Micros Supply Chain myCreations

User Guide

Release 1.9.15

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Micros Supply Chain myCreations User Guide, Release 1.9.15

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Preface

This document describes the Micros Supply Chain myCreations user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is intended for users of the Micros Supply Chain myCreations modules.

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Related Documents

For more information, see the following documents in the Micros Supply Chain myCreations Release 1.9.15 documentation set:

- *Micros Supply Chain myCreations Administration Guide*
- *Micros Supply Chain myCreations Implementation Guide*
- *Micros Supply Chain myCreations Release Notes*

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

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

Review Patch Documentation

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, 1.9.15). 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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`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of an document with part number E123456-01.

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Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`

(Data Model documents are not available through Oracle Technology Network. You can obtain these documents through My Oracle Support.)

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 application designed to meet all aspects of sourcing, developing, and protecting retailer brands. The application 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.

Micros Supply Chain myCreations is composed of the following modules:

- 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.
- myReports allows for searches and reporting across the application.

For more information on any of these modules, see the module User Guide. For information on myLibrary, see Chapter 8.

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

Passwords

Passwords are used to restrict access to Micros Supply Chain myCreations. The requirements for passwords are defined by the system administrator. Requirements can include the definition of password length and content. For example, you may need to enter a password that is at least five characters and includes at least one numeric character. For information on your password requirements, consult your system administrator.

Passwords can be set to expire within a specific number of days after being set. During login, if you are warned that your password is about to expire, you can choose to change your password at that time. If you do not change your password before it expires, you may be locked out from logging into the application. You may also be locked out after a specific number of invalid login attempts. If you are locked out, a system administrator must reset your password. When your password is reset, you are assigned a temporary password that you must change immediately following your next login.

For information on changing your password, see "Changing your Password during Login."

Language Support

Micros Supply Chain myCreations supports multiple languages. The Login page is displayed in the system default language. Once logged in, the pages are displayed in the language selected for the user. For information on selecting the language, see "Editing your Profile."

2

Getting Started

This chapter provides an introduction to accessing and using Micros Supply Chain myCreations. The following topics are covered in this chapter:

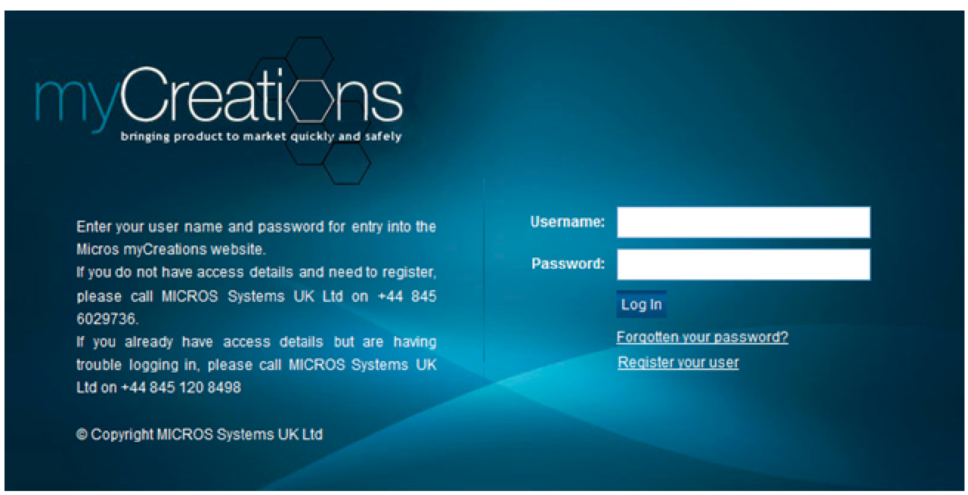
- Login
- Home Page
- Session Timeout
- Logout

Login

To log in to Micros Supply Chain myCreations:

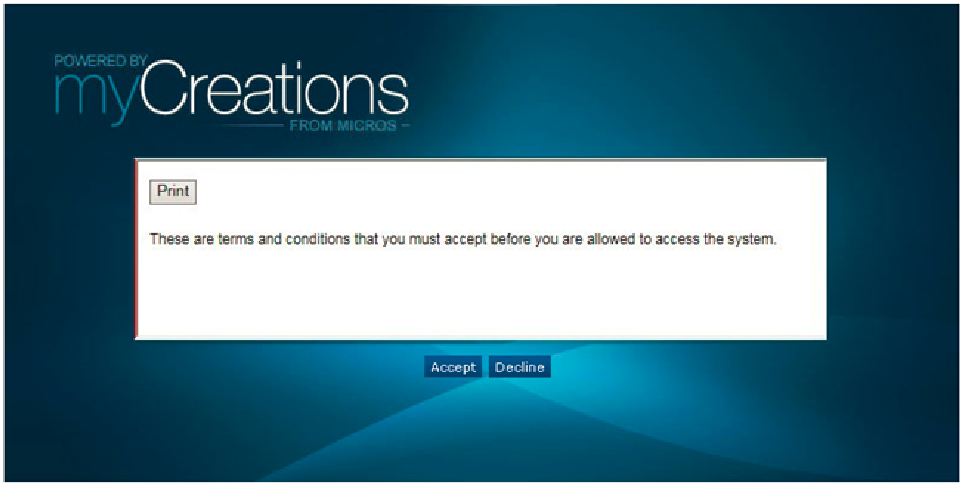
1. To start the application, open a web browser. Enter the URL for your Micros Supply Chain myCreations application. The login page appears.

Figure 2–1 Login Page



2. Enter your user name and password and select **Log In**.
3. If the Terms and Conditions page appears, you must accept the Terms and Conditions. Read the terms and conditions. To continue with the login, select **Accept**.

Figure 2–2 Terms and Conditions Page



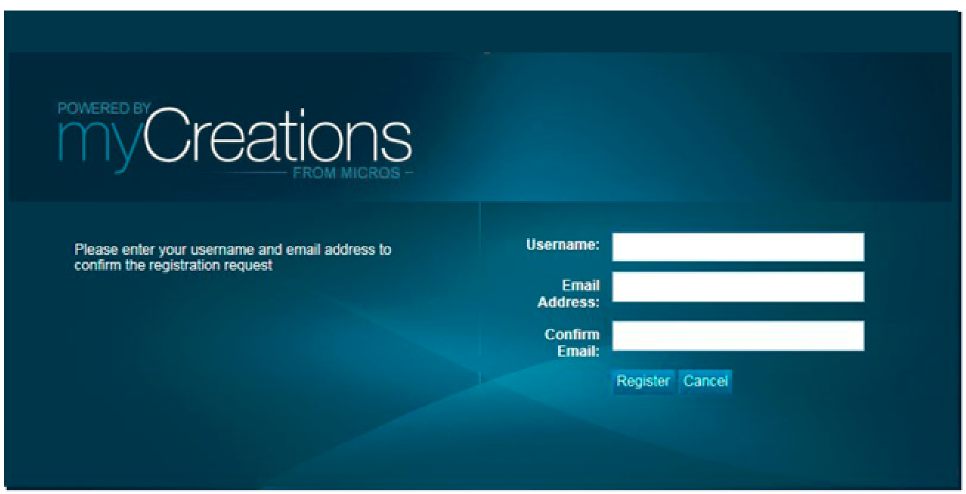
The Home page appears. See "Home Page."

Registering your User Account

To register your user account and set your password for the first time:

1. Select the Register your user link. You are prompted to enter your user name (an email message will have been sent to you when your account was created) and your email address.

Figure 2–3 Register your User Page



2. Enter your user name and email address. Select **Confirm**. An email message is sent to this address. The email message contains a link you can use to set your password.

> **Note:** If the link is not used within 24 hours, it will expire and these steps will need to be repeated.

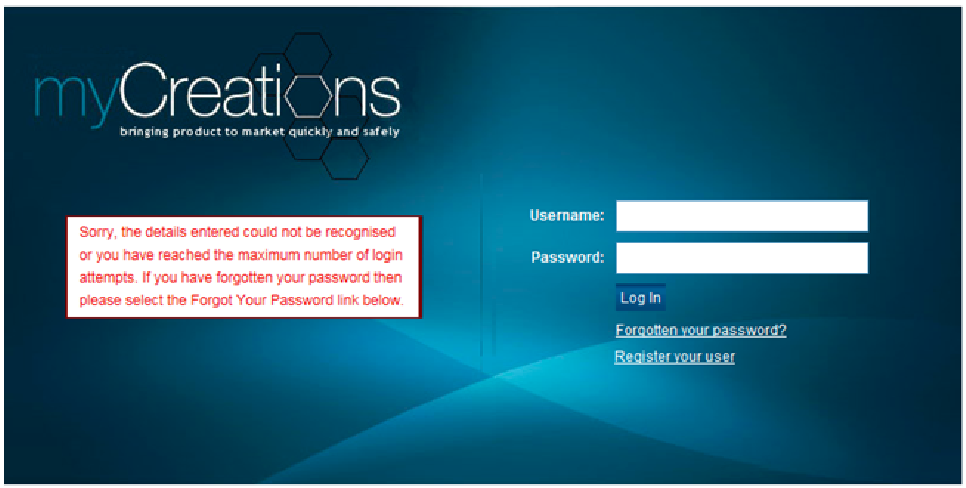
Changing your Password during Login

If your password will expire soon, the Password Expiry dialog box appears. It displays how many days are left until your password expires:

- If you want to change the password, select **Change Password**. Your are prompted to change the password. See Figure 2–4. Enter your current and new passwords. Select **Ok**. The Home page appears.
- If you want to change the password at a later time, select **Change Later**. The Home page appears.

If your password has expired, you are prompted to enter a new password before you can log in. Enter your current password and the new password. Reenter your new password to confirm the change. Select **Ok**. The Home page appears.

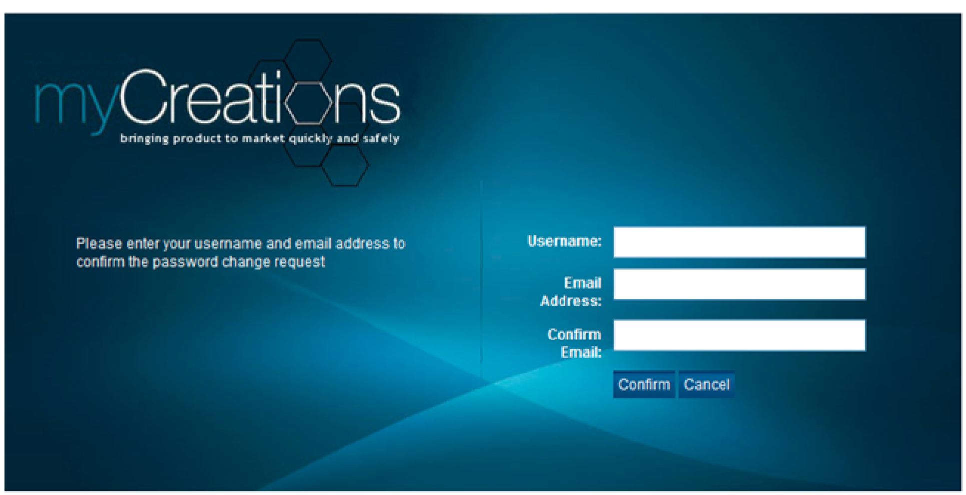
Figure 2–4 Expired Password Page



To change your password if you cannot remember the password:

1. Select the **Forgotten your password** link. You are prompted to enter an email address.

Figure 2–5 Forgotten Password Page



2. Enter your user name and email address. Select **Confirm**. An email message to sent to the address. The email message contains a link you can use to reset your password.

