# Oracle® Retail Brand Compliance Management Cloud Service

Administration Guide

Release 18.0

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Oracle Retail Brand Compliance Management Cloud Service Administration Guide, Release 18.0

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# Contents

## 10 Library Administration



## 11 Glossary Administration



## 12 Internationalization



## A Appendix: SSL Certificate Management

## List of Figures

## List of Tables

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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 Oracle Retail Brand Compliance Management Cloud Service.

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## Related Documents

For more information, see the following documents in the Oracle Retail Brand Compliance Management Cloud Service Release 18.0 documentation set:

- *Oracle Retail Brand Compliance Management Cloud Service Implementation Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Release Notes*
- *Oracle Retail Brand Compliance Management Cloud Service User Guide*

For information on the Oracle Retail Brand Compliance Management Cloud Service modules, see the following documents:

- *Oracle Retail Brand Compliance Management Cloud Service Product User Guide*

- *Oracle Retail Brand Compliance Management Cloud Service Project User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Reports User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Supplier User Guide*

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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

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`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

Oracle Retail Brand Compliance Management Cloud Service 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.

Oracle Retail Brand Compliance Management Cloud Service is composed of the following modules:

- Library enables the issue, receipt, and acceptance of policies, guidelines, and key working documents.
- Product supports the development of products and production specifications.
- Project supports the development of project briefs, plans, and workflow management.
- Supplier enables the identification, selection, and approval of suppliers.

> **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.

## Admin Functions

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

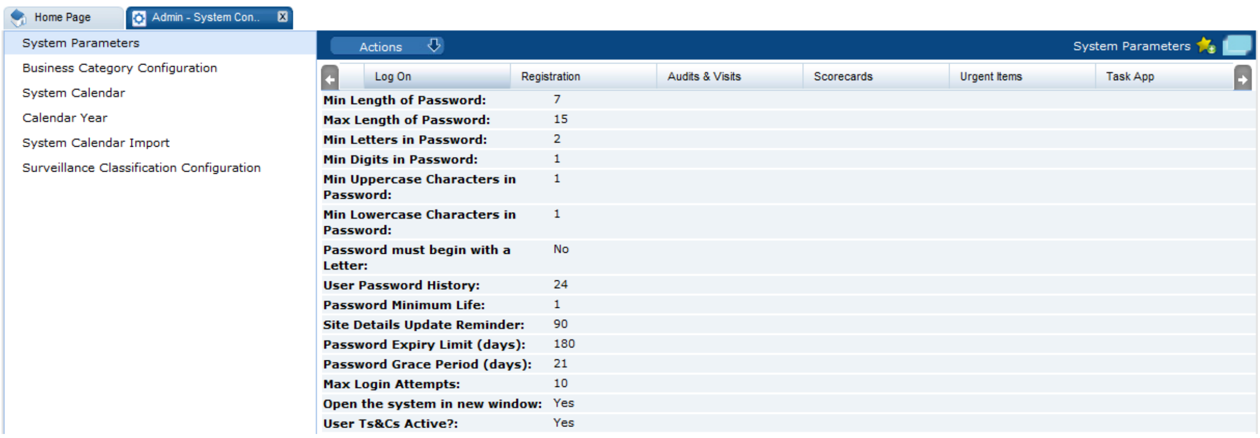
Access to the Admin functions is controlled by Authority Profiles. A user may not have access to all the Admin functions described in this guide.

## 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 application.

# 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

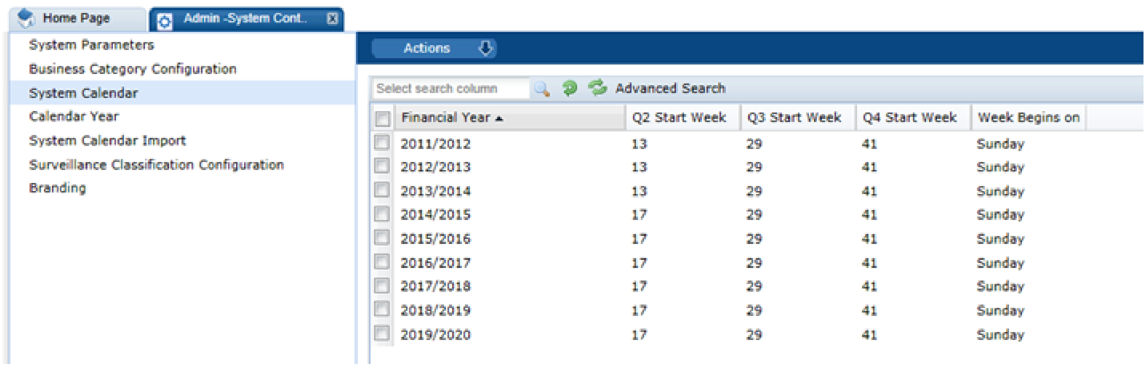
The System Calendar defines the retailer's financial year, period, and week for a given date:

- 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***



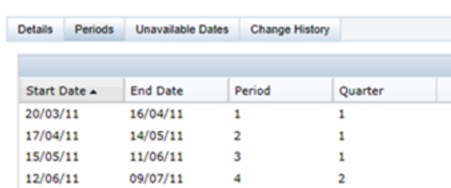

To edit the System Calendar, select a row and then select the Edit action. The row opens in edit mode. For an example of this page, see Figure 1–3

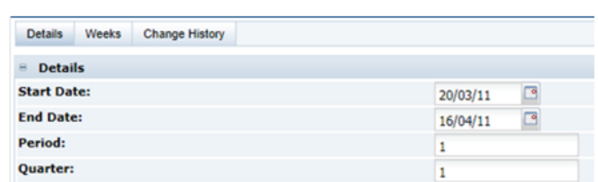
To add a new entry:

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

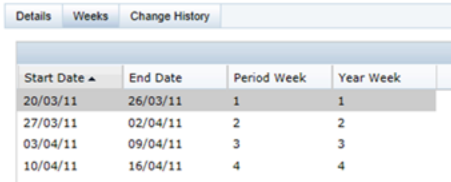
***Figure 1–3 New System Calendar Page***

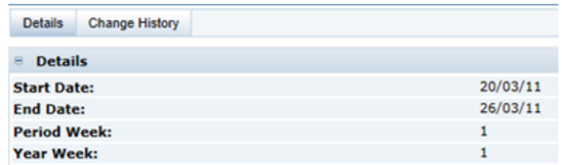

2. In the Details section:
   - Financial Year: Select the financial year from the drop-down list. This field is mandatory.
   - Week Begins On: Select the first day of the week from the drop-down list.
   - Q2 Commences on Week, Q3 Commences on Week, and Q4 Commences on Week: Each field defines the 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 page: set the period number and select the start and end dates for each period.




The list of weeks of each period shows the week start and end dates and the week number within the period and year. This record is read-only.




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.

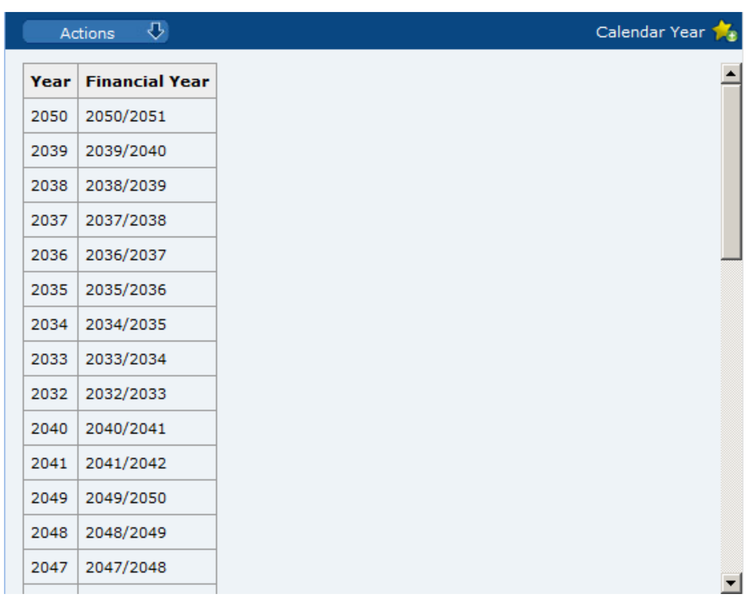
## Calendar Year

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**.

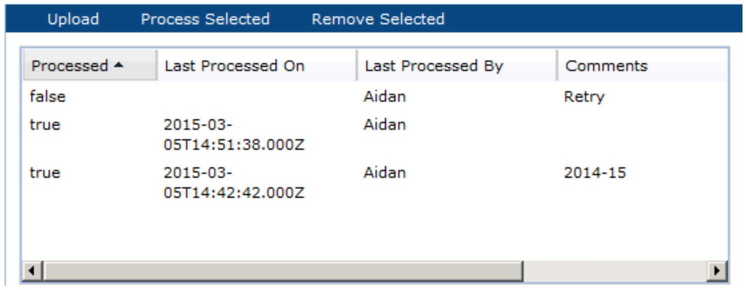
***Figure 1–4 Calendar Year Page***




## 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.

# System Text

The configuration of the portal's languages, and system text (field labels, menu options, error messages, and so on, and the associated help text and translations) is accessible to administrators with the Power Administrator and Oracle Authorized User authority profiles.

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

- Languages
- System Text
- System Text Imports
- System Text Snapshots
- Legacy System Text

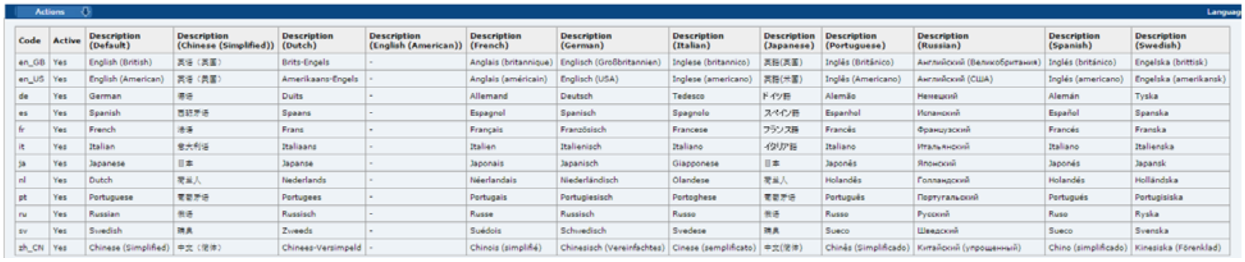
## Languages

Retailer users with the Oracle Authorized Administrator authority profile have access to the Languages option.

To activate, deactivate, or amend the description of a supported system language:

1. Select the Languages option in the left hand pane. The Languages page opens.

***Figure 1–6 Languages Page***



| Code | Active | Description (Default) | Description (Chinese (Simplified)) | Description (Dutch) | Description (English (American)) | Description (French) | Description (German) | Description (Italian) | Description (Japanese) | Description (Portuguese) | Description (Russian) | Description (Spanish) | Description (Swedish) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| en_GB | Yes | English (British) | 英语（英国） | Brits-Engels | - | Anglais (britannique) | Englisch (Großbritannien) | Inglese (britannico) | 英語(英国) | Inglês (Britânico) | Английский (Великобритания) | Inglés (británico) | Engelska (brittisk) |
| en_US | Yes | English (American) | 英语（美国） | Amerikaans-Engels | - | Anglais (américain) | Englisch (USA) | Inglese (americano) | 英語(米国) | Inglês (Americano) | Английский (США) | Inglés (americano) | Engelska (amerikansk) |
| de | Yes | German | 德语 | Duits | - | Allemand | Deutsch | Tedesco | ドイツ語 | Alemão | Немецкий | Alemán | Tyska |
| es | Yes | Spanish | 西班牙语 | Spaans | - | Espagnol | Spanisch | Spagnolo | スペイン語 | Espanhol | Испанский | Español | Spanska |
| fr | Yes | French | 法语 | Frans | - | Français | Französisch | Francese | フランス語 | Francês | Французский | Francés | Franska |
| it | Yes | Italian | 意大利语 | Italiaans | - | Italien | Italienisch | Italiano | イタリア語 | Italiano | Итальянский | Italiano | Italienska |
| ja | Yes | Japanese | 日本 | Japanse | - | Japonais | Japanisch | Giapponese | 日本 | Japonês | Японский | Japonés | Japansk |
| nl | Yes | Dutch | 荷兰人 | Nederlands | - | Néerlandais | Niederländisch | Olandese | 荷兰人 | Holandês | Голландский | Holandés | Holländska |
| pt | Yes | Portuguese | 葡萄牙语 | Portugees | - | Portugais | Portugiesisch | Portoghese | 葡萄牙语 | Português | Португальский | Portugués | Portugisiska |
| ru | Yes | Russian | 俄语 | Russisch | - | Russe | Russisch | Russo | 俄语 | Russo | Русский | Ruso | Ryska |
| sv | Yes | Swedish | 瑞典 | Zweeds | - | Suédois | Schwedisch | Svedese | 瑞典 | Sueco | Шведский | Sueco | Svenska |
| zh_CN | Yes | Chinese (Simplified) | 中文（简体） | Chinees-Versimpeld | - | Chinois (simplifié) | Chinesisch (Vereinfachtes) | Cinese (semplificato) | 中文(简体) | Chinês (Simplificado) | Китайский (упрощенный) | Chino (simplificado) | Kinesiska (Förenklad) |

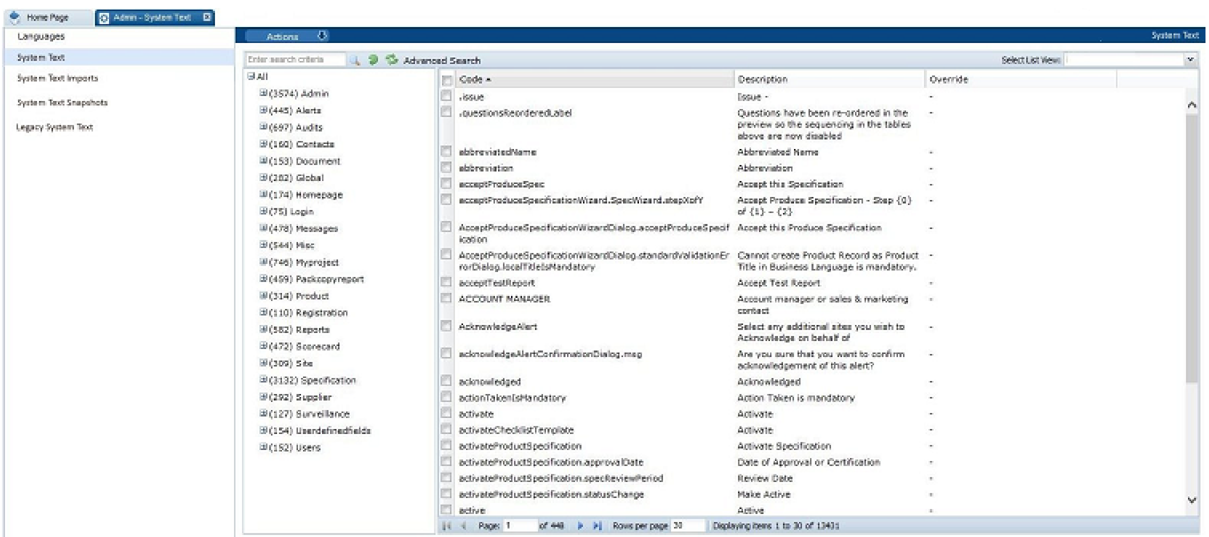
2. Select Edit and then either select or deselect one of the available languages.
3. Select Save & Exit.

