Roles

Roles are constructed from Authority Profiles that define different levels of access to data and functionality within each area of the system, such as, Audit Reader, Audit Editor, and News Administrator. Users may also be assigned individual additional Authority Profiles to grant them specific privileges, such as granting a particular Product Technologist the ability to publish news items.

> **Note:** If a user is assigned individual additional authority profiles, the user’s overall access to the system also takes into account the authority profiles associated to any roles the user has been assigned.

A user role is made up of one or more authority profiles. Each role has a unique name and a list of authority profiles. A role has a predefined level of access to the system determined by its associated Authority Profiles.

Each user is assigned one or more roles appropriate to that user's use of the system. Roles are configurable and a number of standard roles are supplied with the system for the common types of user, such as, Product Technologist. These may then be amended to reflect retailer-specific terminology or business processes as required. Any number of additional roles can be created to enable alternative types of users.

Roles are user classifications that relate to a job title, such as:

- Product Technologist
- Assistant Technologist
- Product Development Manager

Roles can be created to build common variants, for example, a Trainee Assistant Technologist where the level of access is restricted to read-only.

Common User Roles

The system comes with a predefined set of common user roles which can then be amended or extended as necessary. Table 2–1 describes the internal roles.

Table 2–1 Internal (Retailer) Roles

Role Name	Description
Account Administrator	Enables access to orders generated from the supplier registration process.
Assistant Technologist	Enables the user to work with Product Technologists and perform some tasks on their behalf. Therefore, the user by default has the same level of access as a Product Technologist.
Auditor	May be internal (retailer) or external (third-party audit house/certification body) users. The users carry out supplier site audits on behalf of the retailer, so the users can create and complete audits and visits.
Buyer	Enables access to supplier information. The level of access is generally restricted to read-only, such as read access to supplier details.
Laboratory	External users. Initially just basic access to news and documents.
Power User	Allows the configuration of product specification mandatory fields and field locking rules.
Product Development Manager	Involved in the early stages of the product's lifecycle. The level of access is generally restricted to read-only.
Product Technologist	Main users of the system. These users have access to most areas of the system and work in collaboration with the suppliers of products, carrying out site visits and audits.
Project Administrator	Enables the configuration of templates for projects and their activities.
Project Manager	Enables the creation and management of projects.
Retailer Supplier Administrator	Can be given to a retailer user to enable the user to edit the name, address, and contact details of supplier and site accounts.
Site Inspector	Initially, just basic access to news and documents. The user eventually accesses product information for quality assurance purposes.

Table 2–1 (Cont.) Internal (Retailer) Roles

Role Name	Description
Surveillance Laboratory User	Given to external testing laboratory users to allow them to access the portal for the upload of test results, and to run predefined reports.
System Administrator	Provides access to the configuration and administration features.

Each supplier has their own account within the system, comprising a single supplier (head office) record plus a site record for each of their manufacturing or packing locations. Supplier users have their own individual user accounts. Supplier users are either a supplier level user associated to the head office and all its sites, or a site level user associated to one or more sites within the organization and may be granted administration rights. Table 2–2 describes the external roles.

Table 2–2 External (Supplier or Site) Roles

Role Name	Description
Supplier Administrator	A supplier level user with permission to administer supplier and site users and addresses and contacts, that is, Supplier and Site records and their Contacts.
Supplier User	A supplier level user with access to all sites for that supplier including any new sites that are created. This user type can be a contact for the supplier and for any site.
Site Administrator	A site level user with permission to administer site users for their sites only and address and contacts for those sites they have access to, that is, Site Records and their contacts.
Site User	A site level user with access to specified sites. As new sites are added, they do not have access to those sites unless specifically granted by an administrator. They can be a site contact, but not a supplier contact.

Users

Each user of the system is assigned an individual password-protected user account identified by a personal user name and email address. Most transactions made within the system are recorded in time-stamped audit trail logs, identifying the user responsible for the transaction.

Designated administrators, within the retailer and supplier organizations, create and manage their users and access rights. Individual users can then maintain their own contact details, preference settings, and passwords.

User records are assigned one or more roles to set their default level of access. Authority Profiles can also be assigned directly to a user to give them specific access rights.

The User record includes flags to control whether the user is to appear in the drop-down lists of Product Technologist, Assistant Technologists, Auditors, and so on.

Managing Authority Profiles

The descriptions in the supported languages can be changed for the Authority Profiles. Select Authority Profiles from the left pane. The Authority Panels page opens. Select the Edit action. The page opens in edit mode. Make any changes and save the updates.

Managing User Roles

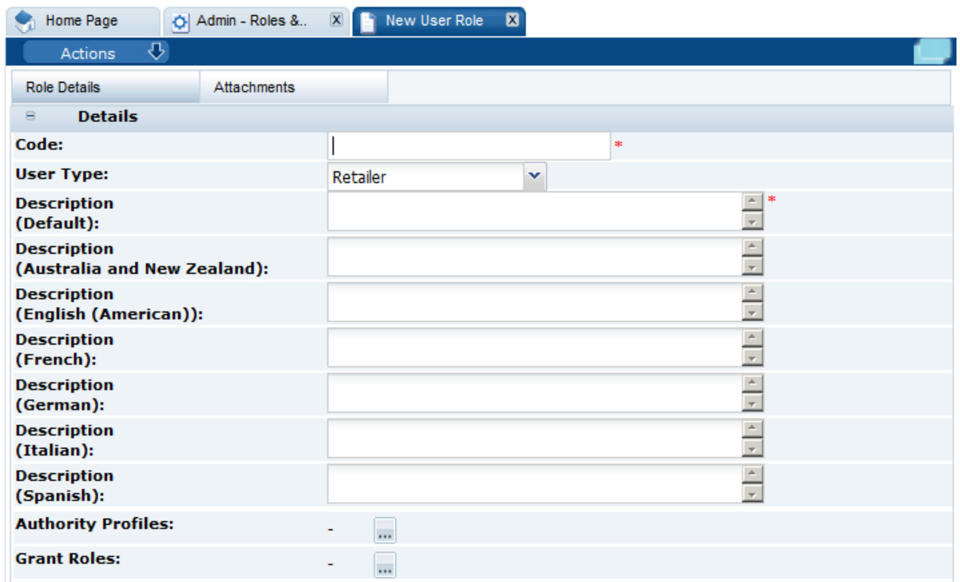
Select User Roles in the left panel. The List Roles page opens. For each role, the code, user type (Retailer, Site, Supplier), and description is shown.

Adding a User Role

To add a new user role:

1. Select the New User Role action. The Role Details page appears.

Figure 2–1 New User Role Page



2. Enter the details for the role and select the Save action.

Table 2–3 New User Role Page Details

Details	Description
Code	Enter a unique code for this user role. Mandatory field.
User Type	Select the type of users for which this role is intended: ▪ Retailer ▪ Supplier ▪ Retailer and Supplier ▪ Site
Description	Enter the description for this role in the supported languages. The description for the default language is mandatory
Authority Profiles	Click the icon and select the Authority Profiles that define this role.
Grant Roles	Click the icon and select the roles that a user assigned this new role can assign to other users.

Editing a User Role

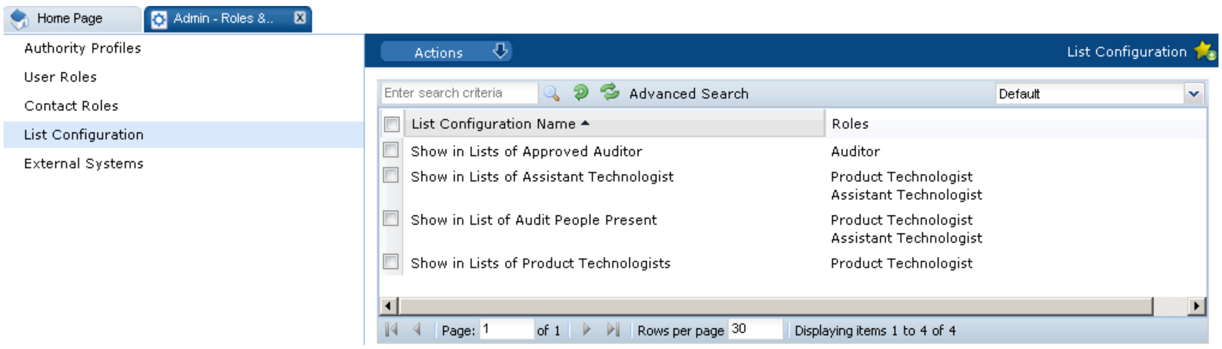
Select the role and select the Edit action. The Role Details are displayed in edit mode. The Code, User Type, and Default Description, and any descriptions entered for a supported language cannot be edited. Descriptions for additional languages can be added.

List Configuration

List configuration enables the auto-selection of users into a list. These lists can be filled with the names of users that have the selected roles for the list.

Select the List Configuration option in the left pane. The List Configuration page opens.

Figure 2–2 List Configuration Page



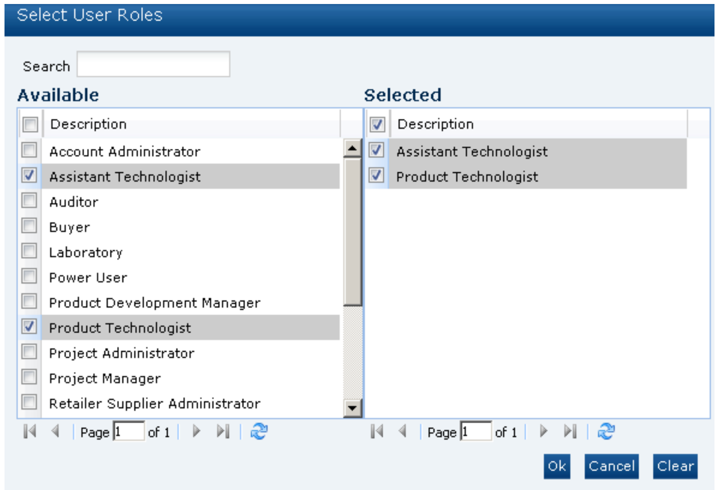
For each list configuration, the roles assigned for that list are shown.

To edit a list configuration, select the entry and then the Edit action. The Details page for the selected list appears.

Figure 2–3 List Configuration Details Page

Select the icon in the Roles panel to see the list of available roles. The Select User Roles dialog box appears. Select the roles you want for this list configuration and select **Ok**.

Figure 2–4 Select User Roles Dialog Box



Managing Contact Roles

To access contact roles, select the Contact Roles option in the left pane. The Contact Roles page opens. For each contact role, the description is shown and a column for each of the following with a Yes/No status for each role:

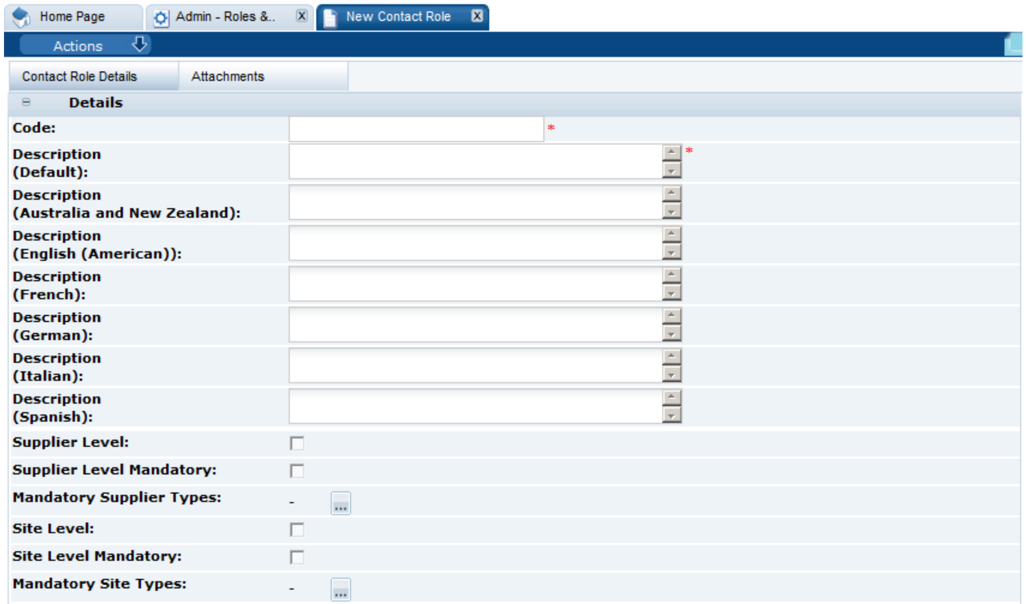
- Is Supplier Role?
- Is Mandatory Supplier Role?
- Is Site Role?
- Is Mandatory Site Role?

Adding a Contact Role

To add a new contact role:

1. Select the New Contact Role action. The New Contact Role page opens.

Figure 2–5 New Contact Role Page



2. Enter the details and select the Save action.

Table 2–4 New Contact Role Page Details

Details	Description
Code	Enter a unique code for this user role. Mandatory field.
Description	Enter the description for this role in the supported languages. The description for the default language is mandatory.
Supplier Level	Check if this is a supplier level contact role.
Supplier Level Mandatory	Check if this is supplier level contact role is mandatory. If a role is mandatory, a contact must be assigned to that role for a supplier record to be approved. A role may also be mandatory if it is required to automatically notify the relevant users when an action is required.
Mandatory Supplier Types	Click the icon and select the mandatory supplier types for this role.
Site Level	Check if this is a site level contact role.
Site Level Mandatory	Check if this site level contact role is mandatory. If a role is mandatory, a contact must be assigned to that role for a site record to be approved. A role may also be mandatory if it is required to automatically notify the relevant users when an action is required.
Mandatory Site Types	Click the icon and select the mandatory site types for this role.

Editing a Contact Role

To edit a contact role, select the role in the Contact Roles page and select the Edit action. The contact role record opens in edit mode in a new tab. The Code, Default Description, and any descriptions entered for a supported language cannot be edited. Descriptions for additional languages can be added.

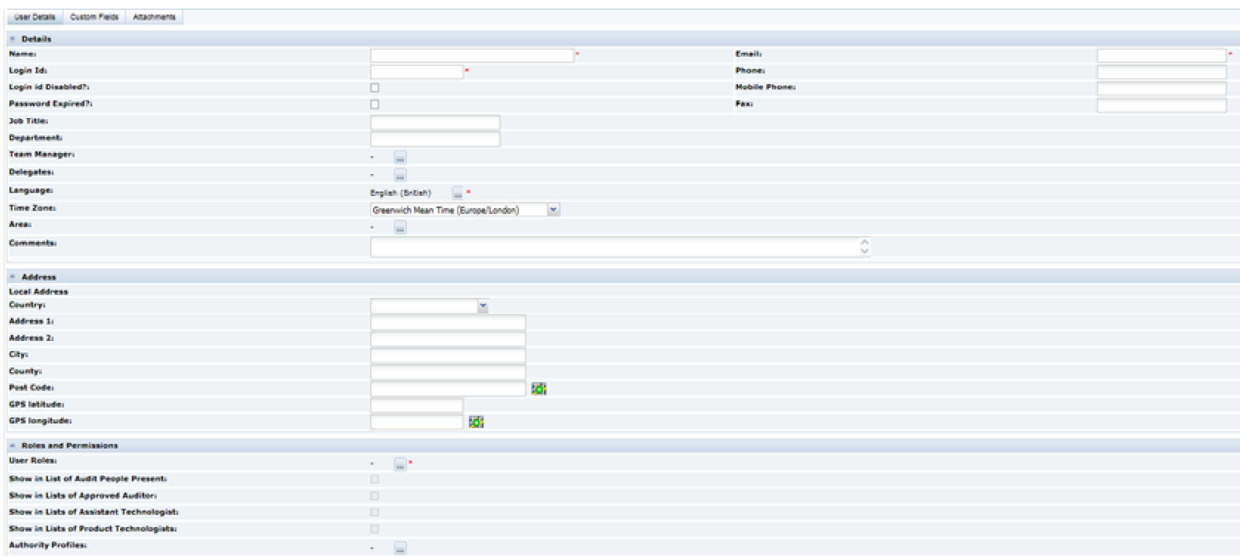
Managing Users

To access the users, select Users from the myCompany menu. The Company Users tab opens. The list of users is displayed. For each user, the user name, login ID, and email address are shown. If available, a phone number and mobile phone number are also shown.

Creating a User

To create a new user, select the New User action. The New User page appears. Figure 2–6 shows the format of the page when a retailer user is being created. Figure 2–7 shows the format when a supplier user is being created.

Figure 2–6 New User Page for a Retailer User



Enter the information in the following sections for the new retailer user:

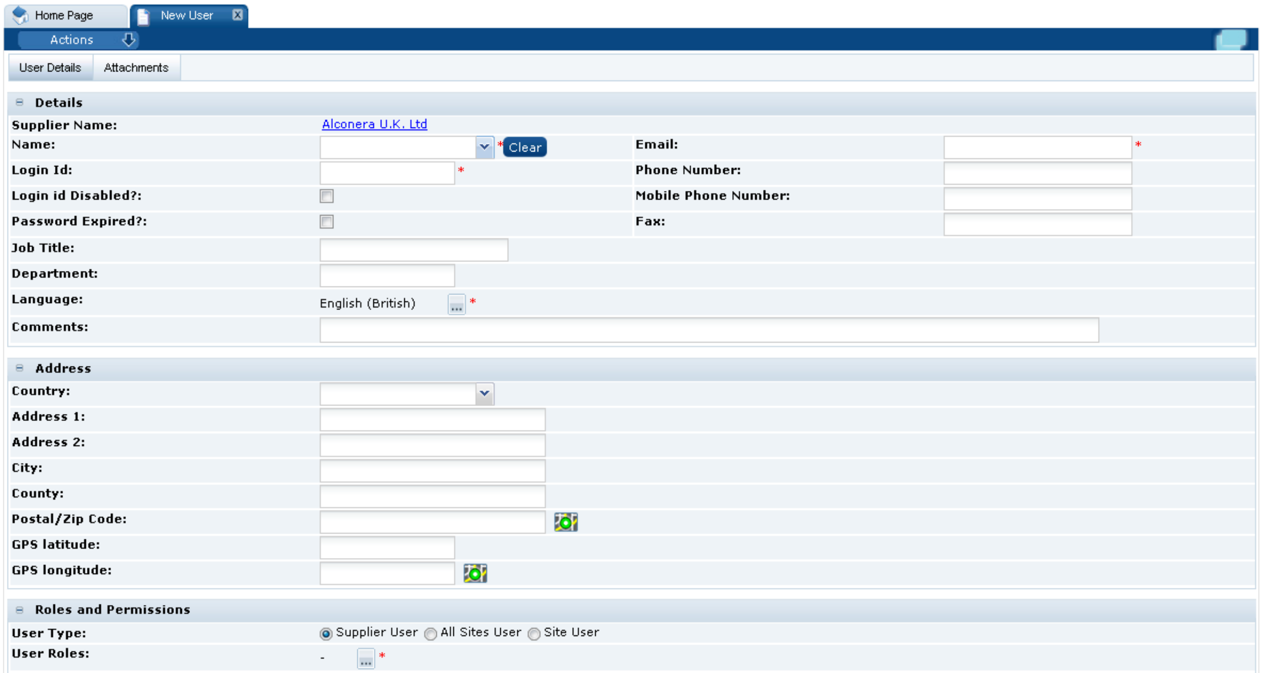
- Details

  The Name, Email, Login Id, and Language fields are mandatory.

  Area only appears if the Restrict Access by Area system parameter has been set. Assigning a user to an Area, or Areas, limits the user's visibility of Supplier information to just those that are assigned to that Area or Areas.

- Address
- Roles and Permissions:
  - User Roles is a mandatory field.
  - If this user should appear in a list configuration, check the box.
  - Additional Authority Profiles can be selected for this user.

Figure 2–7 New User Page for a Supplier User



Enter the information in the following sections for the new supplier user:

- Details

  The Name, Email, Login Id, and Language fields are mandatory.

- Address
- Roles and Permissions

  The list of available roles for this user is dependent on the user type selected. User Roles is a mandatory field.

Editing a User

To edit a user, select the user on the Company Users page and select the Edit action. The user record opens in edit mode in a new tab. The Login Id cannot be changed. If the user has User Administrator rights, the Login id Disabled and Password Expired fields can be changed.

Disabling a User

A user can be prevented from logging in the next time the user tries to log in. You must have the required permissions to be able to disable a login. To disable a user from logging in:

1. Select the user on the Company Users page.
2. Select the Edit action. A tab is opened with the user record in edit mode.
3. Check the Login id Disabled field. The field is found in the Details section. See Figure 2–6.
4. Save the changes.

Deleting a User

To delete a user:

1. Select the user in the Company Users page.
2. Select the Edit action. A tab opens with the user record in edit mode.
3. Select the Delete action. The Confirm Delete User dialog box appears.
4. Click **Ok**. If the user has enabled their account by completing the self-registration and setting their initial password, the system will not permit deletion of the account. In this case, a dialog box appears, preventing the deletion; click **Ok**.

Note: If deletion is not permitted, and an alternative is to deactivate the account, see "Disabling a User.". You may also wish to reduce the roles and permissions to the minimum permitted.

System Parameters

To manage the parameters for users, select the System Control option and then System Parameters. Table 2–5 describes the available parameters.

Table 2–5 System Parameters Used to Manage Users

Subtab	Parameter	Description
Log On	Min Length of Password	Minimum length required for a password. Default is 7.
Log On	Max Length of Password	Maximum length required for a password. Default is 15.
Log On	Min Letters in Password	Minimum number of letters required in a password. Default is 2.
Log On	Min Digits in Password	Minimum number of digits required in a password. Default is 1.
Log On	Min Uppercase Characters in Password	Minimum number of uppercase characters required in a password. Default is 1.
Log On	Min Lowercase Characters in Password	Minimum number of lowercase characters required in a password. Default is 1.
Log On	Password must begin with a Letter	If set to Yes, the password begin with a letter. Default is No.
Log On	User Password History	Number of past passwords the user has defined. This prevents a user from setting their to password to a previous password. Default is 24.
Log On	Password Minimum Life	This can be used to stop a user from quickly changing their password. Default is 1.

Table 2–5 (Cont.) System Parameters Used to Manage Users

Subtab	Parameter	Description
Log On	Site Details Update Reminder	Used for mySupplier login. Number of working days when a reminder is shown in a user's UIM when the user has logged in. It is used to ensure that Mandatory Contact details are kept up to date on both the supplier and sites. Default is 90 days. When the first supplier user logs in, they see an entry in the UIM drawing their attention to this. If they use the Confirm Details action, this stamps the date onto the record so that the next time a user logs in, the system checks if the current date is greater than the stamped date.
Log On	Password Expiry Limit (days)	Number of days a password can be used before it must be changed. Default is 180. Must be between 1 and 180.
Log On	Password Grace Period (days)	Number of days before the Password Expiry Limit is reached when the system starts prompting a user to change the password. Default is 21. Cannot be greater than Password Expiry Limit (days).
Log On	Max Login Attempts	Sets the number of times a user can enter an incorrect password before being locked out. This field is ignored if blank. Default is 5.
Log On	Open the system in new window	If set to Yes, the system opens in a new browser window after valid login credentials are entered. If set to No, the system opens in the current browser window. Default is Yes.
Log On	User Ts&Cs Active	If set to Yes, a new user will have to accept the Terms and Conditions before completing login. If set to No, the user is not prompted to accept Terms and Conditions. Default is Yes.
Global	Session Timeout (mins)	Number of minutes a session can remain idle before it times out and logs off the user. The countdown starts from the last save or refresh action. Default is 90.
Global	Session Timeout Warning (mins)	Number of minutes prior to the session timeout that a warning message is issued to prompt the user to save any work because the session has been idle and will time out after the set number of minutes. Default is 5. Cannot be greater than Session Timeout (mins).
Global	Default Language	Determines the default language used by the system once the user is logged in. Default is English. **Note:** Once set, the default language cannot be changed.
Urgent Items	Show missing mandatory user details	If set to Yes, when a user logs on and if there are any mandatory user details missing from the user's user record, an entry is shown in the UIM. Default is Yes.

Note: The parameters that control the password format and strength can only be edited by the Oracle authorized Administration logon. Changing these parameters results in all users' passwords being automatically expired, forcing each user to reset their password the next time they log in.

If the password parameters are changed, the following message is displayed. Click **Ok** to continue.

A change made affects the strength of the required passwords.
Click Ok to immediately Expire All User Passwords.

3

User Defined Fields

Brand owners may have additional information they need for different type of records. User-defined fields provide a number of fields in records that brand owners can utilize as needed.

Custom Fields

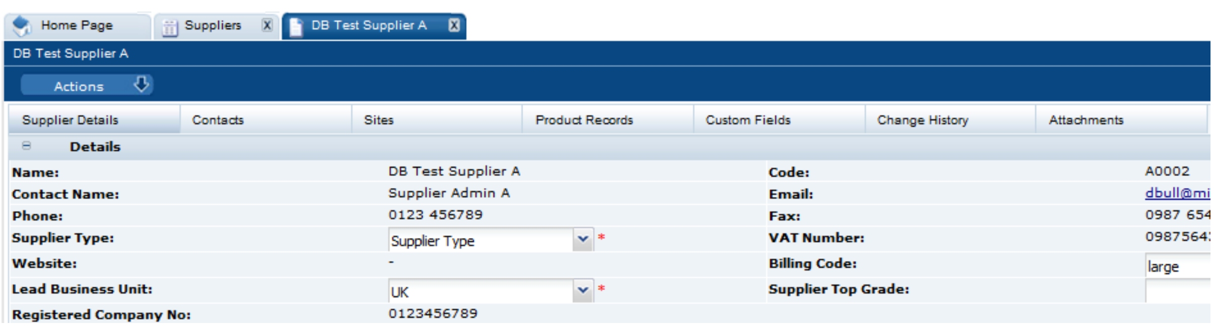
The layout of the custom fields depends on the different types of fields specified when the record is defined. The actual configuration of the custom fields is a portal implementation task, currently only accessible by the MICROS administrator. For product specifications, custom fields can be configured per section and/or as a specific section of the specification.

Figure 3–2 shows an example of a page layout with different field types.

The Custom Fields subtab appears to the left of the Change History subtab. If a record is copied, the custom fields are copied to the new record.

If custom fields are available for a record, the Custom Fields subtab is available on the record page. Figure 3–1 shows an example of the location of the tab.

Figure 3–1 Custom Fields Tab

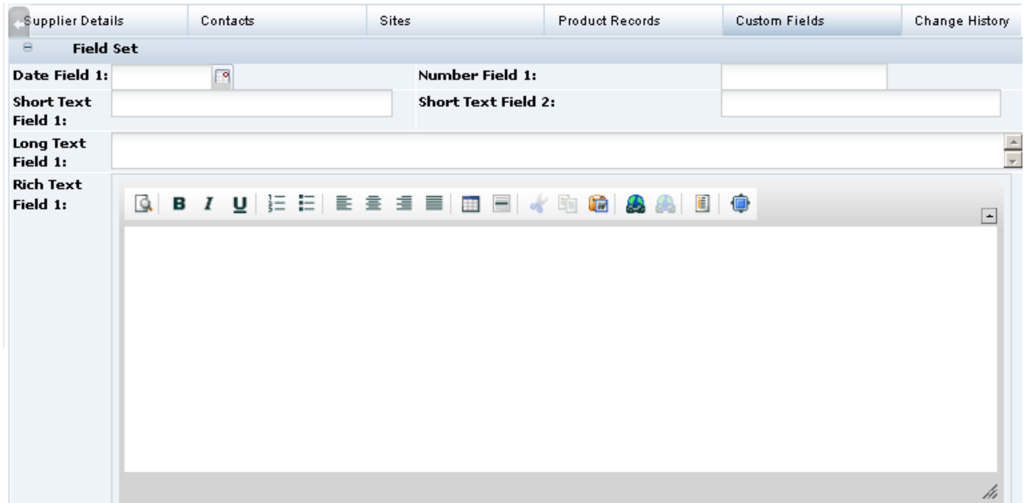


To see the custom fields data, select the Custom Fields subtab. The Custom Fields page opens.

Figure 3–2 Custom Fields Page

To enter data into the fields, select the Edit action. The input fields open. Make any updates and select the Save action.