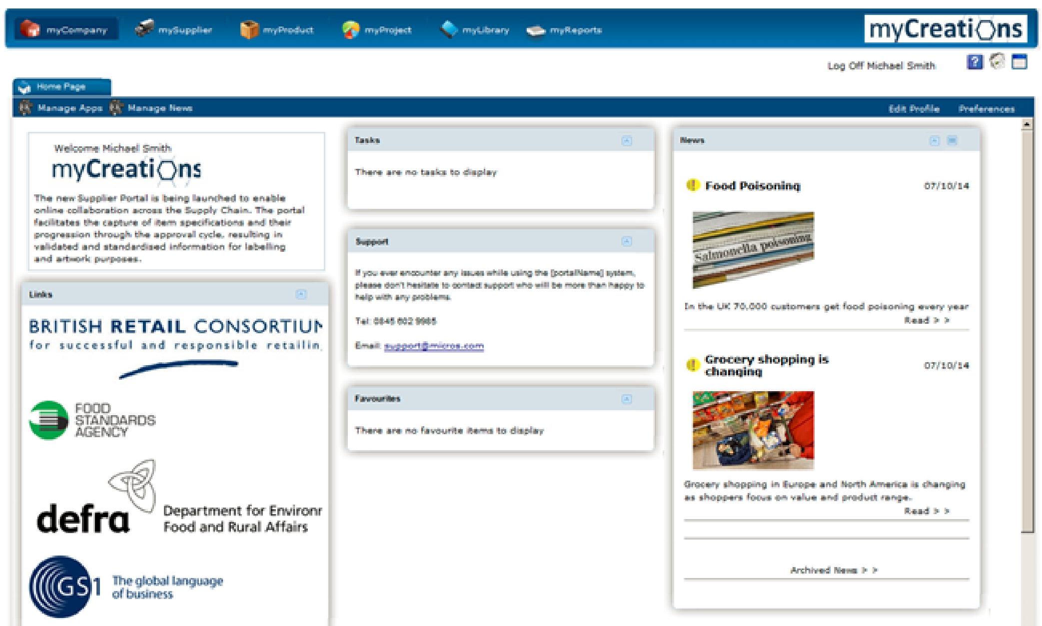
Note: If the link is not used within 24 hours, it will expire and these steps will need to be repeated. The system automatically sends you an email message as a confirmation whenever you change your password.

Note: If the administrator changes the rules that control the format and minimum strength of passwords, your password is automatically expired. You are prompted to set a new password the next time you log in.

Home Page

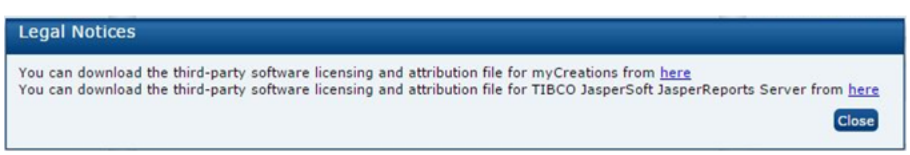
After successfully logging in, the Home page appears.

Figure 2–6 Home Page



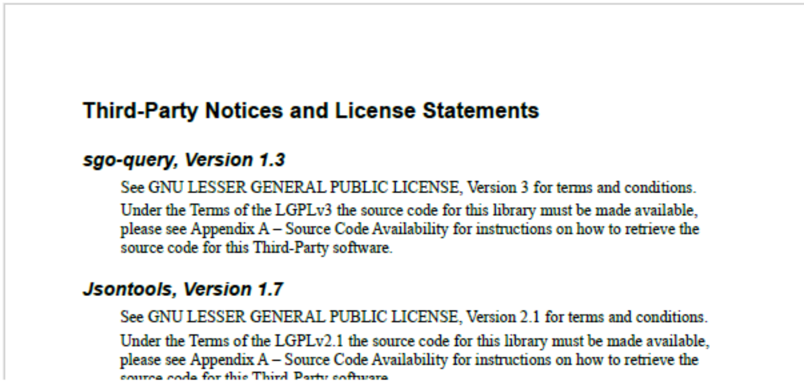
Clicking the Legal Notices link at the bottom of the page displays a message box containing options to display details of all third-party software components that are used within the system.

Figure 2–7 Legal Notices



To view the legal notices, click a link. A PDF appears which lists the third-party software components. An example is shown in Figure 2–8.

Figure 2–8 Example of Legal Notices


Third-Party Notices and License Statements

sgo-query, Version 1.3

See GNU LESSER GENERAL PUBLIC LICENSE, Version 3 for terms and conditions.

Under the Terms of the LGPLv3 the source code for this library must be made available, please see Appendix A – Source Code Availability for instructions on how to retrieve the source code for this Third-Party software.

Jsontools, Version 1.7

See GNU LESSER GENERAL PUBLIC LICENSE, Version 2.1 for terms and conditions.

Under the Terms of the LGPLv2.1 the source code for this library must be made available, please see Appendix A – Source Code Availability for instructions on how to retrieve the source code for this Third-Party software.

Navigation Bar

The navigation bar shows the Micros Supply Chain myCreations modules that you can access. To access a module, select the icon in the navigation bar or an option from the actions available for the module. A new tab is opened to enable you to access the module.

A retailer or supplier user can also view their company details. Select the myCompany icon. The following actions are available:

- Company Details. The details, such as contact name and address, can be viewed and edited.
- Users. The Company Users tab opens. For more information on working with user information, see the *Micros Supply Chain myCreations Administration Guide.*
- Admin. For more information on administration functionality, see the *Micros Supply Chain myCreations Administration Guide.*

Table 2–1 describes the icons that appear on the Home page.

Table 2–1 Icons on Home Page

Icon	Description
	Open online help, if available. For some icons and fields, tooltips are available. A tooltip is displayed when you place the mouse over the icon or field.
	Display the list of recent items you have accessed. Select an item from the list and the item opens. 
	Minimize the navigation bar.

Table 2–1 (Cont.) Icons on Home Page

Icon	Description
	Maximize the navigation bar.
	Add this item to your favorites list.
	Open this tab in a window.

Apps Available on the Home Page

The following Apps are available on the home page:

Welcome

Displays a welcome message.

Links

Displays a set of icons that link to web sites. When you select an icon, the web site opens in a new browser window or tab.

Tasks

Displays any actions that need to be performed. For more information on the Tasks App, see Chapter 5.

Support

Displays information on how to contact customer support if you require assistance or encounter a problem.

Favourites

Use to bookmark records, documents within the document library, or an area of the system, for example, Site Approvals. New bookmarks are added at the top of the list. The items can be moved up and down the list.

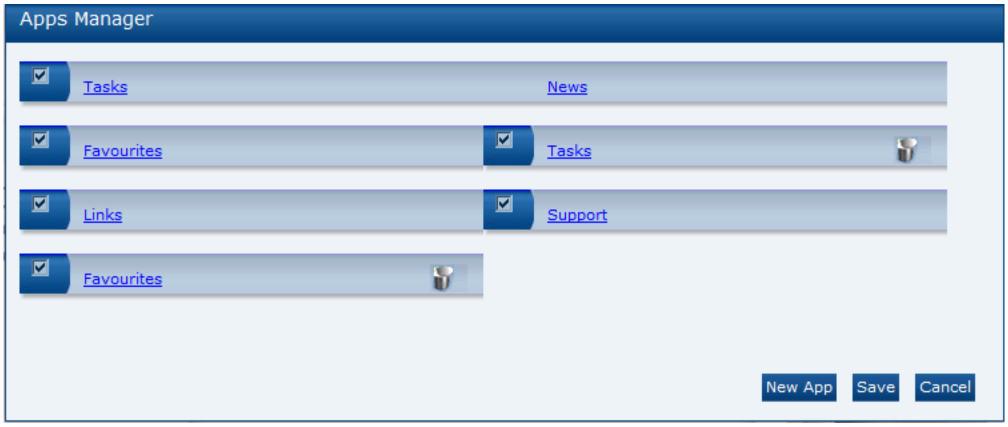
News

Lists available news items. Archived news items can also be accessed. For more information on the News App, see Chapter 4.

Manage Apps Link

Select the Manage Apps link. The Apps Manager dialog box opens. There is an entry for each App shown on the Home page.

Figure 2–9 Apps Manager Dialog Box



If there is checkbox next to the App name, you can add or remove the App from your Home page. To add the App, check the box. To remove the App, uncheck the box. Mandatory Apps cannot be removed.

The following functionality is available for System Administrators:

- The title and other details for the App can be edited. Click the link and a tab opens. For an example of the content, see Figure 2–10.
- If a delete icon is displayed for the App, click the icon to delete the App. The Confirm Delete dialog box appears. Select **Ok**.
- A new App can be created. For more information, see "Create a New App."

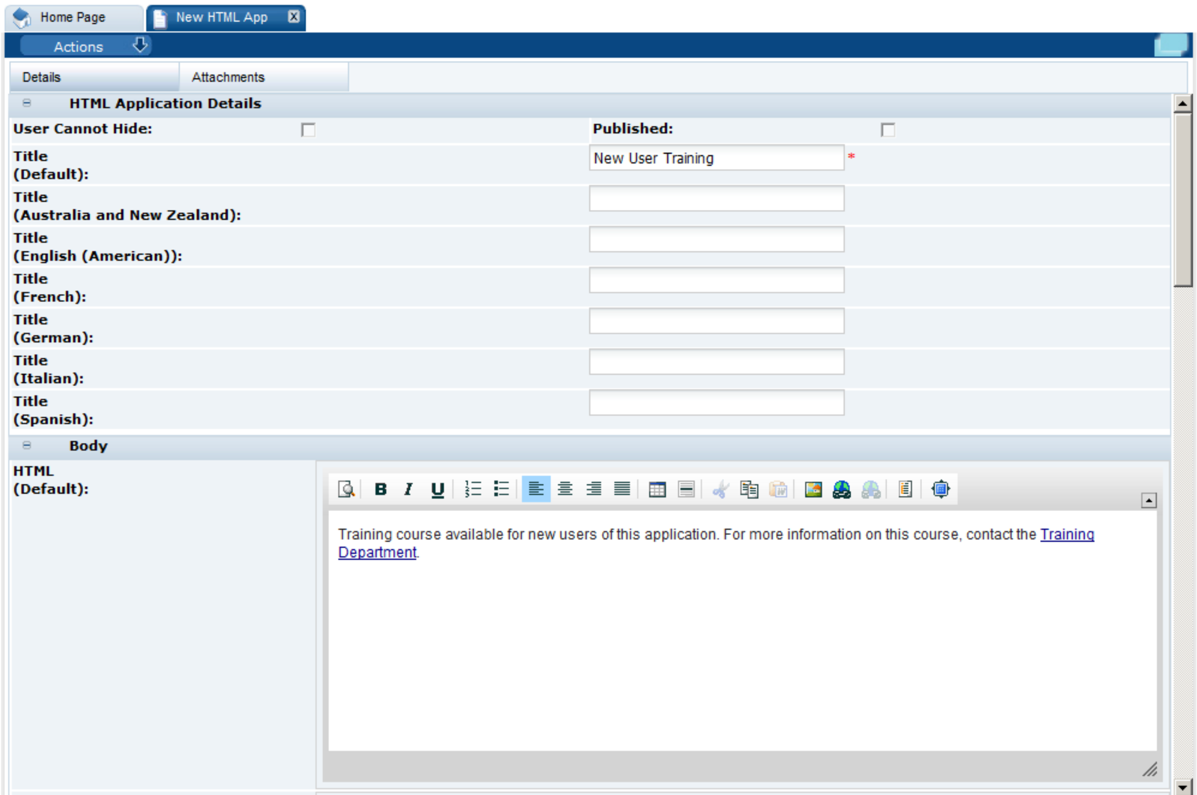
When you have made all your updates, select **Save**.

Create a New App

To create a new App:

1. Select **New App**. The New HTML App tab opens.

Figure 2–10 New HTML App Page



2. Enter the details:
   - If the User Cannot Hide field is checked, the App will not appear in a user's Apps Manager panel. This prevents a user from removing this App from the Home page.
   - If the Published field is checked, all users will see this App when they next log in.
   - A default title is required. You can also enter a title for each available language.
   - In the Body section, enter any content to be displayed. Content can be added for each available language.
3. To save the new App, select **Save**.

Manage News Link

For information on this functionality, see Chapter 4.