## System Text

Selecting this option presents a list view containing the portal's system text files.

The core default system text cannot be changed, however custom overrides can be set up to replace the system text within the portal. This can be used to apply custom terminology, guidance help text, and alternative translations.

***Figure 1–7 System Text Page***




To edit the System Text, select a row and then select the Edit action. The row opens in edit mode. For an example of this page, see Figure 1–8.

To add a new entry:

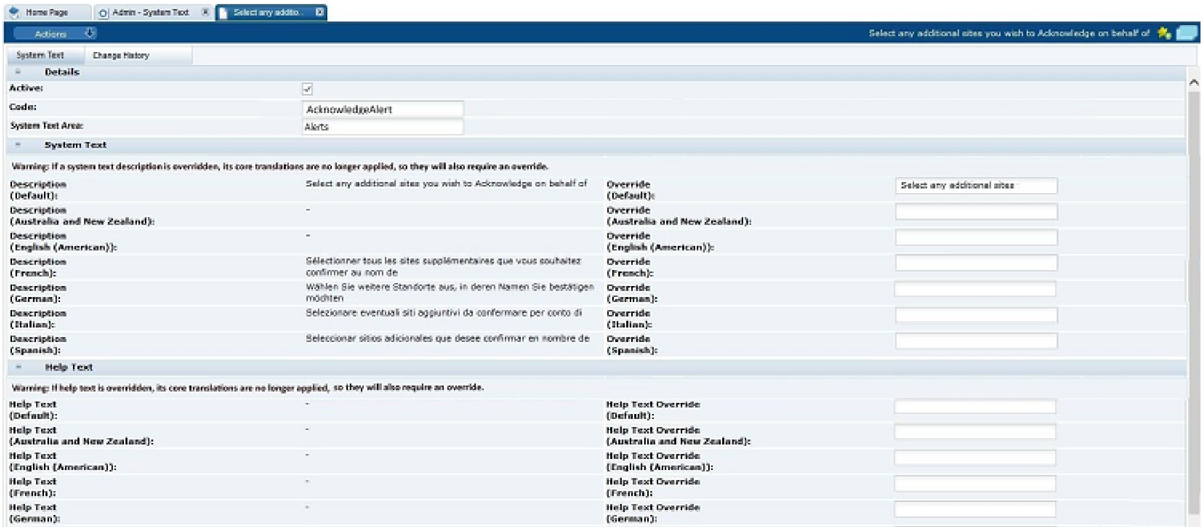
1. Select the New action. The New System Text tab appears.

---

**Note:** The actions to add and delete System Text items will usually only be used when new Custom Fields are being added to the portal.

---

***Figure 1–8 System Text Details Page***




2. In the Details section, set the following values:
   - Active - check the box to activate this item.
   - Code - enter an identity code for the item.
   - System Text Area - the area of the system that this item relates to.

   The System Text and Help Text sections are arranged with the core default text on the left hand side, which cannot be edited, and the custom overrides on the right. If the override is left blank, the core default text will be used. The fields are repeated for each of the portal's supported languages. If an override is subsequently removed, the system will revert to using the core system text.

   > **Note:** If the core default language system text description or help text has an override applied, the associated core translation value is no longer applied as it is assumed the translation is no longer valid. An override translation must be created where translations are required.

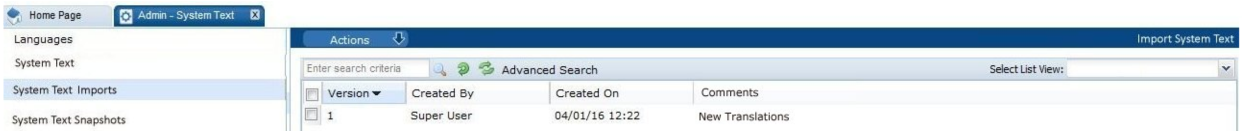
3. In the System Text section, set the following values:
   - Description - the core default system text.
   - Override - the custom text to override the core default value.
4. In the Help Text section, set the following values:
   - Help Text - the core default help text.
   - Help Text Override - the custom help text to override the core default value.
5. Select the Save action.
6. Select the Reload System Text action from the System Text page to apply the changes to the portal.

## System Text Imports

The System Text page includes the option to import system text changes as an alternative to manually editing the individual system text item. Used in conjunction with the System Text Export option, the import allows exported files of system text to be edited offline with a text editor prior to being imported back in through a single action.

Selecting this option presents a list view showing previous imports.

***Figure 1–9 System Text Imports Page***

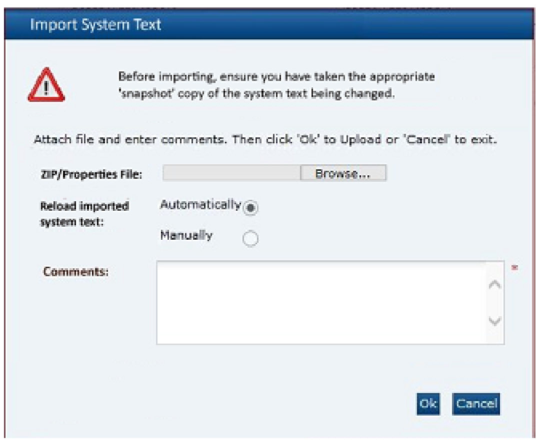



To view the details of a previous import, select a row and then select the View action. The row opens in read mode. For an example of the content this page, see Figure 1–13.

To perform a new import:

1. Select the Import System Text action. The Import System Text dialog box appears.

***Figure 1–10 Import System Text Dialog Box***




   a. Click Browse to select an individual text file (or a ZIP file containing multiple text files) to import.

   b. Choose to either automatically apply the system text to the application on completion of the import, or to manually apply it through the Reload System Text action. The manual option will typically be used where a series of system text changes are being imported and are to then be applied simultaneously.

   c. Enter a comment to describe the changes being imported. This is a mandatory field.

   d. Click **Ok**.

---

**Note:** The import file must be a text file with the extension `.translation`.

Any special characters must be UTF-8 encoded.

The file may contain blank rows or comments (rows that start with #); they will simply be ignored by the import process.

For further details of the file layout, see "System Text Exports."

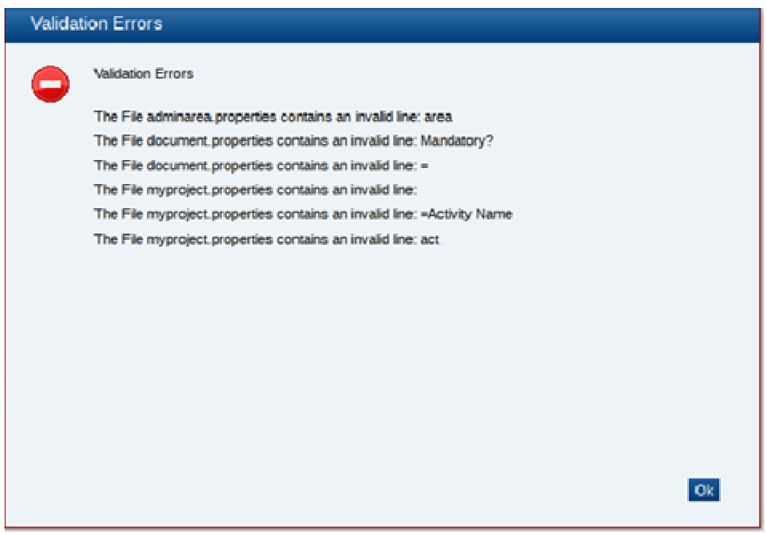
---

2. If the "\u" ASCII character escape sequence prefix is encountered in the file, indicating the presence of special characters that have not been UTF-8 encoded, the following message is displayed with the option to continue or cancel:

***Figure 1–11 Import System Text Warning Dialog Box***


3. To continue the import, click **Ok**. To return to the System Text page, click **Cancel**.
4. If errors are encountered the following dialog box appears:

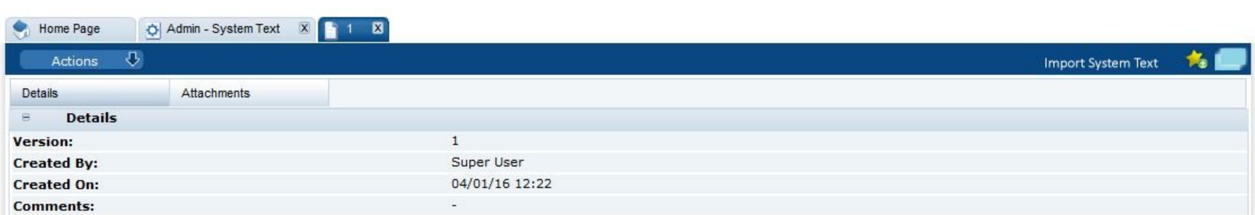
***Figure 1–12 Import System Text Errors Dialog Box***




If no errors are encountered the system text is imported and a row is added to the System Text Import page.

5. To view the details of the import, select the row in the System Text Import page and then select the View action. The row opens in read mode.

***Figure 1–13 System Text Import Details Page***




6. In the Details section (all fields are read-only):
   - Version - this is automatically incremented for each import.
   - Created By - the name of the person who submitted the import.

- Created On - the date and time of the import.
- Comments - the comments that were entered when the import was run.

A copy of the imported file is automatically stored in the Attachments section.

7. If the option was selected to manually apply the changes, click the Reload System Text action when ready for the text to be applied to the portal.

System text records cannot be deleted.

## System Text Exports

The System Text page includes the option to download system text files to your PC for offline editing prior to importing the changes back into the portal.

To perform an export:

1. Select the Export System Text action. The Export System Text dialog box appears, explaining that the Reload System Text action will automatically run as part of the export to ensure any outstanding updates are first applied.

***Figure 1–14 Export System Text Dialog Box***

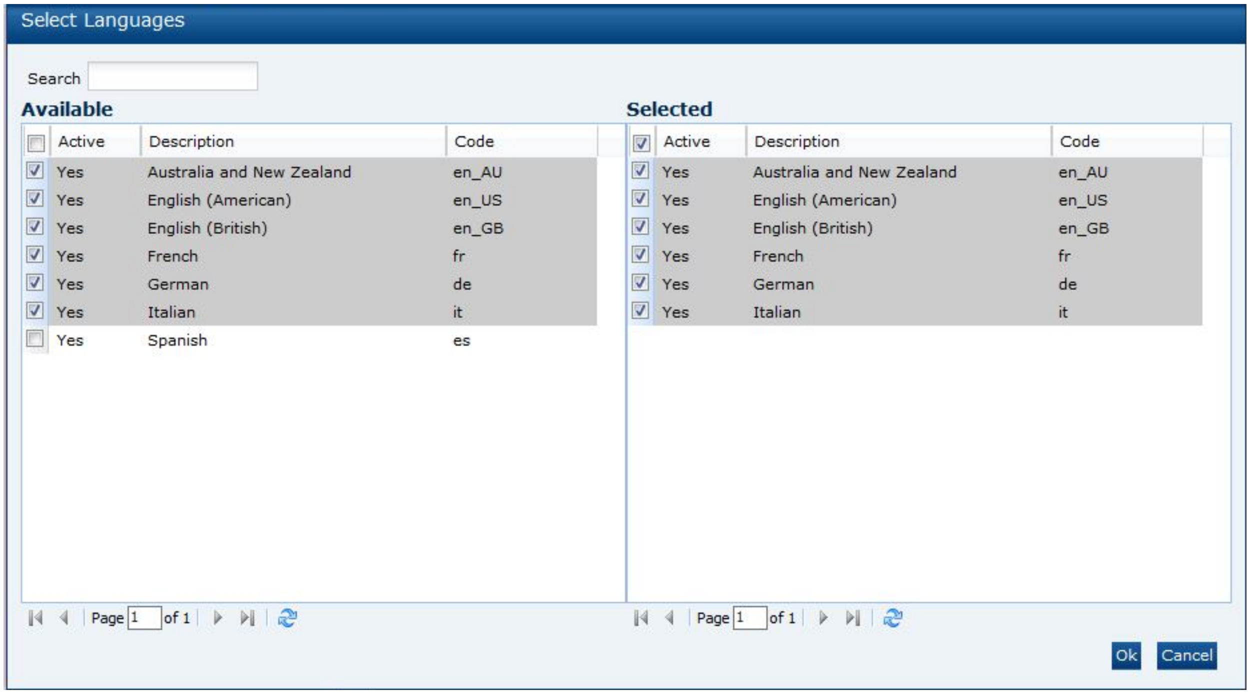

---

**Note:** The export is based on the contents of the System Text page. Filter the list view using the quick or advanced search to contain the required system text items to be included. If no languages are selected, the export file will be empty.

---

2. Click **Ok**. The System Text Export Languages dialog box appears, with all the active languages selected.

***Figure 1–15 System Text Export Select Languages Dialog Box***




3. Select the required languages to be included in the export and click **Ok**. A ZIP file is created containing the individual translation text files for the selected system text items and languages.
4. To save to a local location from which to open the text file, select Save or Save As.

The file is a text file with the `.translation` extension which can be opened and edited using any UTF-8 compliant text editor, such as Microsoft WordPad.