Figure 3–3 Custom Fields Open for Editing



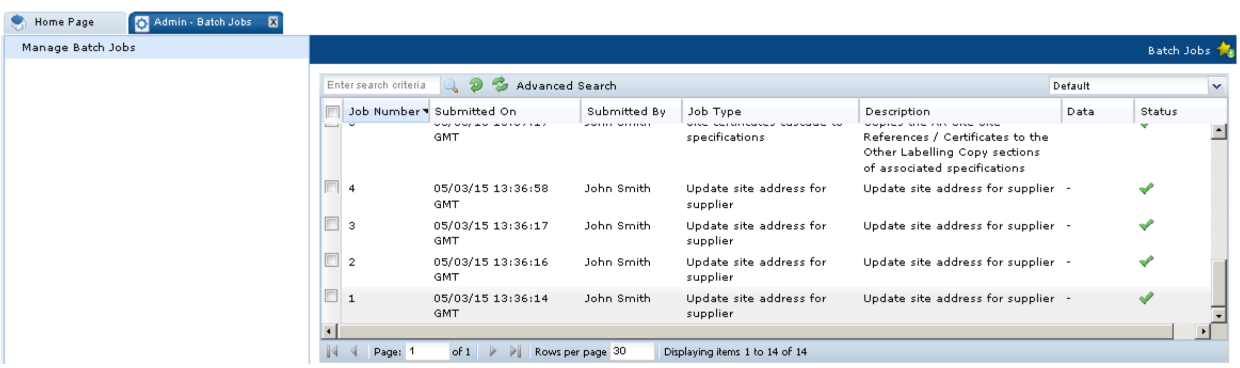
4

Job Management

Batch jobs are initiated by users when required to perform updates to records.

To manage batch jobs, select Batch Jobs from the Admin list. The Manage Batch Jobs page shows the list of all jobs. The jobs are shown in descending order with the most recent job at the top of the list.

Figure 4–1 Manage Batch Jobs Page



The following columns are shown for each job:

- Job Number
- Submitted On: Date and time when the job was submitted.
- Submitted By: Name of the user who submitted the job.
- Job Type
- Description
- Data: If a job was submitted using a spreadsheet, an icon is shown in this column. The user can click the spreadsheet icon and select whether to open or download the spreadsheet.
- Status: The following icons show the job status:

Table 4–1 Manage Batch Jobs Icons

Icon	Status	Description
	Created	The job is created.
	Submitted	The job is ready to run.
	In Progress	The job is currently running.

Table 4–1 (Cont.) Manage Batch Jobs Icons

Icon	Status	Description
	Completed	The job completed. All changes were successfully made.
	Failed	Errors were encountered. Changes were not made.
	Cancelled	The job was cancelled.
	Internal Failure	An internal failure occurred.

You can choose which batch jobs you want to view. The following list views are available:

- All Jobs
- Failed Jobs: Show jobs with a status of failed.
- Running Jobs: Shows jobs with a status of in progress.
- Site TM Changes: Shows jobs with a job type of Change Site Technologist.

5 Global Changes

This chapter describes the functionality available for making global changes to the assignment of users and Product Technologists. To make global changes, select Global Changes from the Admin list. The Admin - Global Changes tab opens. From this tab, the following updates can be made:

- Change Responsibility
- Change Site Managers by Spreadsheet
- Change myProject Project Manager
- Change myProject User Names
- Change myProduct Responsibility
- Change myProduct Produce Responsibility

For more information on the users and responsibilities for the applications, see the following chapters in this guide:

- For mySupplier, see Chapter 7.
- For myProject, see Chapter 9.
- For myProduct, see Chapter 8.

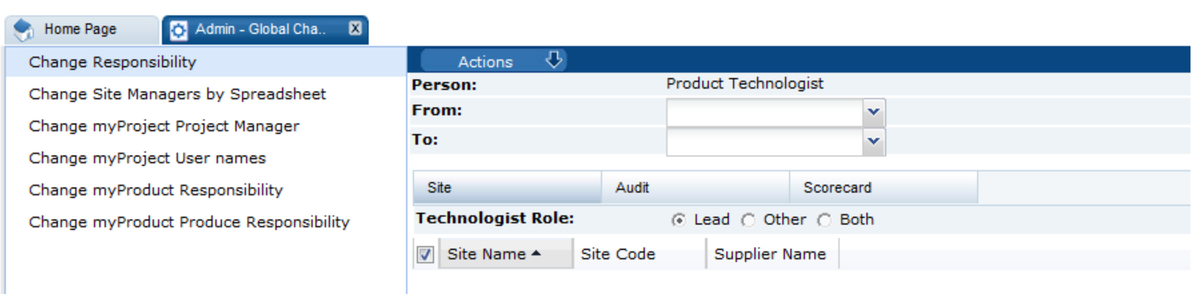
Change Responsibility

The Product Technologist responsible for managing sites can be changed.

To change this responsibility:

1. Select Change Responsibility in the left pane. The Change Responsibility page opens.

Figure 5–1 Change Responsibility Page



When the Site subtab is selected, the associated site name, site code, and supplier name are shown. You can also select to the role to be displayed in the list.

To see information based on audits, select the Audit subtab. To see information based on scorecards, select the Scorecard subtab. The site list is updated to display the selected information.

2. Select the change for the Product Technologist. The list of available of Product Technologists is shown in the From and To drop-down lists.
3. The list of sites is built based on the selection in the From field, that is, the list is filled with the records that are currently assigned to that person. Select the sites where the Product Technologist is to be changed. To select a site from the list, click the row.
4. To make this global change, select the Submit action.

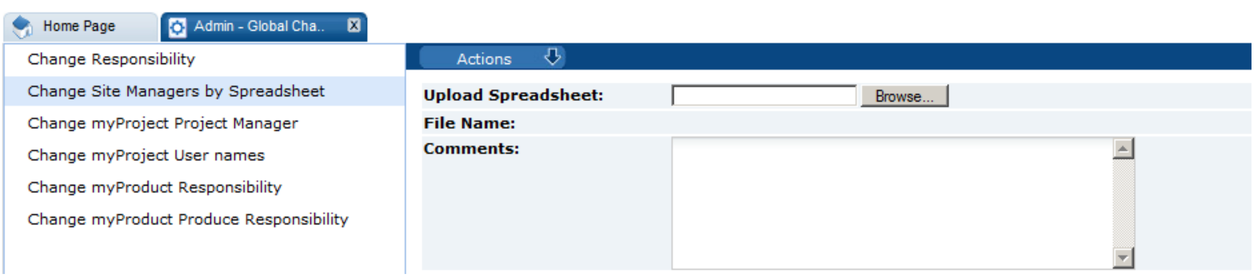
Change Site Managers by Spreadsheet

Instead of changing a particular technologist from one to another through the user interface, changes can be made using a spreadsheet and then uploading the changes.

To change site managers by uploading a spreadsheet:

1. Select Site Managers by Spreadsheet in the left pane. The Change Site Managers by Spreadsheet page opens.

Figure 5–2 Change Site Managers by Spreadsheet Page



2. Click **Browse** to search for the spreadsheet.
3. Enter any comments to describe the reason for the upload.
4. To upload the spreadsheet, select either the Submit or Submit, go to Manage Batch Jobs action.

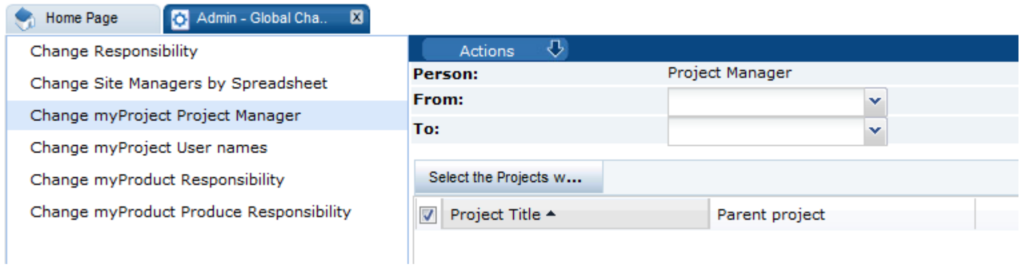
Change myProject Project Manager

The Project Manager for selected projects can be changed.

To change the project manager:

1. Select Change myProject Project Manager in the left pane. The Change myProject Project Manager page opens.

Figure 5–3 Change myProject Project Manager Page



For each project in the list, the project title and parent project are shown.

2. Select the change for the Project Manager. The list of available of Project Managers is shown in the From and To drop-down lists.
3. Select the projects where the Project Manager is to be changed. To select a project from the list, click the row.
4. To make this global change, select the Submit action.

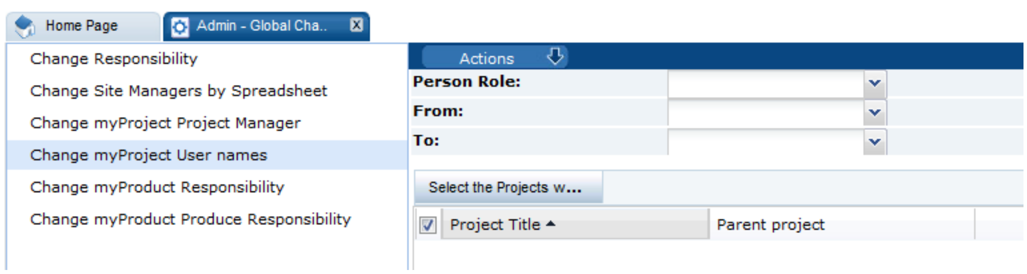
Change myProject User Names

The users assigned to a project can be changed.

To change the users:

1. Select Change myProject User Names in the left pane. The Change myProject User Names page opens.

Figure 5–4 Change myProject User Names Page



For each project in the list, the project title and parent project are shown.

2. Select the role to be changed from the drop-down list. The available roles are Responsible, Owner, or Viewer. The available choices in the From and To drop-down lists depend on the selected role.
3. Select the change for the role. The list of available of users is shown in the From and To drop-down lists.
4. The list of projects is built based on the selection in the From field, that is, the list is filled with the records that are currently assigned to that person. Select the projects where the Project Manager is to be changed. To select a project from the list, click the row.
5. To make this global change, select the Submit action.

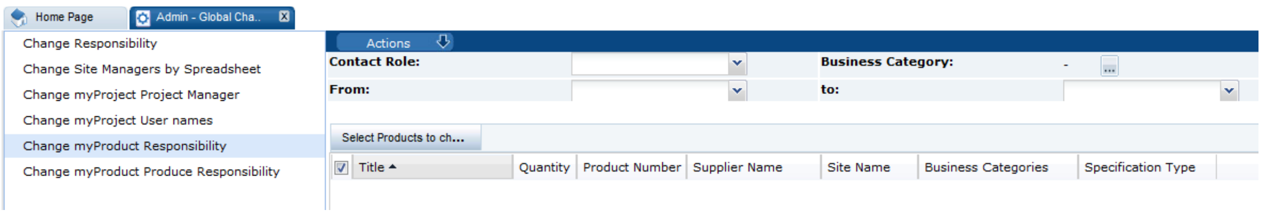
Change myProduct Responsibility

Responsibility for selected products can be changed.

To change product responsibility:

1. Select Change myProduct Responsibility in the left pane. The Change myProduct Responsibility page opens.

Figure 5–5 Change myProduct Responsibility Page



For each product in the list, the name of the product, quantity, product number, supplier name, site name, business categories, and specification type are shown.

2. Select the Contact Role to be changed from the drop-down list. The available roles are Technologist, Buyer, and Production Development Manager. The available choices in the From and To drop-down lists depend on the selected role and business category.

3. To select a business category, click the icon. The Select Business Categories dialog box appears. Select a category and select **Ok**. The list of products is changed to include only the selected business category.

4. The list of products is built based on the selection in the From field, that is, the list is filled with the records that are currently assigned to that person. Select the products where the selected role is to be changed. To select a product from the list, click the row.

5. To make this global change, select the Submit action.

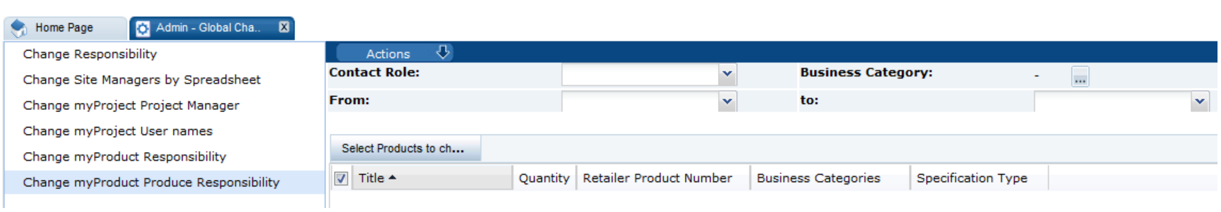
Change myProduct Produce Responsibility

Responsibility for selected produce products can be changed.

To change produce product responsibility:

1. Select Change myProduct Produce Responsibility in the left pane. The Change myProduct Produce Responsibility page opens.

Figure 5–6 Change myProduct Produce Responsibility Page



For each produce product in the list, the name of the product, quantity, retailer product number, business categories, and specification type are shown.

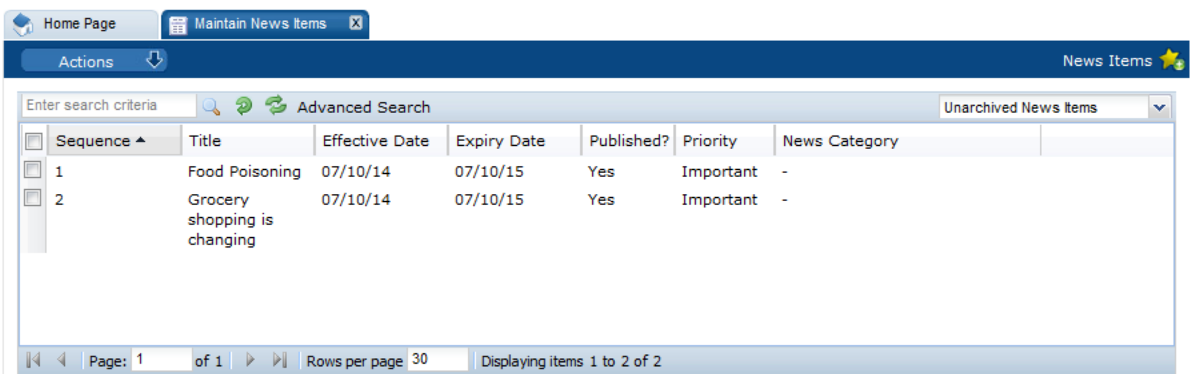
2. Select the Contact Role to be changed from the drop-down list. The available roles are Technologist, Buyer, and Production Development Manager. The available choices in the From and To drop-down lists depend on the selected role and business category.
3. To select a business category, click the icon. The Select Business Categories dialog box appears. Select a category and select **Ok**. The list of products is changed to include only the selected business category.
4. The list of produce products is built based on the selection in the From field, that is, the list is filled with the records that are currently assigned to that person. Select the produce products where the selected role is to be changed. To select a product from the list, click the row.
5. To make this global change, select the Submit action.

6

News App

If you have the News Administrator Authority Profile assigned to you, you can work with news items. Select Manage News on the Home page. The Maintain News Items tab opens.

Figure 6–1 Maintain News Items Tab



For more information, see the following sections:

- Create a News Item
- Edit the News Item Details
- View the Reader Log
- Delete a News Item

Create a News Item

To create a news item, select the New News Item action. A tab to create the item opens. After entering all the information, select the Save or Save & Exit action to create the item.

In the following figure, the Body field is only shown for the default language. When creating a new item, a Body field appears for each supported language.

Figure 6–2 New News Item Tab

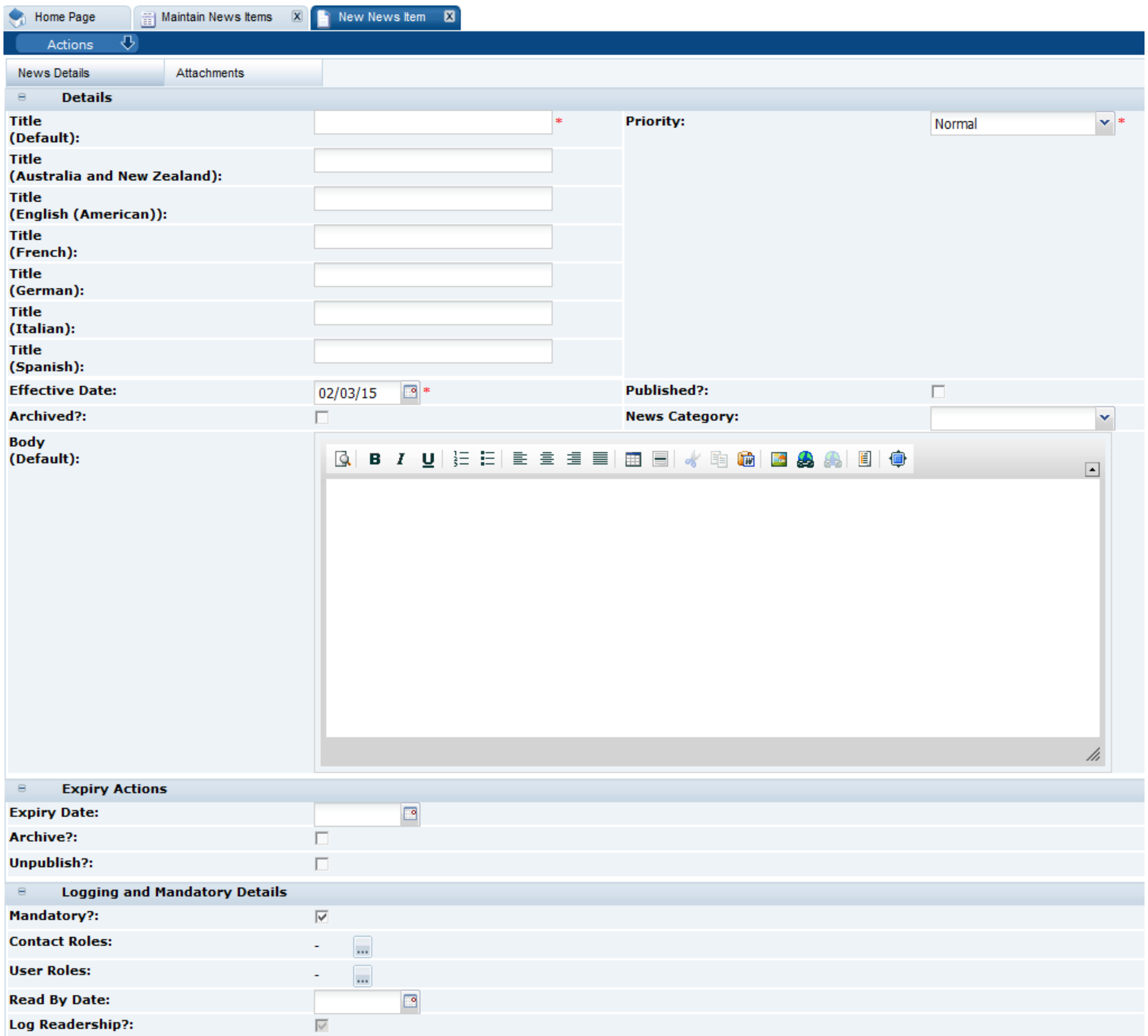


Table 6–1 describes the information that is provided for a new item.

Table 6–1 Information Needed to Create a News Item

Field	Description
Details	
Title	Enter the title of the news item to display. This default title is mandatory. You can enter a title in each supported language.
Priority	Select the priority for reading this item. This field is mandatory.
Effective Date	The date defaults to the current date. It cannot be set to an earlier date. This field is mandatory.
Published?	Check this box to make the news item visible to users.
Archived?	Check this box if the news item has been archived.
News Category	Select the news category for this item from the drop-down list.
Body	Description displayed in the News App. This information can be entered for each supported language.
Expiry Actions	

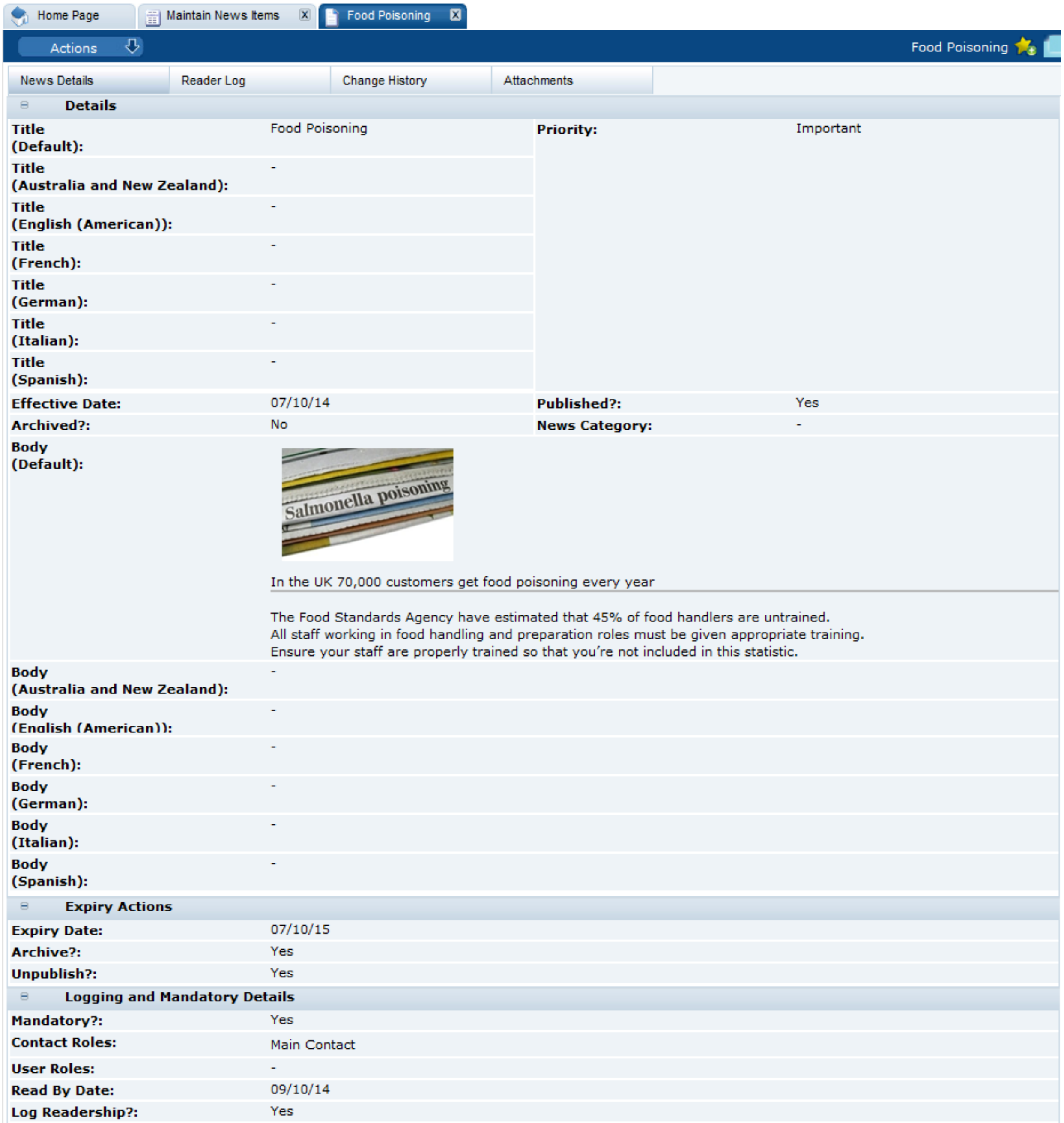
Table 6–1 (Cont.) Information Needed to Create a News Item

Field	Description
Expiry Date	If set, this date must be on or after the effective date.
Archive?	Check this box if the item is to be archived when the expiry date is reached.
Unpublish?	Check this box if the item is to be unpublished when the expiry date is reached.
Logging and Mandatory Details	
Mandatory?	Check this box if a reader is required to read the item. In the News App, the Read and Confirm link appears for the item.
Contact Roles	This field only appears if Mandatory is checked. Select the contact roles that determine who must read the news item.
User Roles	This field only appears if Mandatory is checked. Select the user roles that must determine who must read the news item.
Read By Date	This field only appears if Mandatory is checked. Enter the date by which the news item must be read.
Log Readership?	Check this box if a log of the readers is created. If the Mandatory field is selected, this field is automatically selected.

Edit the News Item Details

Click an item in the Maintain News Items page. A tab with the item details opens. The record is opened in read mode. To edit the details, select the Edit action. For information on the fields, see Table 6–1.

Figure 6–3 Item Details Page

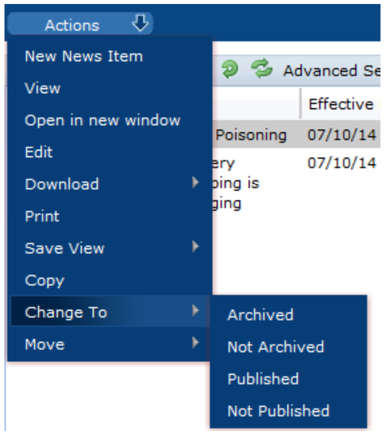


Publish a News Item

You can manually publish and un-publish news items. For a single news item, you can edit the news item record. You can also publish and un-publish from the Maintain News Items page:

1. Select the rows in the list.
2. Select the Change To action.

Figure 6–4 News Item Actions



3. Select the change to be made:

   - Published: The Change to published dialog box appears. To confirm the change to published, select **Ok**. The Publish field in the news item record is checked.
   - Not Published: The Change to not published dialog box appears. To confirm the change to not published, select **Ok**. The Publish field in the news item record is unchecked:
     – The item is removed from any user's News App.
     – The item is removed from any user's UIM.
     – The item is removed from any user's Recent Items list.
     – The item is removed from any user's Favourites App.

Archive a News Item

You can manually archive and un-archive news items. For a single news item, you can edit the news item record. You can also archive and un-archive from the Maintain News Items page:

1. Select the rows in the list.
2. Select the Change To action. See Figure 6–4.
3. Select the change to be made:

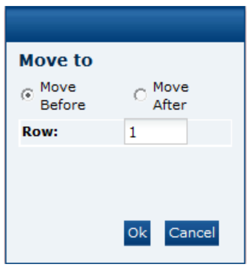
   - Archived: The Change to archived dialog box appears. To confirm the change to archived, select **Ok**:
     – The Archive field in the news item record is checked.
     – The item is removed from any user's News App.
     – The item is removed from any user's UIM.
     – The item is removed from any user's Recent Items list.
     – The item from any user's Favourites App.
   - Not Archived: The Change to not archived dialog box appears. To confirm the change to not archived, select **Ok**. The Archive field in the news item record is unchecked.

Alter the Sequence of the News Items

You can move a row in the list of news items up or down in the list. Select a row in the list and then select one of the following actions:

- Move up. The item is moved above the preceding row.
- Move down. The item is moved below the following row.
- Move to. Enter a row number and select whether to move the item before or after the selected row. Select **Ok**.

Figure 6–5 Move To Dialog Box



View the Reader Log

To view the reader log for a news item, select the Reader Log subtab. A tab opens with the log.

Figure 6–6 Reader Log

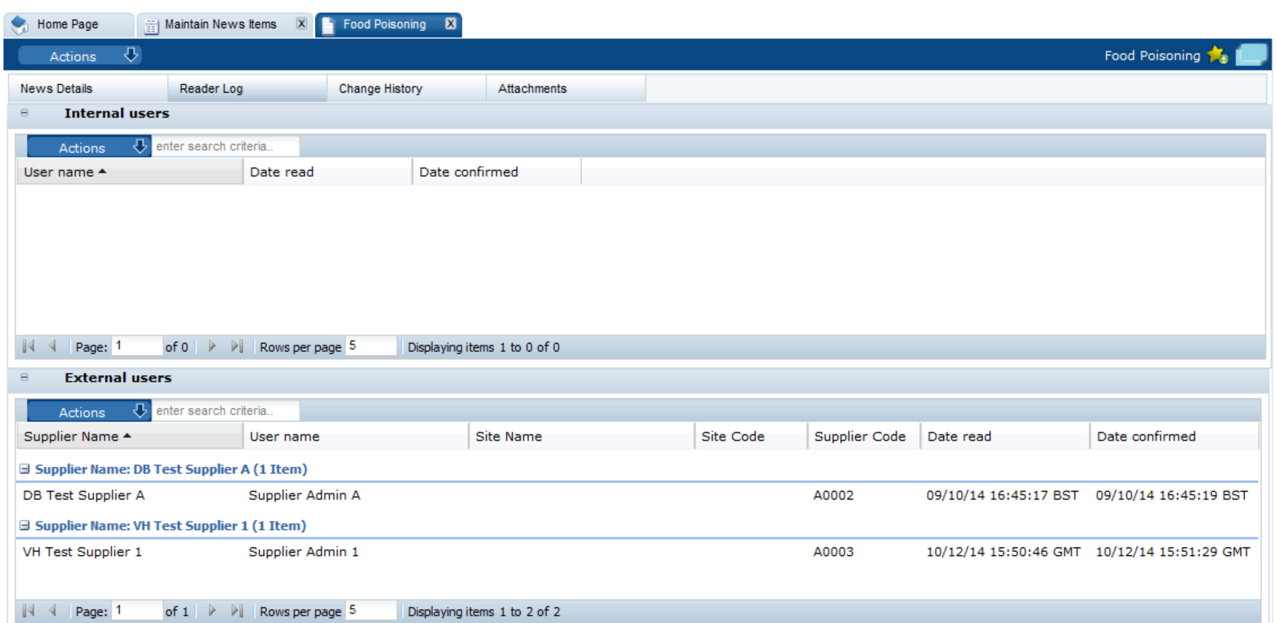


Table 6–2 describes the fields in the reader log. The Internal Users list is sorted by User Name. The External Users list is sorted by Supplier Name and then by User Name within each supplier.