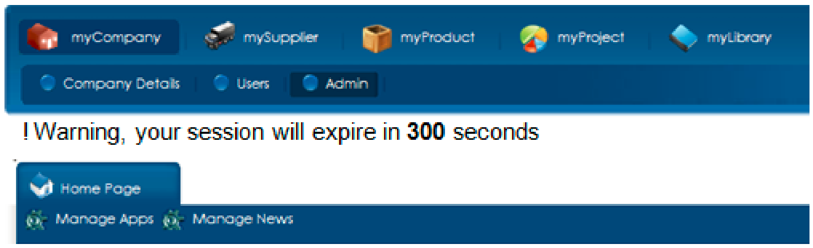
Changing the Layout of the Home Page

To move an App to a different place on the Home page, move the cursor over the title bar of the App. Hold down the left mouse button and move the App. Release the button when it is at the place where you want it on the Home page. If you place it in a position already occupied by another App, the App already in that position moves down one position in the page.

Session Timeout

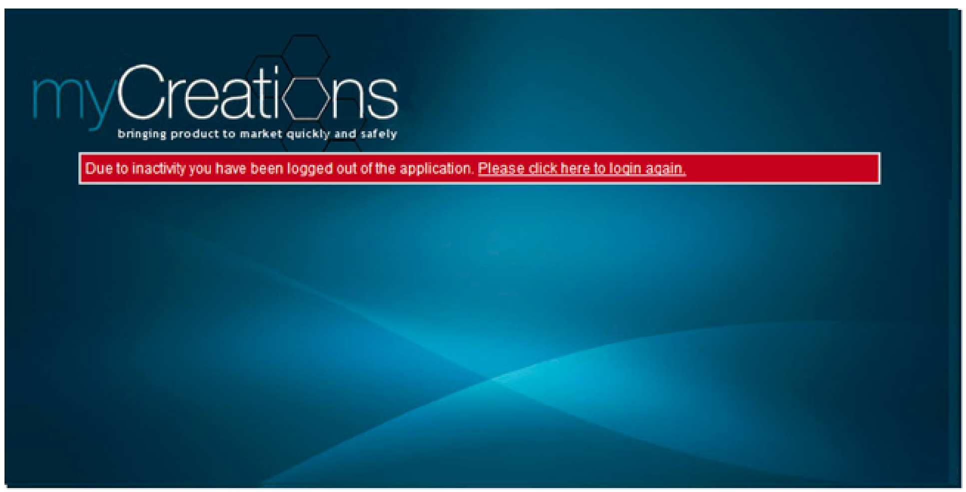
The system can define a timeout interval for sessions. If a user does not interact with the session within that interval, the user is logged out. The system monitors how close a user is to the session expiration time. A warning appears as the limit approaches.

Figure 2–11 Session Timeout Warning



If you interact with the application before the time limit occurs, the timeout is reset. If you do not interact with the system within the time limit, you are logged out of the application. A link is provided to log back in.

Figure 2–12 Session Expired

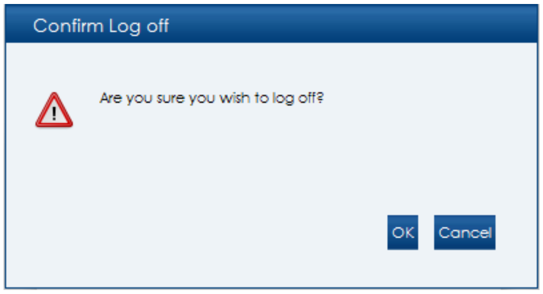


Logout

To log out of Micros Supply Chain myCreations, select **Log Off**. The Confirm Log Off dialog box appears.

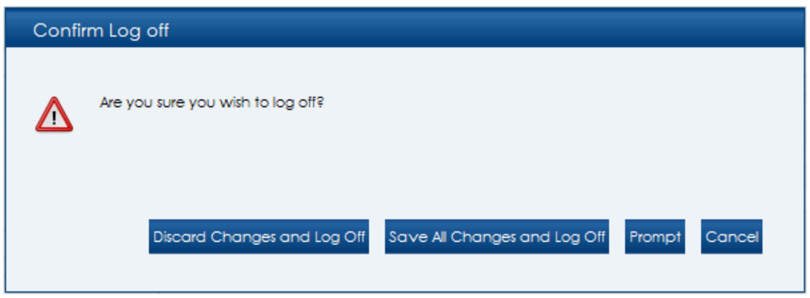
- If you do not have any open records, you are prompted to confirm. Select **Ok**. You are logged out of the application.

Figure 2–13 Confirm Log Off



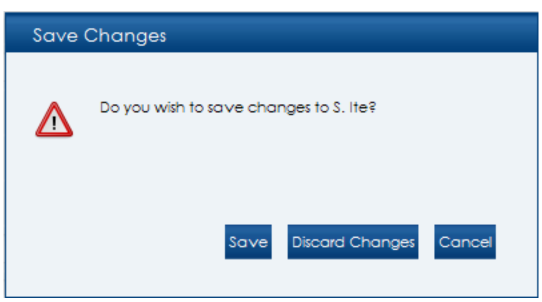
- If you have any open records, you are prompted on how to handle the open records:

Figure 2–14 Confirm Log Off with Open Records



  – If you select **Discard Changes and Log Off**, any pending changes for the open records are discarded and you are logged out.
  – If you select **Save All Changes and Log Off**, your updates to all open records are saved and you are logged out.
  – To handle each open record individually, select **Prompt**. A dialog box is displayed for each open record. For each open record, select whether to save or discard the changes. You are then logged out.

Figure 2–15 Save Changes to Open Records when Logging Out



3 User Information

You can manage your user profile and preferences from the Home page. Changes made to user information take effect immediately.

The following topics are covered in this chapter:

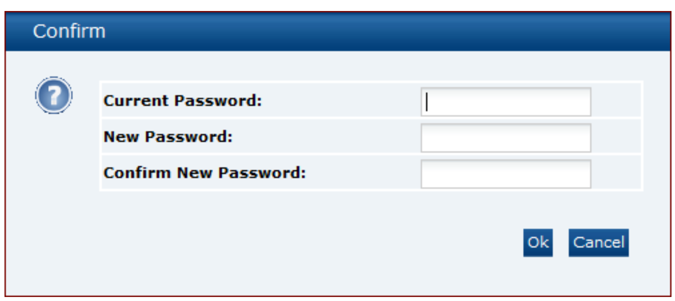
- Changing your Password
- Editing your Profile
- Editing your Preferences

Changing your Password

To change your password:

1. On the Home page, select **Edit Profile**. Your user record opens in edit mode.
2. Select the Change Password action. The Confirm dialog box appears.

Figure 3–1 Confirm Password Change Dialog Box



3. Enter your current password. Enter your new password. Enter your new password again to confirm the change.
4. Select **Ok**. The new password is validated. If there are no errors, your password is changed.

> **Note:** The system automatically sends you an email message as a confirmation whenever you change your password.

Editing your Profile

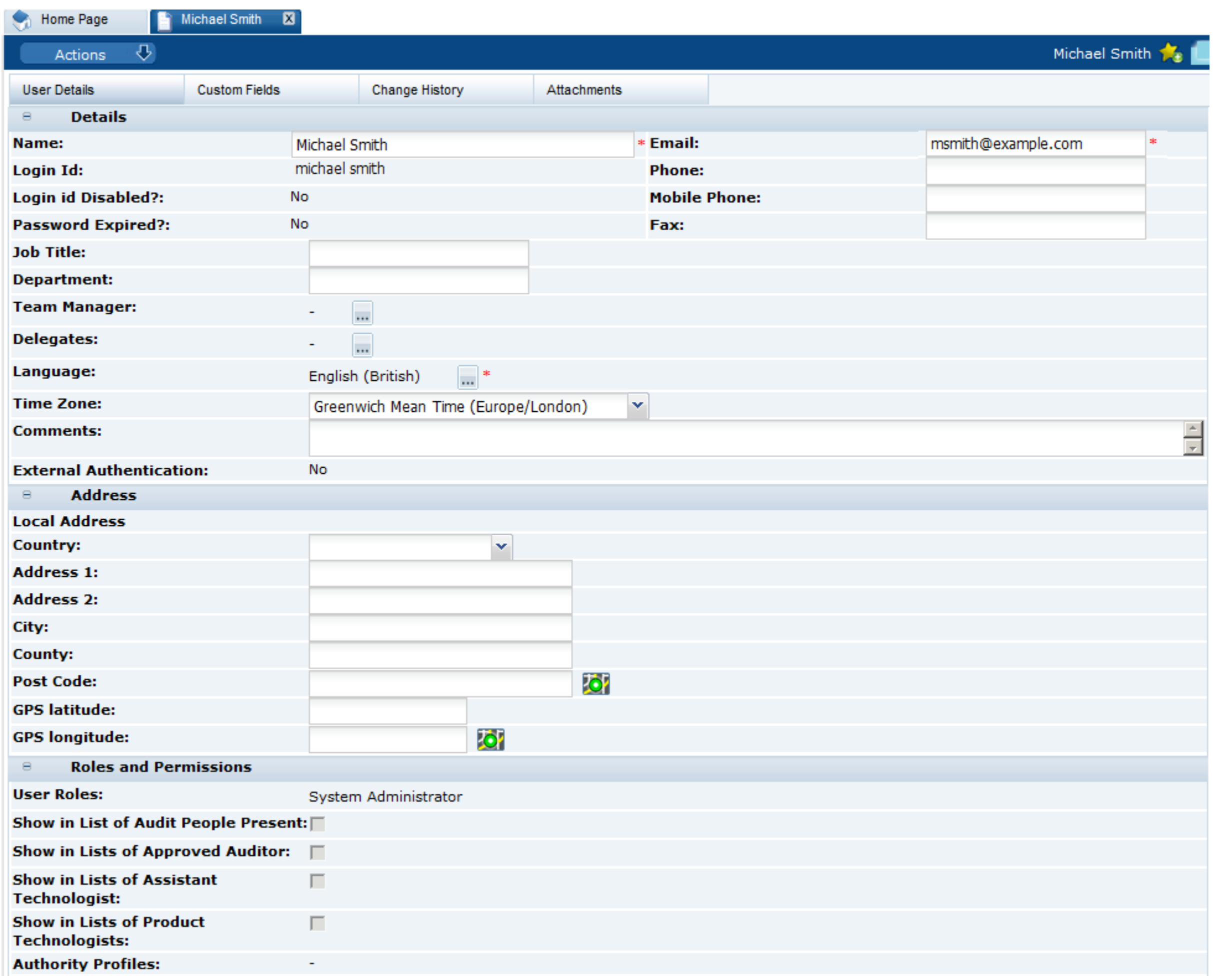
To edit your user profile, select **Edit Profile**. Your user record opens in edit mode. You can edit any of the fields except for the following:

- Login Id
- Logon id Disabled?
- Password Expired
- External Authentication
- Roles and Permissions fields

The following actions are available on this page:

- Validate. The values on the page are validated.
- Save. The user record is saved.
- Save & Exit. The changes are saved and the tab is closed.
- Exit. In the Save dialog box, select if you want to save or discard the changes.
- Change password. For more information, see "Changing your Password."