The file contains the current text value/description as it appears within the system. If a custom override has been set, that will be the value; otherwise the value will be the core default value. If a value is removed/ blanked and reloaded, the system will revert to showing the core default value. Each item is prefixed with its unique identity code, for example, the Oracle Login page contains a login field and a page title; if the system text of these items are "Log In" and "Oracle UK Login" respectively, they would appear in the file as:

```
oracle.loginPage.login=Log In
oracle.loginPage.loginPageTitle=Oracle UK Login
```

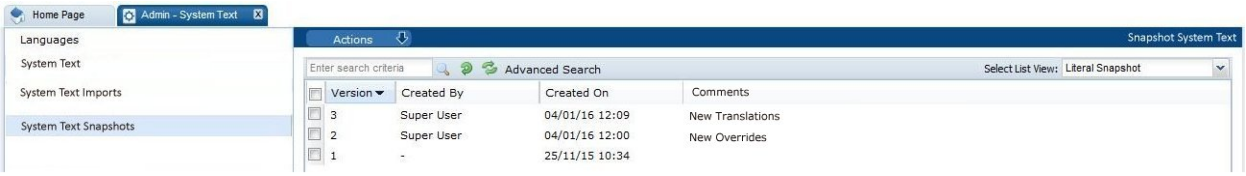
The file names are based on the system text area, with the language code appended, separated by underscore (for example, `Audits_de.translation`).

## System Text Snapshots

The System Text page includes the option to take a copy of system text files prior to changes being made. This is similar to the export option, and if necessary, the snapshot files can be imported back into the system in order to regress changes back to a prior state.

Selecting this option presents a list view showing previous snapshots.

*Figure 1–16 System Text Snapshots Page*

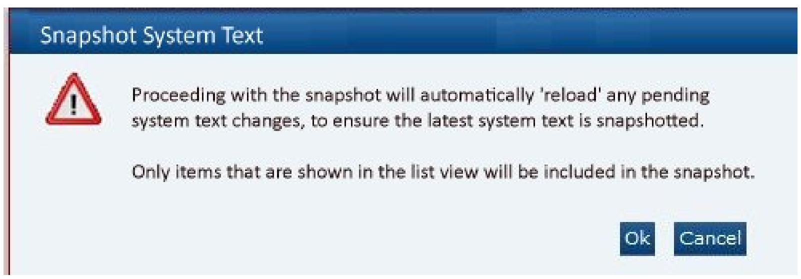



To view the details of a previous snapshot, select a row and then select the View action. The row opens in read mode. For an example of this page, see Figure 1–19.

To create a new snapshot:

1. Select the Snapshot System Text action. The Snapshot System Text dialog box appears, explaining that the Reload System Text action will automatically run as part of the snapshot to ensure any outstanding updates are first applied.

*Figure 1–17 Snapshot System Text Dialog Box*



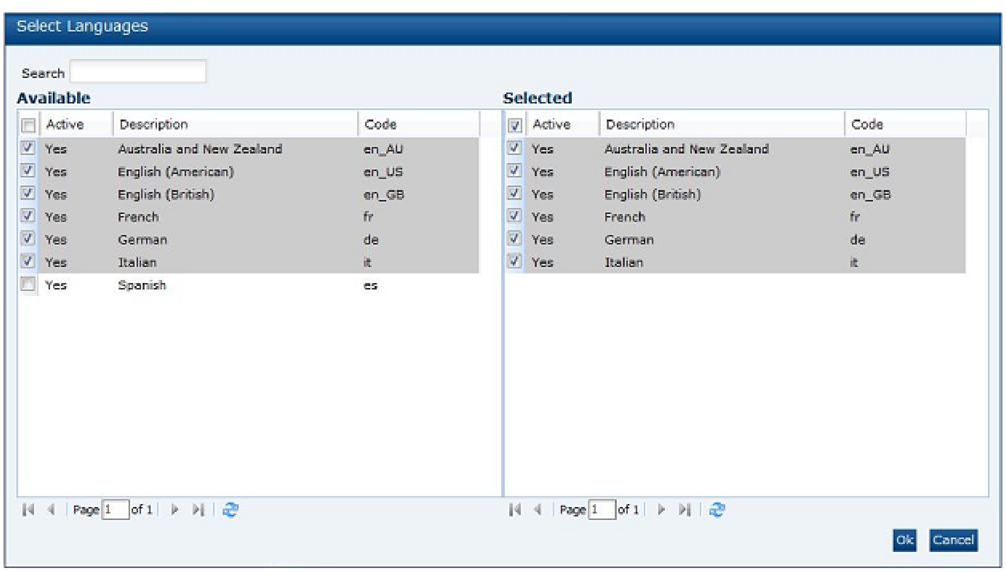

---

**Note:** The snapshot is based on the contents of the System Text page. Filter the list view using the quick or advanced search to contain the required system text items to be included.

---

2. Click **Ok**. The System Text Snapshot Languages dialog box appears, with all the active languages selected.

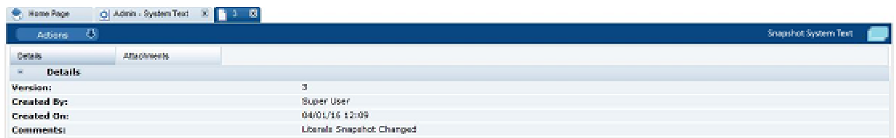
*Figure 1–18 System Text Snapshot Select Languages Dialog Box*



3. Select the required languages to be included in the snapshot and click **Ok**. A ZIP file is created containing the individual translation text files for the selected system text items and languages and a row is added to the System Text Snapshots page.

4. To edit the details of the import, select the row in the System Text Snapshots page and then select the Edit action. The row opens in edit mode.

***Figure 1–19 System Text Snapshot Details Page***




5. In the Details section (all fields except Comments are read-only):

   - Version - this is automatically incremented for each snapshot.
   - Created By - the name of the person who submitted the snapshot.
   - Created On - the date and time of the snapshot.
   - Comments - this is the only editable field.

   The snapshot ZIP file is automatically stored in the Attachments section.

To delete a System Text Snapshot, select a row and then select the Edit action. The row opens in edit mode. Select the Delete action.

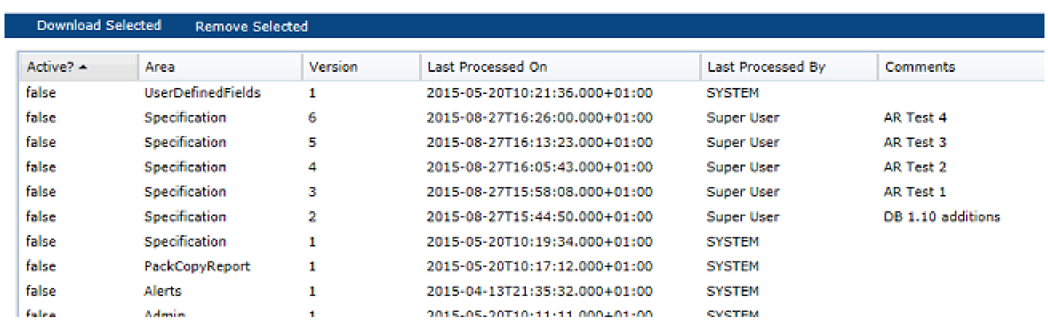
## Legacy System Text

Selecting this option presents a list of the system text spreadsheets that were used in a prior version of the portal which used spreadsheets to manage the system text; although now redundant, the spreadsheets are retained for reference purposes.

To view a legacy system text spreadsheet:

1. Select the row in the list view and click Download Selected.

***Figure 1–20 Legacy System Text Page***



Download Selected Remove Selected

| Active? | Area | Version | Last Processed On | Last Processed By | Comments |
|---|---|---|---|---|---|
| false | UserDefinedFields | 1 | 2015-05-20T10:21:36.000+01:00 | SYSTEM | |
| false | Specification | 6 | 2015-08-27T16:26:00.000+01:00 | Super User | AR Test 4 |
| false | Specification | 5 | 2015-08-27T16:13:23.000+01:00 | Super User | AR Test 3 |
| false | Specification | 4 | 2015-08-27T16:05:43.000+01:00 | Super User | AR Test 2 |
| false | Specification | 3 | 2015-08-27T15:58:08.000+01:00 | Super User | AR Test 1 |
| false | Specification | 2 | 2015-08-27T15:44:50.000+01:00 | Super User | DB 1.10 additions |
| false | Specification | 1 | 2015-05-20T10:19:34.000+01:00 | SYSTEM | |
| false | PackCopyReport | 1 | 2015-05-20T10:17:12.000+01:00 | SYSTEM | |
| false | Alerts | 1 | 2015-04-13T21:35:32.000+01:00 | SYSTEM | |
| false | Admin | 1 | 2015-05-20T10:11:11.000+01:00 | SYSTEM | |

2. To save to a local location from which to open the spreadsheet, select Save or Save As.

To delete a legacy system text spreadsheet, select a row and click Remove Selected.

# 2

# Managing User Access

This chapter describes how user access to Oracle Retail Brand Compliance Management Cloud Service 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
- Managing External Systems
- System Parameters

## Overview of User Security

Following are the components of user security for Oracle Retail Brand Compliance Management Cloud Service:

- 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.

Retailer users with the Oracle Authorized Administrator authority profile have access to the Permissions option within the Admin - Roles & Permissions menu.

### Amending Permissions

The Permissions spreadsheet can be amended using the following steps:

> **Note:** It is recommended that Oracle be consulted before making changes to the Permissions spreadsheet.

1. Open the Roles & Permissions / Permissions page in the Admin area.
2. Select the active permission row in the list view.
3. Click **Download Spreadsheet** and save the XLS file locally.
4. Edit the Permissions.XLS file using a spreadsheet editor such as Excel and save the changes.

   The spreadsheet is organized with a separate tab for each record type. Each page contains the following columns:

   - **Authority Profile** - This is the grouping for which the access rights are provided. Authority Profiles are assigned to users, either grouped together as Roles, or individually. They collectively grant the user the appropriate level of access to the system. This column must contain an entry that is present in the Authority Profiles glossary. The remaining columns specify the profile's access rights for the type of record.
   - **Menu Option** and **Sub Menu Option** - These columns are used to assign access rights to menu options and sub menu options.
   - **Action** - This column is used to assign access rights to actions such as buttons or table actions.
   - **Record** - This column identifies the record that the permission rule applies to.
   - **Page**, **Field Set**, and **Field** - These columns identify individual pages, field sets, or fields within the page which are to have access rights that differ to the overall level of access to the record. For example, an Authority Profile may be assigned edit access to a record in general, but specific pages, field sets, or individual fields may be overridden to have read-only access.
   - **Status** (**Record** and **Parent Record**) - This column can be used to apply rules specific to the status of the record and/or its parent record.
   - **User Mode** - This column can be used to apply a separate set of rules for a restricted level of access. It will usually be set to NORMAL.
   - **Access Level** - This column defines the level of access to be granted. The options are:
     - **R** - Read: Read-only access (also allows the Print action where the option is available).
     - **W** - Write: Write access (also assumes Read access).

  - **C** - Create: Ability to create a new record (also assumes Read and Write access).
  - **D** - Delete: Ability to delete a record (also assumes Read and Write access).
  - **F** - Full Access: Full access to a record (Read, Write, Create, and Delete access).
  - **N** - No Access: No access to the record, item, or action.
  - **Y** - Access Permitted: Ability to access an action.

5. Click **Upload Permissions Spreadsheet** and locate the spreadsheet. Add a comment and click **Ok**.
6. Select the uploaded entry in the list view and click **Process Selected**. The permission changes will become effective to users the next time they log in.

### Setting Permissions for Product Records

An example of using the configurable Permissions rules to apply specific access rights to a certain type of user is where it may be desirable to prevent Supplier users from creating new Product Records, and restricting which fields they may edit within the record:

- The permission rules have to be set up separately for Produce and non-Produce Product Records. An override approach, where a rule might be set up for all specification types and then overridden for Produce, has not been adopted because of the complexities of resolving rule precedence in the Authority Profile hierarchy.
- If permissions for the Produce Product Records need to be the same as for non-Produce Product Records, duplicate the Action and Field Access rows in the Product sheet of the permissions spreadsheet:
  1. Copy all of the rows with an entry in the Record column (column F). Rows where this column is blank can be ignored because they define list view menu options which do not check the state of the record, and therefore Produce or Non-Produce is an irrelevance.
  2. Update the Record column (column F) by prefixing the values with "Produce " or "Produce_" or "PRODUCE " accordingly; the case does not matter.
- If permissions for the Produce Product Records differ from the non-Produce permissions, set them up as required, but ensure that all Action and Field Access rows, as set up for non-Produce Product Records, are accounted for:
  – For example, to configure the Permissions spreadsheet so that specific fields in the non-Produce Product Record are read-only for supplier users (those with the Supplier Product Editor authority profile):

| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2 | Record | Authority Profile | u Opt | enu c | Action | Record | Page | Field Set | Field | Record | arent Re | User Mode | Access Level |
| 3 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | title | | | NORMAL | R |
| 4 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | projectName | | | NORMAL | R |
| 5 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | externalSystemStatus | | | NORMAL | R |
| 6 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | quantity | | | NORMAL | R |
| 7 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | retailerProductNumber | | | NORMAL | R |
| 8 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | site | | | NORMAL | R |
| 9 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | specTypeFormat | | | NORMAL | R |
| 10 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | leadBusinessCategory | | | NORMAL | R |
| 11 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | businessCategory | | | NORMAL | R |
| 12 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | countryWhereSold | | | NORMAL | R |
| 13 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | details | projectName | | | NORMAL | R |
| 14 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | contacts | | | | NORMAL | R |
| 15 | Product | SUPPLIER PRODUCT EDITOR | | | | ProductRecord | productRecordDetails | benchmark | | | | NORMAL | R |

  – Or to configure the Permissions spreadsheet so that specific fields in the Produce Product Record are read-only for retailer users (those with the Retailer Product Editor authority profile):

| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | Functionality | | | | Data | | | | Status | | | |
| 2 | Record | Authority Profile | nu Opt | enu c | Action | Record | Page | Field Set | Field | Record | arent Re | User Mode | Access Level |
| 3 | Product | Retailer Product Editor | | | | Produce Product Record | | | | | | NORMAL | F |
| 4 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | secondarySites | | | | NORMAL | R |
| 5 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | supplierContacts | | | | NORMAL | R |
| 6 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | postHarvestTreatments | | | | NORMAL | R |
| 7 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | growersListDetails | | | | NORMAL | R |
| 8 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | processControlsDetails | | | | NORMAL | R |
| 9 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | countriesOfOrigin | | | | NORMAL | R |
| 10 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | allergenInformation | | | | NORMAL | R |
| 11 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | packagingDetails | | | | NORMAL | R |
| 12 | Product | Retailer Product Editor | | | | Produce Product Record | additionalSupplierInfoPage | | additionalSupplierInformationAttachments | | | NORMAL | R |

## 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.

An Authority Profile record also includes a field called "Control" which can be used to describe what the authority profile does. This becomes useful to an Administrator when using the Display effective permissions button within a user record because, as the cursor hovers over an Authority Profile within the dialog box, a tool tip will display whatever has been entered in the Control field. As text for the field can be entered in all supported languages for the portal, the system will be able to show the text in the language of the user using the system.