Table 6–2 Reader Log Fields

Field	Description
Internal Users	
User Name	User name of the person who read the item.
Date Read	Date and time the item was first opened.
Date Confirmed	Date and time the item was marked as read.
External Users	
Supplier Name	Name of supplier this user is associated with.
User Name	User name of the person who read the item.
Site Name	Name of site this user is associated with.
Site Code	Code for the site this user is associated with.
Supplier Code	Code for the supplier this user is associated with.
Date Read	Date and time the item was first opened.
Date Confirmed	Date and time the item was marked as read.

Delete a News Item

To delete a news item:

1. In the Maintain News Items page, select a news item from the list.
2. Select the Delete action. The Confirm Delete News Item dialog box appears.
3. Select **Ok**. The news item is deleted:
   - The item is removed from any user's UIM list.
   - The item is removed from any user's Recent Items list.
   - The item is removed from any user's Favourites App.

System Parameters

To maintain the parameter used to support the News App, select the System Control option and then System Parameters.

Table 6–3 shows the specific system parameter used to support the News App.

Table 6–3 System Parameter to Support the News App

Subtab	Parameter	Description
Urgent Items	Show News Items	If set to Yes, news items are shown in the UIM. If set to No, news items are not shown.

7

mySupplier Administration

The following topics are covered in this chapter:

- Alerts
- Suppliers & Sites
- Scorecards
- Audits & Visits
- Roles and Permissions
- System Parameters

Alerts

Select the Alerts option from the Admin drop-down list. The following options are available in the left pane:

- Mailing Lists
- Manage Alert Status
- Manage Alert Response Status

Mailing Lists

Mailing lists can be used to create a predefined list of recipients to receive alerts.

To create a mailing list:

1. Select the New Mailing List action. The New Mailing List tab opens.
2. Enter the name of the mailing list. This field is mandatory.
3. Select the list of users from which you can choose the recipients in this mailing list. You can select Sites, Suppliers, or Sites & Suppliers. Open the Recipients tab to select from the list of available users.
4. Select the Save action.

Manage Alert Status

This option enables you to view the alert status codes and descriptions defined for each. To edit the list, select the Edit action. You can change the descriptions and add new status codes.

Figure 7–1 Alert Status Page

Actions | Alert Status

Status	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
UNSENT	Unsent	-	-	Non envoyé	Nicht gesendet	Non inviato	Sin enviar
SENT	Sent	-	-	Envoyé	Gesendet	Inviato	Enviado
RESENT	Re-sent	-	-	Renvoyé	Erneut gesendet	Inviato di nuovo	Enviado de nuevo
ARCHIVED	Archived	-	-	Archivé	Archiviert	Archiviato	Archivado
CANCELLED	Cancelled	-	-	Annulé	Storniert	Annullato	Cancelado

Manage Alert Response Status

This option enables you to view the alert status response codes and the descriptions defined for each. To edit the list, select the Edit action. You can change the descriptions and add new status response codes. The Alert Response Status page has the same format as the Alert Status page shown in Figure 7–1.

Suppliers & Sites

- Billing Codes
- Order Requests
- Supplier Statuses
- Site Statuses
- Business Categories
- Supplier Types
- Site Types
- Maintenance Audit Reasons
- Invoicing Systems
- Supplier Top Grades
- Site Top Grades
- Reference Statuses
- Reference Types
- Business Units
- Currencies
- Countries
- Other Production Details
- Area

Billing Codes

This option is used to define the billing codes used when creating a new supplier. The billing code determines how costs are calculated during the registration process.

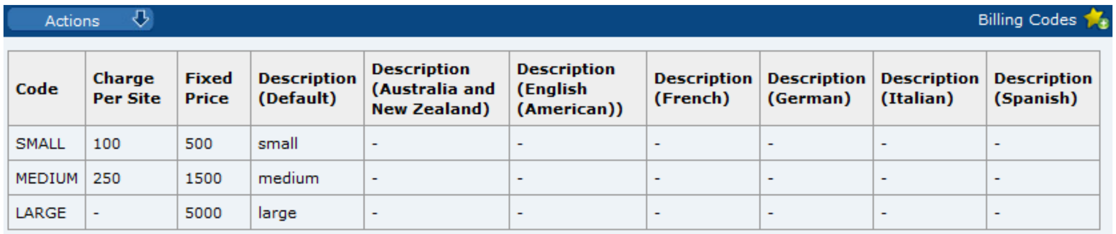
Billing codes are optional. If billing is not applicable or a portal, a code could be defined with a zero charge.

During the registration of a new supplier in the mySupplier module, the values in this table are used to determine the cost charged for the registration:

Registration Cost equals Fixed Price plus (Charge Per Site multiplied by the number of sites registered)

For more information, see the *Micros Supply Chain myCreations mySupplier User Guide*.

Figure 7–2 Billing Codes Page



Code	Charge Per Site	Fixed Price	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
SMALL	100	500	small	-	-	-	-	-	-
MEDIUM	250	1500	medium	-	-	-	-	-	-
LARGE	-	5000	large	-	-	-	-	-	-

To edit the list of billing codes, select the Edit action. The table opens in edit mode. The code and any existing descriptions cannot be edited.

To add a new billing code, click **Add**. A new row is added to the table. Enter the code, charge per site, fixed price, description in the default language. Enter any translations. Select the Save action.

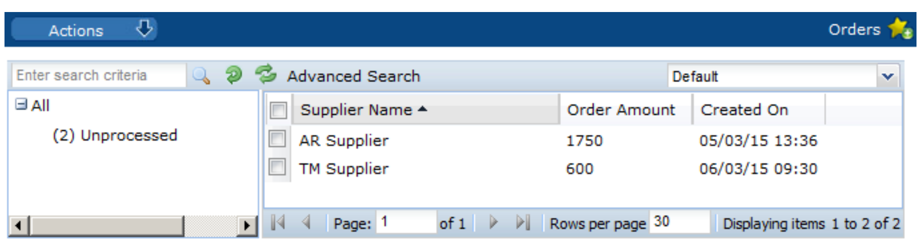
Order Requests

This option is used to manage registration order requests.

To work with orders:

1. Select Order Requests. The list of orders appears. It is sorted into processed and unprocessed orders.

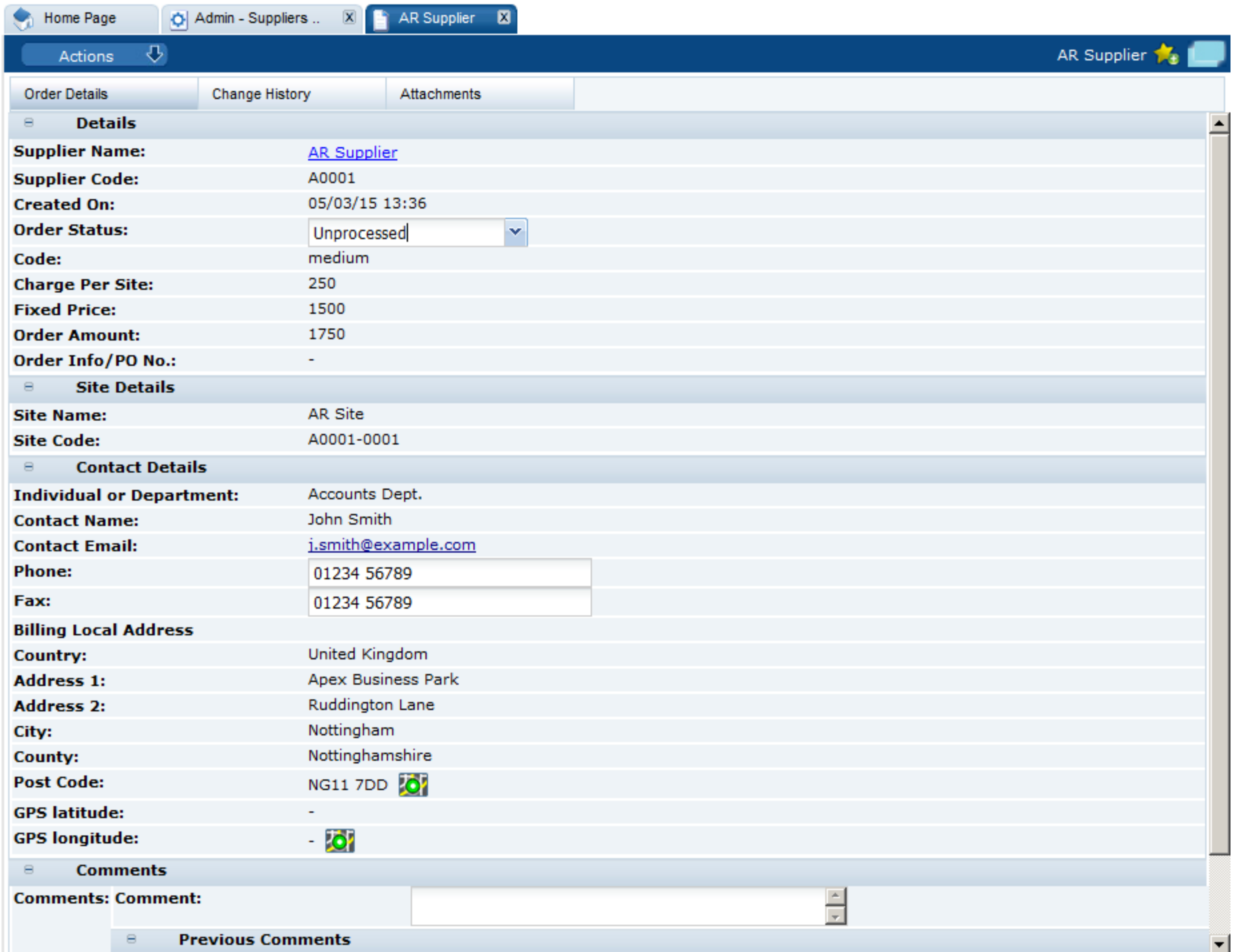
Figure 7–3 Orders Page



2. To see the details for an order, select the order and then select the View action. A new tab opens with the order details in read-only mode. For an example of the content, see Figure 7–4.

3. To edit an order, select the order an then select the Edit actions. A new tab opens with the order record in edit mode.

Figure 7–4 Order Details Page

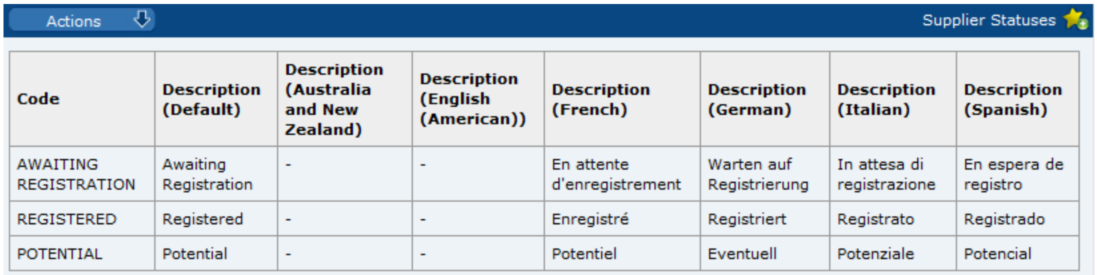


- Order status: Choose the status from the drop-down list. The status can be updated to Processed once the supplier has been billed.
- Contact Details: The Phone and Fax fields can be updated.
- Comments: Enter any comments.

Supplier Statuses

This option is used to define the statuses that can be associated with the registration of a supplier. The codes are defined by the system; new codes cannot be added. To edit the existing codes, select the Edit action. The table opens in edit mode. Any translations that do not already exist can be added. No other changes can be made.

Figure 7–5 Supplier Statuses Page



Actions | Supplier Statuses

Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
AWAITING REGISTRATION	Awaiting Registration	-	-	En attente d'enregistrement	Warten auf Registrierung	In attesa di registrazione	En espera de registro
REGISTERED	Registered	-	-	Enregistré	Registriert	Registrato	Registrado
POTENTIAL	Potential	-	-	Potentiel	Eventuell	Potenziale	Potencial

Site Statuses

This option is used to define the statuses that can be associated with a site. The statuses are defined by the system; new statuses cannot be added. To edit the existing statuses, select the Edit action. The table opens in edit mode. Any translations that do not already exist can be added. No other changes can be made.

Figure 7–6 Site Statuses Page

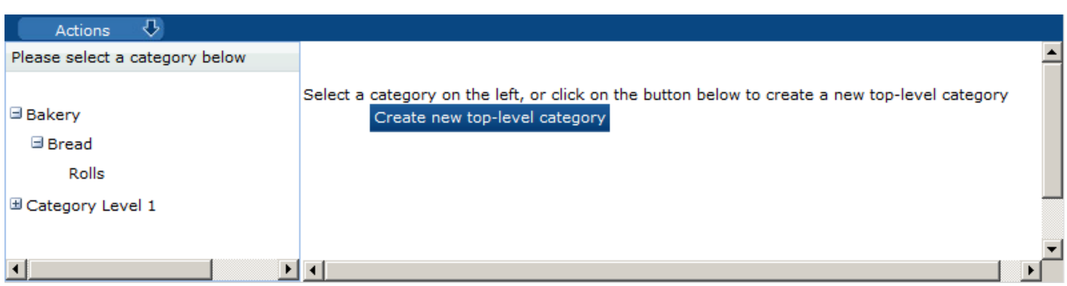
Actions | Site Statuses

Status	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
AWAITING REGISTRATION	Awaiting Registration	-	-	En attente d'enregistrement	Warten auf Registrierung	In attesa di registrazione	En espera de registro
AWAITING APPROVAL	Awaiting Approval	-	-	En attente d'approbation	Warten auf Freigabe	In attesa d'approvazione	En espera de aprobación
ACTIVE	Active	-	-	Actif	Aktiv	Attivo	Activo
UNAPPROVED	Unapproved	-	-	Non approuvé	Nicht freigegeben	Non approvato	No aprobado
INACTIVE	Inactive	-	-	Inactif	Nicht aktiv	Inattivo	Inactivo
DELISTED	Delisted	-	-	Sorti de la liste	Ausgelistet	Fuori elenco	Fuera de lista

Business Categories

Select the Business Categories option in the left pane. The list of defined business categories appears in the right pane. Each top-level category can be expanded to show its child categories.

Figure 7–7 Business Categories Page

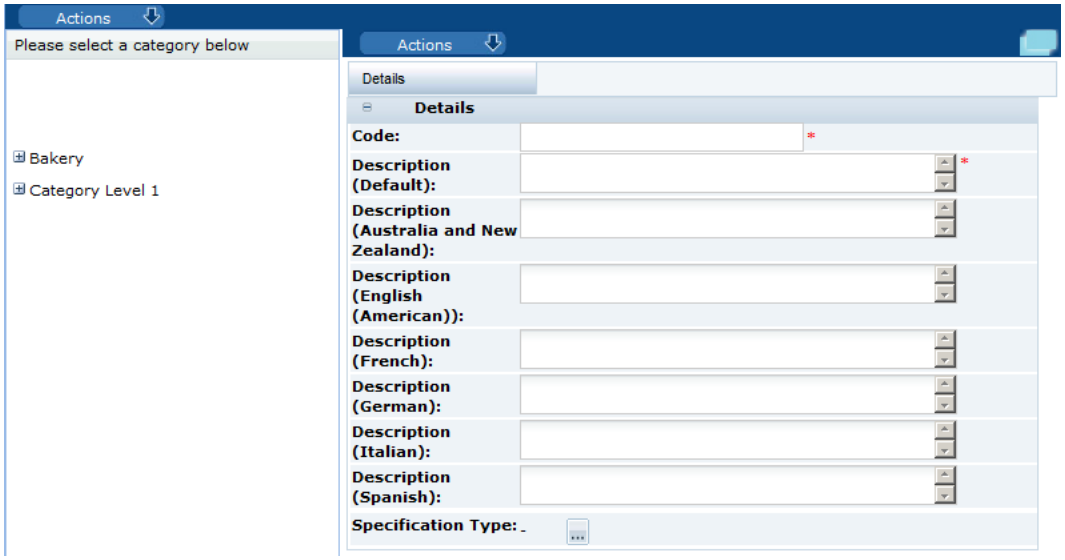


To edit a category entry, select the entry in the left pane and then select the Edit action in the right pane. The category opens in edit mode. The descriptions and specification types can be edited. For an example of the content of this page, see Figure 7–8.

To create a new top-level category:

1. Click **Create new top-level category**. The Business Category Details page opens.

Figure 7–8 Add Business Category Details Page

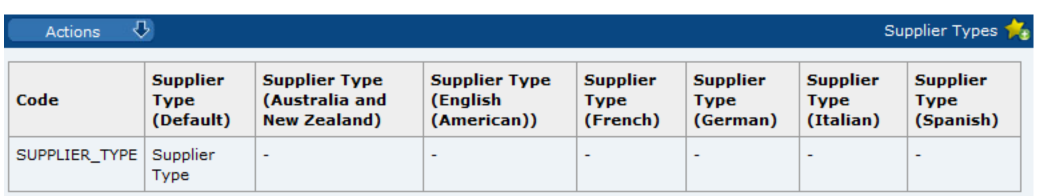


2. Enter the details for the new category:
   - Enter the code. This is a mandatory field.
   - Enter the description for the default language. This is a mandatory field. Enter any translations.
   - To select the specification types for this level, click the icon. The Select Specification Types dialog box appears. Select the specifications for this level and click **Ok**.
3. Select the Save action. The business category is added to the list of categories.
4. To add child categories, select the top-level category and then select the Add Child Category action.
5. Enter the details for the child level and select the Save action.

Supplier Types

This option is used to define the types of suppliers that can be created.

Figure 7–9 Supplier Types Page



Code	Supplier Type (Default)	Supplier Type (Australia and New Zealand)	Supplier Type (English (American))	Supplier Type (French)	Supplier Type (German)	Supplier Type (Italian)	Supplier Type (Spanish)
SUPPLIER_TYPE	Supplier Type	-	-	-	-	-	-

To edit the list of supplier types, select the Edit action. The table opens in edit mode. For existing supplier types, only the translated descriptions that do not already exist can be edited. To add a supplier type, click **Add**. A new row is added to the table. Enter the new supplier type and description in the default language. Enter any translations. Select the Save action.

Site Types

This option is used to define the types of sites that can be created.

To edit the list of site types:

1. Select the Edit action. The table opens in edit mode. For existing site types, only the translated descriptions that do not already exist can be edited.
2. To add a site type:
   a. Click **Add**. A new row is added to the table.
   b. Enter the new site type and description in the default language. Enter any translations.
   c. To select the specification types enabled for this site, click the icon and select the specifications in the dialog box. Click **Ok**.
3. Select the Save action.

Maintenance Audit Reasons

This option is used to define the reasons why a maintenance audit needs to take place. The Maintenance Audit Reasons page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of reasons, select the Edit action. The table opens in edit mode. For existing reasons, only the translated descriptions that do not already exist can be edited. To add a maintenance audit reason, click **Add**. A new row is added to the table. Enter the new reason code and description in the default language. Enter any translations. Select the Save action.

Invoicing Systems

Invoicing systems are used in the Billing Details area of the Supplier and Site records to assign alternative account codes, such as the supplier's account number in the retailer's corporate purchasing system. This option is used to define the available invoicing systems. The Invoicing Systems page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of invoicing systems, select the Edit action. The table opens in edit mode. For existing invoicing systems, only the translated descriptions that do not already exist can be edited. To add an invoicing system, click **Add**. A new row is added to the table. Enter the new invoicing system code and description in the default language. Enter any translations. Select the Save action.

Supplier Top Grades

This option is used to define the grades that can be associated with a supplier for an audit/visit, for example, A, B, and C. The Supplier Top Grades page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of grades, select the Edit action. The table opens in edit mode. For existing grades, only the translated descriptions that do not already exist can be edited. To add a new grade, click **Add**. A new row is added to the table. Enter the new grade code and description in the default language. Enter any translations. Select the Save action.

Site Top Grades

This option is used to define the grades that can be associated with a site for an audit/visit, for example, A, B, and C. The Site Top Grades page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of grades, select the Edit action. The table opens in edit mode. For existing grades, only the translated descriptions that do not already exist can be edited. To add a new grade, click **Add**. A new row is added to the table. Enter the new grade code and description in the default language. Enter any translations. Select the Save action.

Reference Statuses

This option is used to define the reference codes that can be associated with a supplier site, for example, the health mark codes used in the UK or the FDA registration numbers used in the US. The Reference Status page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of statuses, select the Edit action. The table opens in edit mode. For existing statuses, only the translated descriptions that do not already exist can be edited. To add a new status, click **Add**. A new row is added to the table. Enter the new code and description in the default language. Enter any translations. Select the Save action.

Reference Types

This option is used to define the reference types, or certificate types, that can be associated with a supplier.

Figure 7–10 Reference Types Page

Actions

Reference Types

Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
DAIRY	Dairy Est. No.	-	-	-	-	-	-
EC_LICENCE	EC Licence Number	-	-	-	-	-	-
HEALTHMARK	Healthmark	-	-	-	-	-	-
SEDEX	Organic Certification	-	-	-	-	-	-
ORGANIC CERT	Sedex Reference No.	-	-	-	-	-	-
BRC	BRC Ref. No.	-	-	-	-	-	-
EQOS	EQOS Ref. No.	-	-	-	-	-	-
GSI	GS1 Ref. No.	-	-	-	-	-	-
HACCP	Organic Certification	-	-	-	-	-	-
KOSHER	Kosher Certification	-	-	-	-	-	-
MEAT EST	Meat Est. No.	-	-	-	-	-	-
PLANT LICENCE	Plant License Number	-	-	-	-	-	-
PROCESS PRODUCTS	Process Products Est. No.	-	-	-	-	-	-

To edit the list of reference types, select the Edit action. The table opens in edit mode. For existing types, only the translated descriptions that do not already exist can be edited. To add a new type, click **Add**. A new row is added to the table. Enter the new type code and description in the default language. Enter any translations. Select the Save action.

Business Units

This option is used to define the classifications of suppliers and sites.

Figure 7–11 Business Units Page

Actions | Business Units

Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
UK	UK	-	-	-	-	-	-
ROI	Republic Of Ireland	-	-	-	-	-	-
USA	United States of America	-	-	-	-	-	-
CENTRAL_EUROPE	Central Europe	-	-	-	-	-	-
FAR_EAST	Far East	-	-	-	-	-	-

To edit the list of business units, select the Edit action. The table opens in edit mode. For existing business units, only the translated descriptions that do not already exist can be edited. To add a new business unit, click **Add**. A new row is added to the table. Enter the new business code and description in the default language. Enter any translations. Select the Save action.

Currencies

This option is used to define the supported currencies, for example, Sterling and Dollars. The Currencies page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of currencies, select the Edit action. The table opens in edit mode. For existing currencies, only the translated descriptions that do not already exist can be edited. To add a new currency, click **Add**. A new row is added to the table. Enter the new currency code and description in the default language. Enter any translations. Select the Save action.

Countries

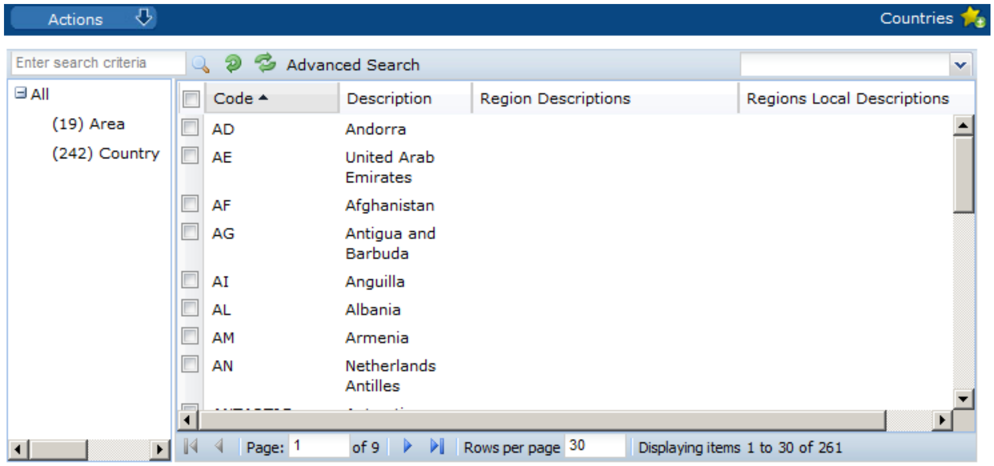
This option is used to define the list of countries used throughout the system (in addresses, countries of origin, countries of manufacture, and so on).

The maintenance of Countries also incorporates Areas and Regions. Areas are geographical areas that are not countries, but may be referenced in a similar way within the system. For example, the country of origin of a product may be a country or may be an area, such as the Atlantic Ocean.

When the user selects from the pick-list of countries, it either contains a list of just Countries (for example, where completing an address), or Countries and Areas (for example, where selecting a country of origin).

A list of Regions can be maintained against a Country to provide, for example, the states or countries of that country. The list can be used to provide a pick-list of the states/counties for use when entering the address for that country.

Figure 7–12 Countries Page

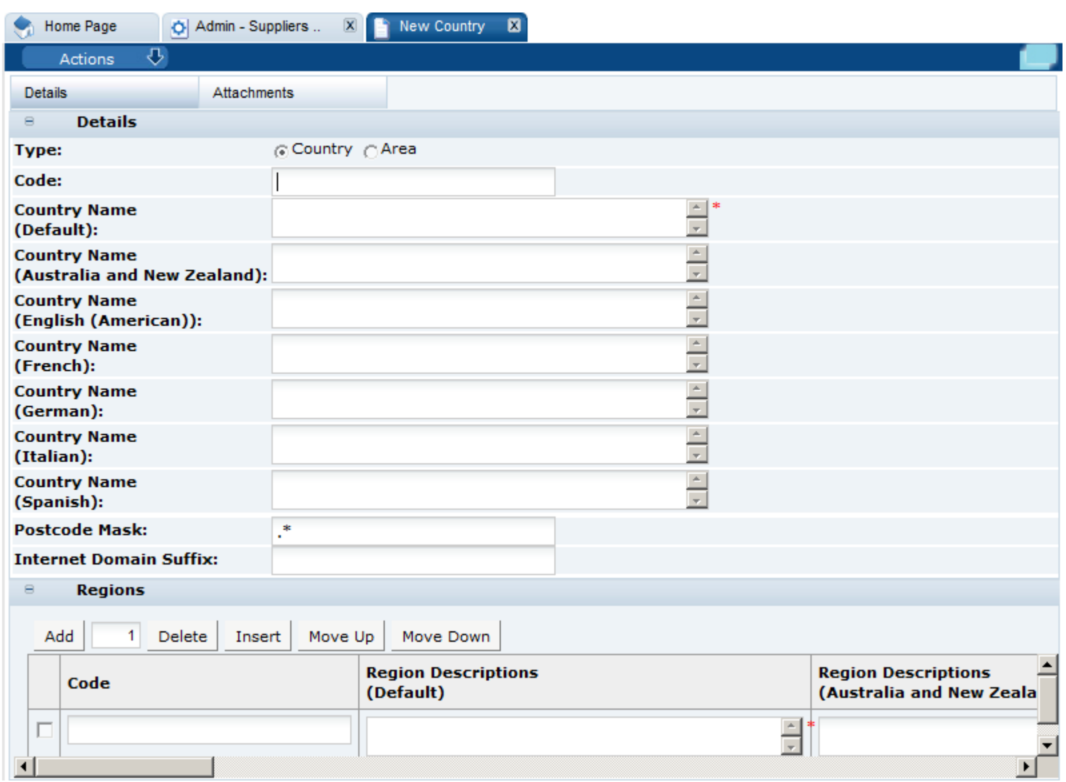


To edit a country entry, select the entry in the list and then select the Edit action. A tab opens in edit mode. Translated descriptions that do not already exist and additional regions can be added. For an example of the content of this page, see Figure 7–13.