Figure 3–2 User Record



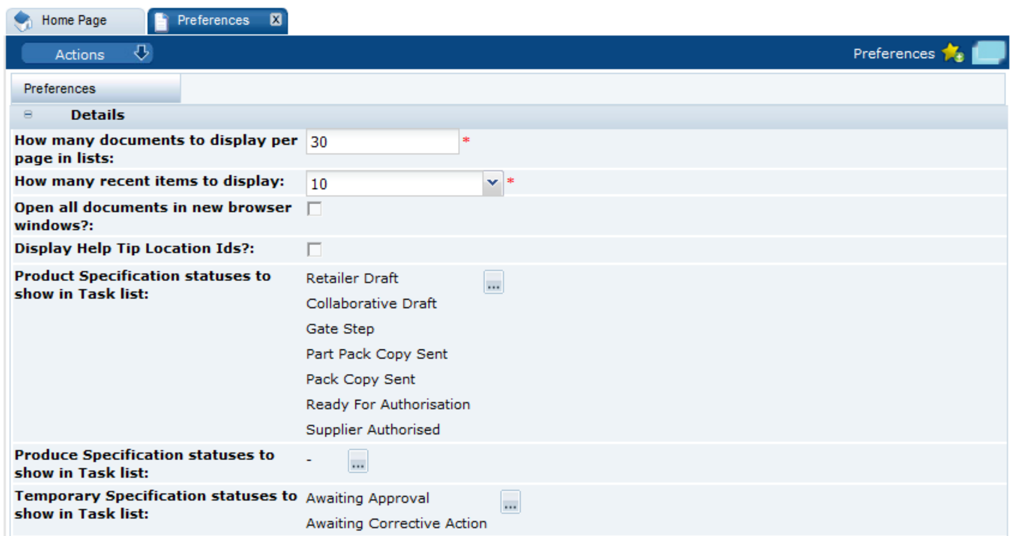
Editing your Preferences

To edit your preferences, select **Preferences**. The Preferences tab opens. You can edit all of the details on this page.

The following actions are available on this page:

- Validate. The values on the page are validated.
- Save. The user record is saved.
- Save & Exit. The changes are saved and the tab is closed.
- Exit. In the Save dialog box, select if you want to save or discard the changes.
- Restore default settings.
- Restore specification status settings.

Figure 3–3 Preferences Page



4

News App

This chapter covers the News App on the Home page.

A user can see the news items that are available to be read. Any archived news items can also be accessed from the App.

Figure 4–1 Example of News App

The following information is displayed for each news item:

- Title

  If a news item is deemed to be important, the title is preceded by an icon with an exclamation point.

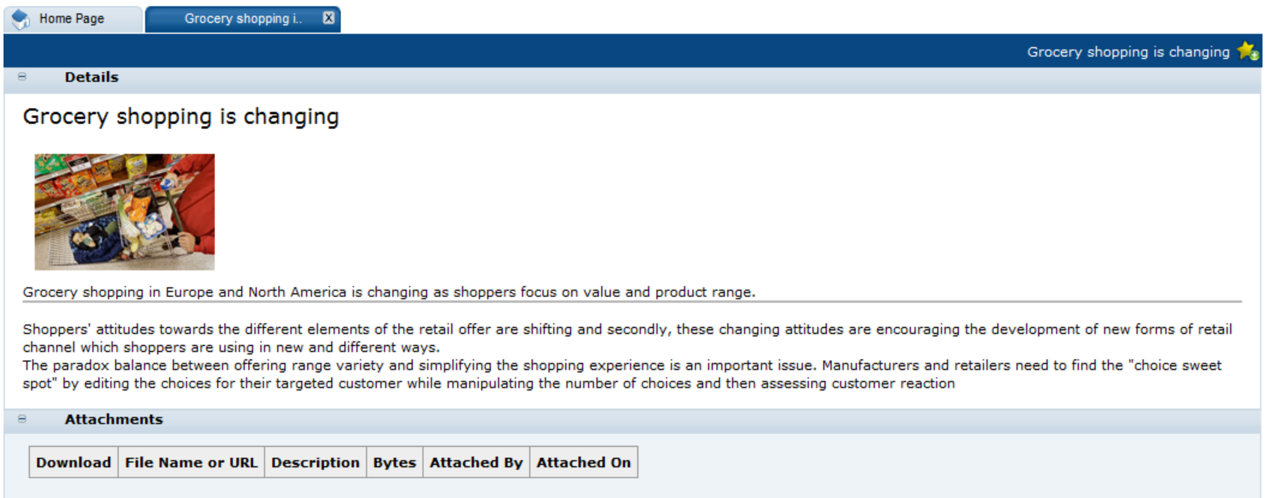
- Date of publication
- Description
- Link to read the item:
  - Read

– Read and confirm

  If this read and confirm option is shown, you must confirm that you have read the news item. After reading the news item, select the Mark as Read action. The date that the item was read is recorded in the Reader log.

To read an item, select the link. The news item opens in a new tab.

Figure 4–2 News Item Opened for Reading



If attachments are included with the news item, the information shown in Table 4–1 appears.

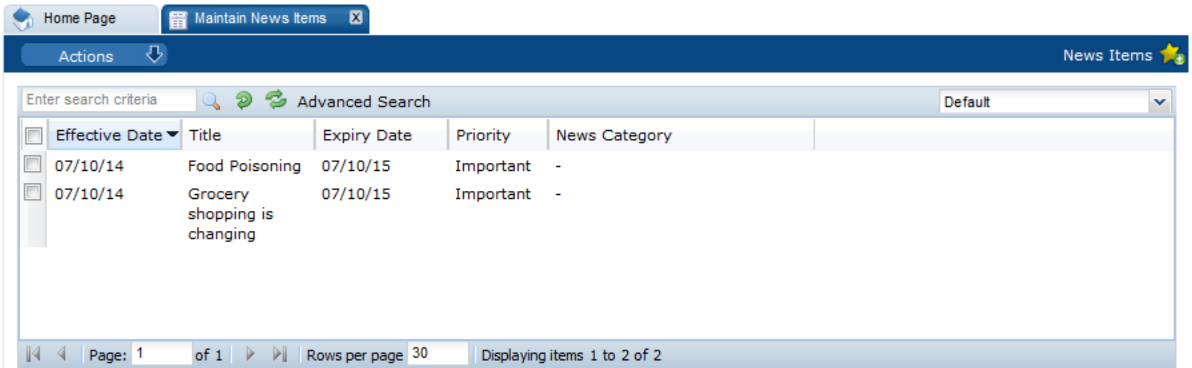
Table 4–1 Columns for News Item Attachments

Column	Description
Download	Double-click the icon to download the file.
File Name or URL	File name or the URL to the file.
Description	Description of the file.
Bytes	Number of bytes in the file.
Attached By	User name of the person who attached the file to the news item.
Attached On	Date and time the file was attached to the news item.

Personalize the News App

To personalize the view of news items, select the icon in the upper right of the App. A tab opens with the list of news items.

Figure 4–3 Maintain News Items



For information on working with lists, see Chapter 6. Select an item in the list and then select an action:

- View: The item opens in a new tab.
- Open in new window: The item opens in a new window.
- Download: Select to download as an Excel, CSV, or XML file.
- Print
- Save View: The Confirm View Change dialog box opens. Select **Ok**. This view will be used the next time you open the Maintain News Items view. To reset to the default view, select the Reset View action.

5

Managing Actions

This chapter covers the Urgent Items Manager (UIM) and Tasks App on the Home page.

> **Note:** If an item appears in both the UIM and Tasks App, the user can resolve the item either using the UIM or Tasks App. Completion of the work for an item results in it being removed from both the UIM and Tasks App.

Urgent Items Manager

The UIM enables a user to deal with any urgent issues that require the user's attention. The UIM deals with many types of items including the following:

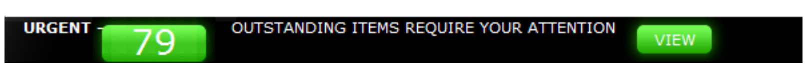
- Audit and visit issues that are overdue
- Audits and visits that are overdue
- Documents
- Mandatory contacts
- Mandatory user details
- News
- Password expiration
- Supplier and site details confirmation

For information on handling the different types of urgent items, see "Working with Urgent Item Categories."

Using the UIM

As soon as there is more than one urgent item for a user, a band appears at the top of the user's screen.

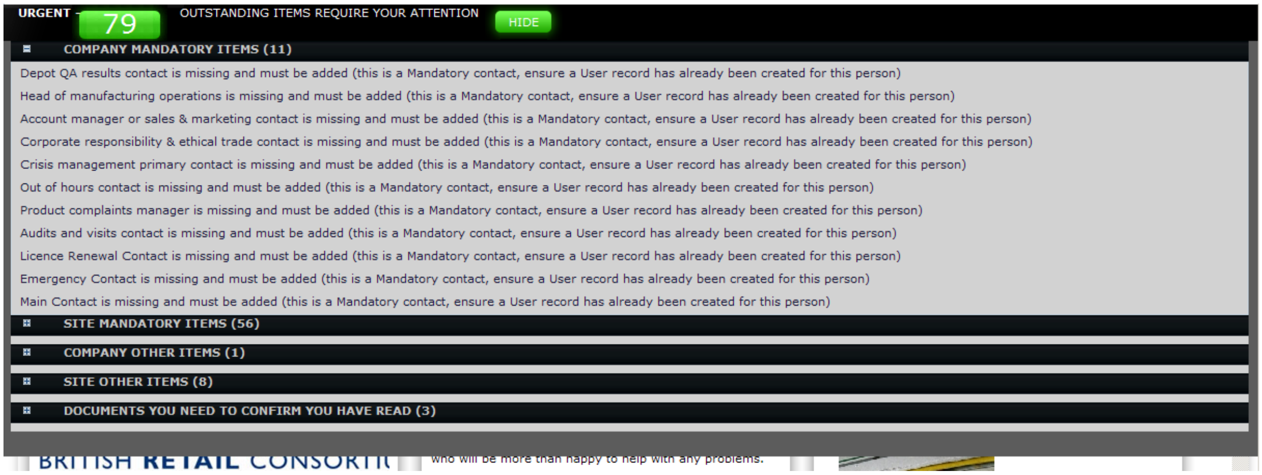
Figure 5–1 UIM Band



The band shows the number of items that require the user's attention. In this example, there are 79 items. This number is updated when items are added or completed.

To see the list of items, select **VIEW**. The UIM expands over the underlying screen to display the list of items.

Figure 5–2 Expanded UIM Content

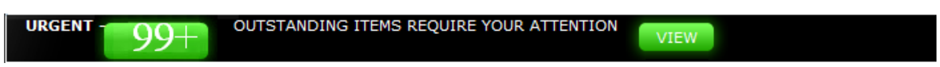


Note the following:

- All urgent items are displayed in categories.
- Category names are shown in upper case, for example, SITE MANDATORY ITEMS.
- For each category, the total number of items in that category is shown in parentheses.
- When the UIM view is opened, all categories are expanded.
- The user can expand a category by selecting the plus sign (+) or minimize it by selecting the minus sign (-).
- To collapse the entire UIM, select **HIDE**.
- If there are no actions required for a particular category, the category is not shown.

The maximum number of items that are displayed is set by an Administrator. If the number of items for a user exceeds the maximum, the maximum number is displayed in the band with a plus sign.

Figure 5–3 UIM Band with Maximum Number of Items Exceeded



In this example, 99 is the maximum number of items that are displayed. The user actually has more than 99 assigned urgent items.

When the necessary work on an urgent item is completed:

- The UIM total displayed in the band is decremented by one.
- The urgent item is removed from the list in the UIM.
- The category total is decremented by one.
- If there are no more items left in a category, the category is no longer shown.

Working with Urgent Item Categories

This section covers the following categories of items:

- Alert Response Items
- Audit/Visit Items
- Document Items
- News Items
- Project Items
- Scorecard Items
- Supplier and Site Management Items
- User Items

Alert Response Items

Alerts are assigned to the person who is associated to the alert's supplier, site, and contact role combination. For users who have visibility across sites for which responses are required, these items remain in the UIM until the user responds on behalf of all those sites or the sites respond.

An alert item appears in the user’s UIM when any of the following criteria is met:

- An alert response is overdue.
- An urgent alert response is required.

The alert item is added to the ALERT RESPONSE ITEMS category. Under that category, the following items may appear:

- Overdue Responses
- Urgent Alert Responses

The items are listed in order by the required date for a response, with the oldest item at the top.

To resolve an alert, click the item. The alert response record opens.

An alert item is removed from the list when any of the following criteria is met:

- The Alert Administrator has updated the alert so that a response is no longer required.
- A supplier user has sent a response to the alert.
- The Alert Administrator has blocked responses to the alert.