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.

Retailer users with the Oracle Authorized Administrator authority profile have access to the Authority Profile Groups option within the Admin - Roles & Permissions menu.

## 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. |

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

| Role Name | Description |
|---|---|
| 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. |
| 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

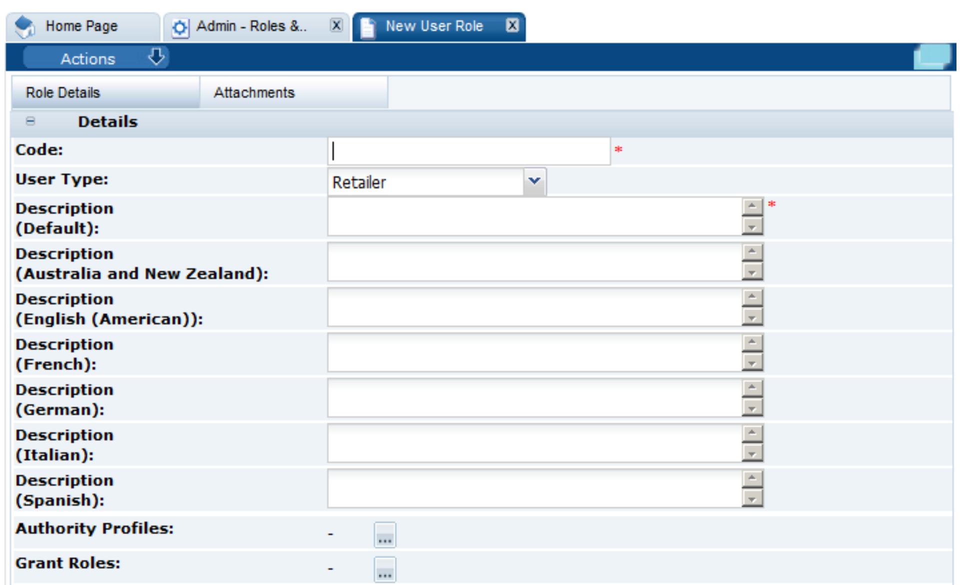
Select User Roles in the left panel. The List Roles page opens. For each role, the code, user type (Retailer, Site, Supplier), and description is shown.

### 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. |

*Table 2–3 (Cont.) New User Role Page Details*

| Details | Description |
|---|---|
| User Type | Select the type of users for which this role is intended:<br>■ Retailer<br>■ Supplier<br>■ Retailer and Supplier<br>■ 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

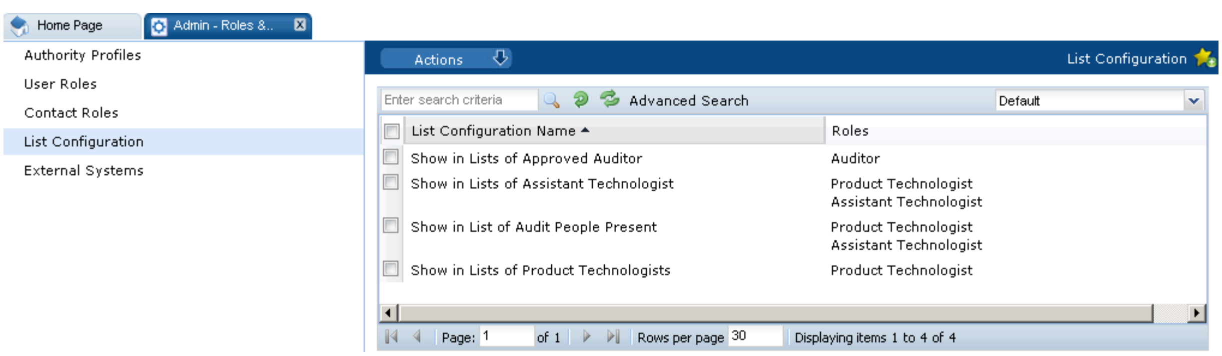
Select the role and select the Edit action. The Role Details are displayed in edit mode. The Code, User Type, and Default Description, and any descriptions entered for a supported language cannot be edited. Descriptions for additional languages can be added.

## 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*



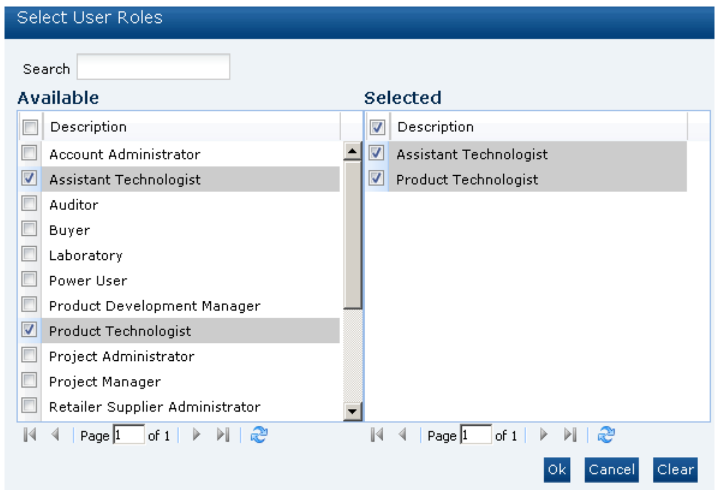

For each list configuration, the roles assigned for that list are shown.

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:

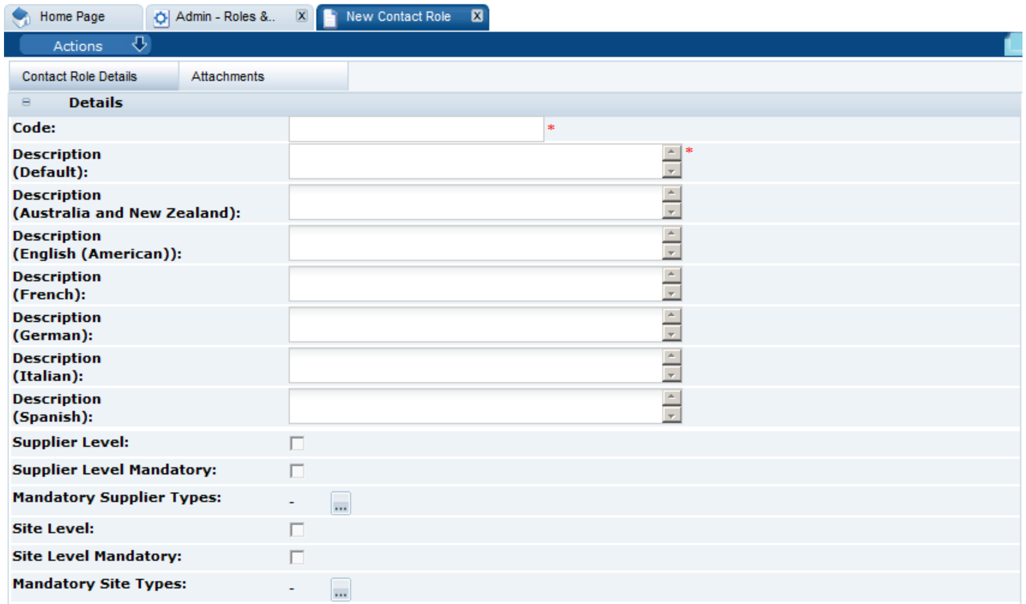
- Is Supplier Role?
- Is Mandatory Supplier Role?
- Is Site Role?
- Is Mandatory Site Role?

## 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.

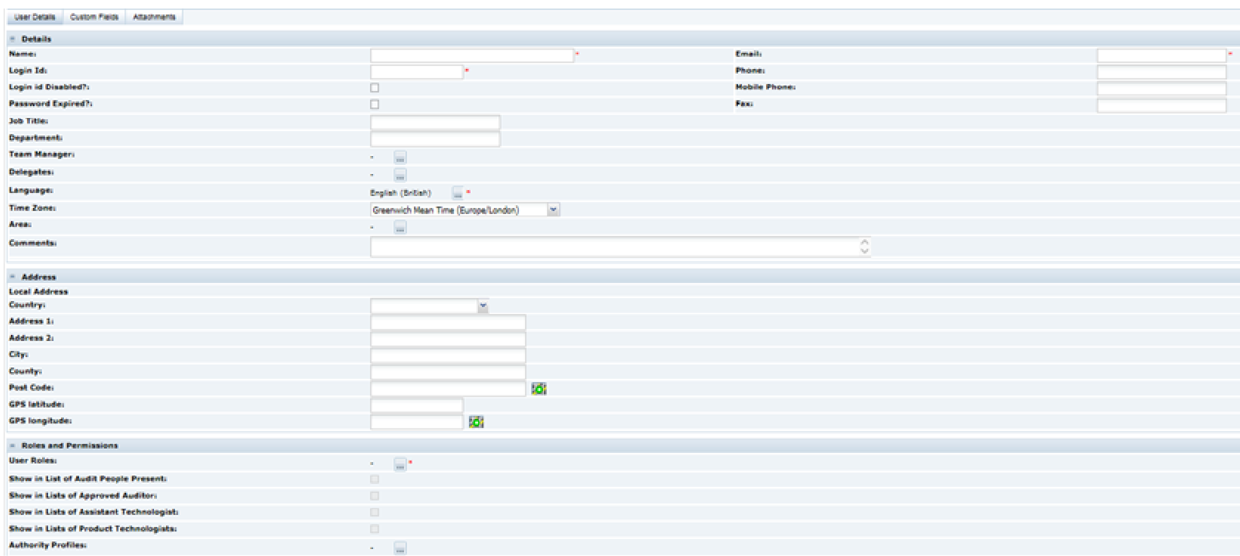
# Managing Users

To access the users, select Users from the Company 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

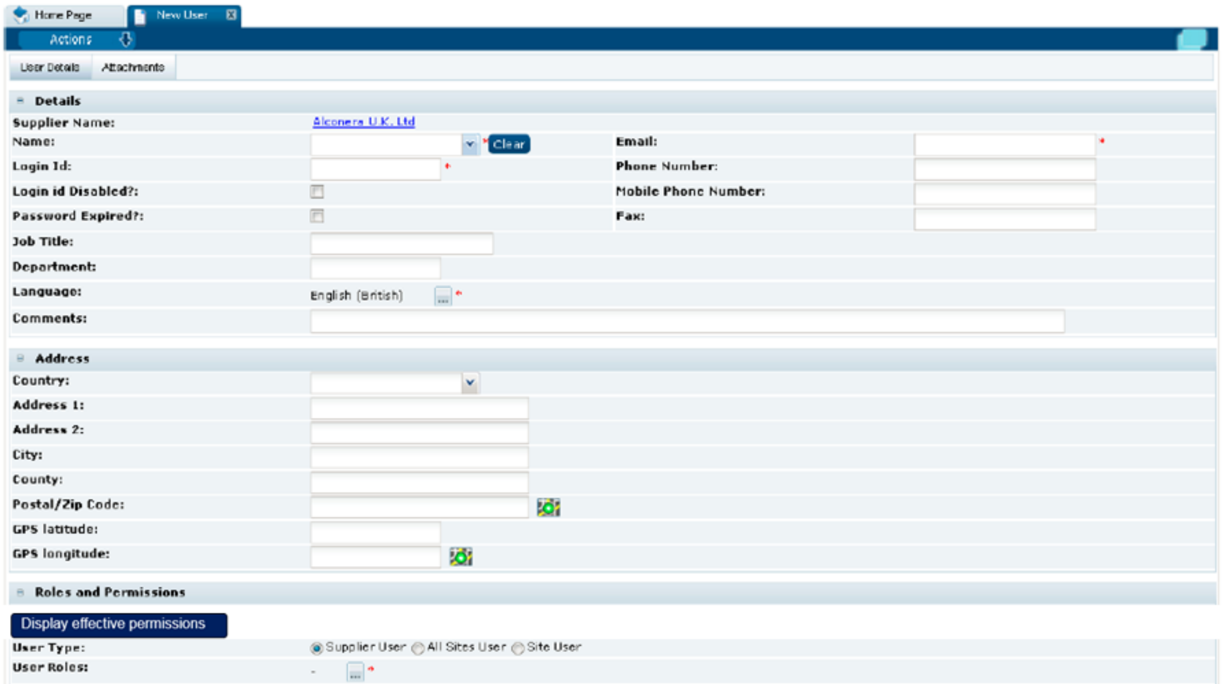
  The Name, Email, Login Id, and Language fields are mandatory.

  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.

  Clicking **Display effective permissions** shows the authority profiles that provide this user's highest level of access, based on their assigned roles and authority profiles.

*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.

  Clicking **Display effective permissions** shows the authority profiles that provide this user's highest level of access, based on their assigned roles and authority profiles.

When the User record is saved, an email message is automatically generated and sent to the user. The user is invited to register and set an initial password.

The administrator can send a reminder email message to any users who have yet to complete their registration. To send the reminder, select the Re-send new User Notification list view action. The email message is not sent if the user has already registered.

## 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.

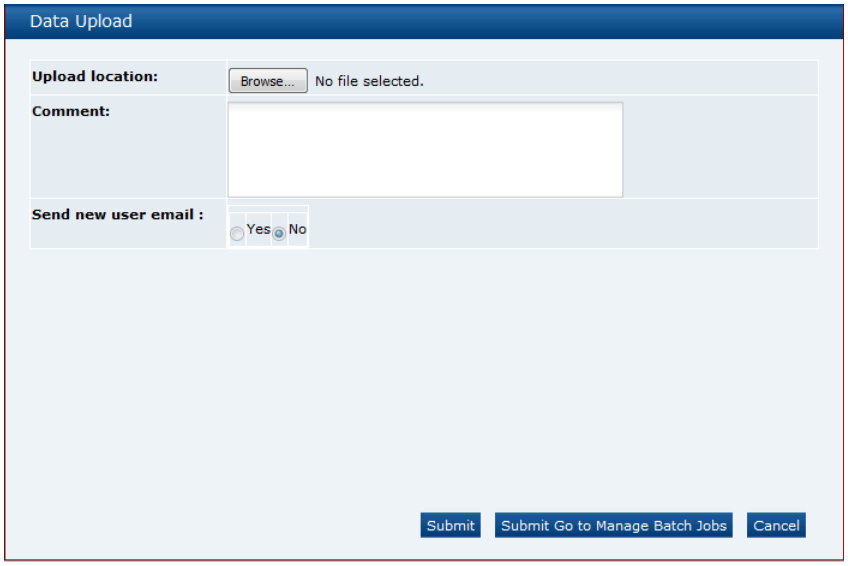
# Upload Retailer User Data

Retailer users with the Upload Administrator authority profile have access to the Upload Data option within the Admin menu for the upload of retailer users.