To add a new country:

1. Select the New Country action. The New Country tab opens.

Figure 7–13 New Country Page



2. In the Details section:
   - Type: Select whether this is a country or area.
   - Code: Enter a code for the country.
   - Country Name: Enter the country name in the default language. This field is mandatory. Enter any translations.
   - Postcode Mask: The Postcode Mark is used to define the format of the postal or zip code for the country. Enter a post code mask to be used for this country.
   - Internet Domain Suffix: Enter the Internet domain suffix used for this country.
3. In the Regions section, enter any regions for this country or area. To add a region, click **Add**. A row is added to the table. Enter the code for the region. Enter a description in the default language. The description is a mandatory field. Enter any translations.
4. Select the Save action.

Other Production Details

This option is used to define the list of production details that can be assigned to a site. The Other Production Details page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of production details, select the Edit action. The table opens in edit mode. For existing details, only the translated descriptions that do not already exist can be edited. To add a new production detail, click **Add**. A new row is added to the table. Enter the new detail code and description in the default language. Enter any translations. Select the Save action.

Area

This option is used to define the supported areas. The Areas page has the same format as the Supplier Statuses page shown in Figure 7–5.

To edit the list of areas, select the Edit action. The table opens in edit mode. For existing areas, only the translated descriptions that do not already exist can be edited. To add a new area, click **Add**. A new row is added to the table. Enter the new area code and description in the default language. Enter any translations. Select the Save action.

Scorecards

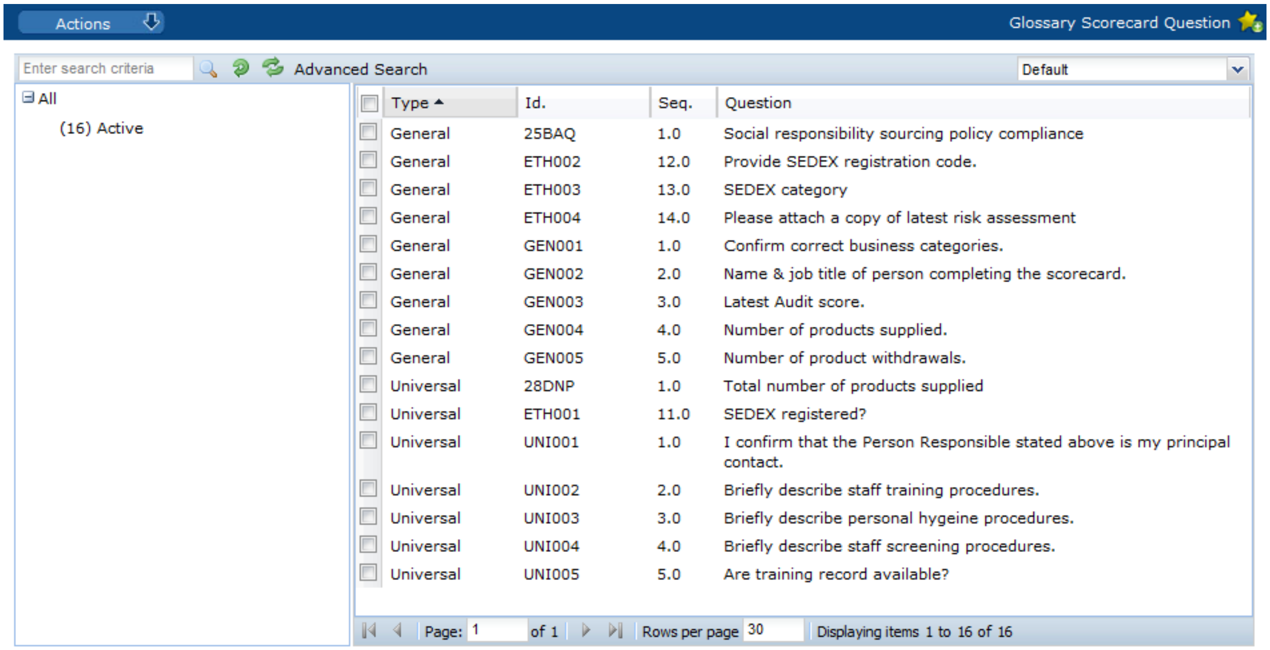
Select the Scorecards option from the Admin drop-down list. The following options are available in the left pane:

- Scorecard Questions
- Scorecard Templates
- Scorecard Status

Scorecard Questions

Each scorecard template is comprised of a series of questions which may be selected from this glossary.

Figure 7–14 Glossary Scorecard Question Page

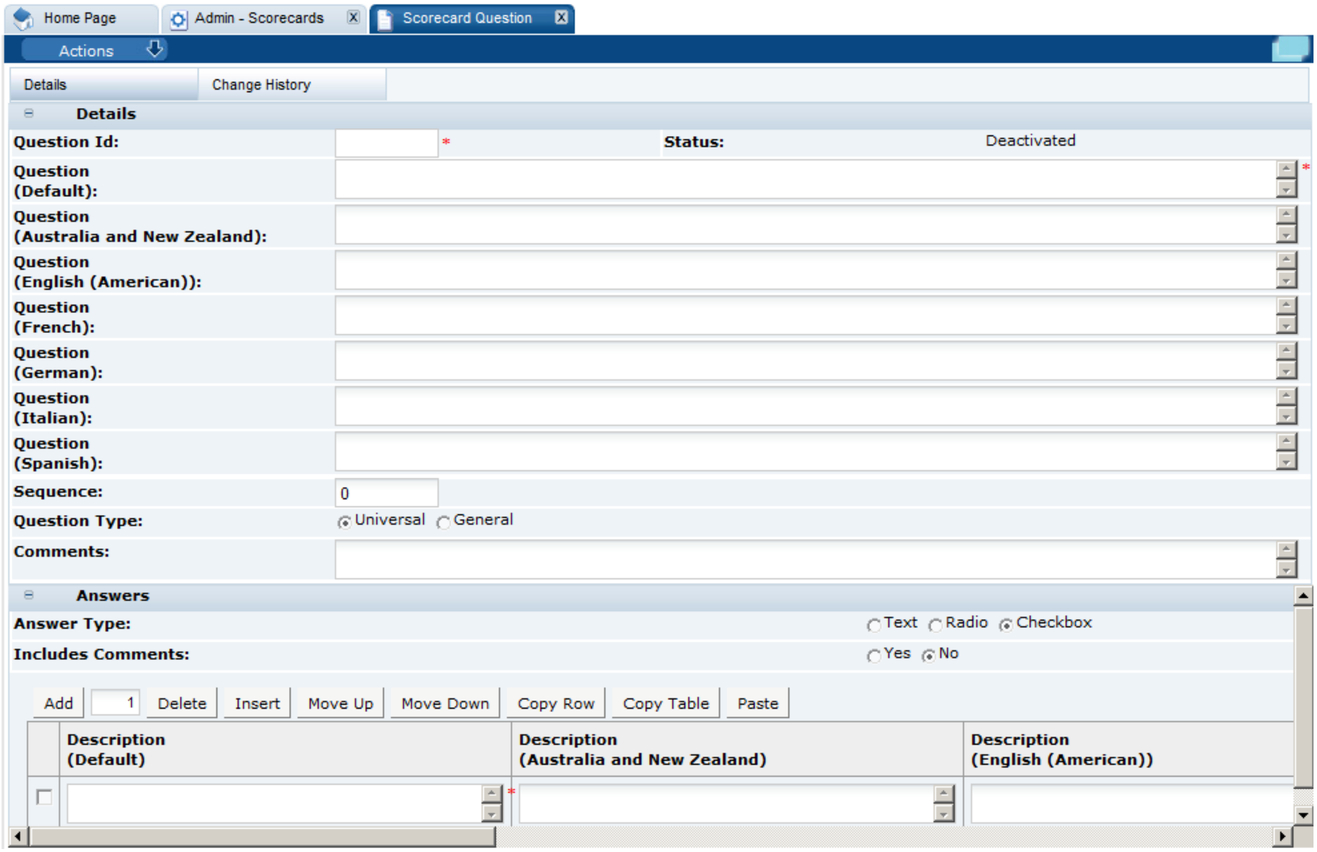


To edit a question, select the question and then select the Edit action. A tab opens with the record in edit mode.

To create a new scorecard question:

1. Select the New Question action. The Scorecard Question tab opens.

Figure 7–15 New Scorecard Question Page



2. In the Details section:

   - Question Id: Enter the ID for this question. The ID must be between 3 and 10 characters and unique. The value cannot be changed once the question has been created. This field is mandatory.
   - Status: The status is set to Deactivated.
   - Question: Enter the question in the default language. This field is mandatory.
   - Sequence: Enter the sequence number for this question. The sequence number is used to set the default order of questions within the scorecard template.
   - Question Type: Select the type of question:
     – Universal questions are automatically added to a scorecard template. These questions may be removed and individually re-added as required (if configured in System Parameters to allow removal).
     – General questions are manually added to a scorecard template from the questions glossary.
   - Comments: Enter any comments. This field is not mandatory.

3. In the Answers section:

   - Answer Type: Select the type of answers allowed for this question.
   - Includes Comments: If set to Yes, a text field is included in the questionnaire to enable the user to enter any comments.

- To add an answer choice, click **Add**. Enter the answer in the default language. This is a mandatory field. Enter any translations.

4. Select the Save action.

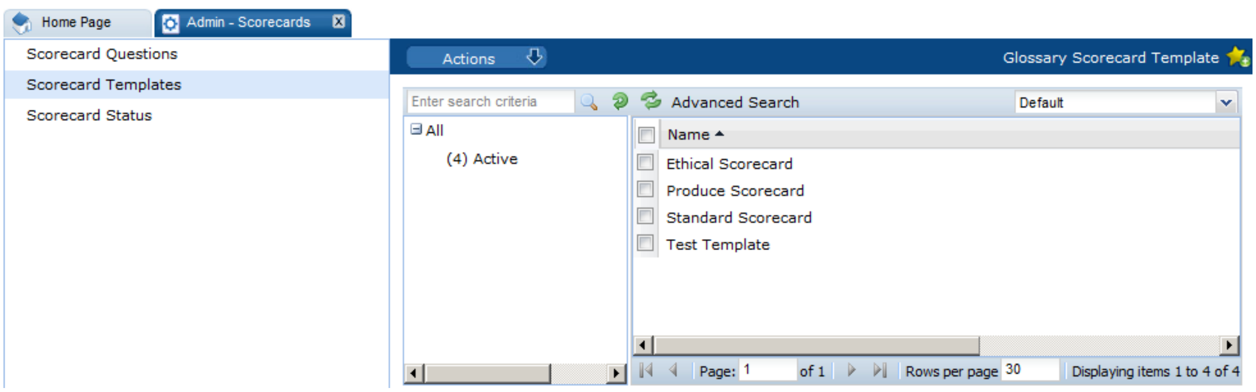
Scorecard Templates

Scorecards provide a means for the retailer to assess their suppliers on an on-going (or ad hoc) basis against a set of predefined criteria. Scorecards are made up of a series of questions which may be answered by the suppler as a self-assessment or completed by the retailer.

Any number of types of scorecard can be configured, with the option to use weighted scoring for the overall grading of suppliers' responses. On completion of a scorecard, the next one can be automatically scheduled based on a predefined periodic or quarterly frequency.

Scorecard templates define the rules that control the behavior of the different types of scorecards. Every scorecard is created from a template which defines the rules for how it behaves within the system, that is, the set of questions and permitted answers, the setting of basic default values, and whether certain fields are used or hidden.

Figure 7–16 Glossary Scorecard Templates Page



To edit a template, select the entry and then select the Edit action. A tab opens in edit mode to enable you to edit the template. For an example of the content, see Figure 7–17.

To create a new template:

1. Select the New Scorecard Template action. The New Scorecard Template tab opens.

Figure 7–17 New Scorecard Template Page

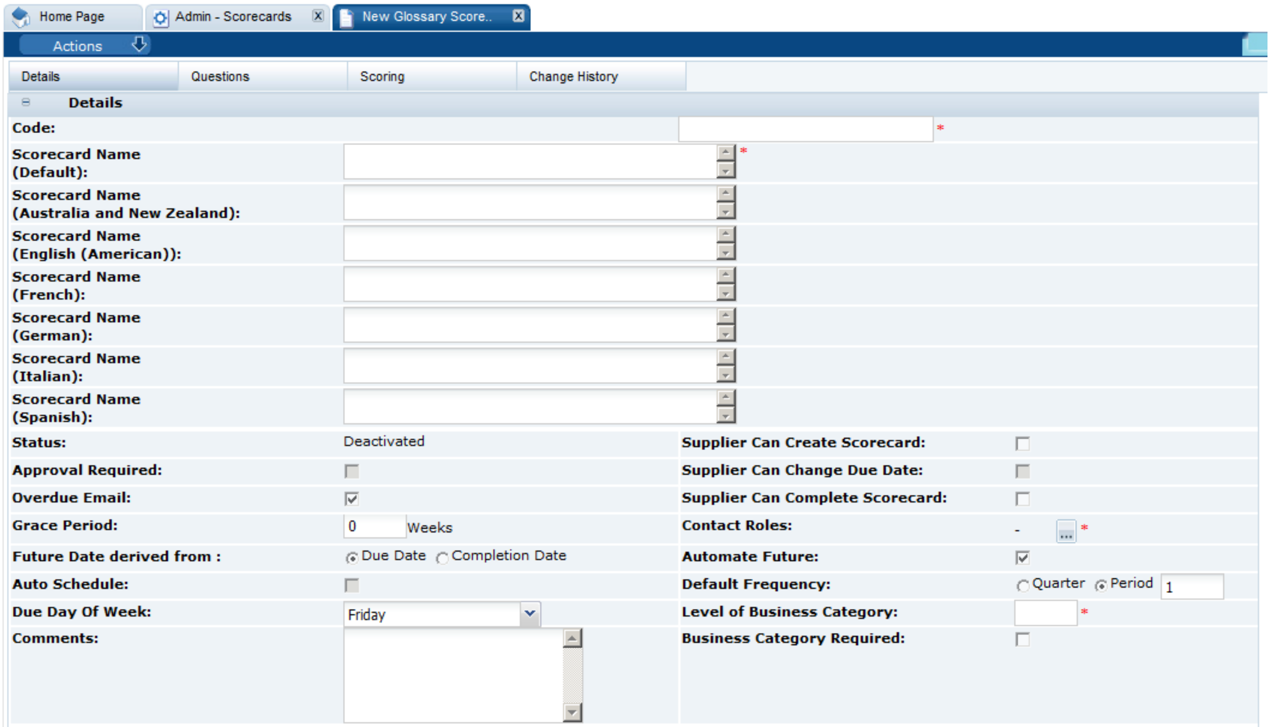


Table 7–1 describes the fields in the Details section.

Table 7–1 New Scorecard Template Fields

Field	Description
Code	Enter a unique code for this template. This field is mandatory.
Scorecard Name	Enter the name for the template in the default language. This field is mandatory. Enter the translations.
Status	The status is set to Deactivated.
Supplier Can Create Scorecard	If checked, the supplier user can choose to create this type of scorecard. The default is unchecked.
Supplier Can Change Due Date	If the supplier can create this type of scorecard and this field is checked, the supplier user may also change the due date of this type of scorecard. The default is unchecked.
Supplier Can Complete Scorecard	If checked, the supplier user may choose to complete this type of scorecard. The default is unchecked.
Approval Required	If the supplier can complete this type of scorecard and if this field is checked, the retailer user is required to approve this scorecard before the supplier can complete it. The default is unchecked.
Grace Period	Enter the number of days or weeks after the scorecard's due date when it becomes overdue.
Overdue Email	If checked, an email is automatically generated to the supplier if the supplier has not completed the scorecard by the time it becomes overdue.
Contact Roles	Select the roles for which supplier users receive the notifications if the scorecard becomes overdue. The field is mandatory.

Table 7–1 (Cont.) New Scorecard Template Fields

Field	Description
Future Date Derived From	These fields are used to control the rules for automatically scheduling subsequent scorecards of this type, and when a scorecard becomes overdue.
Automate Future	
Auto Schedule	
Default Frequency	
Due Day Of Week	
Level of Business Category	Enter the number of levels of business category to be recorded for this type of scorecard. Set to zero if none are required. This is a mandatory field.
Business Category Required	If checked, the business category becomes mandatory when the scorecard is completed.
Comments	Enter a comment regarding this template.

2. Set the questions for this type of scorecard in the Questions tab using the tables of questions for Universal, General, and Ad Hoc Questions:
   - Universal questions are automatically added.
   - General Questions are selected from the glossary of Scorecard Questions.
   - Ad Hoc questions can be entered specifically for this type of scorecard.

   Once the questions have been added, the Refresh Preview action can be used to show the scorecard as it will be presented to the supplier.
3. Select any scoring rules for this type of scorecard in the Scoring subtab.
4. Select the Save action.

Scorecard Status

This option enables you to view the scorecard status codes and descriptions defined for each. To edit the list, select the Edit action. You can change the descriptions and add new status codes. The Scorecard Status page has the same format as the Alert Status page shown in Figure 7–1.

Audits & Visits

Select the Audit & Visits option from the Admin drop-down list. The following options are available in the left pane:

- Certification Bodies
- Audit/Visit Templates
- Audit/Visit Issue Types
- Auditor Types
- Audit/Visit Risk Levels
- Audit/Visit Scores
- Audit/Visit Standards
- Audit/Visit Statuses
- Issue Statuses

- Visit Locations
- Visit Reasons
- Checklist Templates
- Checklist Answers
- Checklist Questions
- Checklist Question Colour Management
- Checklist Question Colours

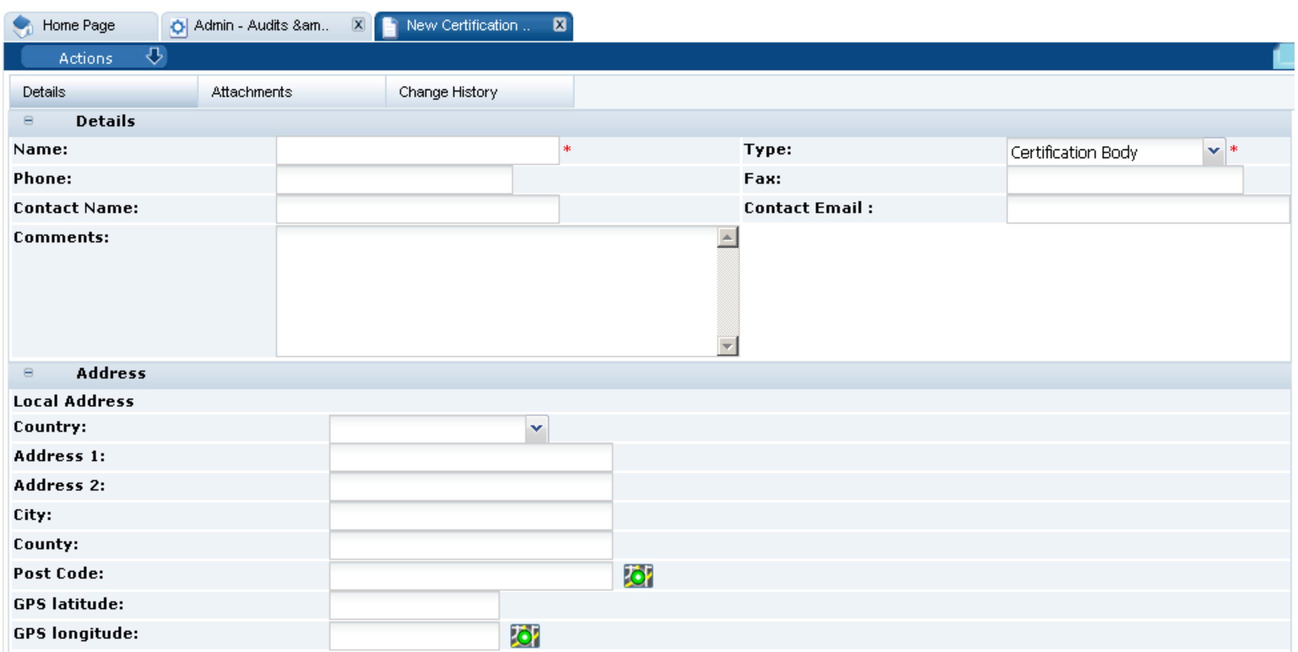
Certification Bodies

Certification bodies are assigned to audits/visits that are carried out by a third-party organization. A certification body defines the details of an organization that carries out an audits. On the Certification Bodies page, the name and contact details of existing auditors and certification bodies are shown.

To edit the details for a certification body, select the entry and then select the Edit action. A page opens in edit mode with the details of the certification body. For an example of the content, see Figure 7–18.

To add a new certification body, select the New Certification Body action. The New Certification Body tab opens. The Name and Type fields are mandatory. The contact details and address may also be entered.

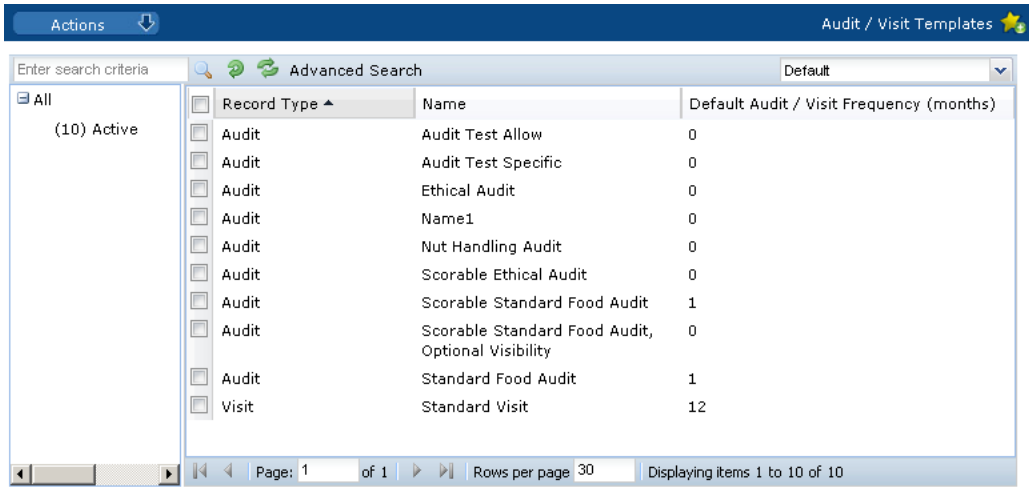
Figure 7–18 New Certification Body Page



Audit/Visit Templates

Audit/visit templates define the rules that control the behavior of the different types of audits and visits. Every audit or visit is created from a template which defines the rules for how it behaves within the system, that is, the setting of basic default values and whether certain fields are used or hidden.

Figure 7–19 Audit/Visit Templates Page

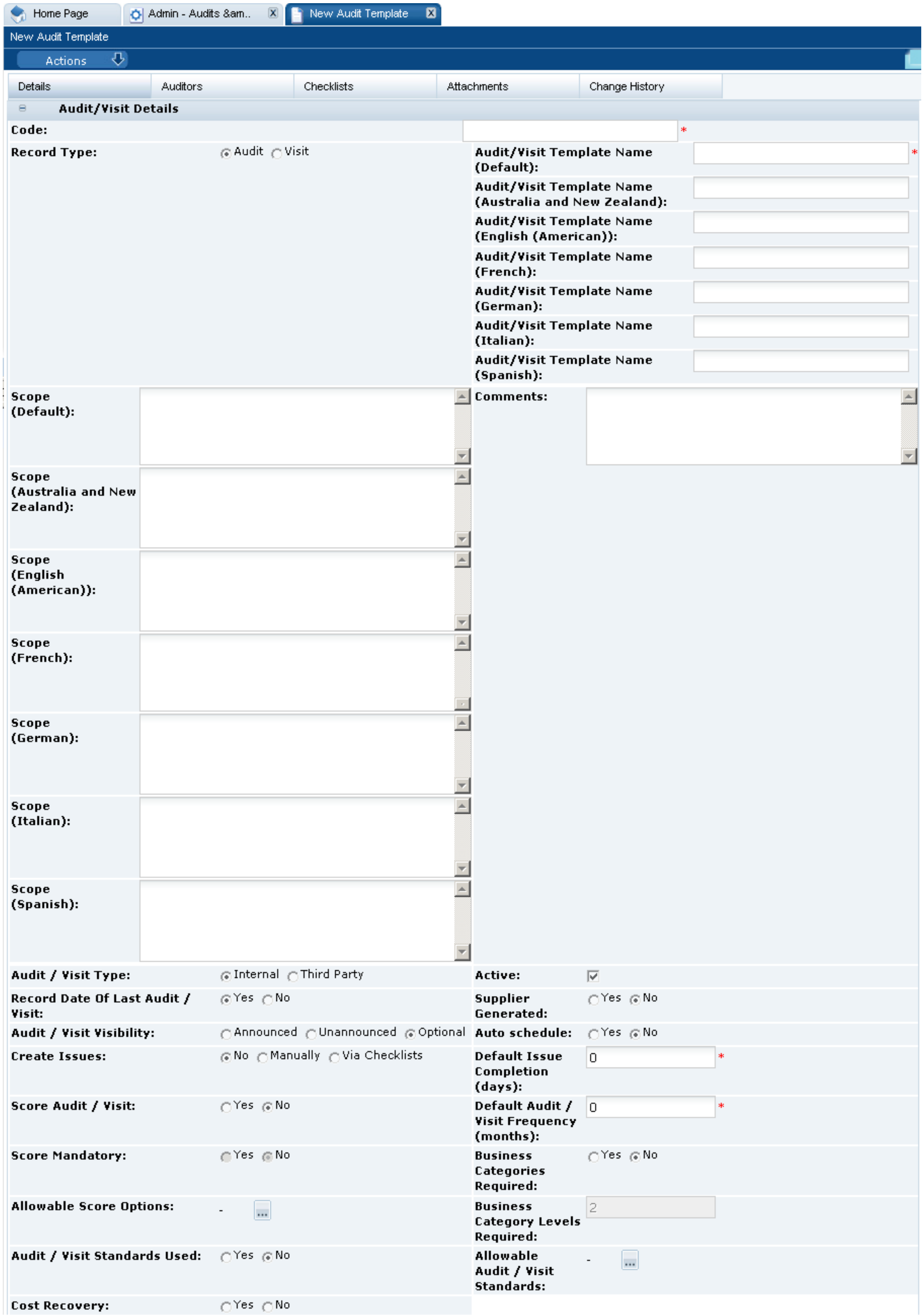


To edit a template, select the entry and then select the Edit action. A tab opens in edit mode to enable you to edit the template. For an example of the content, see Figure 7–20.

To create a new template:

1. Select the New Audit/Visit Template action. The New Audit/Visit Template tab opens.

Figure 7–20 New Audit Template Page



2. Table 7–2 describes the fields in the Audit/Visit Details section.

Table 7–2 Audit/Visit Template Fields

Field	Description
Active	Check the box if this template is set active when created.
Allowable Audit/Visit Standards	Click the icon to select the standards for this audit/visit.
Allowable Score Options	If scoring is used, click the icon to select the scoring options to use.
Audit/Visit Standards Used	If set to Yes, this type of audit is aligned with a particular standard.
Audit/Visit Template Name	Enter the name for the template in the default language. This field is mandatory. Enter the translations.
Audit/Visit Type	▪ Select Internal if the audit/visit is carried out by the retailer. ▪ Select Third Party if a third-party auditor or certification body carries out the audit/visit.
Audit/Visit Visibility	This field determines whether the supplier knows in advance of an audit/visit. If Unannounced, the supplier is not notified until it is time for them to collaborate.
Auto Schedule	If set to Yes, a new future audit/visit is automatically scheduled on completion of the current audit/visit.
Business Category Levels Required	If the Business Categories Required field is set to Yes, enter the number of levels of business category to use on the audit/visit record.
Business Categories Required	If set to Yes, a business category is required for this type of audit/visit.
Code	Enter a unique code for this template. This field is mandatory.
Comments	Enter a comment regarding this template.
Cost Recovery	If set to Yes, the all or part of the cost of the audit/visit is recharged to the supplier.
Cost Recovery Comments	If the Cost Recovery field is set to Yes, the amount to be recharged can be entered as a comment.
Create Issues	If set to Yes, issues can be raised against audits/visits of this type regardless of whether the issue is created by the supplier or retailer.
Default Audit/Visit Frequency (months)	Enter the frequency of the audit/visit in months. This is used when auto-scheduling the next audit/visit.
Default Issue Completion (days)	Enter the number of days an outstanding issue must be completed by before being flagged as urgent.
Record Date of Last Audit/Visit	If set to Yes, the site record is updated with the date when the latest audit is completed.
Record Type	Select whether this template is for an audit or a visit.
Scope	This is the summary of the purpose of the audit/visit. This is the default text for the Scope field in the audit/visit.
Score Audit/Visit	If set to Yes, an overall score/grade is required.
Score Mandatory	If set to Yes, scoring is mandatory when scoring is being used.
Supplier Generated	If set to Yes, the supplier can create new audits/visits of this type.