Audit/Visit Items

An audit/visit item appears in the user’s UIM when any of the following criteria is met:

- The audit/visit has issues that have corrective action due dates that are reached or exceeded or issues that do not have corrective action due dates. These issues appear in the UIM list for the assignee of the issue.

  To resolve this item, click the item. The audit/visit record opens at the issues.
- The audit/visit due date has been reached or exceeded. Overdue issues appear in the UIM for the lead technologist responsible for the site.

  To resolve an issue, click the issue. The audit/visit record opens.

The audit/visit item is added to the AUDITS & VISITS category.

Audit/visit items are removed from the list when the issue or audit/visit status is progressed or the due date is adjusted.

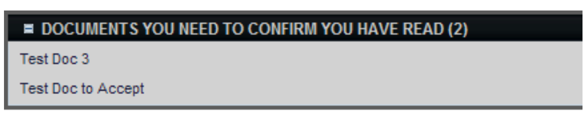
Document Items

A document item appears in the user's UIM when the following criteria are met:

- The document is published.
- The document is not archived.
- The document is available to suppliers.
- The document is mandatory.
- The document has a read-by date and that date has been reached.
- The user is an external (supplier) user.
- The user has not already confirmed that the document has been read.
- If contact roles have been specified, the user is associated to one of the contact roles.
- If sites have been specified for external readers of the document, the user has visibility to one of the sites.

The document item is added to the DOCUMENTS YOU NEED TO CONFIRM YOU HAVE READ category. The items are shown with the oldest at the top of the list.

Figure 5–4 Document Items



To read an item, click the item. The document item is opened in a new tab in read mode.

A document item is removed from the list when it meets any of the following criteria:

- The item is marked as read by the user.
- The document has been archived by the Administrator.
- The document has been deleted by the Administrator.

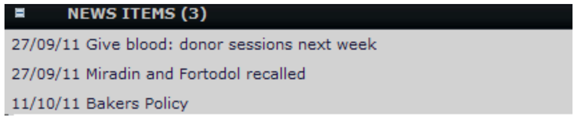
News Items

A news item appears in the user's UIM when all of the following criteria are met:

- The news item is set as Mandatory.
- The Contact Role has not been set or the user is assigned to the selected Contact Roles.
- The user has not read the news item.

The news item is added to the NEWS ITEMS category. The items are shown with the oldest at the top of the list.

Figure 5–5 News Items



News items may be visible to Retailer and Supplier users depending on how the News Administrator has set it up.

To read an item, click the item. The news item is opened in a new tab in read mode.

A news item is removed from the list when it meets any of the following criteria:

- The item is marked as read by the user.
- The document has been archived by the Administrator.
- The document has been unpublished by the Administrator.
- The document has been deleted by the Administrator.

If the user attempts to close the tab without having selected Mark as Read, the Confirm dialog box is displayed.

Figure 5–6 Confirm Dialog Box

If the user selects **Yes**, the new item is marked as read by this user. If the user selects **No**, the dialog box and tab are closed.

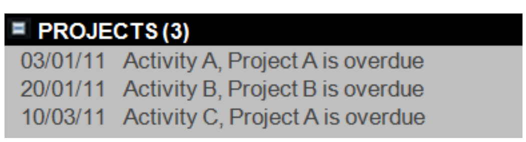
Project Items

A project item appears in the user's UIM when all of the following criteria are met:

- Activities for which the user is designated as responsible.
- Activities that are overdue based on the end date of the activity.

The project item is added to the PROJECTS category. The items are shown with the oldest at the top of the list.

Figure 5–7 Project Items



To see the activity details, click the item. The project item is opened in a new tab in read mode.

A project item is removed from the list when the status for the activity is set to Completed.

Scorecard Items

Scorecard items appear in the UIM of the supplier site user if the user is assigned the role that has been designated as the contact role for that type of scorecard.

A scorecard item appears when the scorecard has a status other than Completed or Awaiting Approval and the Overdue flag is set. Scorecards become overdue when the due date is exceeded, taking into account any grace period that may have been permitted.

If the criteria are met, the scorecard item is added to the SCORECARD OVERDUE category. The items are shown with the oldest at the top of the list.

To complete the scorecard, select the link for the item. The scorecard record opens.

A scorecard item is removed from the list when the scorecard is completed or submitted for approval.

Supplier and Site Management Items

A supplier or site management item appears in a user's UIM when any of the following criteria is met:

- Supplier or site contact information is missing.
- Company or site information needs to be checked.

The items are only available for supplier users.

There are two categories of supplier and site management items that can appear in the UIM, COMPANY and SITES. Under those categories, the following items may appear:

- Mandatory Contacts

  This item appears if any mandatory contacts are missing. To add a contact, click this item. The supplier or site contact record opens so the missing contact can be added.

- Supplier & Site Details Confirmation

  This item appears to remind the user to check the supplier or site address and contact details. To check the details, click this item. The supplier or site record opens so the information can be verified.

A supplier or site management item is removed when it meets any of the following criteria:

- The mandatory contact has been added.
- The Confirm Details action has been selected for the supplier or site record.

User Items

A user item appears in the user’s UIM when any of the following criteria is met:

- There is mandatory user information missing.
- The user’s password is due to expire.

There are two categories of user items that can appear in the UIM, YOUR PASSWORD WILL EXPIRE and YOUR PROFILE.

Figure 5–8 User Items

To change the password or add missing information, click the item. For information on how to change a password or update the profile details, see Chapter 3.

A user item is removed when it meets any of the following criteria:

- The mandatory user details have been updated.
- The password has been changed.

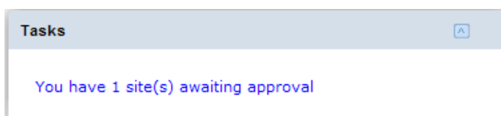
Tasks App

The Tasks App on the Home page enables a user to deal with the following categories of tasks:

- mySupplier Tasks
- myProduct Tasks
- myProject Tasks
- myLibrary Tasks

If any tasks are assigned to you, the number of tasks for each category is shown:

Figure 5–9 Tasks App on the Home Page



To complete the work for a task, select the task from the list. A list view specific to the task opens in a new tab.

mySupplier Tasks

Tasks may be created for the following:

Alerts

If any alerts require your attention, an alert task is assigned to you. If you select a task, the list of alerts appears. To remove a task from the list, respond as needed to the alerts.

Audits and Visits

A task is created when an audit/visit is due with the next x number of days and when an audit/visit is in progress, but is awaiting corrective action, amendment, or sign-off.

Scorecards

A task is created if the scorecard becomes due or overdue, or if awaiting amendment or approval.

Sites

A task is created for the Technologist responsible for the approval of any sites awaiting approval.

myProduct Tasks

You can choose which statuses of product and produce specifications to show in your Task App by updating your preferences. For information on changing your preferences, see Chapter 3.

The myProduct tasks do not appear in the UIM.

Product Specifications at Status

The following tasks can be assigned. Each task includes the number of product specifications that require your attention:

- You have 4 Product Specifications requiring review
- There are 5 Product Specifications at status xxx

  If you select one of these tasks, a list of the product specifications grouped by status appears. The xxx can be any of the following statuses: Retailer Draft, Supplier Draft, Collaborative Draft, Gate Step, Pack Copy Sent, Part Pack Copy Sent, Ready For Authorisation, Supplier Authorised.

To remove a task from the list, the status for the product specification must be updated to the next step in the acceptance process. For more information on product specifications, see the *Micros Supply Chain myCreations myProduct User Guide*.

Produce Specifications

If any produce specification tasks are assigned to you, you see a task that includes how many specifications require your attention:

You have 3 produce specs at draft
You have 2 produce specs at active
You have 2 product specs awaiting supplier approval

To remove a task from the list, a produce specification must be accepted or rejected.

Surveillance

The following tasks can be assigned. Each task includes the number of test reports that require your attention:

- There are 2 product surveillance test reports awaiting supplier action

  A list of the test reports awaiting supplier action appears. To remove the task from the list, the test report must be accepted or rejected.

- There are 4 product surveillance test reports awaiting approval

  A list of the test reports awaiting approval appears. To remove a task from the list, the test report must be accepted or rejected.

- There are 2 imported test reports awaiting review

  A list of the test reports at imported status appears. To remove a task from the list, the test report must be accepted or rejected.

myProject Tasks

The following tasks can be assigned. Each task includes the number of projects, products, or activities that require your attention:

- Projects:

  You have 2 projects which you are responsible for
  You have 3 projects which you are the owner for

  If you select one of these tasks, a list of the projects for which you are responsible or own appears. To remove a task from the list, the project status must be set to completed or cancelled.

- Products:

  You have 4 products which you are responsible for
  You have 2 products which you are the owner for

  If you select one of these tasks, a list of the products for which you are responsible or own appears. To remove a task from the list, the project status must be set to completed or cancelled.

- Activities:

  You have 2 activities which you are responsible for
  You have 3 activities which you are the owner for

  If you select one of these tasks, a list of the activities for which you are responsible or own appears. To remove a task from the list, the activity status must be set to completed or the project status must be set to completed or cancelled.

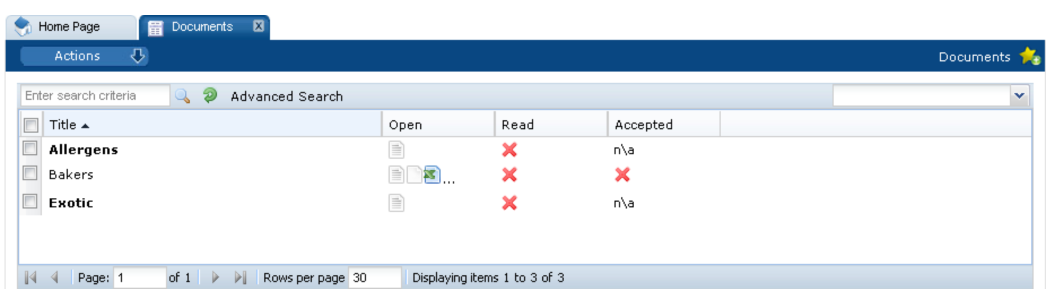
myLibrary Tasks

If any document tasks are assigned to you, you see a task that includes how many documents require your attention:

You have 3 document(s) requiring attention

Select the task and the Documents tab opens. The list of documents is sorted by title.

Figure 5–10 Documents Tab



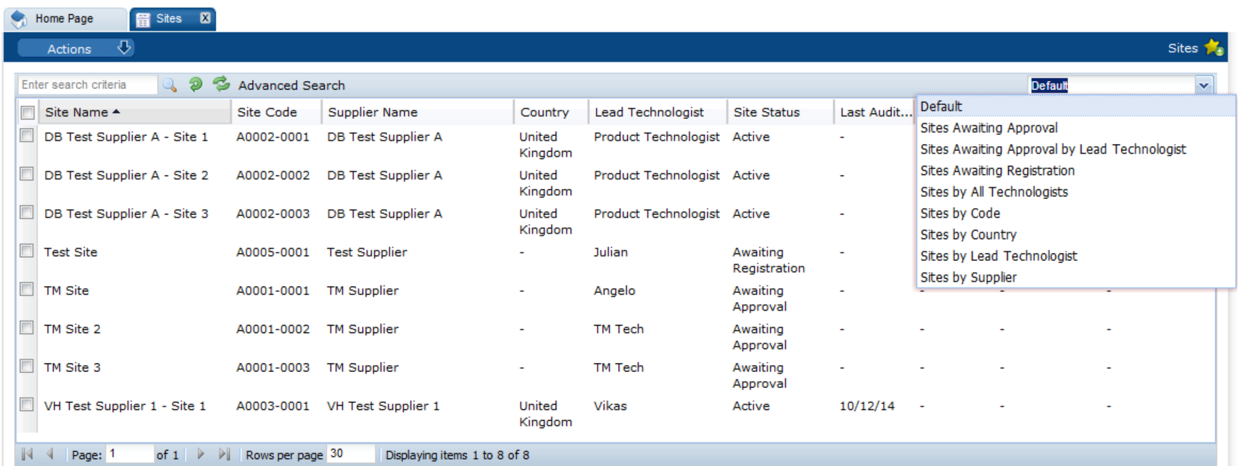
In the Open column, you can select to open a document. To mark the document as read or accepted, select the Mark as Read or Mark as Accepted action.