To upload new retailer user records:

1. Select the Import action from the Product Records List View actions menu. The Data Upload dialog box opens.

***Figure 2–8 Data Upload Dialog Box***




2. Click Browse to search for the upload file.
3. Enter any comments to describe the reason for the upload.
4. Select whether the system is to automatically send email to each newly created user on successful completion of the upload. The email will invite the user to register on the portal. The default is No, which will not send an email.
5. To upload the file, select either the **Submit** or **Submit Go to Manage Batch Jobs** action. At this point, the system will create a background job to process the spreadsheet. The spreadsheet used to upload the data will be stored within the Attachments tab of the batch job.

> **Note:** An email will be sent to the job submitter if the data within the upload file fails validation.

## Download Retailer User Upload Spreadsheet

Retailer users with the Upload Administrator authority profile also have access to the option to download a blank spreadsheet.

To download the latest version of the upload spreadsheet:

1. Select the Download Blank Spreadsheet option in the Users List View menu. An operating system specific dialog box opens with the option to either open or save the file.
2. Select the save option to download the ZIP file to your desktop.

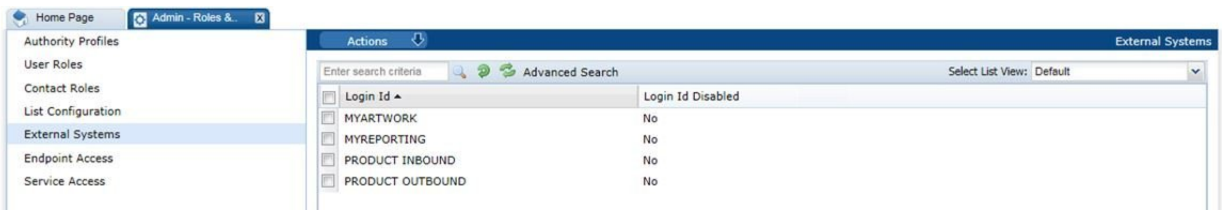
> **Note:** The ZIP file contains a spreadsheet workbook with the first tab used to upload the data. The second tab contains guidance notes and the remaining tabs contain the valid glossary values.
>
> The column heading text shown on the first tab is in the user's language. If translations are not present for the user's language in the system, the portal's default language is substituted. An asterisk (*) will be shown in a column heading if an entry is mandatory.

# Managing External Systems

External systems can access Oracle Retail Brand Compliance Management Cloud Service through its suite of web service APIs. In order for an external system to access an API, it must be granted permission with a login ID and password. Similar to user accounts, an external system account must be created and a password assigned, along with the rules for which services may be accessed.

To access the external system options, select the System Control option from the Admin drop-down list and select External Systems in the left pane. A list of existing external system accounts appears, showing the login IDs and whether the accounts are active or disabled.

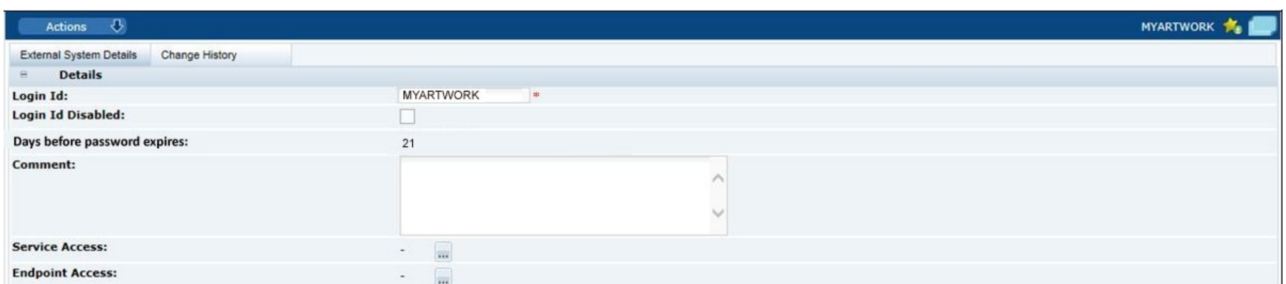
***Figure 2–9 External Systems Page***




## Creating an External System

To create a new external system, select the New External System action. The New External System page appears.

***Figure 2–10 External System Details Page***




Enter the required information for the external system:

- The Login Id is mandatory and must be unique.
- The account can be disabled by checking Login Id Disabled.
- The days before password expires will start with the system's default value.
- Additional information about the external system can be entered in the Comment field.
- Select the Services and/or the individual Endpoints the external system is to be granted access to.

The Change Password action can be used to set the password once the account has been saved.

## Editing an External System

To edit an external system, select the external system on the External Systems page and then select the Edit action. The external system record appears in edit mode in a new tab. The Login Id cannot be changed. If the user has Password Administrator rights, the Login Id Disabled, Comments, Service Access, and Endpoint Access fields can be changed.

Select the Change Password action to set the password.

## Disabling an External System

An external system can be prevented from accessing Oracle Retail Brand Compliance Management Cloud Service. To disable an external system:

1. Select the external system on the External Systems page.
2. Select the Edit action. A tab is opened with the external system record in edit mode.
3. Check the Login Id Disabled checkbox.
4. Save the changes.

An alternative to disabling the account is to deselect the services and endpoints.

## Deleting an External System

To delete an external system:

1. Select the external system on the External Systems page.
2. Select the Edit action. A tab is opened with the external system record in edit mode.
3. Select the Delete action. The delete confirmation dialog box appears.
4. Click **Ok**.

## Expiring Passwords

The external system's password will automatically expire if it is not reset in accordance with the system parameter rules (see Table 2–6).

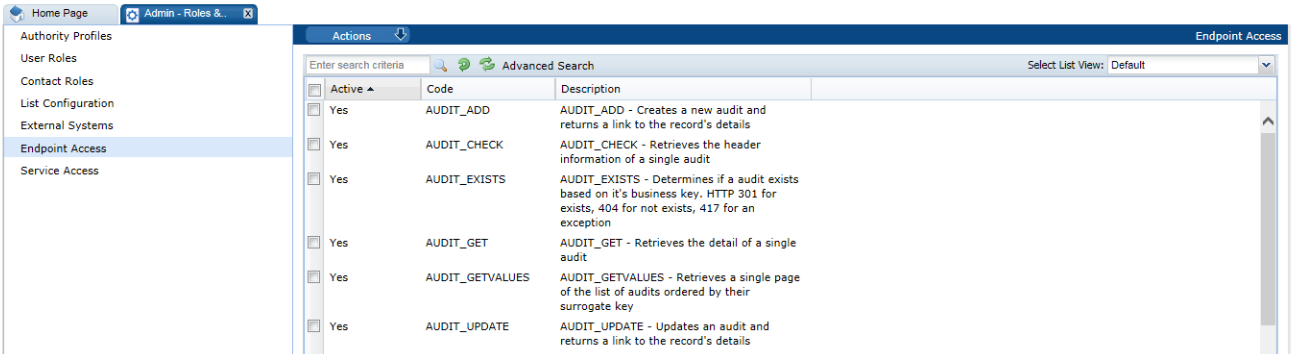
When an external system's password becomes due to expire (based on its grace period), an entry will appear in the Task and UIM (Urgent Item Manager) apps for administrators with the authority profiles specified in the system parameter rules.

When an external system's password expires, an entry will appear in the Task and UIM (Urgent Item Manager) apps for administrators with the authority profiles specified in the system parameter rules. These users will also receive notification of the expiry in an email that is automatically generated by a batch job.

## Managing Endpoints

Endpoints define the individual methods of the web services that are available through the portal's APIs. Endpoints cannot be manually created or deleted, and should only be edited to activate or deactivate the endpoint.

***Figure 2–11 Endpoint Access Page***




To enable or disable an endpoint:

1. Select the endpoint on the Endpoint Access page.
2. Select the Edit action. A tab opens with the endpoint record in edit mode.
3. Check the Active checkbox to activate the endpoint; un-check the checkbox to deactivate the endpoint.
4. Save the changes.

***Figure 2–12 Endpoint Access Details Page***


---

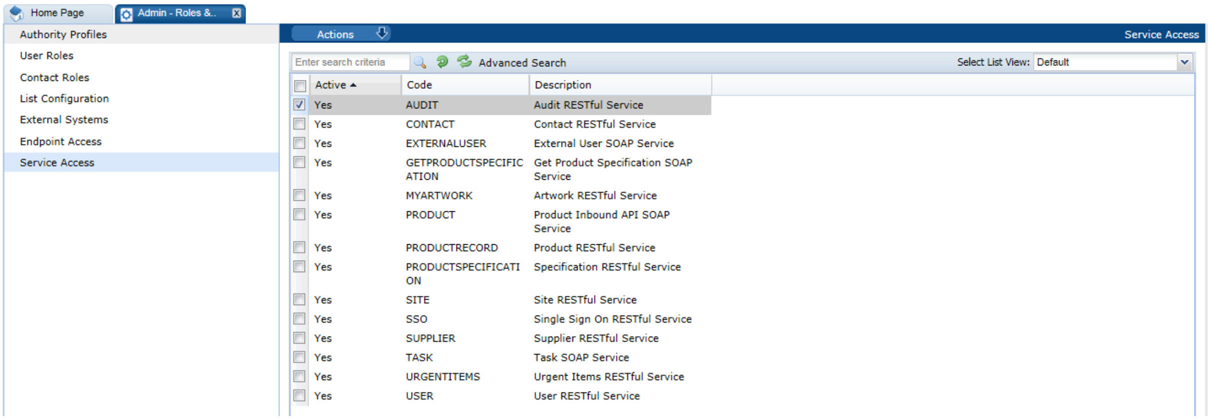
**Note:** Deactivating an endpoint prevents it from being selected as part of a service, it does not stop the endpoint being accessed in existing services. To prevent an external system accessing an endpoint, deselect the endpoint and/or service in the External System record.

---

## Managing Services

Services define the web services that are available as the portal's APIs. Services cannot be manually created or deleted, and will usually only be edited to activate or deactivate the service.

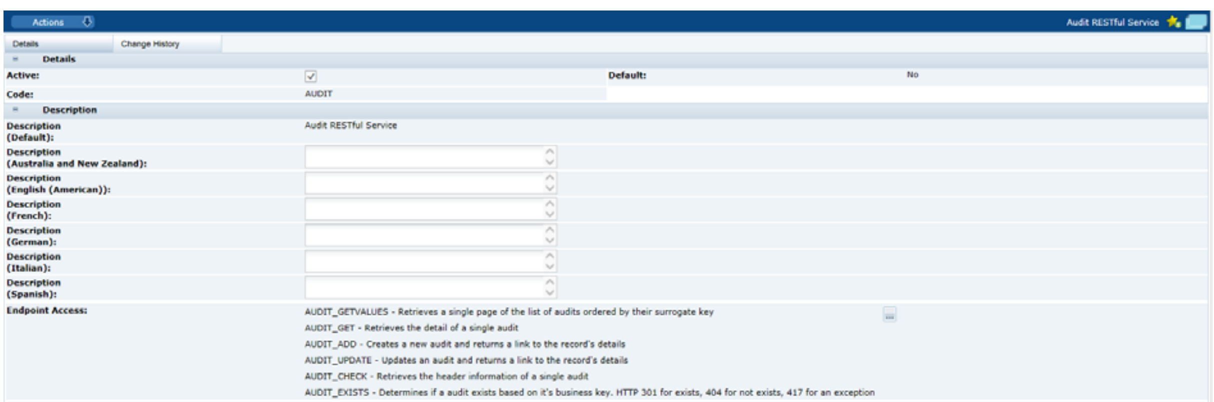
*Figure 2–13 Service Access Page*




To edit, disable or enable a service:

1. Select the service on the Service Access page.
2. Select the Edit action. A tab is opened with the service record in edit mode.
3. Check the Active checkbox to activate the service; un-check the checkbox to deactivate the service.
4. Select the endpoints to be made available through this service.
5. Save the changes.

*Figure 2–14 Service Access Details Page*




---

**Note:** Deactivating a service prevents it from being granted to an external system, it does not stop the service being accessed where it has already been granted to an external system. To prevent an external system accessing a service, deselect the service in the External System record.

---

# 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 8. Cannot be less than 8. |
| 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 must 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 the 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. |
| Log On | Site Details Update Reminder | Used for supplier 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.<br><br>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.<br><br>Default is Yes. |

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

| Subtab | Parameter | Description |
|---|---|---|
| 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.<br>**Note:** Once set, the default language cannot be changed. |
| Global | Enable user preference option for the auto refresh of list views | If checked, users will have an option in their user preferences to set whether the contents of list views automatically refresh each time the user returns to it, rather than each time it is initially opened.<br>If unchecked, the user will not have the preference option, and list views will only refresh when initially opened, or the Refresh action is manually selected.<br>This parameter is used to reduce the amount of processing time spent on automatically refreshing list views, a potential performance overhead.<br>For new installations the default is unchecked (no auto refresh); for portal upgrades, the default is checked (individual users choose to enable auto refresh).<br>This is only editable by users with the Oracle Authorized Administrator authority profile. |
| Global | Number of days to keep Web Service Logs | Controls how long entries in the Web Service Log are retained for (number of days).<br>A daily scheduled batch job purges any entries from the Web Service Log that are older than the specified number of days.<br>The default value is 30 days.<br>Only whole days can be specified (any decimals are stripped); there is no upper limit.<br>If a value of zero is entered, all entries in the log will be removed each time the job is run (daily); a negative value is treated as zero.<br>If no value is entered, no purging will be applied, so the log entries will be retained indefinitely. |

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

| Subtab | Parameter | Description |
| --- | --- | --- |
| 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.

---

To manage the parameters for external systems, select the System Control option and then System Parameters. Table 2–6 describes the available parameters.