3. In the Auditors subtab, select the certification bodies and internal auditors who are allowed to perform the audit:

   - If All is selected, all defined certification bodies or internal auditors are allowed to perform the audit.
   - If Only Allowable is selected, the list of certification bodies or internal auditors is chosen. Click the icon and select the certification bodies or internal auditors.

Figure 7–21 New Audit Template Auditors Subtab

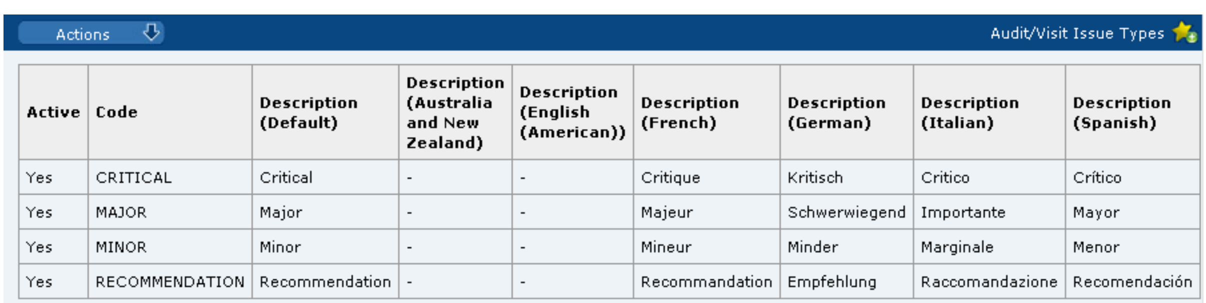
4. Select the Checklists subtab. Add any checklists to be used for the audit. When an audit/visit is created, if its template has checklists assigned, the checklists are automatically created as Audit/Visit Checklist records for completion during the audit/visit.
5. In the Attachments subtab, attach any documents to the audit.
6. Select the Save action.

Audit/Visit Issue Types

Audit/visit issue types define the types or levels of non-conformance that can be raised against an audit. An audit/visit template may not be edited once it has been made active; to make any changes it must first be deactivated. The Audit/Visit Issue Types page has the following columns:

- Set to Yes if the issue type is active.
- Code for the issue type.
- Description for the issue type in the default language.
- Descriptions for each supported language.

Figure 7–22 Audit/Visit Issue Types Page



Active	Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
Yes	CRITICAL	Critical	-	-	Critique	Kritisch	Critico	Crítico
Yes	MAJOR	Major	-	-	Majeur	Schwerwiegend	Importante	Mayor
Yes	MINOR	Minor	-	-	Mineur	Minder	Marginale	Menor
Yes	RECOMMENDATION	Recommendation	-	-	Recommandation	Empfehlung	Raccomandazione	Recomendación

To edit the list of issue types, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new issue type, click **Add**. If the issue type should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Auditor Types

Audit types are used to differentiate between individuals (Auditors) and organizations (Certification Bodies). The Auditor Types page has the same format as the Audit/Visit Issue Types page shown in Figure 7–22.

To edit the list of auditor types, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new auditor type, click **Add**. If the auditor type should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Risk Levels

Where used, the levels of risk may be assigned to a site based on the type of product the site produces, for example, High Risk and Low Risk. The levels can be used, based on risk level, to vary the frequency of an audit/visit type per site. The Audit/Visit Risk Levels page has the same format as the Audit/Visit Issue Types page shown in Figure 7–22.

To edit the list of risk levels, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new risk level, click **Add**. If the risk level type should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Scores

Audit/visit scores provide the scoring or grading options for audits, for example, Red and Green. The Audit/Visit Scores page has the same format as the Audit/Visit Issue Types page shown in Figure 7–22.

To edit the list of scores, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new score, click **Add**. If the score should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Standards

Each type of audit can be aligned with a specific standard. The Audit/Visit Standards page has the same format as the Audit/Visit Issue Types page shown in Figure 7–22.

To edit the list of standards, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new standard, click **Add**. If the standard should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Statuses

Statuses define the names of the stages of the Audit/Visit workflow.

To edit the list of statuses, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

Figure 7–23 Audit/Visit Statuses Page

Actions Audit/Visit Statuses

Status	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
ABANDONED	Abandoned	-	-	Abandonné	Zurückgezogen	Abbandonato	Abandonado
AWAITING AMENDMENT	Awaiting Amendment	-	-	En attente de modification	Warten auf Berichtigung	In attesa di modifica	En espera de modificación
AWAITING CORRECTIVE ACTION	Awaiting Corrective Action	-	-	En attente d'action corrective	Warten auf Abhilfemaßnahme	In attesa di azione correttiva	En espera de acción correctiva
AWAITING SIGN-OFF	Awaiting Sign-Off	-	-	En attente d'autorisation	Warten auf Freigabe	In attesa di approvazione	En espera de aprobación
COMPLETED	Completed	-	-	Terminé	Abgeschlossen	Completato	Completada
FAILED	Failed	-	-	Echoué	Fehlgeschlagen	Non superato	Erróneo
IN PROGRESS	In Progress	-	-	En cours	In Bearbeitung	In corso	En proceso
NOT PROGRESSED	Not Progressed	-	-	Sans progression	Nicht abgeschlossen	Non avanzato	Sin progresar
SCHEDULED	Scheduled	-	-	Programmé	Geplant	Programmato	Programado

Issue Statuses

Issue statuses define the names of the stages of the Issues (non-conformances) workflow. The Issue Statuses page has the same format as the Audit/Visit Statuses page shown in Figure 7–23.

To edit the list of statuses, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

Visit Locations

Only used in visits, the locations are a predefined list of options for specifying where the visit takes place, for example, Head Office or Conference Room. The Visit Locations page has the same format as the Audit/Visit Issue Types page shown in Figure 7–22.

To edit the list of locations, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new location, click **Add**. If the location should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Visit Reasons

Only used in visits, the reasons are a predefined list of options for why the visit takes place, for example, Audit Follow-up or Complaint Investigation. The Visit Reasons page has the same format as the Audit/Visit Issue Types page shown in Figure 7–22.

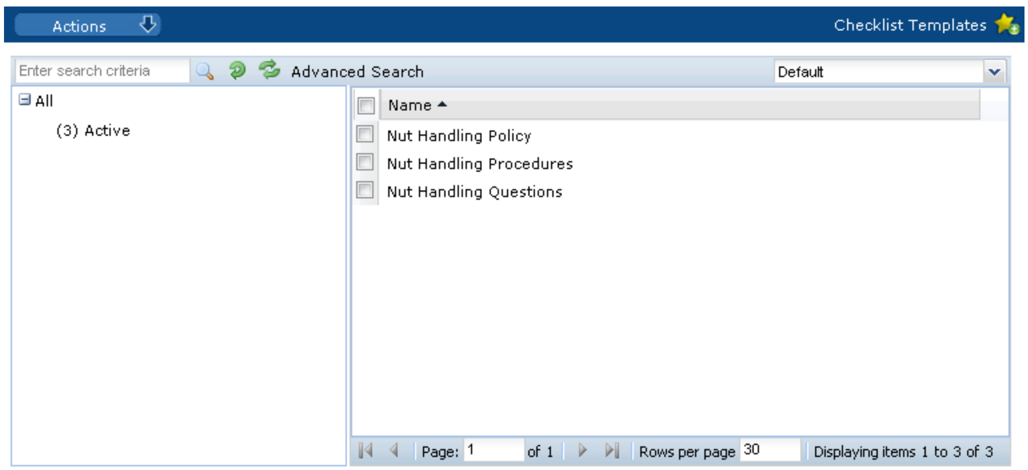
To edit the list of reasons, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new reason, click **Add**. If the reason should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Checklist Templates

A checklist is the breakdown of items to be assessed as part of an audit or visit. The items may correspond to individual clauses in corporate standards or policy documents. A checklist template is the grouping together of checklist questions and their permissible answers to form reusable common questionnaires for completion during an audit.

Figure 7–24 Checklist Templates Page

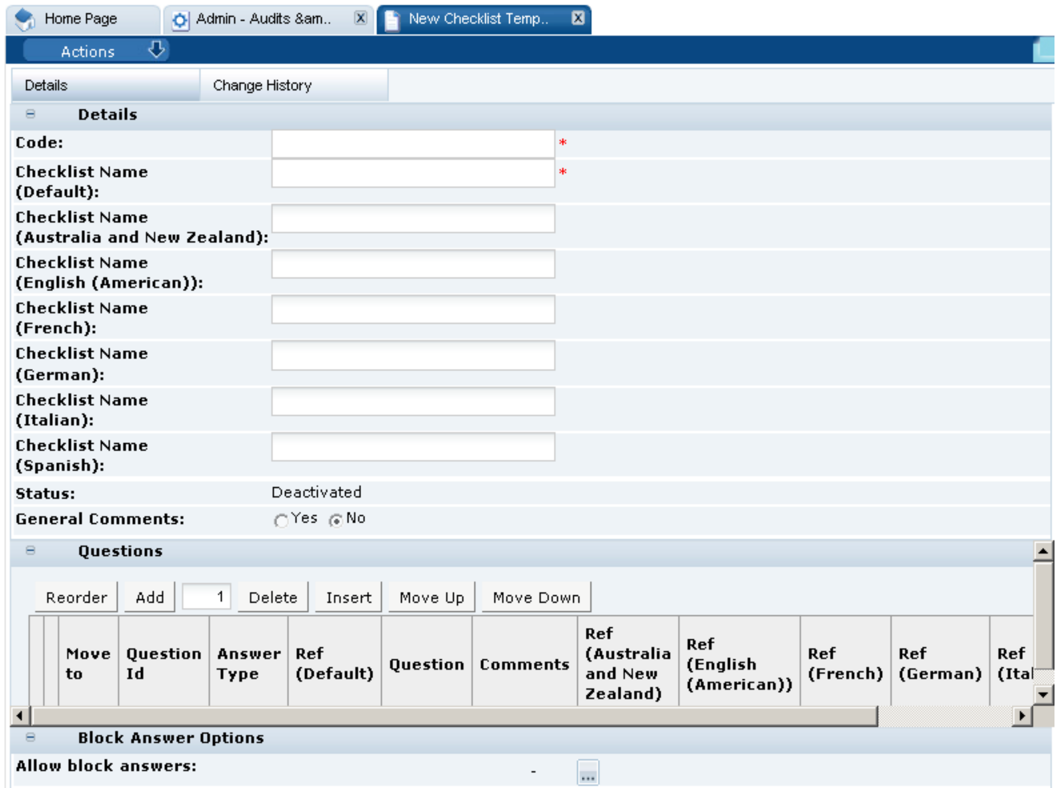


To edit a template, select the Edit action. The template record opens in edit mode.

To add a new checklist:

1. Select the New Checklist Template action. The New Checklist Template tab opens.

Figure 7–25 New Checklist Template Page



2. In the Details section:

   - Code: A unique Code must be entered when the template is created, after which it is read-only. This field is mandatory.
   - Checklist Name: Enter the name that appear in the audit/visits. The name must be unique. The name is editable after the record has been created. Enter any translations. This field is mandatory.
   - Status: The status is set to Deactivated.
   - General Comments: If set to Yes, a general comments field is included in the checklist.

3. In the Questions section: To add questions, click **Add**. The Select Glossary Questions dialog box appears with the list of available questions. Select questions and then click **Ok**.

4. In the Block Answer Options section: Allow block answers adds an option to the checklist to allow the user to block answer all the questions with the answers specified here, where it is one of the permissible answers for the question. For example, if block answering is set to Not Assessed, all questions in the checklist that have Not Assessed as one of the answer options are answered in that way. The contents of the Allow Block Answer pick-list are dynamically built based on the set of answers associated to the questions present in this checklist. Any duplicates are excluded.

5. Select the Save action.

Checklist Answers

The sets of available checklist answers are managed using this option.

Figure 7–26 Checklist Answers

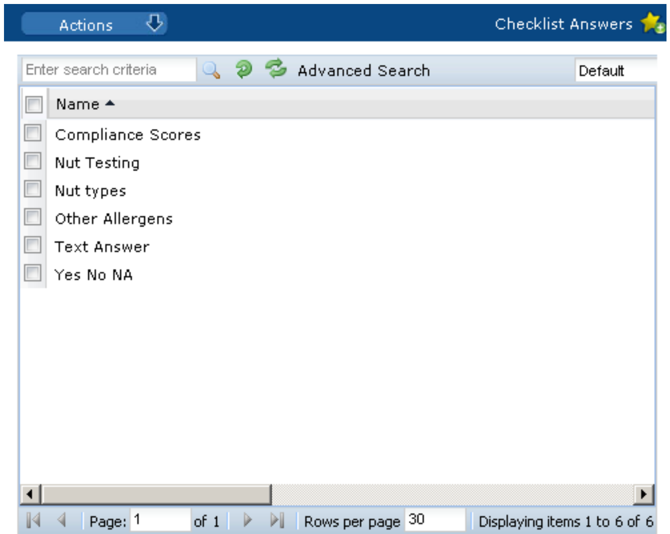
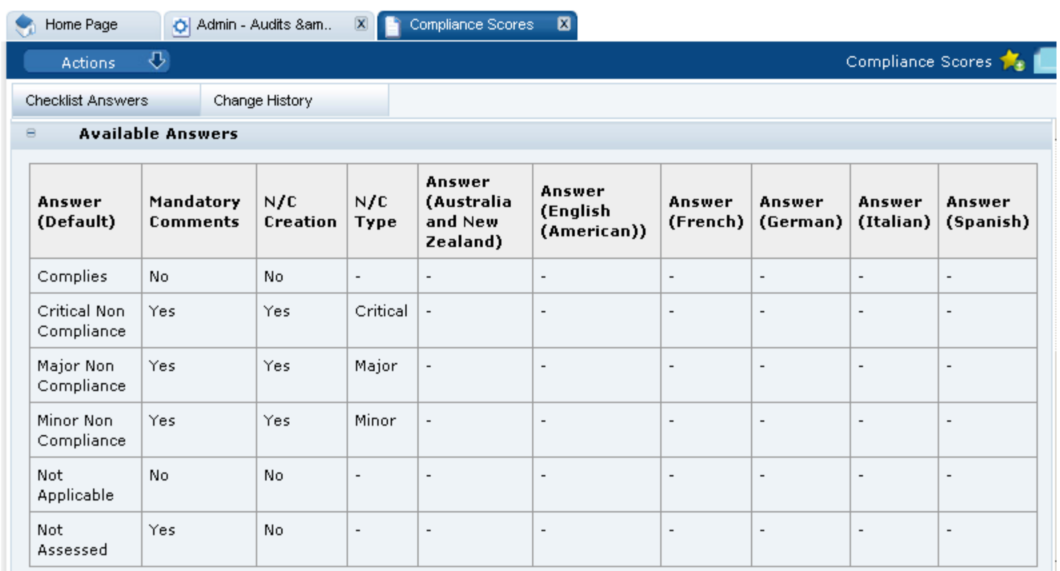


Figure 7–27 shows an example of checklist answers.

Figure 7–27 Checklist Answers Example



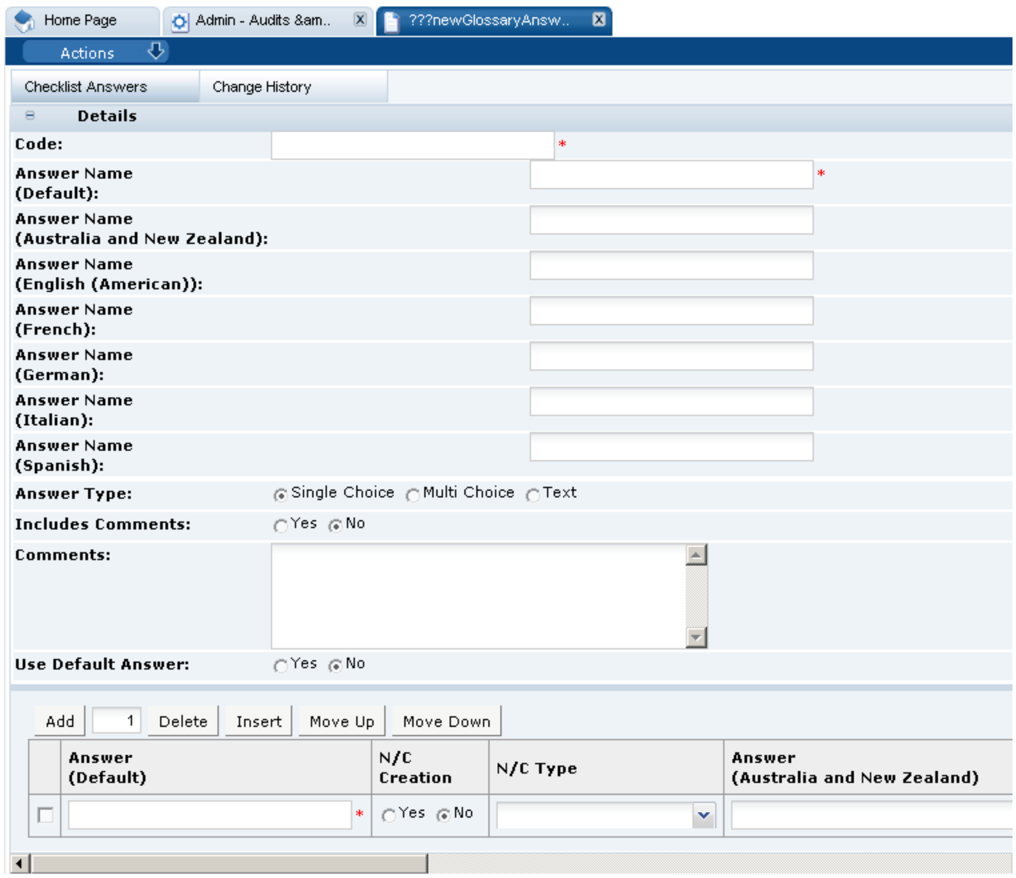
Answer (Default)	Mandatory Comments	N/C Creation	N/C Type	Answer (Australia and New Zealand)	Answer (English (American))	Answer (French)	Answer (German)	Answer (Italian)	Answer (Spanish)
Complies	No	No	-	-	-	-	-	-	-
Critical Non Compliance	Yes	Yes	Critical	-	-	-	-	-	-
Major Non Compliance	Yes	Yes	Major	-	-	-	-	-	-
Minor Non Compliance	Yes	Yes	Minor	-	-	-	-	-	-
Not Applicable	No	No	-	-	-	-	-	-	-
Not Assessed	Yes	No	-	-	-	-	-	-	-

To edit a set of checklist answers, select the entry and then select the Edit action. The template record opens in edit mode.

To add a new set of checklist answers:

1. Select the New Checklist Answer option. The New Glossary/Answers page opens.

Figure 7–28 New Checklist Answer Page



2. In the Details section:

   - Code: Enter a unique code for this answer set. This field is mandatory.
   - Answer Name: Enter a unique identifier of this answer set in the default language. This field is mandatory. Enter any translations.
   - Answer Type: Select the type of answer presented to the user:
     – Single Choice presents a pick-list.
     – Multi Choice presents a multi-select pick-list.
     – Text presents an auto-expanding text area.
   - Include Comments: This field determines a comment is required. If the selected answer type is Text, this field is set to No and cannot be changed.
   - Comments: Use this field to enter a comment regarding this checklist answer glossary.
   - Use Default Answer: If the answer type is Single Choice or Multi Choice, the Use Default Answer option is used to control whether a default value is to be set for this answer when presented in a checklist. If Yes is selected, the Default Answers field presents a checklist of the answers that have been added to the Answers table for one to be selected. If No is selected the selector is hidden.

3. The table of answers defines the answer choices and is only presented if the answer type is Single Choice or Multi Choice. To add answer, click **Add** to add a row to the table:

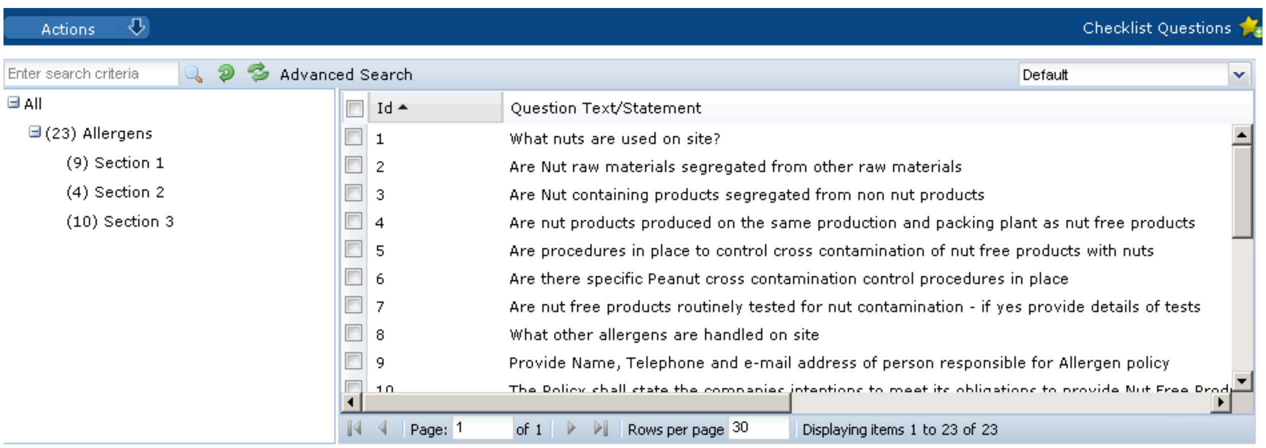
   - Enter the answer in the default language. This field is mandatory.
   - The N/C Creation field determines whether, when the chosen answer is given to this question, the system should generate an issue for the question.
   - The N/C Type field determines for what issue type an issue is automatically generated. The selection is made from the Issue Types glossary, for example, Critical, Major, Minor, or Recommendation.
   - Enter the descriptions in the supported languages.

4. Select the Save action.

Checklist Questions

The sets of available checklist questions are managed using this option.

Figure 7–29 Checklist Questions

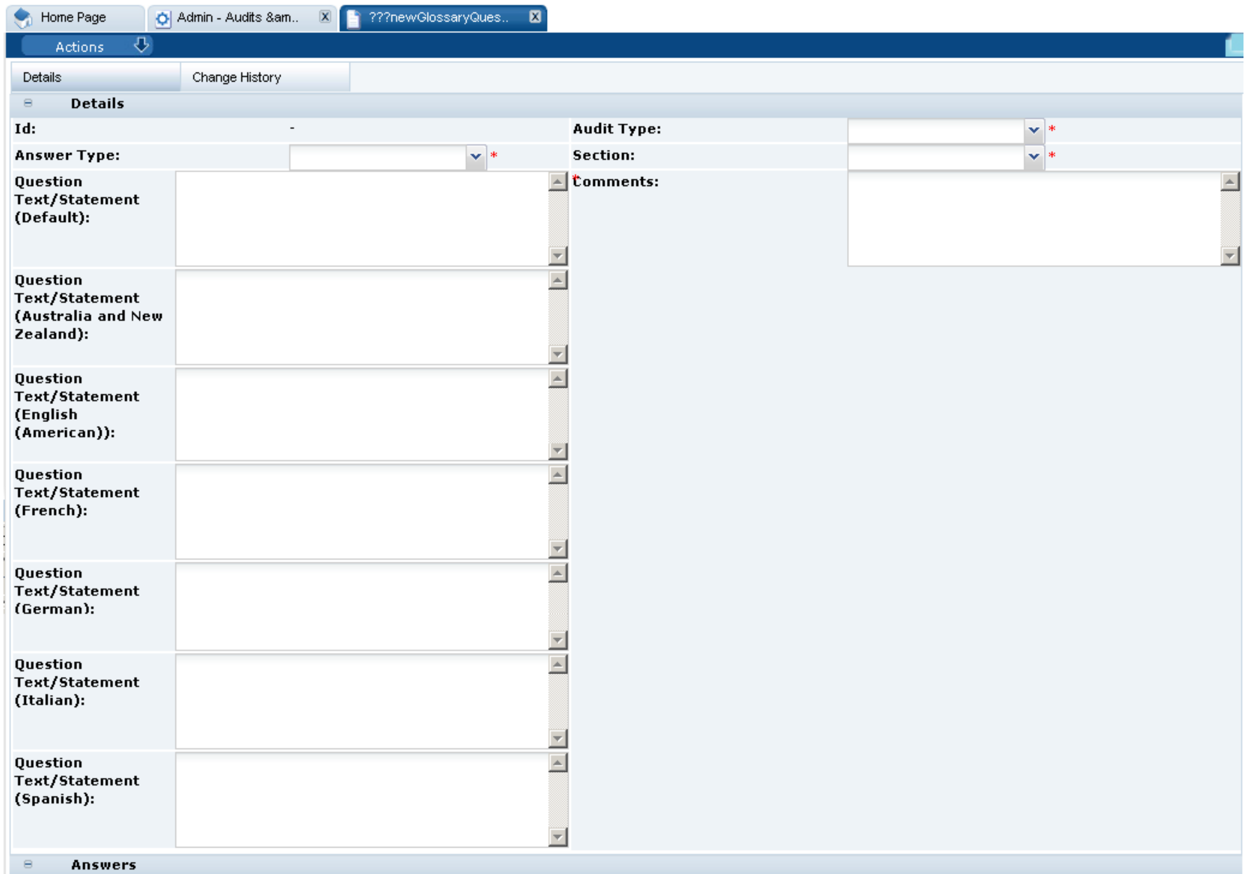


To edit a checklist question, select the entry and then select the Edit action. The question record opens in edit mode.

To add a checklist question:

1. Select the New Checklist Question action. The New Glossary/Question tab opens.

Figure 7–30 New Checklist Question Page



2. In the Details section:
   - Id: This is a unique identifier of each question. It is automatically assigned as an incrementing sequence number.
   - Audit Type: Select the type of audit associated with this question from the drop-down list. This field is mandatory.
   - Answer Type: Select the type of answer associated with this question from the drop-down list. This field is mandatory.
   - Section: Select the section of the questionnaire from the drop-down list. This field is mandatory.
   - Question/Text Statement: Enter the question in the default language. This field is mandatory. Enter any translations.
   - Comments: Use this field to enter a comment regarding this checklist question glossary entry.
3. In the Answers section: The table of Answers is automatically built based on the selected answer type. The table is only applicable for Single Choice and Multi Choice answer types. For more information, see "Checklist Answers."
4. Select the Save action.

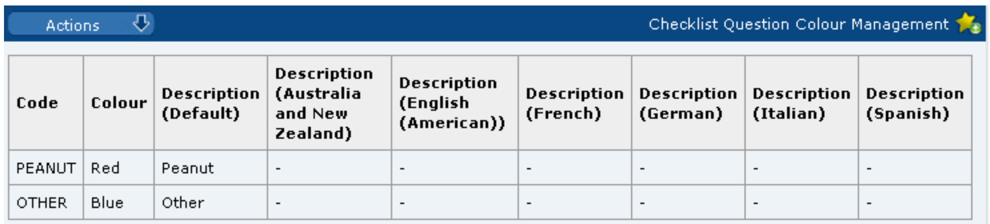
Checklist Question Colour Management

This option is used to define the rules for color-coding within checklists. The system uses this table to apply to present the text in the specific color if it encountered as part of a checklist question.

To edit the list of colors, select the Edit action. The table opens in edit mode. The color and descriptions can be edited.

To add a new color, click **Add**. A row is added to the table. Enter the code, color, and description in the default language. Enter any translations.