To remove a task from the list, the document must be marked as needed, that is, read or accepted.

6 List Views

This chapter describes the functionality available for list views including adding and removing columns, sorting, and advanced searching. Figure 6–1 shows an example of a list.

Figure 6–1 List View Example



Note the following about views:

- The system default view is the initial view displayed the first time a tab is opened.
- When you close the tab, the view being displayed is remembered. The next time you open the tab, that view appears.
- In the View Selector drop-down list, you can select a view. When you click a view in the list, the page is updated. The available list view names appear in alphabetical order.
- The rows per page is initially set from the value in the user preferences. The number of rows per page can be changed while viewing the list, but the value in the user preferences is used the next time the tab is opened.
- The options to search and change list views are not available for those list views that are embedded within a record, such as, the list of Sites within the Supplier records, list of Scorecards within the Site record, and so on.

Table 6–1 describes the icons are available for lists.

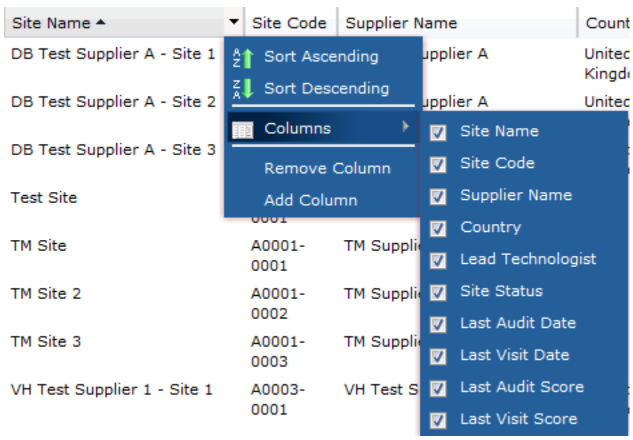
Table 6–1 List View Icons

Icon	Description
	Select this icon to search the list based on the search criteria.
	Select this icon to clear the search criteria and reset the list.
	Select this icon to refresh the list.

Changing the List View

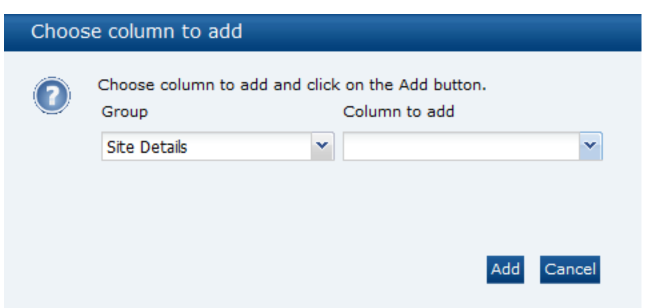
Options are available to change how columns and rows displayed in the list view.

Figure 6–2 Options for Changing the List View



- To sort the order of the rows, select either Sort Ascending or Sort Descending.
- To select the columns for the view, select **Columns**. Check the box for each column that you want in the view.
- To remove a column from the view, select the column and then select **Remove Column**.
- To add a column to the view, select **Add Column**.

Figure 6–3 Choose Column to Add Dialog Box



Select a group from the drop-down list. Select a column to add from the drop-down list. The choices available in this list are dependent on the value selected for the group. Select **Add**. The column is added to the list as the right-most column.

Resize Column Width

You can also resize the width of a column. Place the mouse on the right-hand side of the column. When the cursor appears, move it to the left or right to change the width of the column.

Export a View

To export the list view, select the Download action. The following export options are available:

- Export to Excel
- Export to CSV
- Export to XML

Only the columns shown in the view are exported.

View or Edit a Record

To view or edit the record for an entry in the list, select the row and select the Edit action. The record is opened in a new tab.

Searches

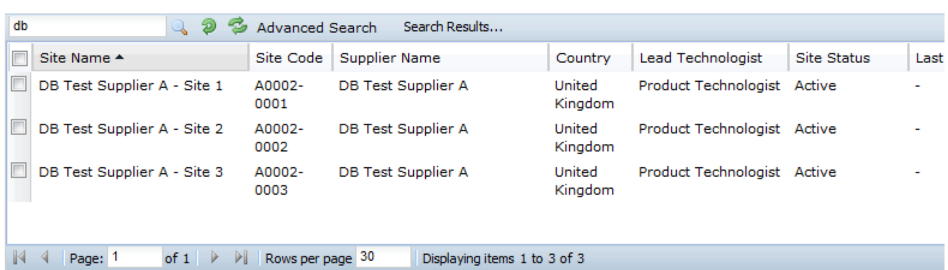
There are two types of searches, simple and advanced.

Simple Search

To perform a simple search, enter text the search criteria filed and select the search icon. The list is updated to only include those entries that contain the text entered as the search criteria.

For example, if db is entered as the search criteria, the list shown in Figure 6–1 now only shows those entries that contain the text db.

Figure 6–4 Simple Search Results Example



Site Name	Site Code	Supplier Name	Country	Lead Technologist	Site Status	Last
DB Test Supplier A - Site 1	A0002-0001	DB Test Supplier A	United Kingdom	Product Technologist	Active	-
DB Test Supplier A - Site 2	A0002-0002	DB Test Supplier A	United Kingdom	Product Technologist	Active	-
DB Test Supplier A - Site 3	A0002-0003	DB Test Supplier A	United Kingdom	Product Technologist	Active	-

Search Results appears at the top of the page to indicate the list content is the result of running a search.

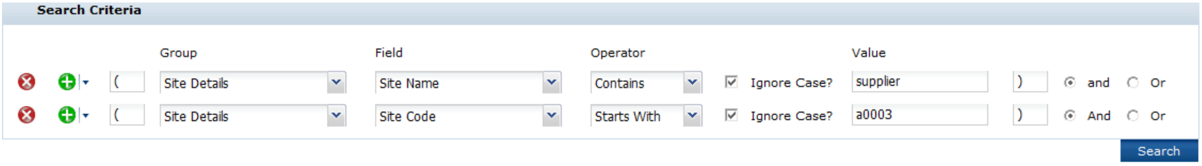
Advanced Search

Advanced search enables you build an expression to be used to determine what entries are included in the list. You can group rows in the search criteria by using parentheses and also use logical operators (And, Or).

To perform an advanced search:

1. Select **Advanced Search**. The Search Criteria opens.

Figure 6–5 Advanced Search Criteria Example



2. Enter the search criteria:

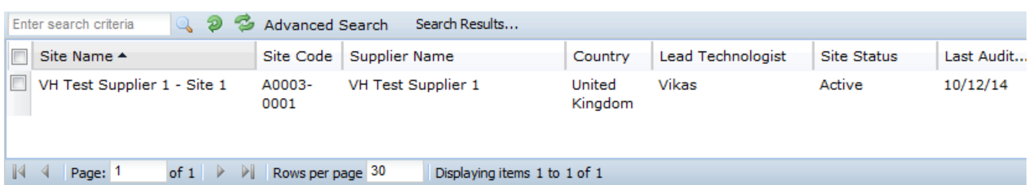
   - Group: Select a group from the drop-down list.
   - Field: Select a field from the drop-down list. The choices available in this list are dependent on the value selected from the Group list.
   - Operator: Select an operator from this list. This sets how the Value field is used in the search. The available options in this list are dependent on the selection in the Field list.
   - Select the search option. The selection is dependent on the selection in the Field list. For example, you may select whether the case should be ignored for any text fields or if the current date should be used.
   - Value: Enter the value for the search based on the selection from the Field list.
   - Select open and closing parentheses as needed.
   - Select a logical operator.

   To add a row to the search criteria below the current row, select the icon with the plus sign. To delete a row, select the icon with the x on that line.

3. Select **Search**. The list is updated to only include those entries that meet the search criteria.

   Figure 6–6 shows the list with only those entries that meet the search criteria shown in Figure 6–5.

Figure 6–6 Advanced Search Results Example



7
Change History Logs

When the following occurs for a record, the name of the user and the date and time of the change are logged:

- When a new record is created and saved, either as a the result of a New or Copy action within a wizard or automated task.
- When a field within a record is changed and saved either as a result of a manual edit or update within a wizard or automated task.

When a record is physically deleted, the change history is also deleted. If a record is *soft deleted* by changing the status or moving it to an archive area, the event is recorded as an update transaction if the record it set to record such events.

When displaying a record, the Change History subtab is available. To see the change history for the record, select this subtab.

Figure 7–1 Change History Log for a Record

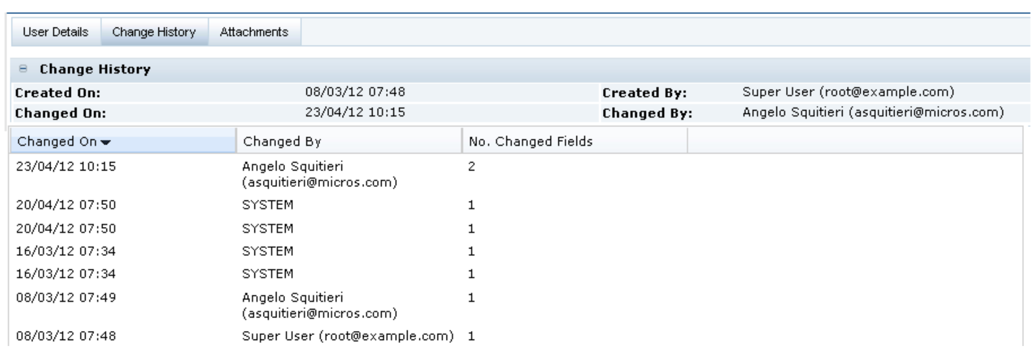


Table 7–1 describes the layout of this view. A field with multiple values is displayed as a comma-separated list.

Table 7–1 Layout of Change History Log

Information	Description
Creation Details	■ Date and time the record was created. ■ User name and email address of the person who created the record or SYSTEM if the record was created by a system process.
Change Details	■ Date and time the record was last changed. ■ User name and email address of the person who last changed the record or SYSTEM if the record was modified by a system process.

Table 7–1 (Cont.) Layout of Change History Log

Information	Description
Changes	Table that lists all changes in descending order by date and time, that is, the latest change is at the top of the table.

If a row is selected in the list, the details of the change appear.

Figure 7–2 Change History or a Selected Entry

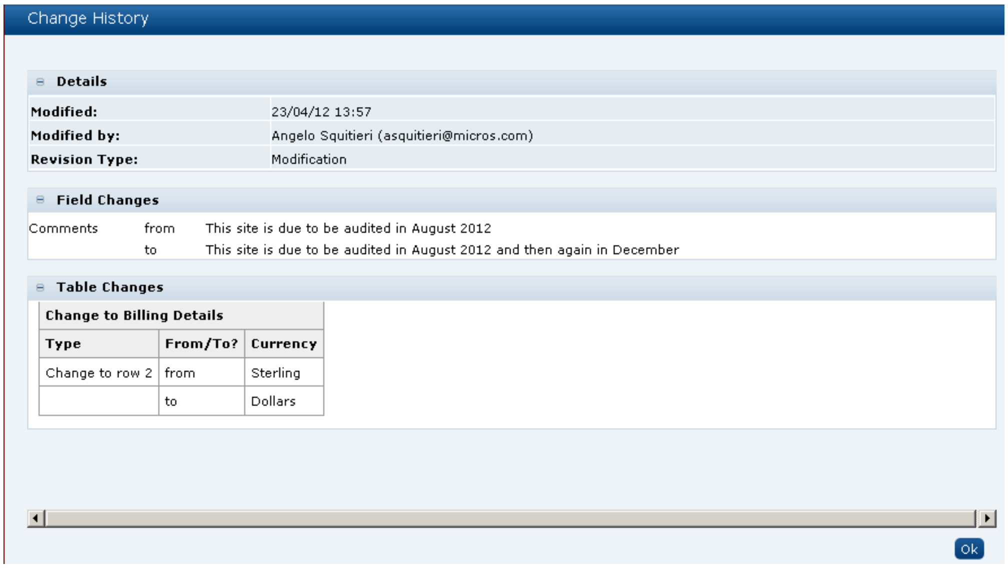


Table 7–2 describes the layout of this view.