*Table 2–6 System Parameters Used to Manage External Systems*

| Subtab | Parameter | Description |
| --- | --- | --- |
| Log On | Min Length of Password | Minimum length required for a password. This value must be at least 8. Default is 8. |
| 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 must begin with a letter. Default is No. |
| Log On | User Password History | Number of past passwords the external system has defined. This prevents setting the password to a previous password. Default is 24. |
| Log On | Password Minimum Life | Minimum number of days the password must be set before being changed. Default is 1. |
| Log On | Password Expiry Limit (days) | Number of days a password can be used before it must be changed. Default is 180. |
| Log On | Password Grace Period (days) | Number of days before the Password Expiry Limit is reached when the system starts prompting to change the password. Default is 21. |

*Table 2–6 (Cont.) System Parameters Used to Manage External Systems*

| Subtab | Parameter | Description |
|---|---|---|
| Log On | Max Login Attempts | Sets the number of times an incorrect password can be submitted before the external system is locked out. This field is ignored if blank. Default is 5. |
| Log On | Notify Authority Profiles | Sets the authority profiles of users to be notified (through the Task App, UIM, and email) of the expiry of an external system's password.<br><br>At least one authority profile must be selected.<br><br>Default is Password Administrator. |
| Log On | User T's & C's Active | If set to Yes, users must accept the portal's terms and conditions when they first log on. Default is Yes.<br><br>This parameter can only be seen and maintained by users with the Oracle Authorized Administrator authority profile. |

Below is an example of the use of the password expiry and grace period parameters, showing that if the expiry period is 8 days and the grace period 2 days, the password will expire at the start of the ninth day following the last reset of the password (including that day); and from the start of two days prior to the expiry day, a reminder to change the password will be issued (until the password is reset or expiry is reached).

**Expiry no. days:** 8 **Grace period:** 2

| **Day** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10+** |
|---|---|---|---|---|---|---|---|---|---|---|
| **Event** | Change password | | | | | | 00:00<br>User is warned that password is due to expire | | 00:00<br>Password Expires<br><br>Password Expired | |

# 3 Custom Configuration

Brand owners may customize aspects of the portal. Custom fields can be used to extend records for the capture of additional data; images and styles can be overridden to apply custom branding and theming.

## 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 Brand Compliance Management Cloud Service 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.

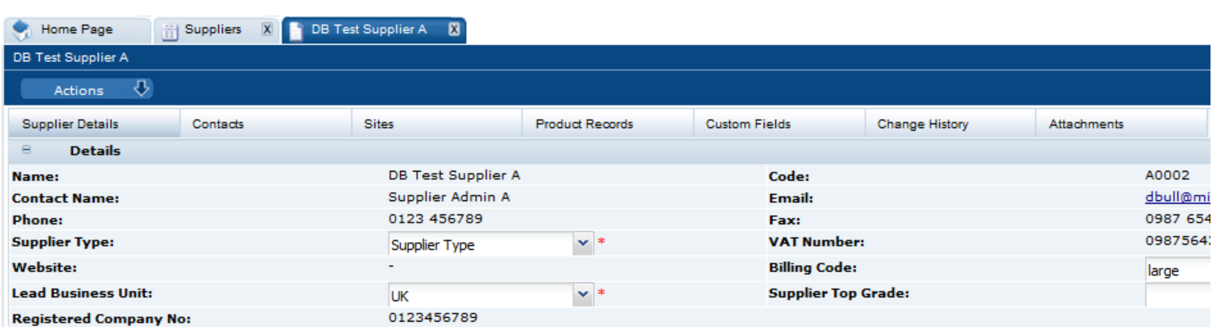
---

**Note:** There is a limitation in the configurable mandatory field rules for Product Specifications with relation to custom fields. While it is possible to apply mandatory validation to custom fields in each section of the specification, it is not possible to do so in the main Custom Fields section of the specification.

Also, it is not possible to configure mandatory field rules for the EAN Barcode and Shipping Case Code fields within the specification.

---

***Figure 3–1 Custom Fields Tab***

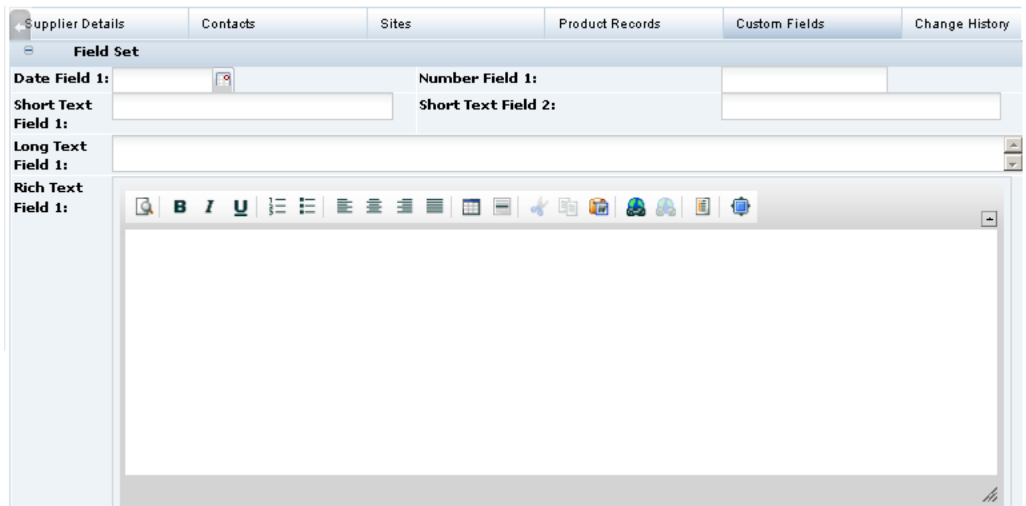


To see the custom fields data, select the Custom Fields subtab. The Custom Fields page opens.

***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***




# Branding & Theming

The Oracle Retail Brand Compliance Management Cloud Service images and style sheets can be overridden to use custom styles, such as alternative logos or color schemes. Also, the terms and conditions can be customized. Select the System Control option and then Branding.

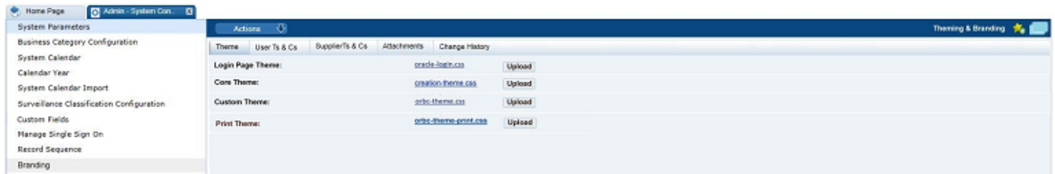
## Managing Styles

Custom styles are applied by uploading CSS stylesheets in the Theming & Branding record. In read mode, the existing CSS files can be downloaded by clicking the hyperlinks. In edit mode, the option to upload alternative stylesheets is available. Administrators with the Oracle Authorized Administrator authority profile can edit the Theme page.

To apply a custom style:

1. Select Branding in the left pane. The Theme page appears.

***Figure 3–4 Theming & Branding Theme Page***




2. Edit the record.
3. Click the Upload button to load a CSS file into the Custom Theme field.
4. Select the Save action. The changes should become visible to users the next time they log in.

---

**Note:** To customize the portal's theme, the following files need to be uploaded:

- The Login page splash icon (800 x 400 pixels; name: loginBackground.png)
- The portal logo displayed on the top right of the application toolbar (200 x 37-40 pixels; name: portalLogo.png)
- The supplier registration logo (200 x 40 pixels; name: supplierRegistration.png)

The default versions can be found in the Attachments page. When changing the theme, all of the files in the Attachments page should be deleted apart from these. A quick way to do this is to select all attachments and deselect these three.

If necessary, the portal's theme can be reset to the default by Oracle Development as a support activity.

---

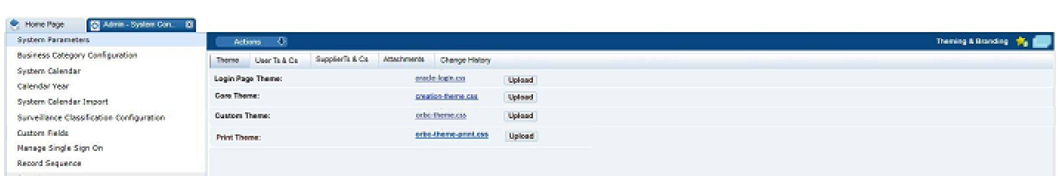
## Managing Images

Custom logos and other images are applied by uploading the files in the Theming & Branding record. The Attachments page contains the resource files that are referenced by the CSS stylesheets. Administrators with the Oracle Authorized Administrator authority profile can edit the Attachments page.

To apply a custom image:

1. Select Theming & Branding in the left pane.
2. Edit the record and open the Attachments page.

***Figure 3–5 Theming & Branding Attachments Page***




3. Click the New Attachment action to load a file and enter a description.

Multiple resource files can be uploaded through a single action by uploading a ZIP file that contains the individual files. The upload will automatically unpack the individual files; the same description will be applied to each of them.

If any of the file names are already attached, the entire upload will be prevented with the error: "The selected attachments cannot be uploaded because the file names are not unique." In this case, delete the original files before re-uploading (and amending the stylesheet if necessary).

If changing an image such as the portal logo, upload the new image and ensure the file is referenced accordingly in the custom CSS stylesheet file.

---

**Note:** Image dimensions for logos should be 200x37 pixels (ideally max 200Kb).

Image dimensions for login page backgrounds should be 400x800 pixels (ideally max 300Kb).

To display correctly, image file types must be JPEG, GIF, or PNG format.

The core Brand Compliance themes are available for download from the Glossaries Import/Export area, in the form of a ZIP file containing collections of the image and stylesheet files.

---

4. Select the Save action. The changes should then become visible to users, if any necessary changes have been made to the CSS stylesheets.

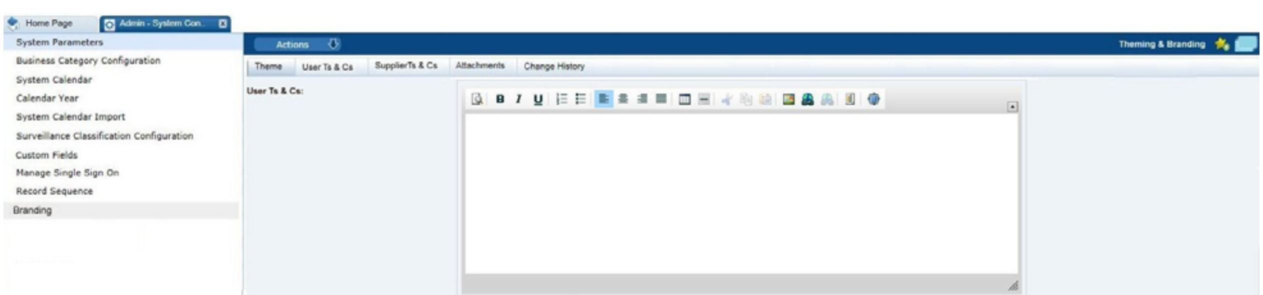
## Managing User Ts & Cs

The terms and conditions text that is presented to the user when they first log in to the system can be customized through the Theming & Branding record. Administrators with the Configuration Editor authority profile can edit the User Ts & Cs page.

To edit the User Ts & Cs text:

1. Select Theming & Branding in the left pane.
2. Edit the record and open the User Ts & Cs page.

***Figure 3–6 Theming & Branding User Ts & Cs Page***




3. Edit the text in the User Ts & Cs field. The text editor options can be used to apply text formatting such as bold and underline, and to insert hyperlinks or images. Enter any translations.
4. Select the Save action. The changes will then become visible to new users when they log in for the first time.

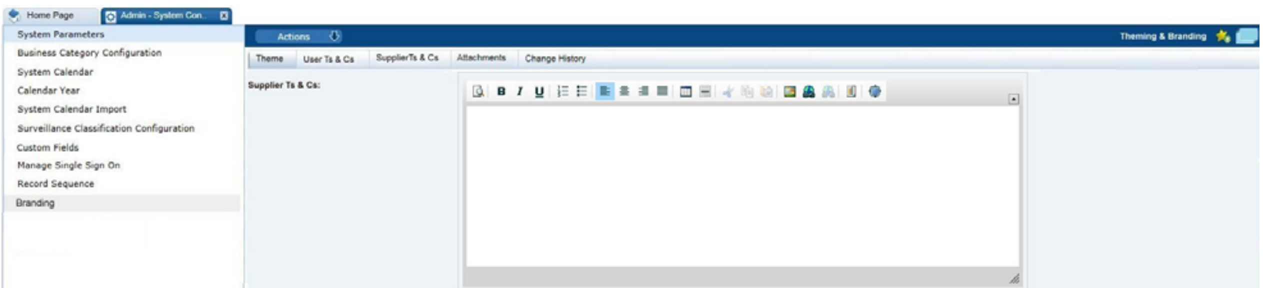
## Managing Supplier Ts & Cs

The terms and conditions text that is presented to the Supplier when they complete the Registration wizard can be customized through the Theming & Branding record. Administrators with the Configuration Editor authority profile can edit the Supplier Ts & Cs page.

To edit the Supplier Ts & Cs text:

1. Select Theming & Branding in the left pane.
2. Edit the record and open the Supplier Ts & Cs page.

***Figure 3–7 Theming & Branding Supplier Ts & Cs Page***




3. Edit the text in the Supplier Ts & Cs field. The text editor options can be used to apply text formatting such as bold and underline, and to insert hyperlinks or images. Enter any translations.
4. Select the Save action. The changes will then become visible to new Suppliers when they complete the Registration wizard.

# Email Templates

The emails that are generated automatically by the system, based on certain predefined events each have a configurable template. The templates are provided as part of the portal installation.

The maintenance of the templates, in the Notifications / Email Templates page of the Admin area, is limited to just allowing the administrator to customize the content of the email; templates cannot be added or deleted.

The emails are capable of containing dynamic content through the use of predefined parameters, such as to substitute the name of the user, supplier, product, and so forth.

Table 3–1 describes the parameters are used in email templates.