Figure 7–31 Checklist Question Colour Management



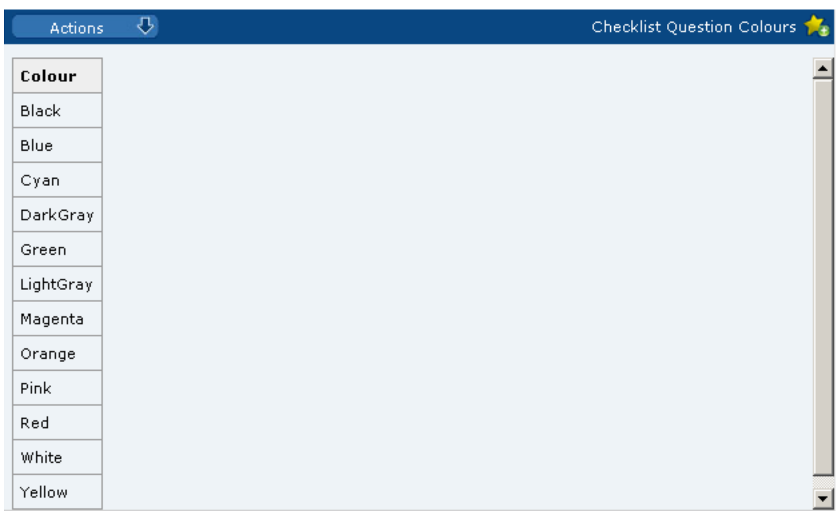
Code	Colour	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
PEANUT	Red	Peanut	-	-	-	-	-	-
OTHER	Blue	Other	-	-	-	-	-	-

Checklist Question Colours

This option is used to build the list of colors available for use when defining the color-coding rules.

To edit the list of colors, select the Edit action. The table opens in edit mode. To add a new color, click **Add**.

Figure 7–32 Checklist Question Colours

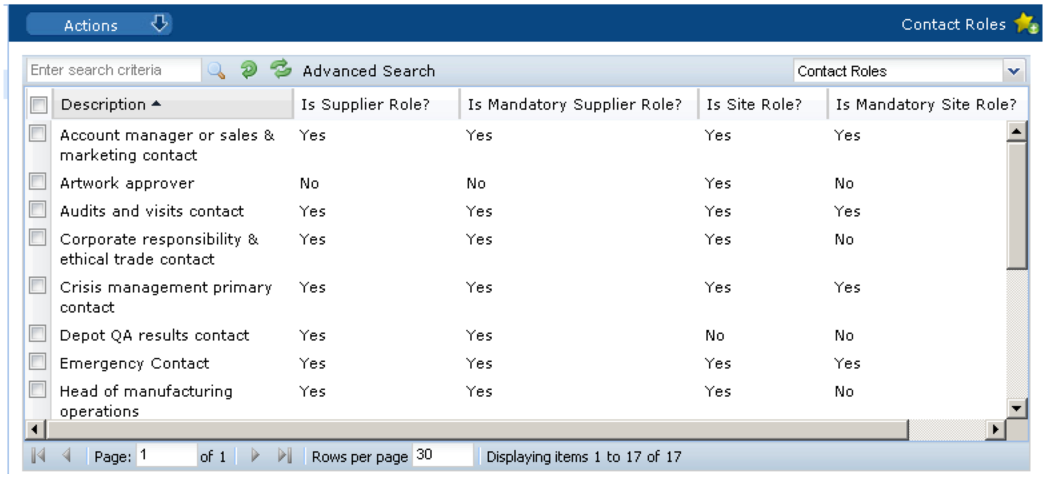


Colour
Black
Blue
Cyan
DarkGray
Green
LightGray
Magenta
Orange
Pink
Red
White
Yellow

Roles and Permissions

Select the Contact Roles option in the left pane. The Contact Roles page opens.

Figure 7–33 Contact Roles Page



The set of contact roles is configurable. Each portal can build their own set of roles that contacts are to be recorded for at the supplier and site levels. The roles may be set as mandatory, in which case, a contact must be assigned to that role for the supplier/site account to be approved.

Some roles are mandatory because they are used by the system to automatically notify the relevant users as part of the system's workflow, for example, an Audits &Visits Main Contact would be notified when an audit requires action.

Where there are mandatory roles that have not been assigned a contact, the supplier/site administrator is alerted through the Urgent Item Manager (UIM) app.

For more information on adding and editing contact roles, see "Managing Contact Roles."

System Parameters

To maintain the parameters used to support mySupplier, select the System Control option and then System Parameters.

Table 7–3 shows the specific system parameters, by subtab on the System Parameters page, used to support mySupplier.

Table 7–3 System Parameters to Support mySupplier

Subtab	Parameter	Description
Audits & Visits	Allow creation of Audits from Audits List	If set to Yes, users may create new audits/visits from within the Audits & Visits area (in which case, they select the supplier and site) as well as through the Site record. If set to No, new audits/visits are created through the Site record (in which case there is no need to select the supplier and site). Default is No.
Audits & Visits	Max Time Spent (hours)	Sets the maximum value a user may record as the time spent on an audit/visit. This prevents excessive time being accidentally entered. Default is 20.

Table 7–3 (Cont.) System Parameters to Support mySupplier

Subtab	Parameter	Description
Audits & Visits	Use Risk Levels	Determines whether levels of risk are being assigned to Sites (based on the type of product produced). If set to Yes, a Risk Level classification can be set on the Site record, and the frequency of an audit/visit may be set differently per risk level; thus allowing an audit/visit to be scheduled more (or less) frequently for sites that supply particular types of products. Default is No.
Audits & Visits	Days to show Scheduled in Tasks App	Used to control when Scheduled audits/visits appear in the user's Task App in order to limit the list of audit/visits to just those that will become due in the next 28 days, for example, thereby excluding those that are currently scheduled but not due for a number of months. Default is 28.
Audits & Visits	Edit Score on Completion	If set to Yes, where an audit/visit is scored, the score can be assigned or changed when the audit/visit is completed (through the completion confirmation dialog box). If set to No, any scoring has to be assigned directly within the Audit/Visit record. Default is No.
Log On	Site Details Update Reminder	Number of working days between a reminder being shown in a user's UIM when a user has logged in. It is used to ensure that Mandatory Contact details are kept up to date on both the supplier and sites. Default is 90 days. When the first supplier user logs in, they see an entry in the UIM drawing their attention to this. If they use the Confirm Details action, this stamps the date onto the record so that the next time a user logs in, the system checks if the current date is greater than the stamped date.
Registration	Notify Lead Technologist	If set to Yes, the Product Technologist is notified by email when a supplier completes the registration for a site for which they are the Lead Technologist. Default is No.
Registration	Notify Others	User roles, with Role Type equal to Retailer, for which users should be copied on the email sent to a Technologist when a supplier completes registration. For example, it is used to notify Auditors when sites are ready to be audited. Parameter is linked to the user roles.
Registration	Create Initial Audit	If set to Yes, additional fields are made available to allow the user to create the initial audit when a site is approved. Default is No.
Registration	Notify Accounts	If set to Yes, the Account Administrator is automatically notified by email (REG3) that an order has been created when the supplier has completed their part of the registration process (for a standard supplier registration). Default is Yes.

Table 7–3 (Cont.) System Parameters to Support mySupplier

Subtab	Parameter	Description
Registration	Registration Ts&Cs Active	If set to No, suppliers will not have to accept the Terms and Conditions during step 5 of registration. Default is Yes.
Registration	Create initial scorecard	If set to Yes, additional fields are made available to allow the user to create the initial scorecard when a site is approved. Default is No.
Scorecards	Allow creation of Scorecards from Scorecards list	If checked, scorecards can be created from the scorecards list views. If not checked, scorecards can only be created directly from within a Site record.
Scorecards	Grace period	Select if the scorecard completion overdue grace period is in days or weeks.
Scorecards	Email Agent run on	Controls which days of the week reminder emails are generated for overdue scorecards. Specific days can be selected. Buttons are available to select or clear all days.
Scorecards	Allow ad hoc (non glossary) questions	If checked, scorecard templates have the option to have questions added that do not appear in the questions glossary.
Scorecards	Allow removal of universal questions	If checked, whether universal questions may be removed from a scorecard template (if not, all universal questions will appear on every scorecard type
Urgent Items	Show Alert Items	If set to Yes, Alert KPIs are shown in the UIM. Default is Yes.
Urgent Items	No. Days Before Alert Response is overdue	Number of days before this KPI is shown. Default is two days.
Urgent Items	Show scorecards	If set to Yes, scorecards are shown in the UIM. Default is Yes.
Urgent Items	Scorecard Overdue Off-set days	Number of days before an overdue scorecard is shown. Default is two days.

8

myProduct Administration

The following topics are covered in this chapter:

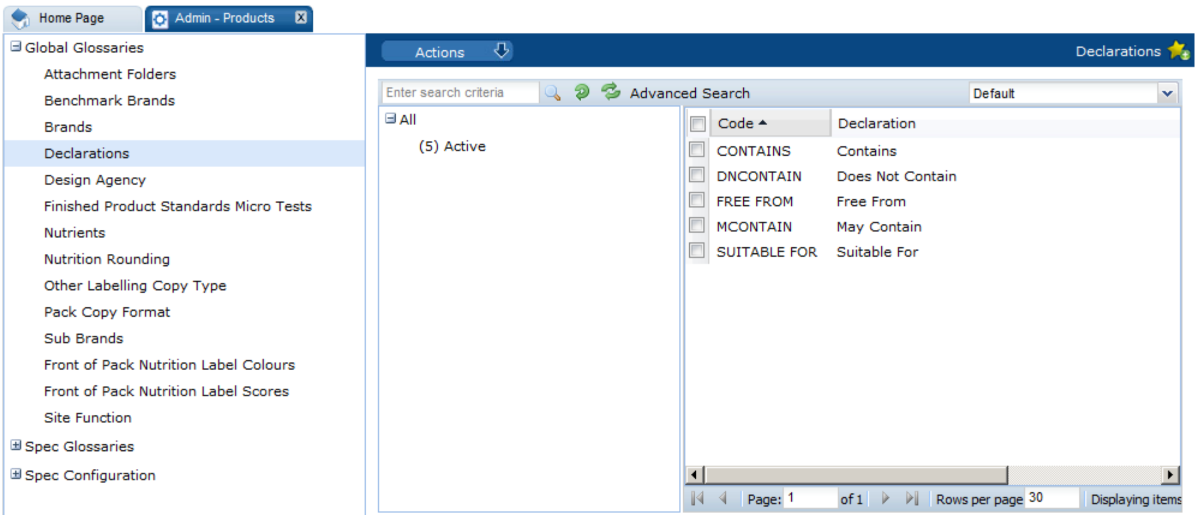
Global Glossaries

The Global Glossaries define the keywords and order of those keywords in pick-lists available for selection throughout myProduct.

Simple keyword glossaries are maintained through a list of the single values, plus their translations. The more complex glossaries, that combine multiple fields, such as Nutrients, are maintained as individual records presented in a list view. If translations are provided for a glossary, pick-list options are presented to the user in the user's language. If no translation is present for that language, the options are shown in the portal's base language.

To access Global Glossaries, select Products from the Admin drop-down list. The Admin - Products tab opens. Figure 8–1 shows an example of the expanded Spec Glossaries in the left pane with the Declarations glossary open.

Figure 8–1 Global Glossaries Options

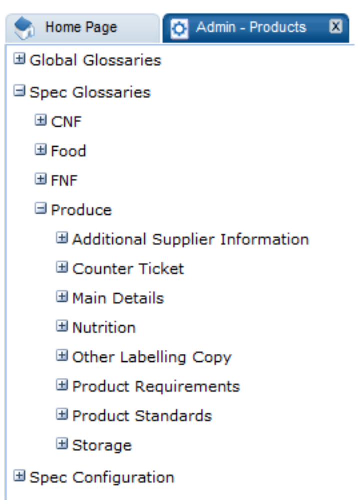


Spec Glossaries

The Spec Glossaries define the keywords and order of those keywords available for selection in pick-lists when working with specification records. A glossary folder is available for each section of a specification. The glossaries are grouped by specification type and are maintained either as a list of single values or a separate record per glossary entry for the more complex entries.

To access Spec Glossaries, select Products from the Admin drop-down list. The Admin - Products tab opens. Figure 8–2 shows an example of the expanded Spec Glossaries in the left pane.

Figure 8–2 Spec Glossaries Options



Spec Configuration

Spec Configuration is used to define the following for each stage of the myProduct workflow process:

- Which specification fields become mandatory in order to progress to a certain status, that is, data must be entered for these fields.

- The rules that determine when specification fields become locked due to a certain status being reached, that is, the data becomes read-only.

To access Spec Configuration, select Products from the Admin drop-down list. The Admin - Products tab opens.

The following options are available in the left pane for Spec Configuration:

- Mandatory Field Rules
- Specification Locking Rules
- Manage Mandatory Field Rules
- Manage Specification Locking Rules

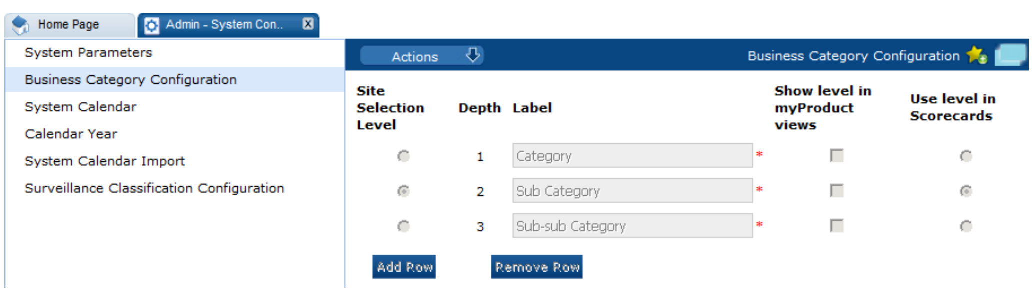
There are other options, currently only available to MICROS/Oracle Administrators, to set the specification types available for the portal and which sections are mandatory or optional within each specification type.

Business Category Configuration

This configuration controls the number of levels that can be maintained within the actual glossary of Business Categories. The glossary is maintained under the Suppliers & Sites Admin option. For more information on that option, see "Business Categories."

To configure the Business Categories used within myProduct, select the System Control option and then select Business Category Configuration in the left panel. The Business Category Configuration page opens.

Figure 8–3 Business Category Configuration Page



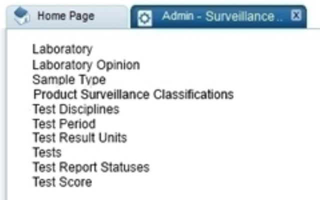
To change the configuration, select the Edit action. The page is changed to edit mode. The labels and the number of rows can be changed. To select a category level to be shown in the myProduct views, check the box for that level.

Surveillance

The configuration of the Product Surveillance module is administered within its own section in the Admin section of myProduct. It is only accessible to those users with Product Surveillance Administrator authority profile.

Select Product Surveillance to open the Product Surveillance Admin tab.

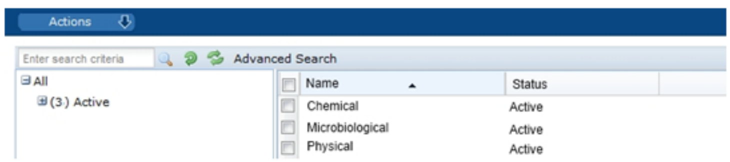
Figure 8–4 Admin - Surveillance Options



Test Disciplines

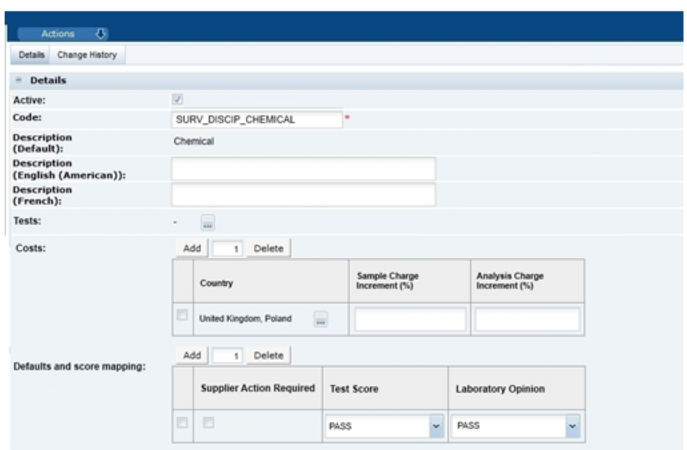
The Test Disciplines within Product Surveillance are the categories of testing carried out on products.

Figure 8–5 Surveillance Test Disciplines



Each individual discipline record contains the configuration of the tests which can be applied, the associated costs, and the mapping for laboratory opinion and score. By default, there are three entries, disciplines can be added or deleted but only by the Oracle-MICROS administrator.

Figure 8–6 Surveillance Discipline Record



The tests table defines what tests can be used for any classification under the Discipline. The tests available are held in the Tests glossary.

The Costs table determines the incremental percentage to be added to the laboratory supplied charges associated with any sample testing. Charges can be configured on a Country or multi-Country level. The country to be used for the calculation is selected on import. If there is no configuration for the country selected, no costs are calculated and the costs tab is hidden from the test report record. There is a validation check when saving the record to check that the same country does not appear in two or more rows in the table. If the check fails, the record cannot be saved.

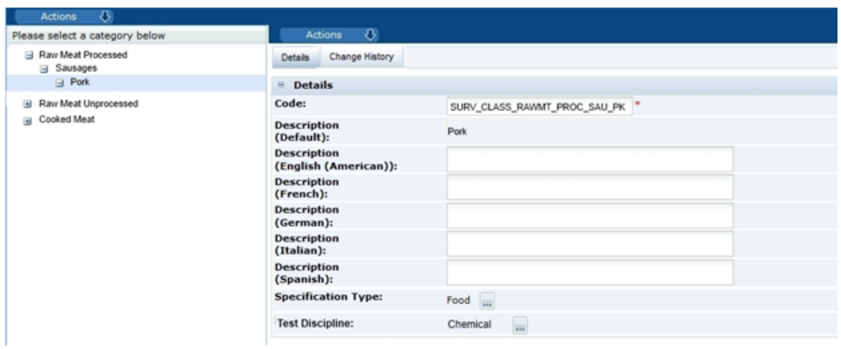
The Default and Score Mapping table defines the default for the Test Score and Supplier Action Required fields in the Results Summary when a result is imported into the system. The available values are held in the respective Laboratory Opinion and Test Score glossaries. There is a validation check when saving the record to check that the same value does not appear in two or more rows in the table. If the check fails, the record cannot be saved.

Product Surveillance Classifications

Under each Test Discipline, the Product Surveillance Classifications categorize products that require the same Product Surveillance testing. In core, by default, there is a 3-tier classification hierarchy. Classifications can be assigned to one or more specification types.

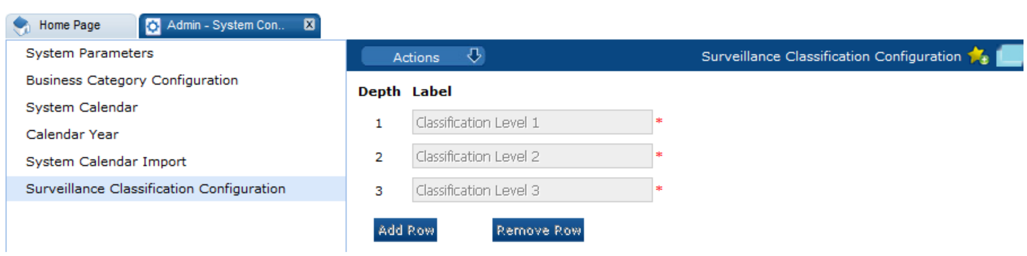
The following figure shown an example product surveillance classification hierarchy for Raw Meat under the product surveillance discipline of Microbiological.

Figure 8–7 Product Surveillance Classification Example



Each classification record can be assigned to one of more specification type. By default, the number of Product Surveillance classification levels is set to three. However, this can be configured for individual client needs, as with the Business Categories, within the System Control administration section.

Figure 8–8 Surveillance Classification Configuration Page



To change the configuration, select the Edit action. The page is changed to edit mode. The labels and the number of rows can be changed.

Other Glossaries

The following keyword glossaries are also maintained in the Product Surveillance administration area:

- Tests
- Laboratory Opinion

- Test Score
- Test Result Units
- Test Period
- Sample Type
- Laboratory

System Parameters

Note: Before using Surveillance, ensure that the parameters listed in this section have been set up.

To maintain the parameters used to support myProduct, select the System Control option and then System Parameters.

Table 8–1 shows the specific system parameters, by subtab on the System Parameters page, used to support myProduct.

Table 8–1 System Parameters to Support myProduct

Subtab	Parameter	Description
Products	Notify Supplier on Product Creation	If Yes, generate an email for the supplier when a product is created. Default is Yes.
Products	Notify Retailer on Product Creation	If Yes, generate an email for the retailer when a product is created. Default is Yes.
Products	Allow creation of multiple products	Determines how many products can be associated to a Product Record. If Yes, a specification can only be linked to one product. If No, a specification can be linked to more than one product. Default is No.
Products	Capture Declarations	If set to Yes, the area for specifying reasons for not declaring an allergen is used in the D&A section. Default is Yes.
Products	Retain D&A Answers When Copying a Specification tab within Spec	If set to Yes, the answers to D&A questions are carried across when a new version of a Specification is created. If set to No, the answers are cleared. Default is Yes.
Products	Retain D&A Answers When Creating a New Version of a Spec	If set to Yes, the answers to D&A questions are carried across when a Specification is copied. If set to No, the answers are cleared. Default is Yes.
Products	Pack Copy Format	Data file format used for a Produce specification's pack copy file.

Table 8–1 (Cont.) System Parameters to Support myProduct

Subtab	Parameter	Description
Products	Set Pack Copy Language	If set to Yes, the language of the pack copy can be set. If set to No, pack copies are produced solely in the systems' Business Language. Default is Yes.
Products	System uses Single Legislation	If set to Yes, the Legislation field is not displayed in the following places: ■ Spec creation Wizard ■ Main Details section of specification ■ Nutrition Panel record ■ Footnote Table record ■ Footnote Table list view Default is No.
Products	Legislation	If System uses Single Legislation is set to Yes, this field must be set to one of the legislations available for the portal.
Products	Product Record Controls Countries Field	If set to Yes, the system shows a Countries Where Sold field in the Product Record and the Countries Where Sold field in Specs is read only. If set to No, the system hides the Countries Where Sold field in the Product Record and the Countries Where Sold field in Specs is editable (subject to spec status and user permissions). Default is No.
Products	Show Lead Business Category in Product Record	If set to Yes, the system shows a Lead Business Category field in the Product Record & Specification and relabels the Business Category field to Other Business Category in both records. It also shows a Lead Category field in the site record and relabels the Categories field to Other Categories. If set to No, the system hides the Lead Business Category field and relabels the Other Business Category field to Business Category in both the Product Record and the associated specification. Default is No.
Products	Are nutrient targets used	If set to Yes, the Salt Targets field set appears in the Nutrition section in Food specifications and additional validation is added to specifications. Default is No.
Products	Front of Pack Nutrition Labelling Used	If set to Yes, the Front of Pack Nutrition feature is enabled. Default is No.
Products	Legislations Supporting Nutrition Targets	If Nutrition Targets are used, sets the legislation options to be available. Default is EU.

Table 8–1 (Cont.) System Parameters to Support myProduct

Subtab	Parameter	Description
Products	Show Specification Section Attachments table by Default	If set to Yes, attachments are not listed within the Attachments field-set within each section of a Specification, but instead are controlled through the use of the Show Attachments button. Default is No.
Products	Show Codes in Product Record	If set to Yes, the EAN/Barcode and Shipping Case code fields are present in the Product Record. If set to No, they are hidden. Default is No.
Products	Enable Recipe & Formulation Import/Export	If set to Yes, the Import Recipe and Export Recipe buttons appear in the Food Specification's Recipe and Raw Materials section and the Import Formulation and Export Formulation buttons appear in the FNF Specification's Formulation and Raw Materials section. If set to No, the buttons are not shown. Default is No.
Global	Show Business Language Fields	If set to Yes, the system does the following: ▪ Adds Spec Name in Bus Language to Spec Main Details (and Pack Copy). ▪ Adds Prod Title in Bus Language to Product Record. ▪ Adds Supplier and Site Name in Bus Language to Registration Wizard. ▪ Adds extra text to email templates. ▪ Adds Name in Bus Language to Supplier and Site records. ▪ Shows two addresses in the address component. Default is No.
Surveillance	Task App External Contact Roles	Allows administrators to select which Contact Roles for external users should be able to see the number of reports relevant to them, that is, the number for their Supplier or their Site depending on the role in the Task App. This is a multi-select selector that shows the Contact Roles set up on the system. If the global parameter Use Site Code is False, any Site Contacts selected will be ignored.
Surveillance	Use Site Codes	Options are Yes and No (Read Only). The default setting is Yes. When set to Yes, the system will check the value of the Site Code against the site codes held for sites for the respective Product Record and report an error if not found. If this parameter is set to No, the site code is ignored on import, and the site code and site name will be blank in the imported test report. This configuration is set on portal setup by Oracle-MICROS and cannot be edited.

9

myProject Administration

Administration activities are performed by the Project Administrator and Project Manager.

Project Administrator Authority Profile

This Authority Profile can be assigned to Retailer users who need to have the ability to configure Project, Product, and Activity templates and the associated administration options:

- View what has been set up for myProject, such as, templates, teams, and pick list values.
- Create, amend, or delete Projects, Activities, and Briefs.
- Schedule projects.
- Unlink records from a project.
- Access and maintain the system calendar.
- Access the Global Changes option in order to reassign the project manager for a project. Mass changes to project managers and users can be made using the Change myProject Project Manager and Change myProject User Names Global Changes options.

Project Manager Authority Profile

This Authority Profile can be assigned to users who need to be able to create projects and edit schedules:

- View what has been set up for myProject, such as, templates, teams, and pick list values.
- Create, edit, or delete Projects, Activities, and Briefs.
- Schedule projects.
- Unlink records from a project.

To access the administration options for myProject, select the Project Management Admin option. The Admin - Project Management tab opens. In the left pane, select an option and a page opens for that option. For more information on each option, see the following topics in this chapter:

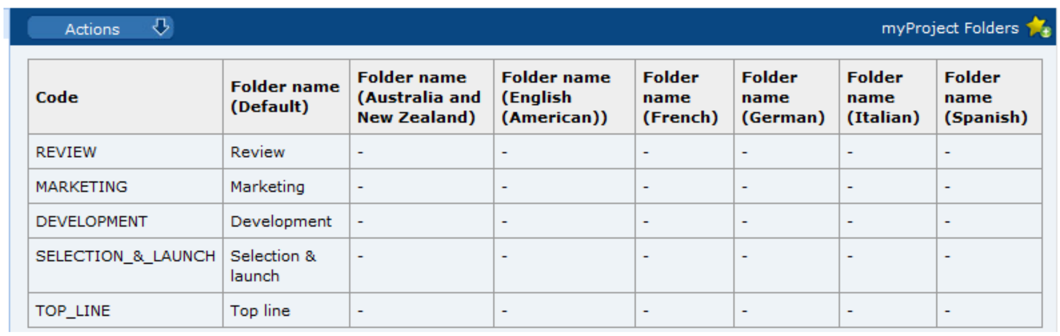
- myProject Folders
- Activity Status
- Activity Sub-Status

- Activity Type
- Activity Template
- Brief Templates
- Project Status
- Project Type
- Project Template
- Team

myProject Folders

This list of folders is used in the Project and Activity templates to allow lists to be filtered when selecting templates to be used in Projects or templates. To edit the list of folders, select the Edit action. The page opens in edit mode. From this page, you can update the translations, add a folder, or delete an existing folder.

Figure 9–1 myProject Folders Page

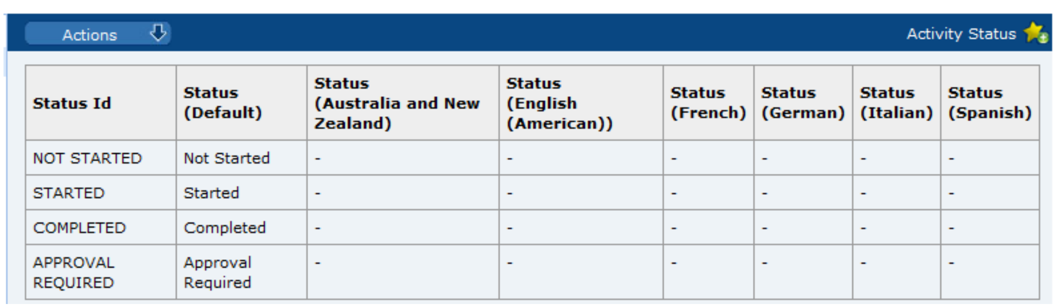


Code	Folder name (Default)	Folder name (Australia and New Zealand)	Folder name (English (American))	Folder name (French)	Folder name (German)	Folder name (Italian)	Folder name (Spanish)
REVIEW	Review	-	-	-	-	-	-
MARKETING	Marketing	-	-	-	-	-	-
DEVELOPMENT	Development	-	-	-	-	-	-
SELECTION_&_LAUNCH	Selection & launch	-	-	-	-	-	-
TOP_LINE	Top line	-	-	-	-	-	-

Activity Status

The list of activity statuses is defined by the system. The Status ID and default status description cannot be changed. To edit any of the translated descriptions, select the Edit action. The page opens in edit mode.