Table 7–2 Layout of Change History for a Selected Entry

Information	Description
Details	▪ Modified: Date and time the record was created. ▪ Modified by: User name and email address of the person who created the record or SYSTEM if the record was created by a system process. ▪ Revision Type: Modification is always displayed.
Field Changes	List of fields that were changed. For each change, the field label and before and after values are shown.
Table Changes	This section is only included when the changes include modifications to a table that is part of the record. For more information, see "Table."

Table

Changes to values within tables are logged in the same way as individual fields and are presented in the Change History view as a table. A separate log is shown for each table that was updated during the transaction. The name of the changed table and changes by row number are shown. If the table was changed due to the Add or Delete table actions, the values of all columns are shown. For modifications, only the values for changed columns are shown. An example of a modification is shown in Figure 7–2.

Figure 7–3 Change History Log for a Table

Table Changes

Change to Billing Details

Type	From/To?	Business Unit	Currency	Further Information	Invoicing Ref	Invoicing System	Sequence
Added row 3		Republic Of Ireland			423 342342	Oracle	2

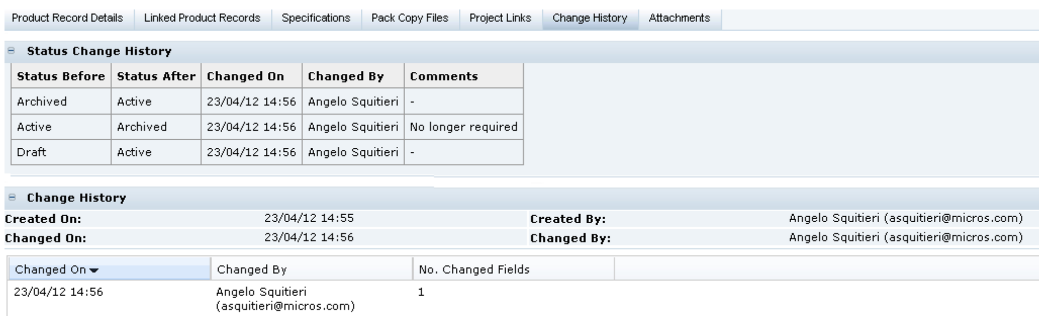
Change to References

Type	From/To?	Country	Expiry Date	Certificate No.	Certifier	Type	Sequence	Status
Added row 1				121`		Organic Certification		PENDING
Removed row 1			2012-03-07	KJ-1231	Third party	Organic Certification		CERTIFIED

Status

Certain record types, such as sites, alerts, or audits, require a specific log of changes to the status of the record to be recorded. For these record changes, a Status Change History log is included.

Figure 7–4 Change History Log for Status



Product Record Details | Linked Product Records | Specifications | Pack Copy Files | Project Links | Change History | Attachments

Status Change History

Status Before	Status After	Changed On	Changed By	Comments
Archived	Active	23/04/12 14:56	Angelo Squitieri	-
Active	Archived	23/04/12 14:56	Angelo Squitieri	No longer required
Draft	Active	23/04/12 14:56	Angelo Squitieri	-

Change History

Created On:	23/04/12 14:55	Created By:	Angelo Squitieri (asquitieri@micros.com)
Changed On:	23/04/12 14:56	Changed By:	Angelo Squitieri (asquitieri@micros.com)

Changed On	Changed By	No. Changed Fields
23/04/12 14:56	Angelo Squitieri (asquitieri@micros.com)	1

The entries are listed in descending order by transaction date and time. The most recent change is listed at the top. Table 7–3 describes the layout of this log.

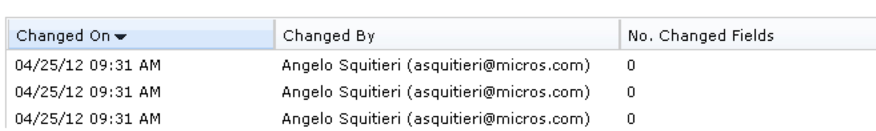
Table 7–3 Layout of Change History Log for Status

Column	Description
Status Before	The status before the change was made.
Status After	The status after the transaction was made.
Changed On	Date and time the change was made.
Changed By	Name of the user who made the change.
Comments	Any comments entered by the user.

Attachment Manager

All changes made through a record's Attachment Manager, that is, file attachments or URL links are added, changed, or deleted, are reflected in the change history log.

Figure 7–5 Change History Log for an Attachments Record



Changed On	Changed By	No. Changed Fields
04/25/12 09:31 AM	Angelo Squitieri (asquitieri@micros.com)	0
04/25/12 09:31 AM	Angelo Squitieri (asquitieri@micros.com)	0
04/25/12 09:31 AM	Angelo Squitieri (asquitieri@micros.com)	0

[Table 7–4](#) describes the columns in this log.

Table 7–4 Layout of Change History Log for Attachment Record

Column	Descritption
Changed On	Date and time the change was made.
Changed By	Name of the user who made the change.
No. Changed Fields	Number of fields in the section that were changed.

Figure 7–6 Change History for a Selected Row for an Attachment

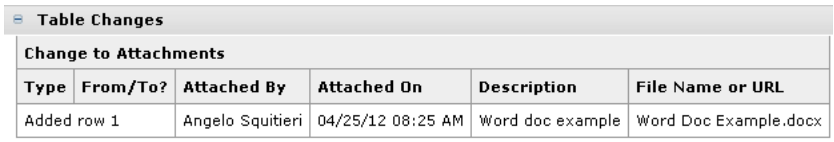


Table Changes

Change to Attachments

Type	From/To?	Attached By	Attached On	Description	File Name or URL
Added row 1		Angelo Squitieri	04/25/12 08:25 AM	Word doc example	Word Doc Example.docx

[Table 7–5](#) describes the columns in this log.

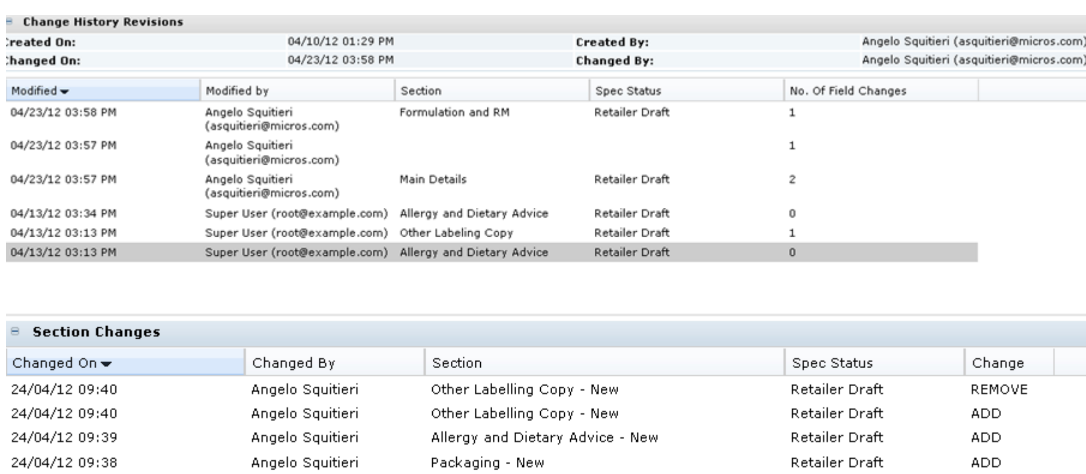
Table 7–5 Layout of Change to Attachments Section

Column	Descritption
Type	Indicates if an addition or deletion was made for the attachment.
From/To?	If a row was modified, the before and after values are shown.
Attached By	Name of the user who attached the file.
Attached On	Date and time the file was attached.
Description	Description of the attachment.
File Name or URL	Name of the file or the URL to the file.

Product Specification

The Change History log for the Product Specification record groups changes by specification section. Section Changes shows a summary of the sections that have been added or removed since the initial creation of the specification.

Figure 7–7 Change History Log for Product Specification


Change History Revisions

:reated On:	04/10/12 01:29 PM	Created By:	Angelo Squitieri (asquitieri@micros.com)
:hanged On:	04/23/12 03:58 PM	Changed By:	Angelo Squitieri (asquitieri@micros.com)

Modified	Modified by	Section	Spec Status	No. Of Field Changes
04/23/12 03:58 PM	Angelo Squitieri (asquitieri@micros.com)	Formulation and RM	Retailer Draft	1
04/23/12 03:57 PM	Angelo Squitieri (asquitieri@micros.com)			1
04/23/12 03:57 PM	Angelo Squitieri (asquitieri@micros.com)	Main Details	Retailer Draft	2
04/13/12 03:34 PM	Super User (root@example.com)	Allergy and Dietary Advice	Retailer Draft	0
04/13/12 03:13 PM	Super User (root@example.com)	Other Labeling Copy	Retailer Draft	1
04/13/12 03:13 PM	Super User (root@example.com)	Allergy and Dietary Advice	Retailer Draft	0

Section Changes

Changed On	Changed By	Section	Spec Status	Change
24/04/12 09:40	Angelo Squitieri	Other Labelling Copy - New	Retailer Draft	REMOVE
24/04/12 09:40	Angelo Squitieri	Other Labelling Copy - New	Retailer Draft	ADD
24/04/12 09:39	Angelo Squitieri	Allergy and Dietary Advice - New	Retailer Draft	ADD
24/04/12 09:38	Angelo Squitieri	Packaging - New	Retailer Draft	ADD

Table 7–6 describes the columns in this log. Table 7–7 describes the columns in the Section Changes.

Table 7–6 Layout of Change History Log for Product Specification

Column	Descritption
Modified	Date and time the change was made.
Modified by	Name of the user who made the change.
Section	Title of the section that was changed.
Spec Status	Status of the product specification.
No. of Field Changes	Number of fields in the section that were changed.

Table 7–7 Section Changes Layout of Change History Log for Product Specification

Column	Descritption
Changed On	Date and time the change was made.
Changed By	Name of the user who made the change.
Section	Title of the section that was changed.
Spec Status	Status of the product specification.
Change	Indicates whether the section was added or removed.

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myLibrary

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 8–1 shows an example of this page.

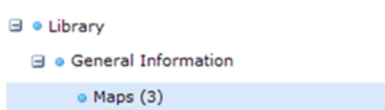
Figure 8–1 myLibrary Tab

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 8–2 Folder Content Display

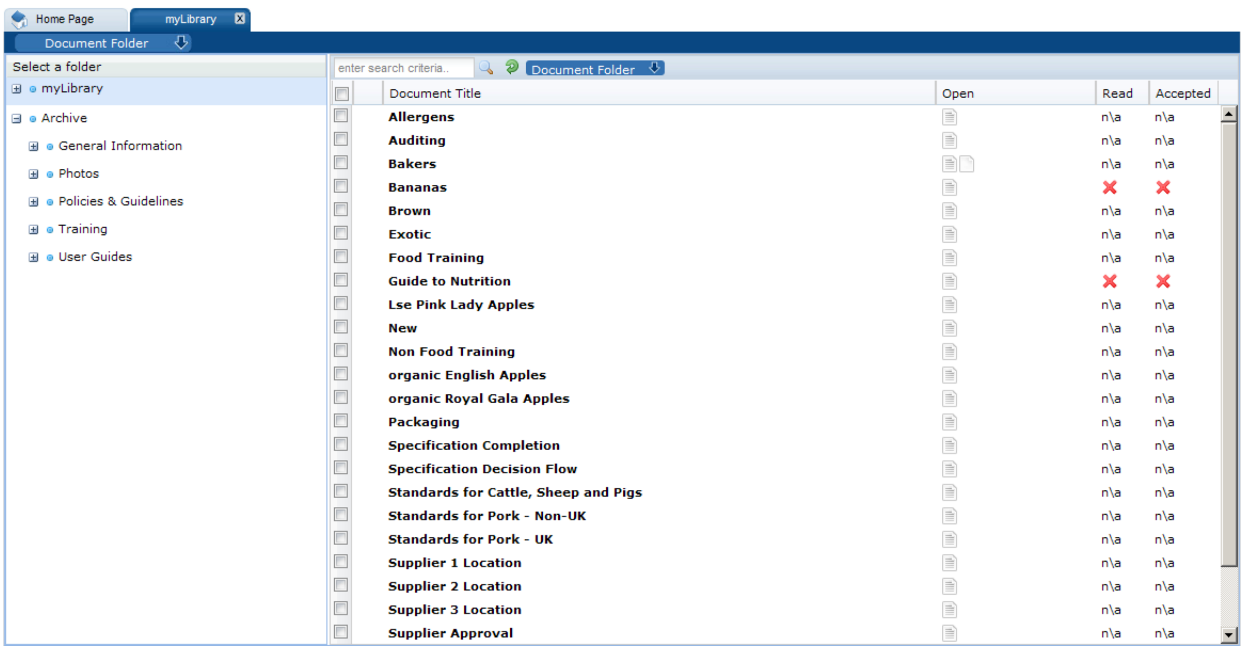


Table 8–1 describes the columns displayed for the selected folder.