***Table 3–1 Email Parameters***

| Parameter | Description |
|---|---|
| **General** | |
| $createdByEmail | Email address of the user who triggered the email. |
| $createdByName | Name of user who triggered the email. |
| $emailComments | Comments in the email body. |
| $link | Hyperlink to a Brand Compliance record. |
| $loginID<br>$userName | Login user name of the user. |

*Table 3–1 (Cont.) Email Parameters*

| Parameter | Description |
|---|---|
| $loginUrl<br>$portalURL | Portal URL. |
| $name | Name of the user. |
| $portalName<br>$portal | Name of the portal. |
| $recipients | List of email recipients. |
| $recipientUserName | Login user name of email recipient. |
| $retailerName | Name of the retailer or portal owner. |
| $showInternationalNames | Whether international names are used. |
| $supportEmail | Email address of support team. |
| **Suppliers & Sites** | |
| $site<br>$sites | List of sites. |
| $site.code | Site code. |
| $site.name<br>$siteName<br>$site_names | Site names, in the business language. |
| $site.localName<br>$sitelocalname | Site names, in the local language. |
| $supplier_local_name<br>$supplierlocalname | Name of the supplier, in the local language. |
| $supplier_name<br>$supplierName | Name of the supplier, in the business language. |
| $supplierCode | Supplier code. |
| **Batch Jobs** | |
| $batchJobStatus | Status of batch job. |
| $errorMessages | Batch job error message. |
| $jobNumber | Batch job number. |
| $jobType | Type of batch job. |
| **Projects** | |
| $activity_name | Name of activity. |
| $activity_status | Status of activity. |
| $date_and_time | Date and time of activity notification. |
| $end_date | Activity end date. |
| $errorText | Brief extract error message. |
| $project_name | Name of project. |
| $responsible | User responsible for activity. |
| $start_date | Activity start date. |

*Table 3–1 (Cont.) Email Parameters*

| Parameter | Description |
|---|---|
| $URL_to_activity | Hyperlink to an activity record. |
| **Product Records** | |
| $message | Rejected surveillance test reports. |
| $productCode | The product's code. |
| $productCovered<br>$productsCovered | List of products covered. |
| $productCovered.retailerProductNumber | Product coverage product number. |
| $productCovered.variantName | Product coverage variant name. |
| $productTitle | Name of product. |
| $retailerProductNumber<br>$retailerProductNo | Alternative product number. |
| **Product Specifications** | |
| $packCopyVersion | Pack Copy file version number. |
| $specCreateStatement | Instruction to create and complete a product specification. |
| $specName | Name of product specification. |
| $specNumber | The specification's number. |
| $specStatus | Status of specification. |
| $specTitle | Title of specification. |
| $specVersion | Specification version number. |
| **Alerts** | |
| $alertDescription | Description of alert. |
| $alertExtractError | Alert extract error message. |
| $alertIssueDate | Date alert was issued. |
| $alertProcessReport | Alert responses extract. |
| $alertTitle | Title of alert. |
| **Audits & Visits** | |
| $auditLink | Hyperlink to audit/visit record. |
| $auditOrVisit | Audit or visit. |
| **Scorecards** | |
| $duedate | Scorecard due date. |
| $fromPeriod | Range from period. |
| $fromYear | Range from year. |
| $scorecardtype | Type of scorecard. |
| $scorecardUrl | Hyperlink to scorecard record. |
| $toPeriod | Range to period. |
| $toYear | Range to year. |

*Table 3–1 (Cont.) Email Parameters*

| Parameter | Description |
|---|---|
| **Reports** | |
| $createdOn | Date report created. |
| $purgeDays | Number of days before report is purged. |
| $reportCanceller | Name of user who cancelled report. |
| $reportLink | Hyperlink to report output record. |
| $reportName | Name of report. |
| $result | KPI result value. |
| **Data Extracts** | |
| $attachmentLink<br>$attachmentLinks | Hyperlinks to report output attachments. |
| $criteriaName | Data extract criteria. |
| $extractErrors | Data extract error message. |
| $extractLink | Hyperlink to data extract report output record. |
| $listViewName | Data extract list view. |

---

**Note:** Usage of a parameter is subject to it being specifically coded to be available to the template.

---

Table 3–2 shows the parameters that can be used within each email template.

*Table 3–2 Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| **Alerts** | | |
| ALERT1 | Notify suppliers and sites of a new alert. | $alertTitle<br>$alertDescription<br>$link<br>$recipientUserName<br>$suppliername<br>$showInternationalNames<br>$supplierlocalname<br>$siteName<br>$sitelocalname |
| ALERT2 | Notify internal users of a new alert. | $alertTitle<br>$emailComments<br>$alertDescription<br>$link |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| ALERT3 | Remind suppliers to respond to an alert. | $alertTitle<br>$alertIssueDate<br>$alertDescription<br>$link<br>$recipientUserName<br>$suppliername<br>$showInternationalNames<br>$supplierlocalname<br>$siteName<br>$sitelocalname |
| ALERT4 | Notify suppliers that an alert has been cancelled. | $alertTitle |
| ALERT5 | Notify suppliers that an alert response can be resubmitted. | $alertTitle<br>$alertDescription<br>$link<br>$recipientUserName<br>$suppliername<br>$showInternationalNames<br>$supplierlocalname<br>$siteName<br>$sitelocalname |
| ALERT6 | Notify a user that an extract of alert responses has completed. | $alertTitle<br>$link |
| ALERT7 | Notify a user that an extract of alert responses has errors. | $alertTitle<br>$alertExtractError<br>$link |
| ALERT8 | Notify the Alert Administrator that alert responses have been generated, listing any errors. | $alertTitle<br>$alertProcessReport<br>$link |
| ALERT9 | Notify the Alert Administrator that a supplier would like to change their responses. | $alertTitle<br>$link<br>$suppliername<br>$showInternationalNames<br>$supplierlocalname<br>$siteName<br>$sitelocalname |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| ALERT10 | Notify suppliers that an alert response cannot be resubmitted. | $alertTitle<br>$alertDescription<br>$link<br>$recipientUserName<br>$suppliername<br>$showInternationalNames<br>$supplierlocalname<br>$siteName<br>$sitelocalname |
| **Audits & Visits** | | |
| AUDIT AWAITING AMENDMENT | Generated when an audit or visit has actions rejected. | $auditOrVisit<br>$portal<br>$auditLink |
| AUDIT AWAITING CORRECTIVE ACTION | Generated when an audit or visit has actions to be addressed. | $auditOrVisit<br>$portal<br>$auditLink |
| **Batch Jobs** | | |
| BATCHJOBCOMPLETE | Notify user that a job has completed. | $jobType<br>$jobNumber |
| BATCHJOBSUBMIT | Notify user that a job has been initiated. | $jobType<br>$jobNumber |
| **General** | | |
| EXTERNAL SYSTEM PASSWORD EXPIRED | Notify user that an external system's password for accessing an API has expired. | $loginID<br>$portalName<br>$supportEmail |
| EXTRACT1 | Notify user that a data extract job has failed. | $jobType<br>$extractLink |
| EXTRACT2 | Notify user that a data extract job has successfully completed. | $jobType<br>$extractLink |
| EXTRACT3 | Notify user that a data extract job has failed for an unknown reason. | $jobType<br>$extractErrors |
| FORGOT EMAIL PASSWORD | Used when resetting a password. | $name<br>$link |
| HARDGOODS 01 SUPPLIER | Generated when changes are made to the Post Launch Information product specification section. | $specTitle<br>$portalName<br>$supportEmail |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| NEW USER EMAIL | Notification to new user. | $retailerName<br>$name<br>$createdByName<br>$createdByEmail<br>$userName<br>$supportEmail |
| PASSWORD CHANGED | Notify user of their password changing. | $retailerName<br>$name<br>$supportEmail |
| PREVALIDATIONFAILURE | Notify the job submitter that an uploaded file has been checked and there are problems with it. | $jobType<br>$jobNumber |
| REGISTER EMAIL PASSWORD | Notify the job submitter that the uploaded file has been checked and there are problems with it. | $name<br>$createdByName<br>$createdByEmail<br>$link |
| SSOOFF | Used where single sign on is enabled. | $portalName<br>$name<br>$userName |
| SSOON | Used where single sign on is enabled. | $name<br>$portalName |
| **Product Record** | | |
| PPROD-EMAIL1 | Notification when supplier has moved a Produce product record from Draft to Active status. | $specTitle<br>$portalName<br>$supportEmail |
| PPROD-EMAIL2 | Notification when supplier has updated the Additional Supplier Information tab. | $specTitle<br>$portalName<br>$supportEmail |
| PR1 | Notify supplier/retailer that a new product record has been created. | $productCode<br>$productTitle<br>$specCreateStatement<br>$showInternationalNames<br>$supplierName<br>$supplierCode<br>$supplierlocalname<br>$site<br>$sites<br>$site.name<br>$site.localName<br>$site.code<br>$retailerProductNumber |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| **Product Specifications** | | |
| ADVISEPACKCOPY | Advise ready for pack copy submission email. | $specName<br>$portalName<br>$showInternationalNames<br>$supplierName<br>$supplierCode<br>$supplierlocalname<br>$site<br>$sites<br>$site.name<br>$site.localName<br>$site.code<br>$productCovered<br>$productsCovered<br>$productCovered.variantName<br>$productCovered.retailerProductNumber<br>$specVersion |
| HARDGOODS 01 RETAILER | Changes have been made to the Post Launch Information product specification section. | $specTitle<br>$portalName<br>$supportEmail |
| PRI01 | Notification of a new Produce specification. | $specName<br>$specNumber<br>$specVersion<br>$supportEmail |
| PRI02 | Notification that Produce specification accepted. | $supplierName<br>$specName<br>$specNumber<br>$specVersion<br>$portalName<br>$supportEmail |
| SPEC4 | Notification of pack copy generation. | $specName<br>$productTitle<br>$retailerProductNo<br>$specName<br>$specNumber<br>$specVersion<br>$packCopyVersion |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| SPECSTATUSRET | Notify retailer that a specification has changed status. | $specName<br>$specStatus<br>$showInternationalNames<br>$supplierName<br>$supplierCode<br>$supplierlocalname<br>$site<br>$sites<br>$site.name<br>$site.localName<br>$site.code<br>$productCovered<br>$productsCovered<br>$productCovered.variantName<br>$productCovered.retailerProductNumber<br>$specVersion |
| SPECSTATUSSUPP | Notify supplier that a specification has changed status. | $specName<br>$specStatus<br>$showInternationalNames<br>$supplierName<br>$supplierCode<br>$supplierlocalname<br>$site<br>$sites<br>$site.name<br>$site.localName<br>$site.code<br>$productCovered<br>$productsCovered<br>$productCovered.variantName<br>$productCovered.retailerProductNumber<br>$specVersion |
| TEMPSPEC-EMAIL1 | Notification when supplier has moved a Temporary specification from Draft to Awaiting Approval status. | $specTitle<br>$portalName<br>$supportEmail |
| TEMPSPEC-EMAIL2 | Notification to supplier when retailer has moved a Temporary specification from Awaiting Approval to Awaiting Corrective Action status. | $specTitle<br>$portalName<br>$supportEmail |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| TEMPSPEC-EMAIL3 | Notification to supplier when retailer has moved a Temporary specification from Awaiting Approval to Active status. | $specTitle<br>$portalName<br>$supportEmail |
| **Projects** | | |
| PROJECT1 | Notification of an activity status change. | $activity_name<br>$project_name<br>$activity_status<br>$date_and_time<br>$URL_to_activity<br>$project_name<br>$start_date<br>$end_date |
| PROJECT2 | Activity notification. | $activity_name<br>$URL_to_activity<br>$project_name<br>$start_date<br>$end_date<br>$activity_status<br>$responsible |
| PROJECT3 | Notify user that a project/activity brief job has failed. | $jobType<br>$errorText<br>$listViewName<br>$criteriaName |
| PROJECT4 | Notify user that a project/activity brief extract job has successfully completed. | $jobType<br>$listViewName<br>$criteriaName |
| **Reports** | | |
| KPIDELIVERY | Notify the recipients that a KPI has been generated. | $reportName |
| REPORT_CANCELLED | Notify user that a report schedule has been cancelled. | $reportName<br>$reportCanceller |
| REPORTDELIVERY | Notify the recipients that a report has been generated. | $reportName<br>$reportLink |
| REPORTNOTIFICATIO N | Notify the external system that a report has been generated providing an API URL to retrieve the attachments. | $reportName<br>$attachmentLink<br>$attachmentLinks |
| REPORTPURGE | Notify user that a report is due to be purged. | $reportName<br>$createdOn<br>$purgeDays |
| **Scorecards** | | |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| SCORE1 | Overdue scorecard reminder. | $site<br>$scorecardtype<br>$duedate<br>$showInternationalNames<br>$suppliername<br>$suppliercode<br>$supplierlocalname<br>$site<br>$sites<br>$site.name<br>$site.code<br>$site.localName<br>$scorecardUrl |
| SCORE2 | Scorecard extract notification. | $scorecardtype<br>$fromPeriod<br>$fromYear<br>$toPeriod<br>$toYear<br>$userName |
| **Suppliers & Sites** | | |
| REG1 | Registration request raised by retailer. | $portalName<br>$userName<br>$createdByName<br>$createdByEmail<br>$supportEmail |
| REG2 | Registration completed by supplier. | $portalName<br>$showInternationalNames<br>$suppliername<br>$suppliercode<br>$supplierlocalname<br>$sitename<br>$sitecode<br>$sitelocalname<br>$link<br>$supportEmail |

*Table 3–2 (Cont.) Email Parameters for Email Templates*

| Email Code | Description | Parameters |
|---|---|---|
| REG3 | Supplier registration order notification. | $retailerName<br>$showInternationalNames<br>$suppliername<br>$suppliercode<br>$supplierlocalname<br>$site<br>$sites<br>$site.name<br>$site.code<br>$site.localName<br>$loginUrl<br>$supportEmail |
| REG4 | Registration request raised by retailer for additional sites. | $portalName<br>$showInternationalNames<br>$site<br>$sites<br>$site.name<br>$site.code<br>$site.localName<br>$supportEmail |
| SUPPLIER ACTIVATED | Supplier activated notification. | $retailerName<br>$showInternationalNames<br>$suppliername<br>$suppliercode<br>$supplierlocalname<br>$site<br>$sites<br>$site.name<br>$site.code<br>$site.localName<br>$supportEmail |
| **Surveillance** | | |
| SUR1 | Supplier action required notification. | $retailerName<br>$portalName<br>$supportEmail |
| SUR2 | Supplier action rejected notification. | $productTitle<br>$portalName<br>$supportEmail |
| SUR3 | Test report acceptance batch job failure notification. | $message<br>$portalName<br>$supportEmail |

Some email templates contain conditional and looping logic to form lists of values. For example:

- List of a specification's supplier and sites, showing either international names or local names, depending on the setting of the system parameter:

```
#if ( $showInternationalNames )
Supplier: $supplierName $supplierCode
$supplierlocalname
#else
Supplier: $supplierName $supplierCode
#end

Site: #foreach( $site in $sites )$site.name
#if ( $showInternationalNames )
$site.localName
#end
($site.code)
#end
```

- List of the product coverage table:

```
#foreach( $productCovered in $productsCovered )$productCovered.variantName
 #if( $productCovered.retailerProductNumber
 )($productCovered.retailerProductNumber)#end
#end
```

- List of a report output's attachments:

```
#foreach( $attachmentLink in $attachmentLinks )$attachmentLink
#end
```

- List of email recipients:

```
#foreach( $recipient in $recipients ) $recipient.personName
 ($recipient.email)
#end
```

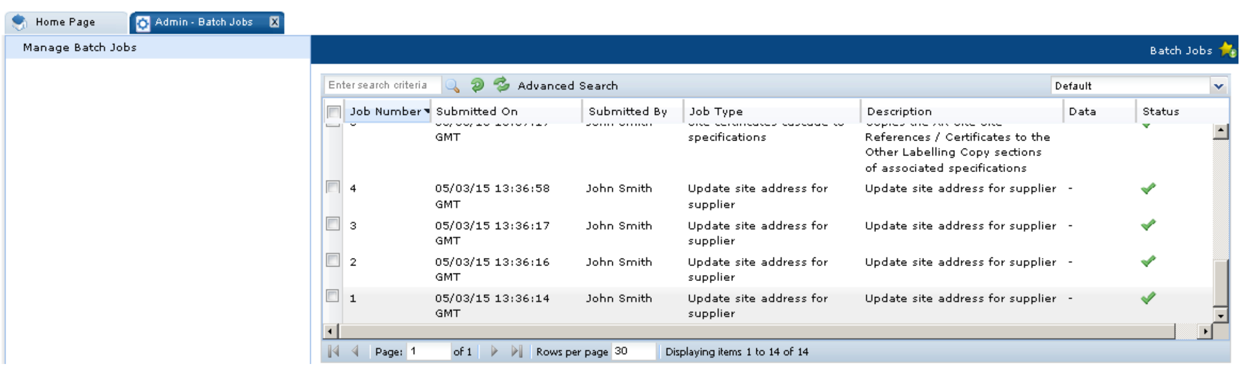
# 4

# 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: Any comments entered when the job was submitted. If no comments were entered, the filename of any uploaded files will appear here.
- 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. |

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

| Icon | Status | Description |
|---|---|---|
| | In Progress | The job is currently running. |
| | 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.