Figure 9–2 Activity Status Page



Status Id	Status (Default)	Status (Australia and New Zealand)	Status (English (American))	Status (French)	Status (German)	Status (Italian)	Status (Spanish)
NOT STARTED	Not Started	-	-	-	-	-	-
STARTED	Started	-	-	-	-	-	-
COMPLETED	Completed	-	-	-	-	-	-
APPROVAL REQUIRED	Approval Required	-	-	-	-	-	-

Activity Sub-Status

Activity Sub-Status is a configurable list of sub-status codes that may be used as a secondary, but separate field option, to the system workflow status. The Activity Sub Status page has the same format as the Activity Status page shown in Figure 9–2.

To edit the sub-statuses, select the Edit action. The page opens in edit mode. From this page, you can update translations for the sub-status codes, add a new sub-status, or delete an existing sub-status.

Activity Type

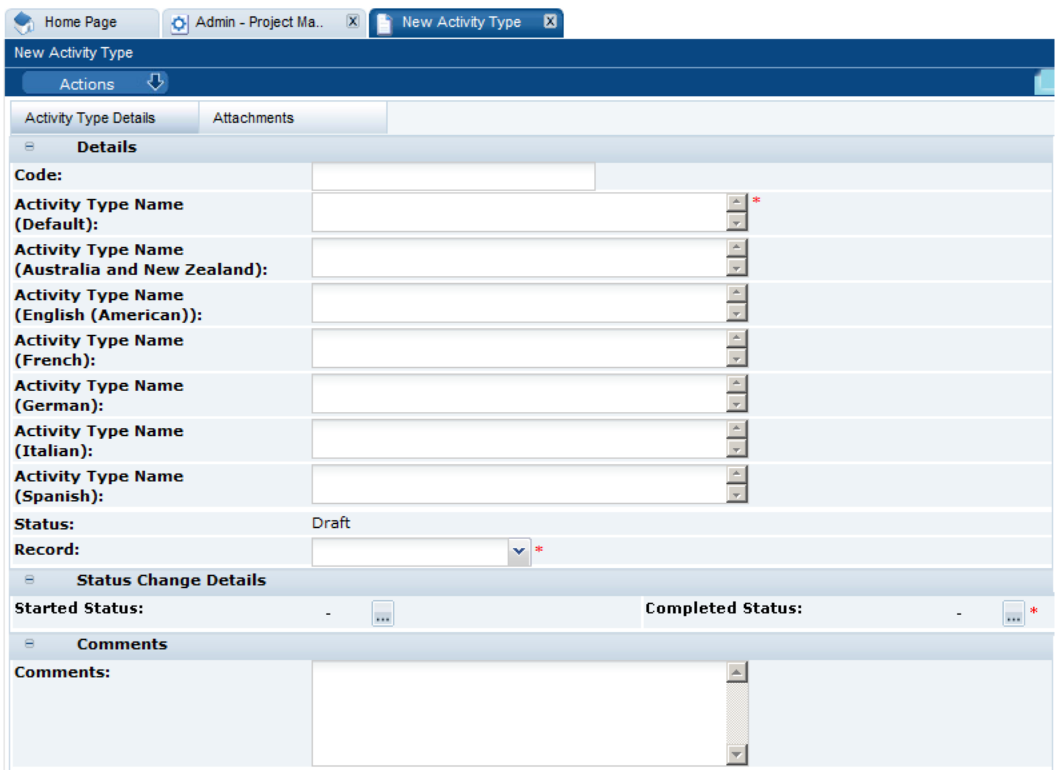
An activity is a defined task or link. Activities can be used to link to other elements within the system (such as, Specification request) and can be auto-completed using the status changes of linked elements. Activity Type names appear in the Activity Type pick-list on the Activity Template record.

The Activity Type page lists the defined Activity Type names and record numbers. To edit an existing activity type, select the activity type and then select the Edit action. A tab opens in edit mode.

To create a new activity type:

1. Select the New action. The New Activity Type tab opens.

Figure 9–3 New Activity Type Page



2. Enter the Activity Type name in the default language. This field is mandatory. Enter any translations.

3. In the Status Change Details section, select the record type from the drop-down list.

4. In the Status Change Details section, select the states that trigger the activity to be set to Started or Completed. Whenever the status of a record that has been linked to the activity changes, the system checks for the selected states. If there is a match, it changes the activity's status. Where the status selected in both fields matches the record's state, the system changes the Activities status to Completed. These fields are mandatory:

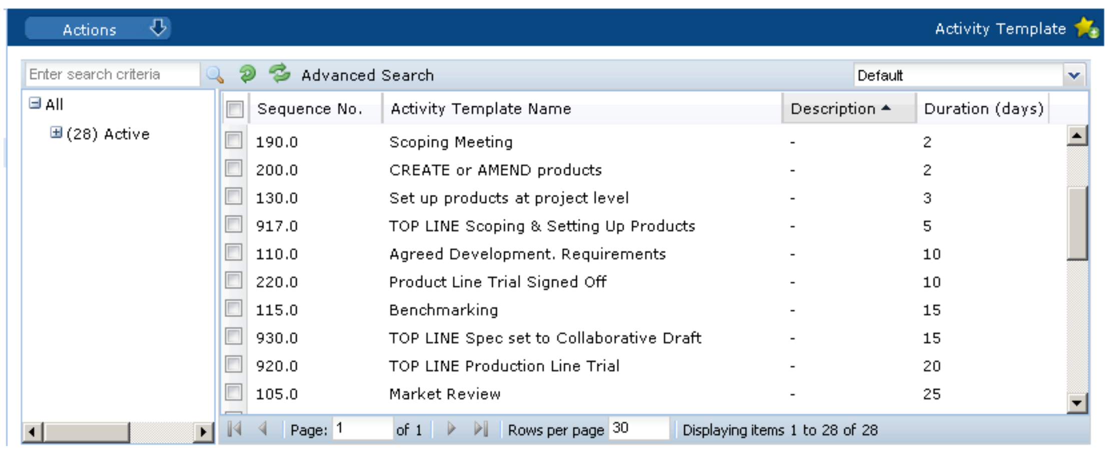
- To select the triggers for Started status, click the icon. The Select Started Statuses dialog box appears. Select the statuses and then click **Ok**.
- To select the triggers for Completed status, click the icon. The Select Completed Statuses dialog box appears. Select the statuses and then click **Ok**.

5. Enter a code and comments. These fields are not mandatory.
6. In the Attachments tab, add attachments to the activity type.
7. Select the Save action.

Activity Template

Templates for activities can be created and then assigned to Project Templates. These are single elements which can form part of the critical path or run in parallel to the main time-line. The Activity Template page shows the list of defined activity templates. For each activity, the sequence number, name, description, and duration in days are shown.

Figure 9–4 Activity Template Page

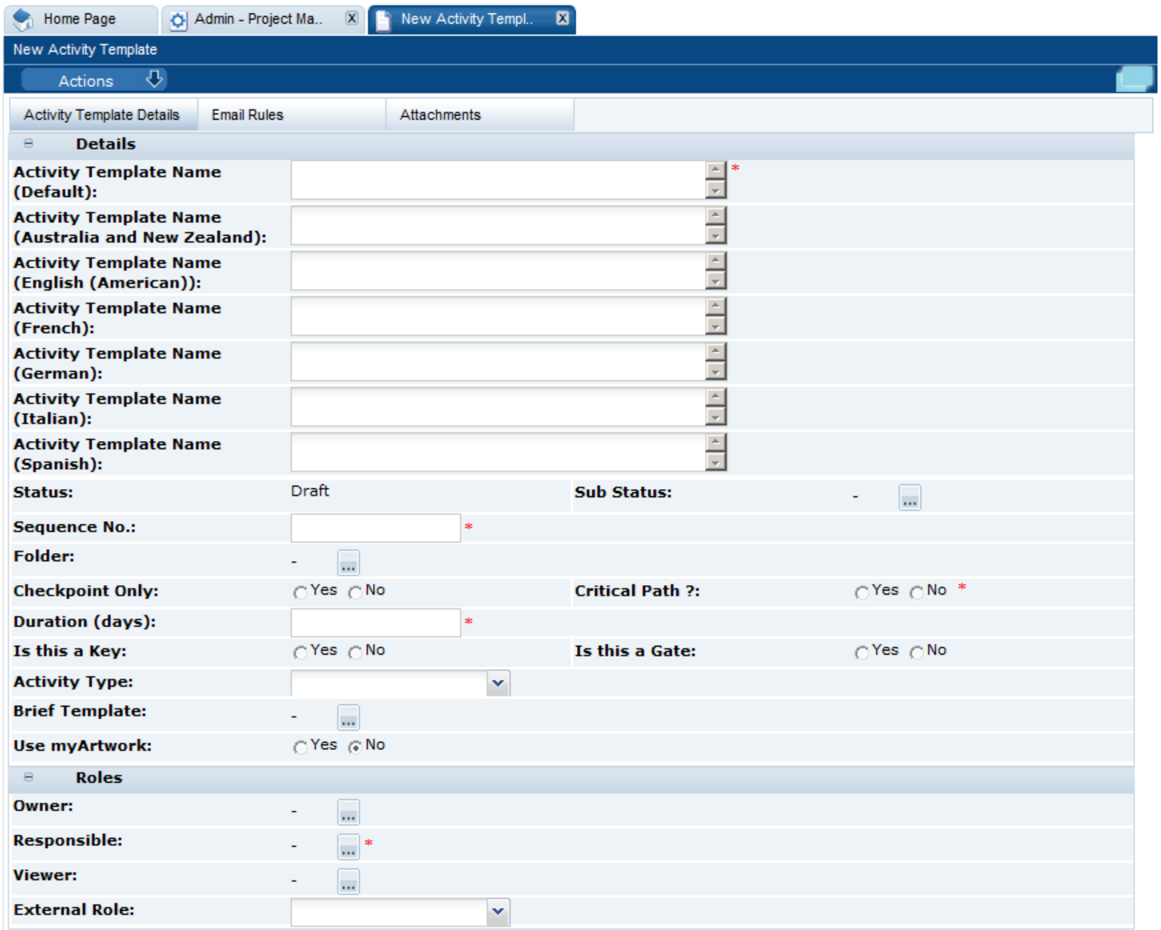


To edit an existing template, select the template and then select the Edit action. A tab opens in edit mode.

To create a new Activity Template:

1. Select the New action. The New Activity Template page opens.

Figure 9–5 New Activity Template Page



2. In the Details section:

   - Activity Template Name: Enter the template name for the default language. This is a mandatory field. Enter any translations.
   - Status: The status is set to Draft.
   - Sub Status: Select the icon. Select the allowed sub-status in the Select Allowable Sub-Statuses dialog box and click **Ok**.
   - Sequence No: Enter a sequence number. This field is mandatory.
   - Folder: Select the icon. Select the folder in the Select Folder dialog box and click **Ok**. This field is mandatory.
   - Checkpoint Only: Check whether this template is only for checkpoint activities.
   - Critical Path: Check whether this template is for critical path activities. This field is mandatory.
   - Duration (days): Enter the duration in number of days. This field is mandatory.
   - Is this a Key: Check if this is a key activity.
   - Is this a Gate: Check if this is a gate activity. If Yes is selected, the Gate Type field appears. Select whether the gate type is Auto Complete or Approval Required.

- Activity Type: Select the activity type associated with this template from the drop-down list.
- Brief Template: Select the icon. Select the Brief Template that provides the questions for this activity in the Select Brief Template dialog box and click **Ok**.
- Use myArtwork: Select whether the myArtwork module is used.

3. In the Roles section, select the Owner, Responsible, and Viewer roles from the list of portal owner roles. Responsible is a mandatory field. The options for External Role are Supplier Responsible and Supplier Viewer.
4. In the Email Rules subtab, the rules used to trigger email are listed.
5. In the Attachments tab, add attachments to the template.
6. Select the Save action.

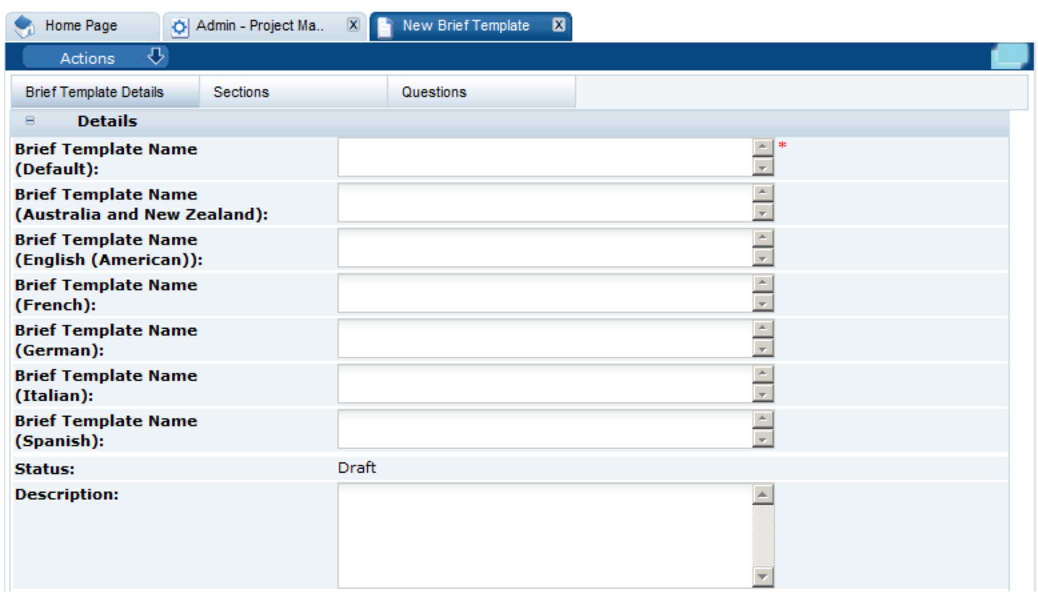
Brief Templates

A Brief is a questionnaire which is held in either the activity or product (can be linked to specifications) and is completed as part of an activity by either the solution owner's user or supplier. A Brief Template pulls together the sections, questions, and answers and defines the order in which these appear on the screen. To edit an existing template, select the template and then select the Edit action. A tab opens in edit mode.

To create a new template:

1. Select the New action. The New Brief Template tab opens.

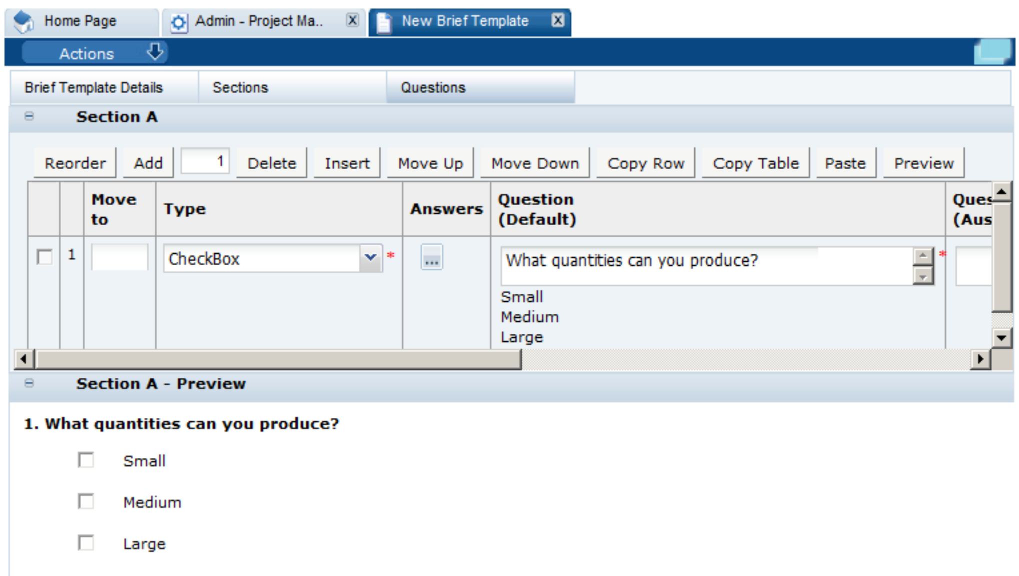
Figure 9–6 New Brief Template Page



2. In the Brief Template Details subtab:
   - Enter the template name for the default language. This is a mandatory field. Enter any translations.
   - The status of the template is set to Draft.
   - Enter a description. This is not a mandatory field.

3. In the Sections subtab, to add a section to the Brief, select **Add** and enter the description and any translations. You can define multiple sections.
4. In the Questions subtab, you can define questions for each section:
   a. Select the type of answer from the drop-down list.
   b. To select the possible answers, click the icon in the Answers column. The Select Allowable Answers dialog box opens. Enter the answers and click **Ok**.
   c. Enter the question in the default language. This is a mandatory field. Enter any translations.
   d. To see what the questions will look like on a screen, select **Preview**. This displays a preview of the questions for that section.

Figure 9–7 New Brief Template Questions Page



5. Select the Save action.

Project Status

The list of project statuses is defined by the system. The Project Status page has the same format as the Activity Status page shown in Figure 9–2. The Status ID and default status description cannot be changed. To edit any of the translated descriptions, select the Edit action. The page opens in edit mode.

Project Type

Project Type is a configurable list of project type codes. The Project Type page has the same format as the Activity Status page shown in Figure 9–2.

To edit the project types, select the Edit action. The page opens in edit mode. From this page, you can update translations for the codes, add a new project type, or delete an existing project type.

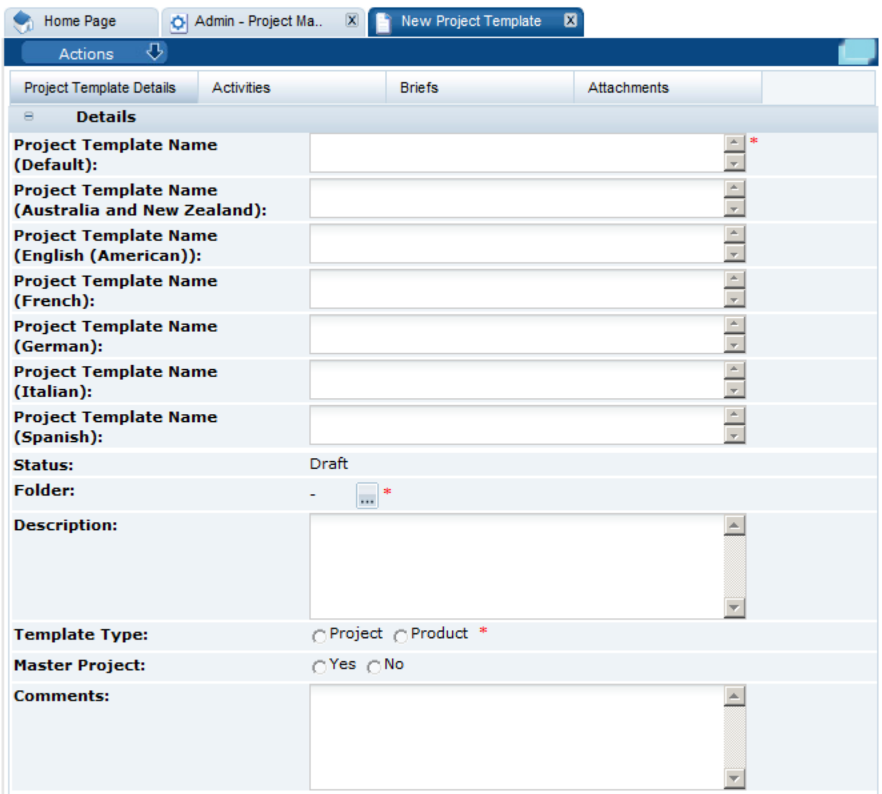
Project Template

A Project Template is used to define a set of activities and associated roles so that different processes and project schedules can be configured. It contains general project information, project details, key personnel involved, and activities. The Project Template page lists the available templates and the folder for each. To edit an existing template, select the template and then select the Edit action. A tab opens in edit mode.

To create a new project template:

1. Select the New action. The New Project Template opens.

Figure 9–8 New Project Template Page



2. In the Project Template Details subtab:

   - Project Template Name: Enter the name of the project template in the default language. This field is mandatory. Enter the translations for any supported languages.
   - Status: The status of the template is set to Draft.
   - Folder: Select the icon. Select the folder in the Select Folder dialog box and click **Ok**. This field is mandatory.
   - Description: Enter a description. This field is not mandatory.
   - Template Type: Select the template type. This field is mandatory.
   - Master Project: Select whether this template is for a master project. If set to Yes, these template can be used to identify projects in the following records of the system:
     – The initial or the start project in a hierarchy.

  - As an indicator to export to third-party systems, for example, myArtwork.
  - The initial project which can be the top level project for reports.
- Comments: Enter any comments. This fields is not mandatory.

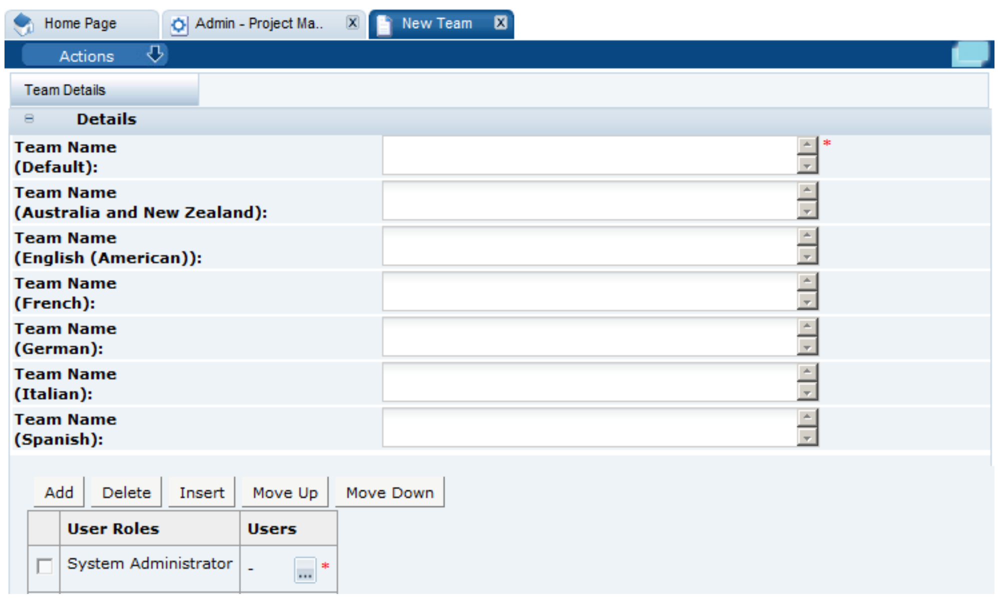
3. In the Activities subtab, add the activities to the template. Select the Add action. The Select Activity dialog box opens. Choose the activities and click **Ok**.
4. In the Briefs subtab, select the Brief templates to be added to this Project Template.
5. In the Attachments tab, add attachments to the template.
6. Select the Save action.

Team

Team administration can help a Project Manager by populating and adding users to roles which then populate the roles listed in an activity. On the Team page, the list of teams and roles associated with each team are shown. To edit an existing team, select the team and then select the Edit action. To create a new team:

1. Select the New action. The New Team tab opens.

Figure 9–9 New Team Page



2. Team Name: Enter the team name for the default language. This is a mandatory field. You can also define the translated team names.
3. User Roles: This field is mandatory. To add a role to the team:
   a. Select **Add**. The Select User Role dialog box appears.
   b. Select the roles and click **Ok**.
   c. To add users for a role, select the icon. The Select Users dialog box. Select the specific users for the team and click **Ok**.
4. Select the Save action.

System Parameters

To maintain the parameters used to support myProject, select the System Control option and then System Parameters.

Table 9–1 shows the specific system parameters, by subtab on the System Parameters page, used to support myProject.

Table 9–1 System Parameters to Support myProject

Subtab	Parameter	Description
Urgent Items	Show myProject Activities	If set to Yes, myProject activities are shown in the UIM. Default is Yes.

10

myLibrary Administration

Users with the Library Administration authority profile use myLibrary to manage the library structure and publish documents to the user base. Access to documents can be managed based on internal retailer users and external supplier users. The logging and tracking of user readership is also available.

To access myLibrary, select myLibrary on the main navigation bar. The list of published documents that can be accessed by the user is shown. Figure 10–1 shows an example of this page.

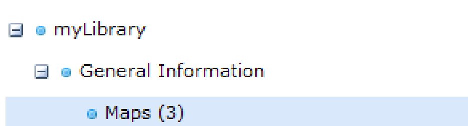
Figure 10–1 myLibrary Tab

Document Folder Pane

The contents of the document library are presented as a structured hierarchy where documents are organized within a tree of libraries that contain any number of folders and sub-folders.

A user only sees the folders and sub-folders that contain documents to which the user has access. Clicking a folder or sub-folder name displays the list of all documents in the folder or sub-folder and all its sub-folders.

When a user puts focus on the lowest level folder, the number of documents is shown in brackets:



Archive shows the folder and sub-folder structure of archived documents. It is only available to users with the Library Administrator authority profile.

Permissions

Permissions control whether a user has access to the document library. Generally, all users are granted access. Access to individual documents can be granted or refused on a user basis. The Library Reader authority profile provides reader access to the library.

Locating a Document

To display all the documents within and beneath a folder, click the folder name in the Document Folder pane area. Only those documents to which the user has access are shown.

Figure 10–2 Folder Content Display

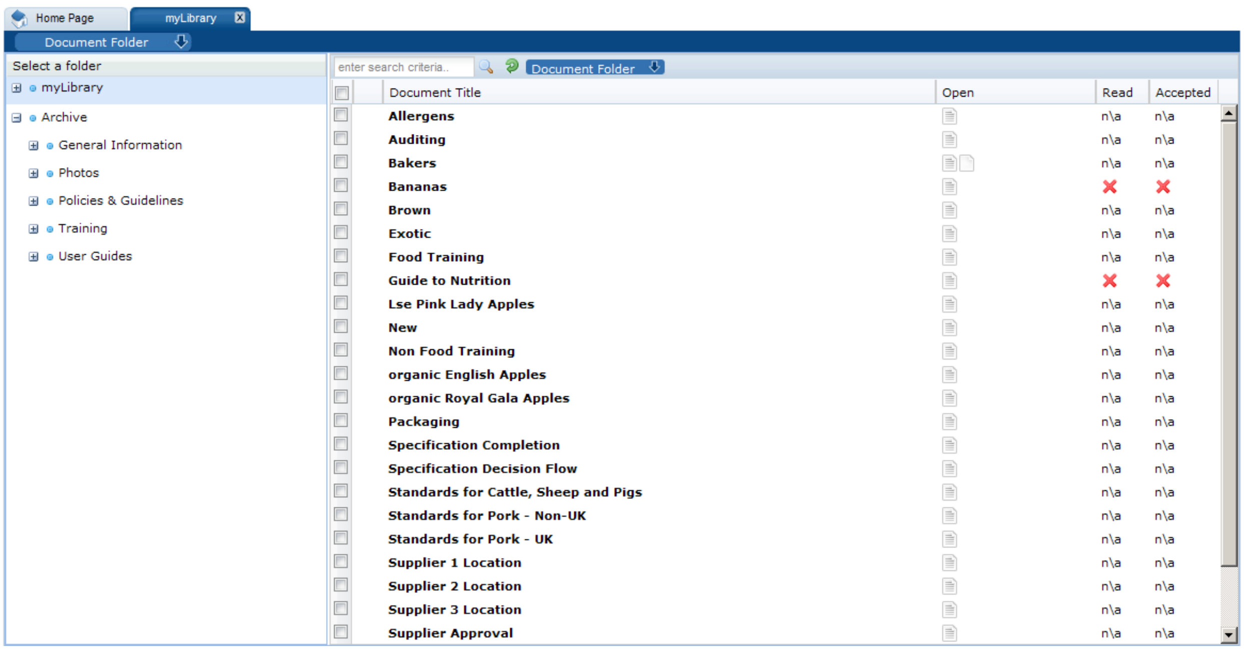


Table 10–1 describes the columns displayed for the selected folder.