Table 8–1 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 8–1 (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
		Portable Document Format (PDF) file
		Text 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

Reading a Document

To read a document:

1. Click a document folder. The list of available documents in the folder appears. See Figure 8–2.
2. To read a document, click the document title. A new tab opens for the document.
3. If there are any attachments available, an icon is shown in the Open column. Click the icon to open the attachment.
4. If you are required to mark the document as read when you complete reading it, select the Mark as Read action. If you are required to mark the document as accepted when you complete reading it, select the Mark as Accepted action.

Marking a Document

The Library Administrator can require that a user confirm that a document has been read and approved.

Marking a Document as Read

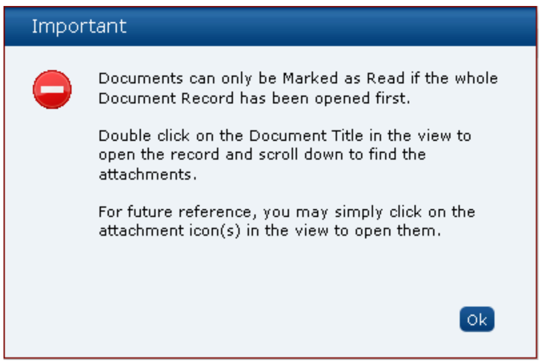
The read confirmation action is only applicable for mandatory' documents It can only be selected if the user has at some point opened the document or one of its attachments.

To mark a document as read, do one of the following:

- Select the document in the left-hand pane and select the Mark as Read action from the Actions menu in the right-hand pane.
- Select the document in the left-hand column. Right-click and select the Mark as Read action.
- Open the Summary document and select the Mark as Read action.

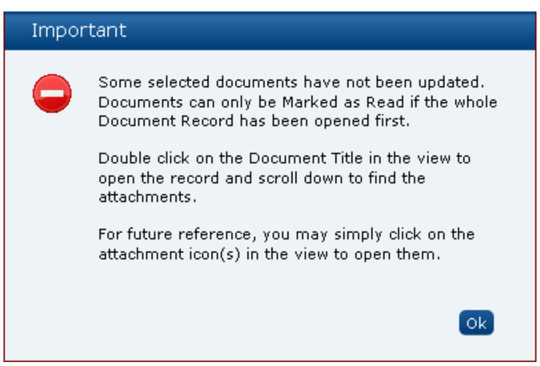
If the Mark as Read action is selected, but the document has not been opened the following error dialog box appears.

Figure 8–3 Mark as Read Error Dialog for Document Not Opened



If the Mark as Read action is selected, but the document has not been opened within a multiple selection of documents, the following error dialog box appears. Some documents are marked as read, but the rest of the documents are not marked.

Figure 8–4 Mark as Read Error Dialog for Not All Documents Marked



Marking a Document as Accepted

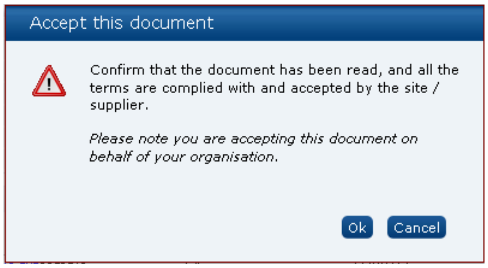
The accept confirmation action is only applicable for mandatory documents It can only be selected if the user has at some point opened the document or one of its attachments.

To mark a document as accepted, do one of the following:

- Select the document in the left-hand column and select the Mark as Accepted action from the Actions menu in the right-hand pane.
- Select the document in the left-hand column. Right-click and select the Mark as Accepted action.
- Open the Summary document and select the Mark as Accepted action.

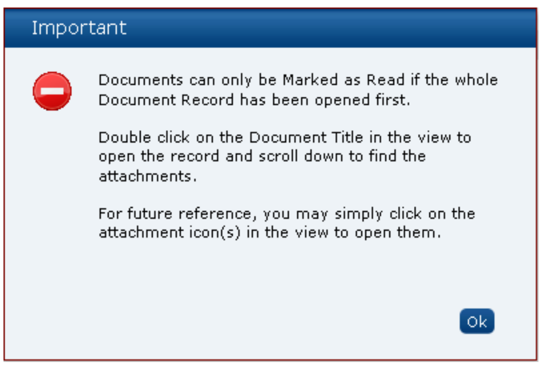
A dialog box appears to enable the user to confirm the acceptance. Select **Ok**.

Figure 8–5 Accept this Document Dialog Box



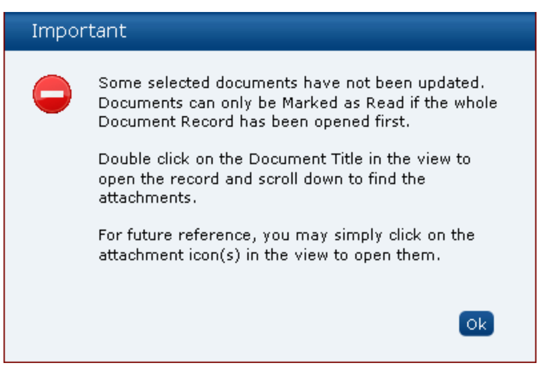
If the Mark as Accept action is selected, but the document has not been opened the following error dialog box appears.

Figure 8–6 Mark as Accept Error Dialog for Document Not Opened



If the Mark as Accept action is selected, but the document has not been opened within a multiple selection of documents, the following error dialog box appears. Some documents are marked as accepted, but the rest of the documents are not marked.

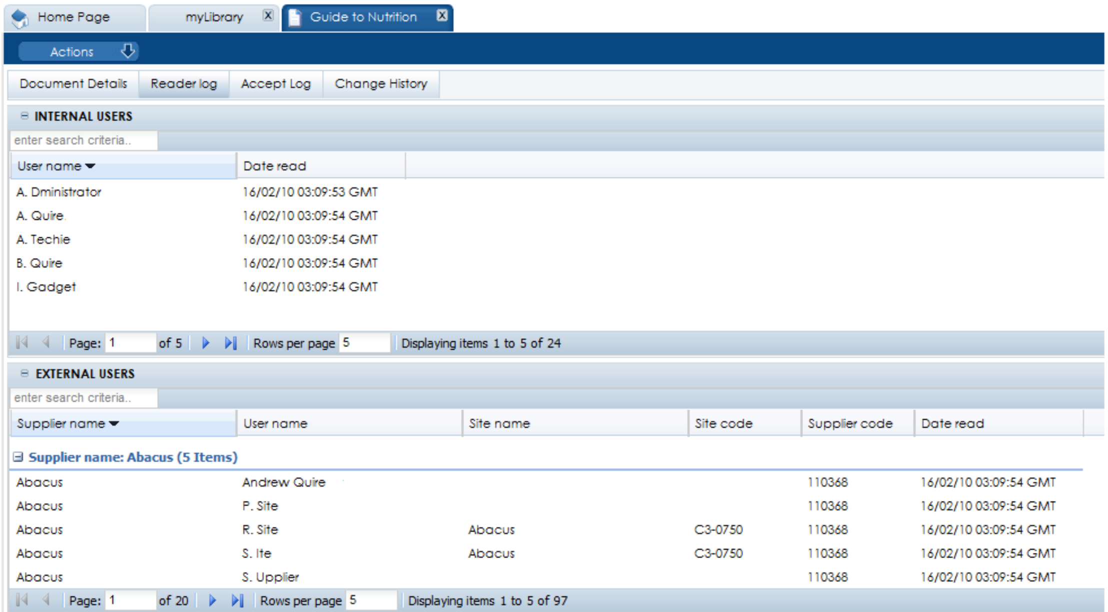
Figure 8–7 Mark as Accept Error Dialog for Not All Documents Marked



Viewing the Reader Log

The Reader Log page enables users to see who has read the document.

Figure 8–8 Reader Log Page



The list of internal users is sorted by the user name in ascending order. The list of external users is sorted by the supplier name and then user name, both in ascending order.

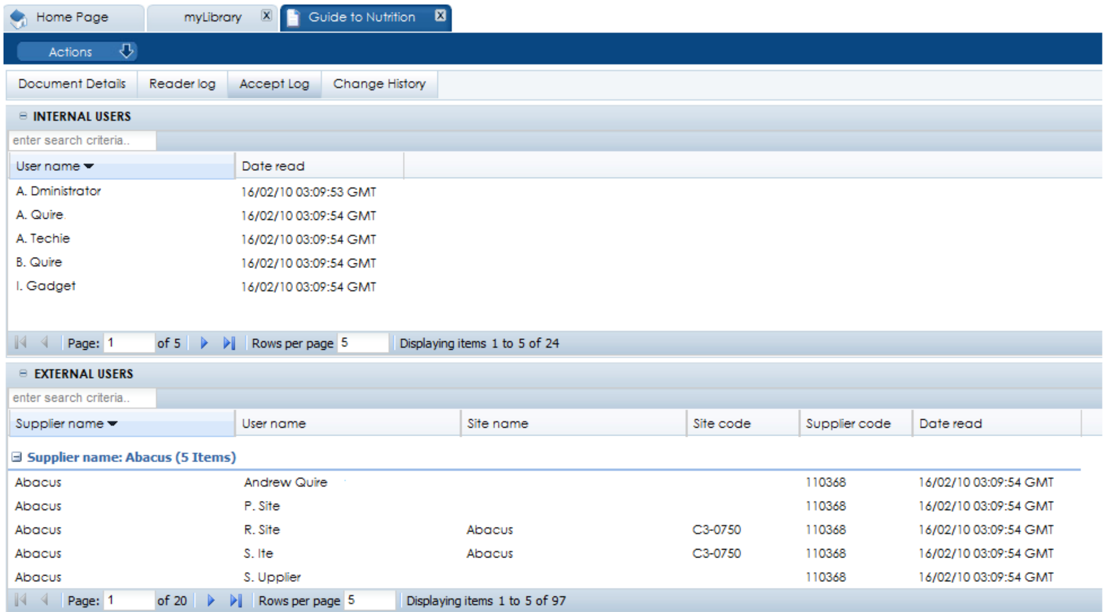
Supplier users have visibility to mandatory documents so they can see who else within their organization has read the document (restricted to only being able to see information relating to their organization). They are not able to see the Internal Users field set.

Users are able to perform a Quick Search on the full contents of the log and export the log to Microsoft Excel.

Viewing the Accept Log

The Accept Log page enables users to see who has accepted the document.

Figure 8–9 Accept Log Page



The list of internal users is sorted by the user name in ascending order. The list of external users is sorted by the supplier name and then user name, both in ascending order.

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Users are able to perform a Quick Search on the full contents of the log and export the log to Microsoft Excel.