Table 10–1 Columns Displayed for a Selected Folder

Column	Icons	Description
First	Shows the status of the document.	
		This document is only visible to internal users, that is, the retailer's users. The document title in the next column is shown in red.
		This document is mandatory. This icon is only shown for supplier users.
		This document has not been published and is therefore only visible to users with the Library Administrator authority profile.
Document Title	The list of document titles is sorted by the icon in the first column. Clicking a document title opens the summary document as a new tab.	

Table 10–1 (Cont.) Columns Displayed for a Selected Folder

Column	Icons	Description
Open	Indicates the type of attachments to the document, if any. If there are more than three attachments, an ellipsis is appended to the icon for the third attachment.	
		Microsoft Excel spreadsheet
		Microsoft Word document
Read	Indicates if this document has been read by the user.	
		User has not read the document.
	n\a	Indicates the document has Log Readership set to NO.
		User has marked the document as read.
Accepted	Indicates the acceptance of the document by the user.	
		User has not accepted the document.
	n\a	Indicates the document has Log Readership set to NO.
		User has accepted the document.

The following actions are available in this pane:

- Mark as read
- Mark as accepted

Managing Folders

The actions for managing folders are available to users with the Library Administrator authority profile. A hierarchy of folders can be formed by selecting an existing folder and creating a new folder beneath it.

This section covers the following actions available to manage folders:

- Creating a Folder
- Editing a Folder
- Deleting a Folder
- Managing Archive Folders

Creating a Folder

To create a new folder:

1. Select a folder in the left pane and select the New Folder action. A dialog box appears for entering the folder names.

Figure 10–3 New Folder Dialog Box

2. Enter a folder name in any of the languages as needed. Select **Ok**.

   If there are no errors, the folder is created in the Archive area.

3. If a folder name is entered for the Default language and that folder name is not unique, the Cannot Save Folder dialog box appears. Select **Ok** in the dialog box and reenter the folder name for the Default language.

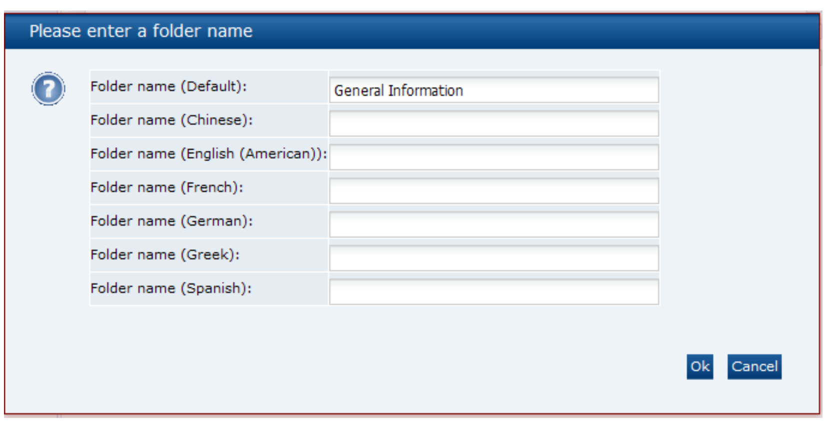
   If there are no errors, the folder is created in the Archive area.

Editing a Folder

To edit a folder:

1. Select a folder in the left pane and select the Edit Folder action. A dialog box appears for changing the folder names.

Figure 10–4 Edit Folder Dialog Box



2. Enter any changes. Select **Ok**.

   If there are no errors, the folder names are updated.

3. If a folder name is not unique, the Cannot Save Folder dialog box appears. Select **Ok** in the dialog box and reenter the folder name.

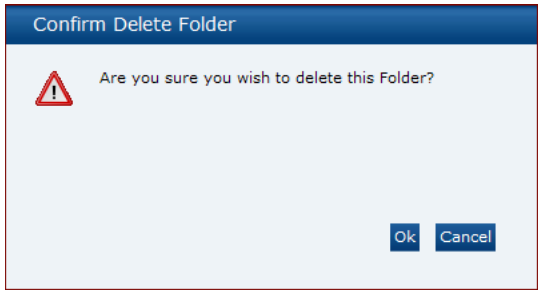
   If there are no errors, the folder names are updated.

Deleting a Folder

A folder can only be deleted if it does not contain any documents. To delete a folder:

1. Select the folder in the left pane and select the Delete Folder action. The Confirm Delete Folder dialog box appears.

Figure 10–5 Delete Folder Dialog Box

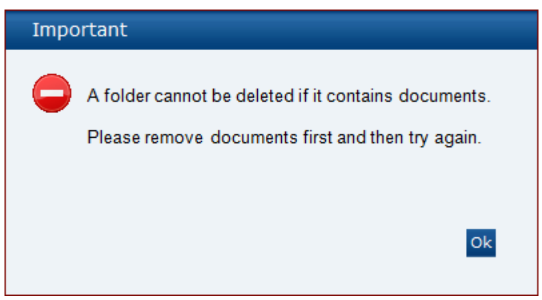


2. To delete the folder, select **Ok**.

   If there are no errors, the folder is deleted.

3. If the folder contains documents, the following dialog box appears. Select **Ok** in the dialog box. Remove the documents and then try to delete the folder again.

Figure 10–6 Cannot Delete Folder Dialog Box



Managing Archive Folders

The archive area is only visible to Library Administrators. It is shown at the same level, but beneath the root node. For an example, see Figure 10–1.

The folder structure of the Archive area mirrors that of the myLibrary area above it. Documents that have been set as archived are no longer visible to the general user, but remain accessible through this area. If an archived document is then un-archived, it reappears in the myLibrary area within its original file structure.

The Read and Accept document actions are not available from this area. The option to delete a folder in the archive area is only available if the folder contains no documents.

Managing Documents

This section covers the following operations available to manage documents:

- Creating a New Document
- Copying a Document
- Deleting a Document

- Archiving a Document

Creating a New Document

To create a new document, select a folder in the archive area and select the New Document action. The New Document tab opens.

Figure 10–7 New Document Tab

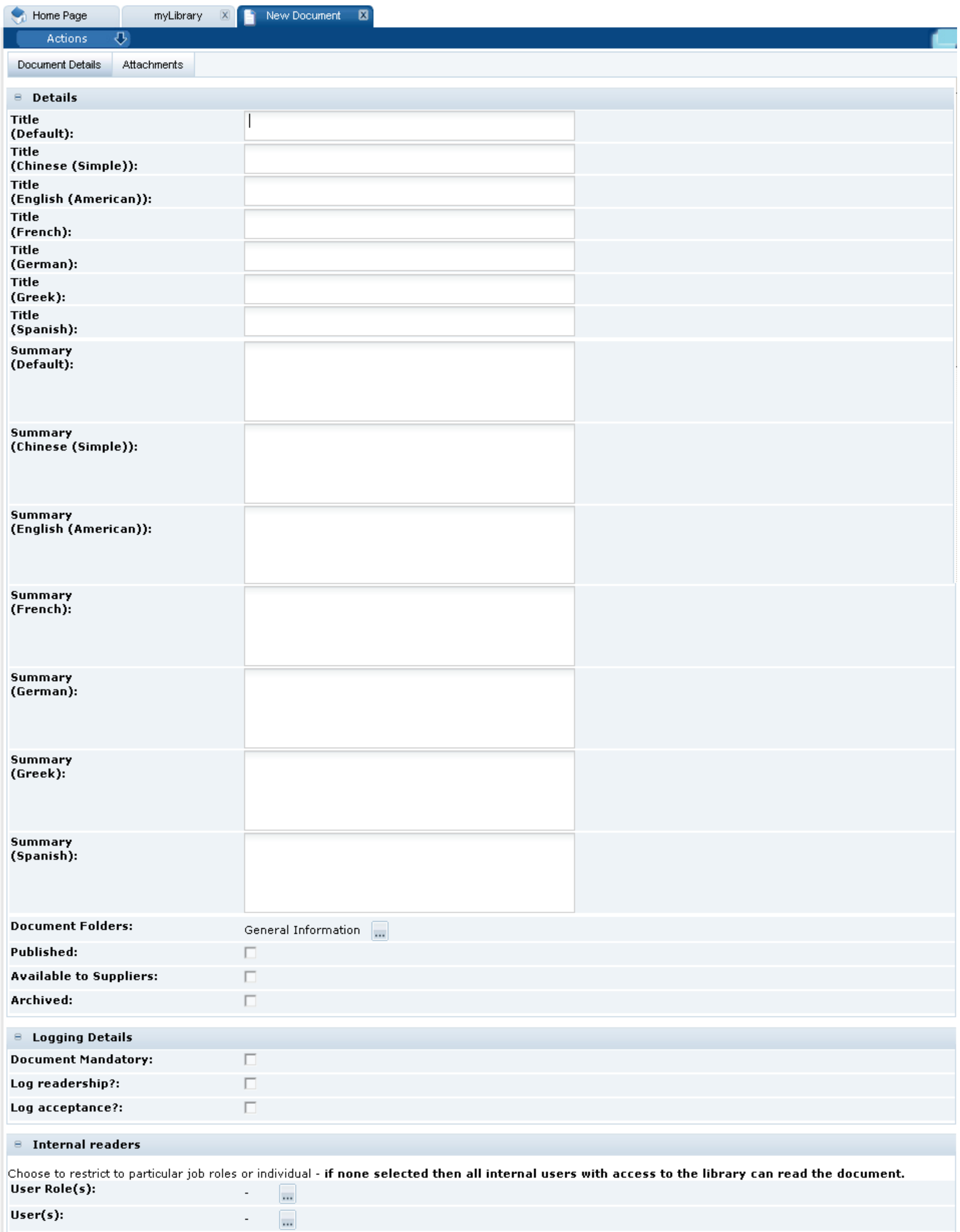


Table 10–2 describes the fields for this tab.

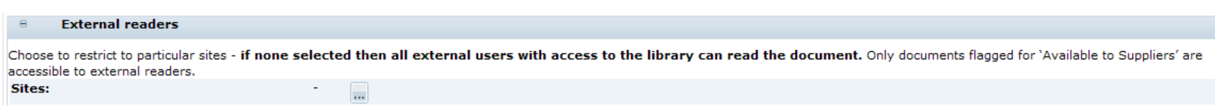
Table 10–2 Fields in the New Document Tab

Field	Description
Title	The completion of the Title in the default language is mandatory in order to save the document. The document title can be added for the other supported languages so that users logged in with an alternative language can see documents in their own language.
Document Folders	This shows where this document is to appear and is used to assign the document to one or more folders within the library.
Published	This controls if the document can be seen by non-administration users.
Available to Suppliers	This controls if the document can be seen by supplier (External) users. This field is only available to users with the Library Administrator profile authority. For more information, see "Available to Suppliers Field."
Archived	This is used to archive the document when required. If this is checked, the document moves to the archive area and vice versa.
Logging Details	If Document Mandatory is checked: ■ Log Readership is checked and greyed out. ■ A Read By field becomes visible to enable the user to enter a date by which the document is to be read. If required, this is used by the Urgent Items Manager (UIM). For information on the UIM, see *Micros Supply Chain myCreations User Guide*. If Document Mandatory is not checked: ■ Log Readership will not be greyed out and remains checked. ■ The Read By field is no longer visible. To log that users are to read this document, check Log Readership. To log that users are to accept this document, check Log Acceptance. Documents are only shown as mandatory for external users. Documents can be set as mandatory for specific external users by assigning contact roles. This field is only available to users with the Library Administrator profile authority.
Internal Readers	This controls if all internal readers can see and read this document. This field is only available to users with the Library Administrator profile authority. For more information, see "Internal Readers Field."

Available to Suppliers Field

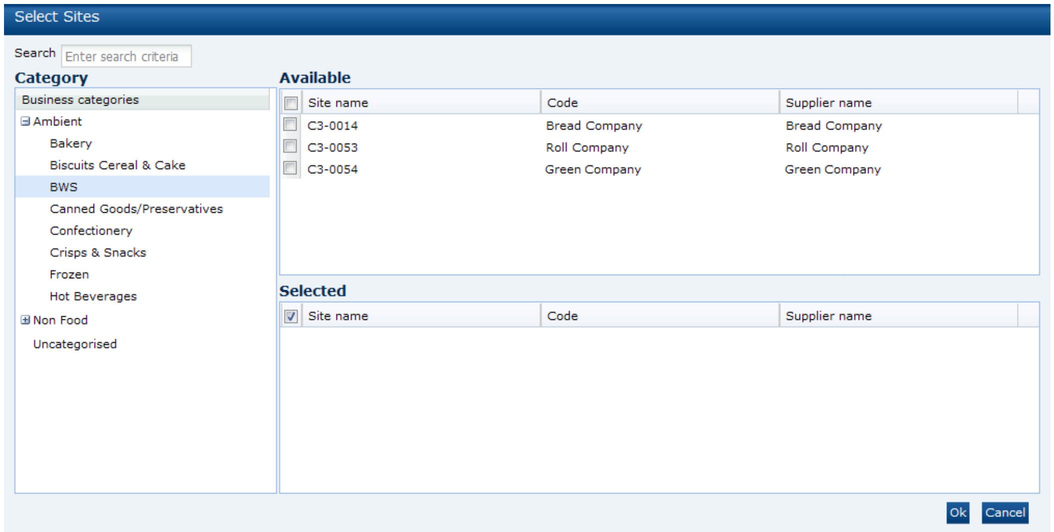
If this field is checked, the following field becomes available:

Figure 10–8 External Readers Field



The Sites field is used to target the visibility of the document to specific sites. This is done using the Select Sites dialog box.

Figure 10–9 Select Sites Dialog Box



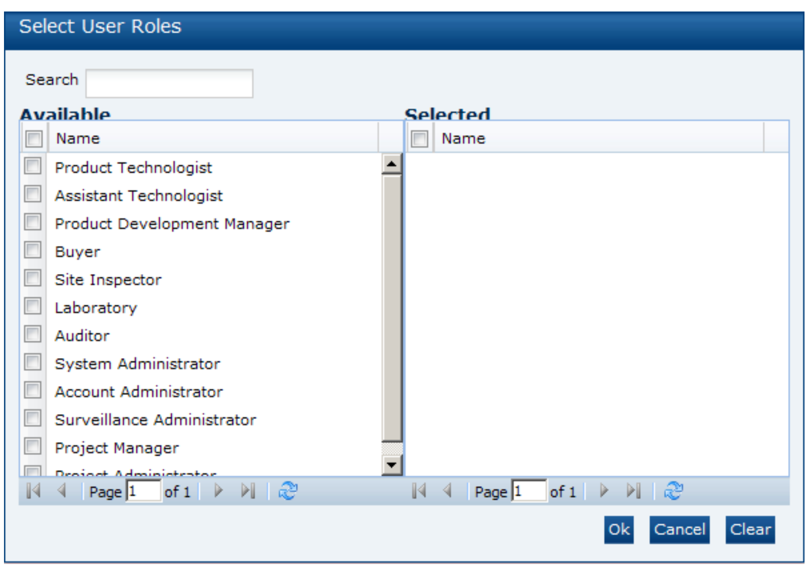
Any sites that have not been assigned a Business Category can be found by selecting Uncategorised shown at the bottom of the Category pane. Sites can be identified using the business categories shown in that pane. If there are no sites selected, all sites have visibility to the document.

Internal Readers Field

Internal readers can be assigned based on user roles or users.

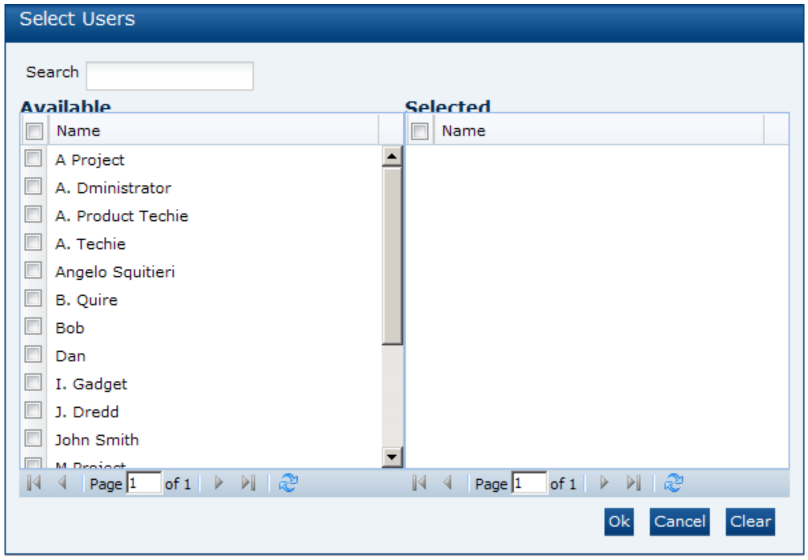
User Roles can be specified if the document is targeted to users with a particular user role. If none are selected, all internal users are able to read and see the document. The Select User Roles dialog box is used.

Figure 10–10 Select User Roles Dialog Box



Users can be specified if the document is targeted to specific internal users. If none are selected, all internal users are able to read and see the document. The Select Users dialog box is used.

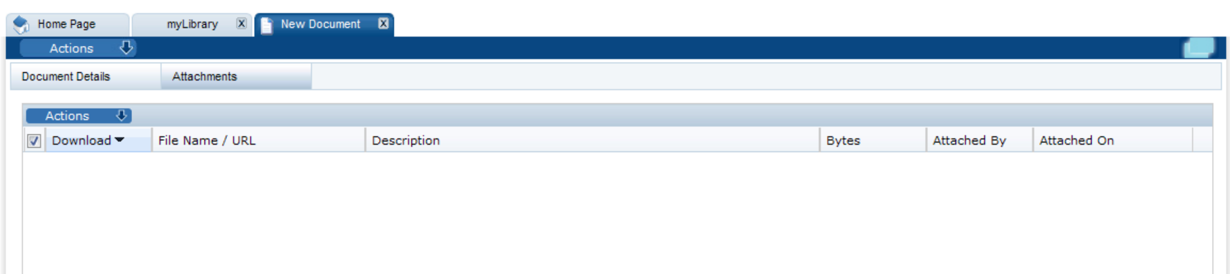
Figure 10–11 Select Users Dialog Box



Attachments

The Attachment Manager component is used to upload the actual documents as file attachments.

Figure 10–12 Attachments



Copying a Document

To create a copy of a document in the selected folder, select the Copy action. The Copy Document dialog box appears. Select **Ok**. A copy of the document is created:

- The whole record is copied, except attachments and readership logs.
- The words, Copy of, are added to the document title.
- The copied document appears in the same folder.

Deleting a Document

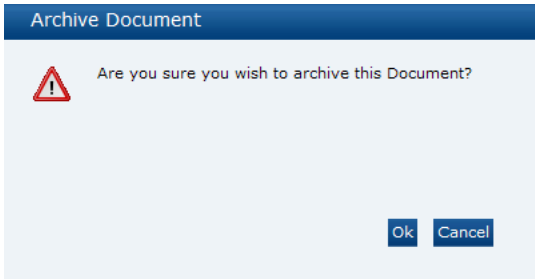
A document can be deleted if it does not contain any readership log details, other than the record of which users have opened it, or has been archived. To delete a document, select the Delete action. The Delete Document dialog box appears. Select **Ok**. The document is deleted:

- The document is physically deleted.
- If there are no more documents left in the folder, the folder is no longer visible within the main library for non-Library Administrator users.

Archiving a Document

To archive a document, select the Archive action. The Archive Document dialog box appears.

Figure 10–13 Archive Document Dialog Box



Select **Ok**. The document is archived:

- The document is no longer be visible in the main library.
- The document is visible in the same folder location within the archive area.
- If there are no more documents left in the folder, the folder is no longer visible within the main library for non-Library Administrator users.

Translating Folders and Documents

The Document Administrator has the ability to create translations for folders and documents in the document library to the supported languages.

Translating Folders

The folder title and subject fields can be translated. Translations can be added when creating or editing a folder. For more information, see "Creating a Folder" and "Editing a Folder."

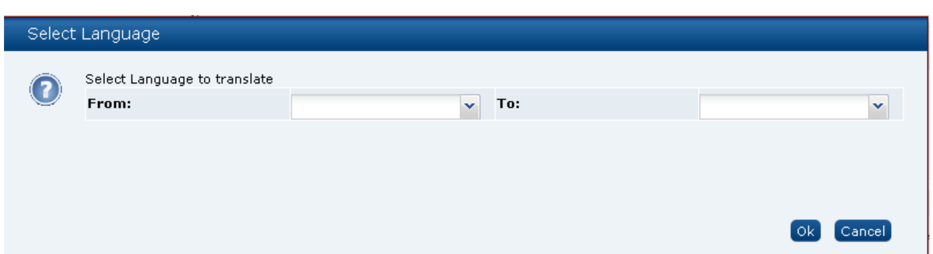
Translations for folders and documents can also be entered directly when the record is being edited.

Translating Documents

Users with the Library Administrator authority profile can add translations for documents. To add a translation to a document:

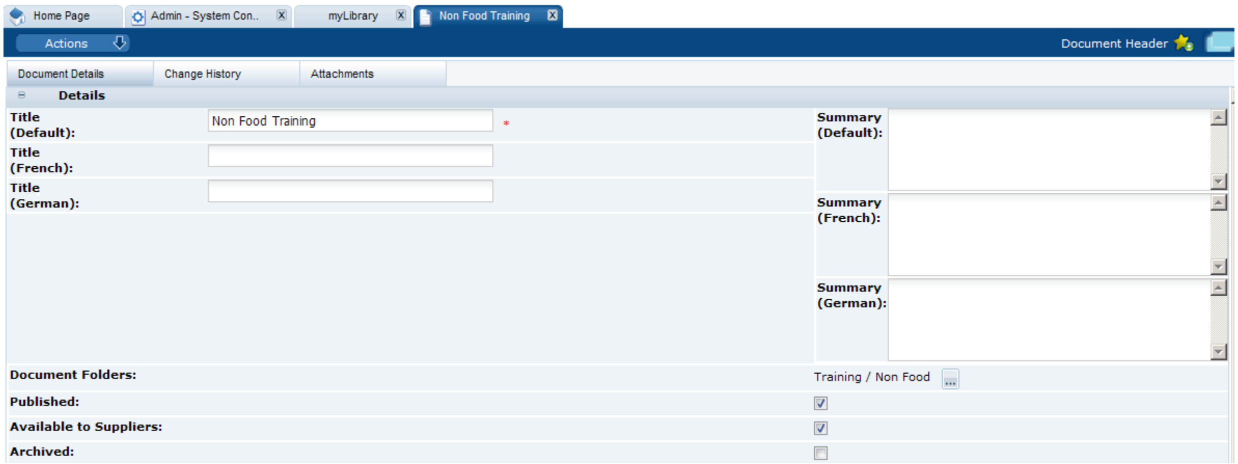
1. Open the document in Read mode. Select the Translate action. The Select Language dialog box appears.

Figure 10–14 Select Language Dialog Box



2. Select the languages from the drop-down list and select **Ok**. The document details appear. The file is open in Edit mode. The fields for Title and Summary appear for each selected language.

Figure 10–15 Document Details for Translation



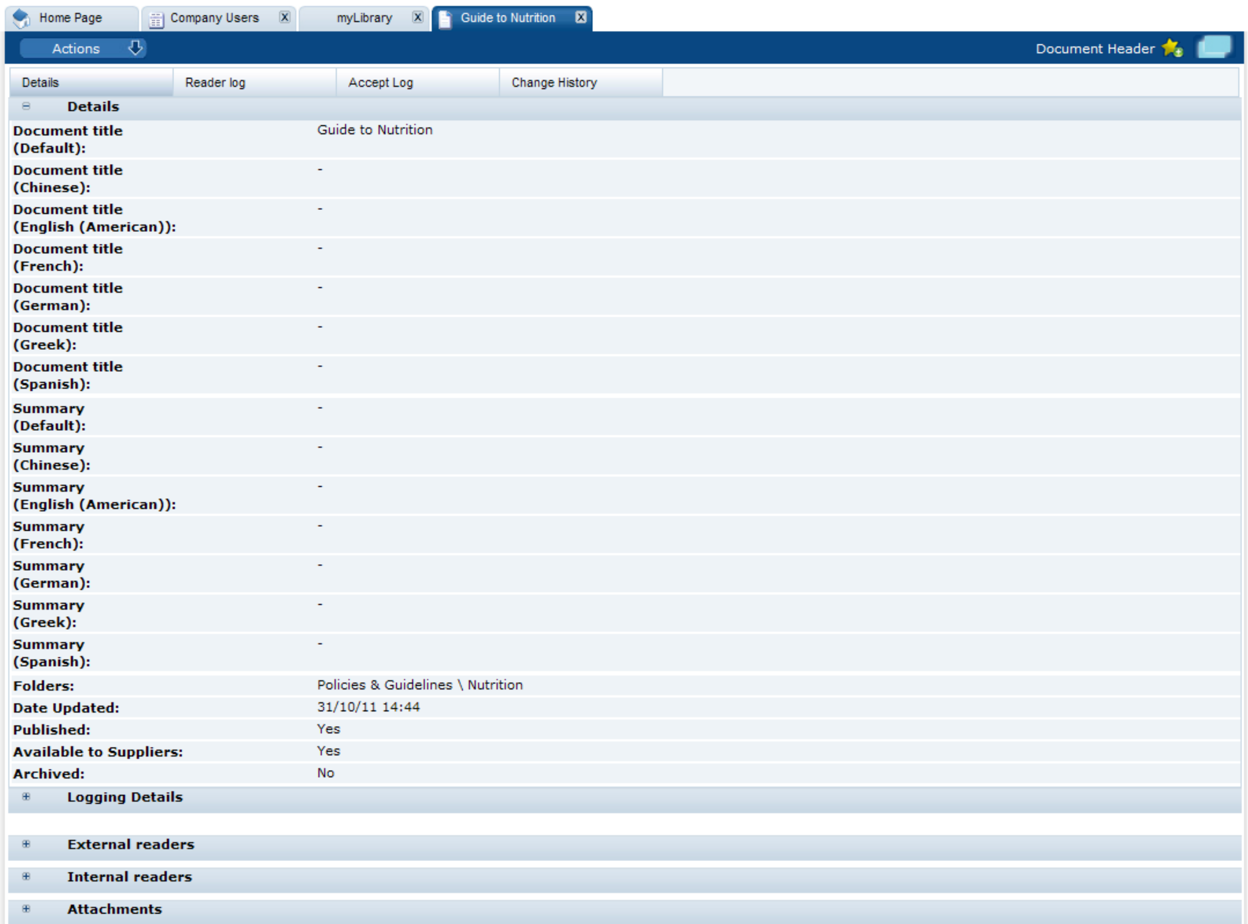
3. Enter the translations for the Title and Summary fields. Select **Ok** when completed.

Viewing Translations

The View Translations action is used to see all the translations for a document. This action is available to all users.

To see the available translations for a document, open the document in Read mode and select the View Translation action. The translation details appear.

Figure 10–16 View Translations



System Parameters

To maintain the parameters used to support myLibrary, select the System Control option and then System Parameters.

Table 10–3 shows the specific system parameters, by subtab on the System Parameters page, used to support myLibrary.

Table 10–3 System Parameters to Support myLibrary

Subtab	Parameter	Description
Urgent Items	No Days Before Read By Date	Used to populated the UIM with items that are near to the expiration date that have not yet been read by the user.
Urgent Items	Show Documents	If set to Yes, document items are shown in the UIM. If set to No, document items are not shown.

11 Internationalization

Internationalization is the process of creating software that can be translated easily. Changes to the code are not specific to any particular market.

The Micros Supply Chain myCreations applications have been internationalized to support multiple languages.

Translation

Translation is the process of interpreting and adapting text from one language into another. Although the code itself is not translated, components of the application that are translated may include the following, among others:

- Graphical user interface (GUI)
- Error messages

The following components are not translated:

- Documentation (online help, release notes, installation guide, user guide, operations guide)
- Batch programs and messages
- Log files
- Configuration tools
- Demonstration data
- Training materials

The user interface for the Micros Supply Chain myCreations applications have been translated into the following languages:

- French
- German
- Italian
- Spanish

There is a provision for some specific overrides to the base language (English (British)) for English (American) and English (Australia and New Zealand). Any number of additional languages can be configured as required in a portal, subject to the client supplying the necessary translations. The translations apply to system text (User Interface field labels, buttons, menu options, error messages, and so on) plus glossary pick-list entries.