## Opening a Batch Job

To open a batch job, double click the job in the list. The job will open as a new tab.

- The job's bookmark shows the Job Number and the Job Type.
- A Messages tab appears if any errors were encountered when the job ran.
- An Attachments tab stores the file used to upload data, or where applicable, a rejects file containing records that could not be uploaded due to errors.
- A Linked Jobs tab shows links to related jobs if part of a series of jobs.

# 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 Project Project Manager
- Change Project User Names
- Change Product Responsibility
- Change Product Produce Responsibility

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

- For Supplier, see Chapter 7.
- For Project, see Chapter 9.
- For Product, see Chapter 8.

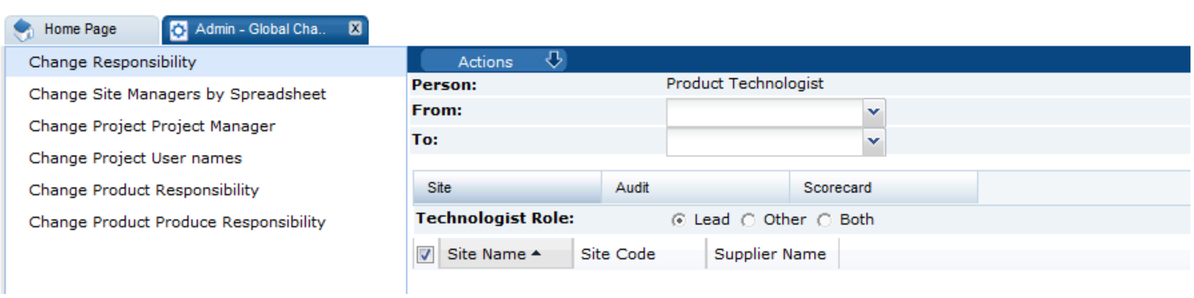
## Change Responsibility

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.

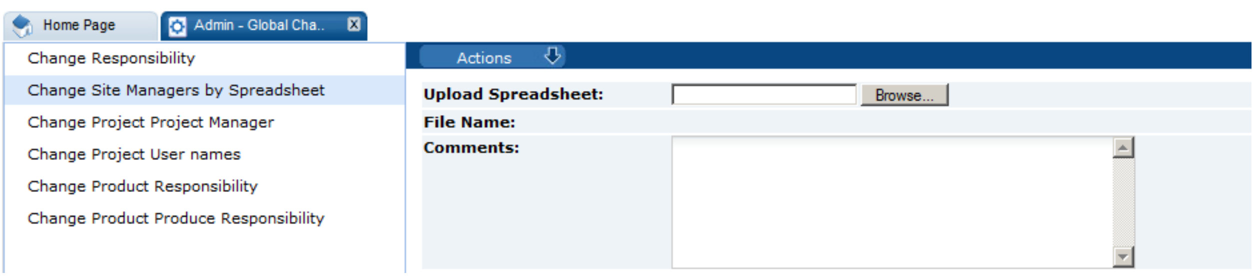
## Change Site Managers by Spreadsheet

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.

**Note:** The spreadsheet comprises six columns:

Supplier Code, Site Code, Lead Technologist, Other Technologist Update, Other Technologist Add, and Other Technologist Delete.

The Lead Technologist column in the spreadsheet replaces the existing Lead Technologist.

The Other Technologist Update column removes all Other Technologists and replaces with the values in this column.

Other Technologist Add adds this Technologist to the existing list.

Other Technologist Delete removes this Technologist from the existing list.

The above columns must be present in the spreadsheet, but can be left blank if not making those changes.

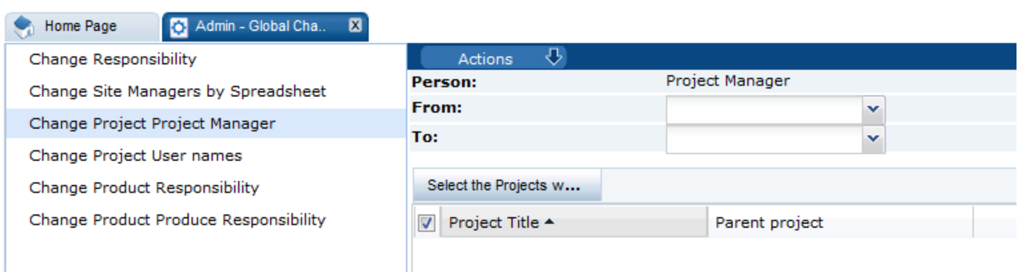
## Change Project Project Manager

The Project Manager for selected projects can be changed.

To change the project manager:

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

*Figure 5–3 Change Project 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.

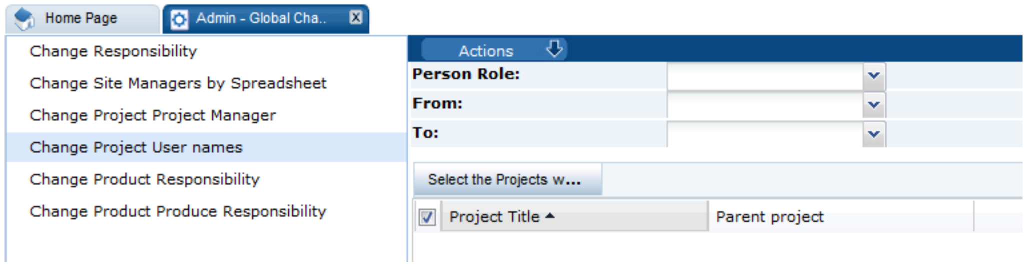
## Change Project User Names

The users assigned to a project can be changed.

To change the users:

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

***Figure 5–4 Change Project 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.

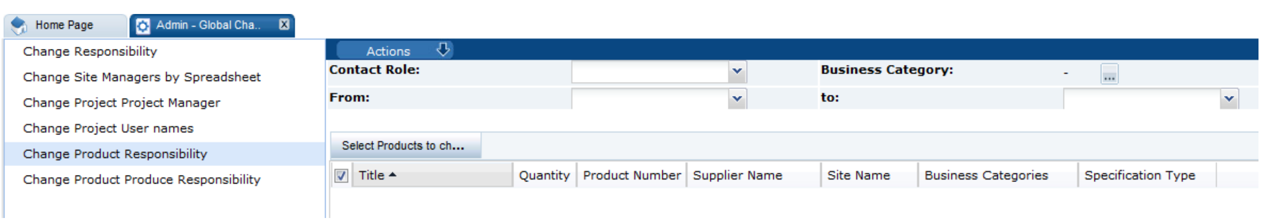
# Change Product Responsibility

Responsibility for selected products can be changed.

To change product responsibility:

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

***Figure 5–5 Change Product 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.

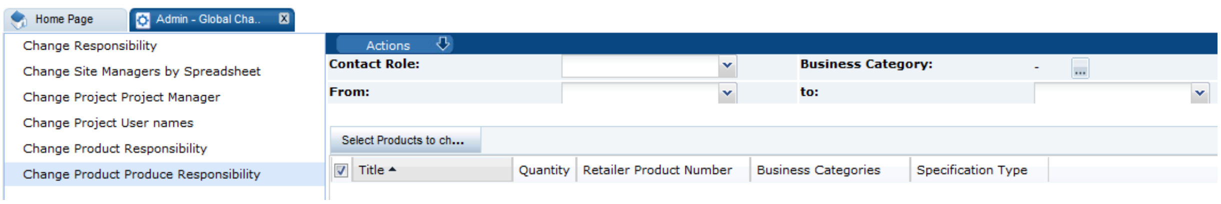
## Change Product Produce Responsibility

Responsibility for selected produce products can be changed.

To change produce product responsibility:

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

***Figure 5–6 Change Product 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.

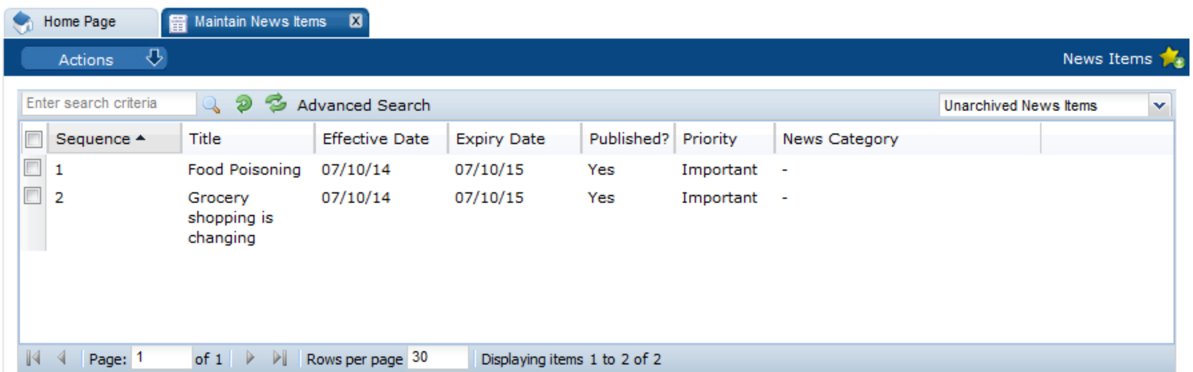
5. To make this global change, select the Submit action.

# 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*

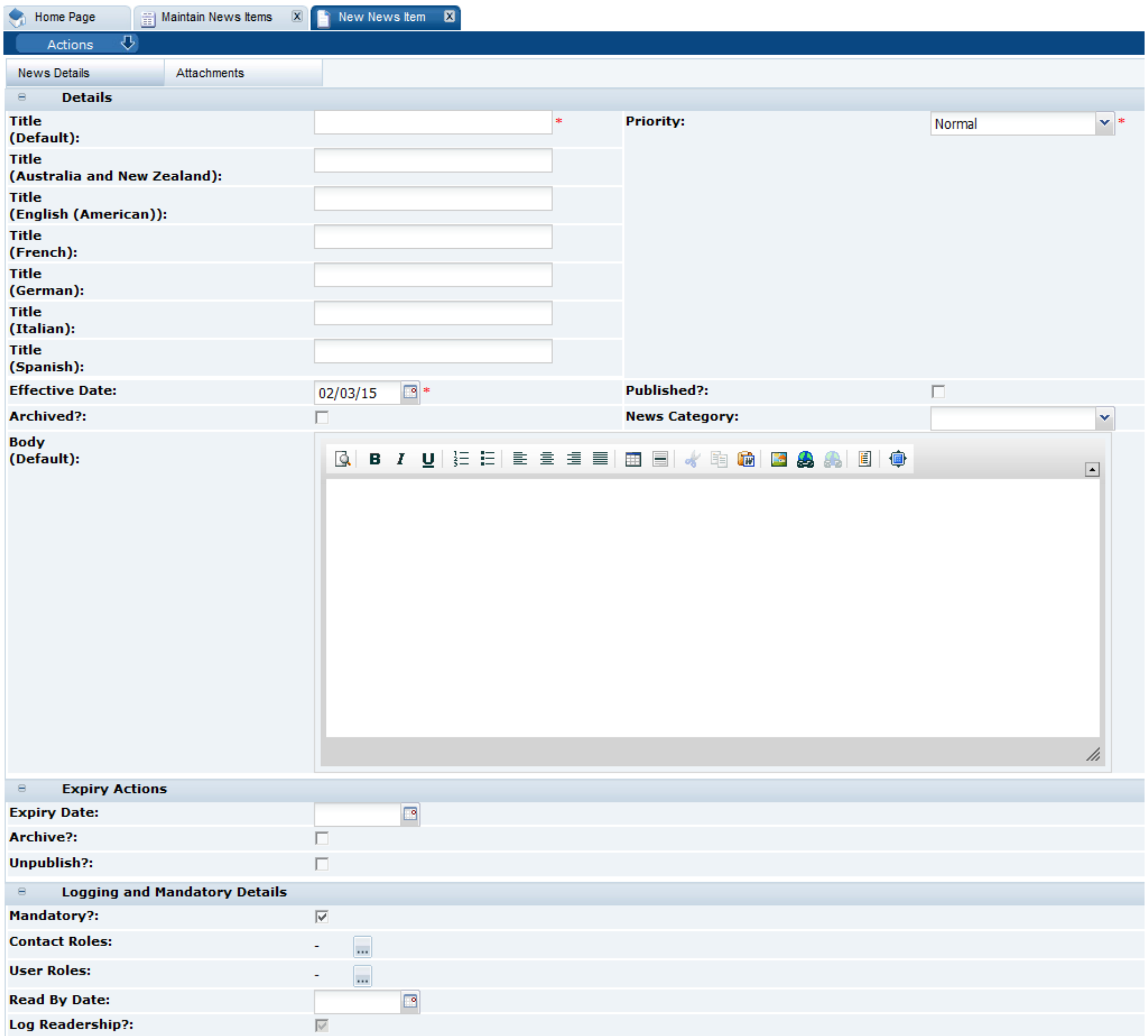



Table 6–1 describes the information that is provided for a new item.

*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** | |

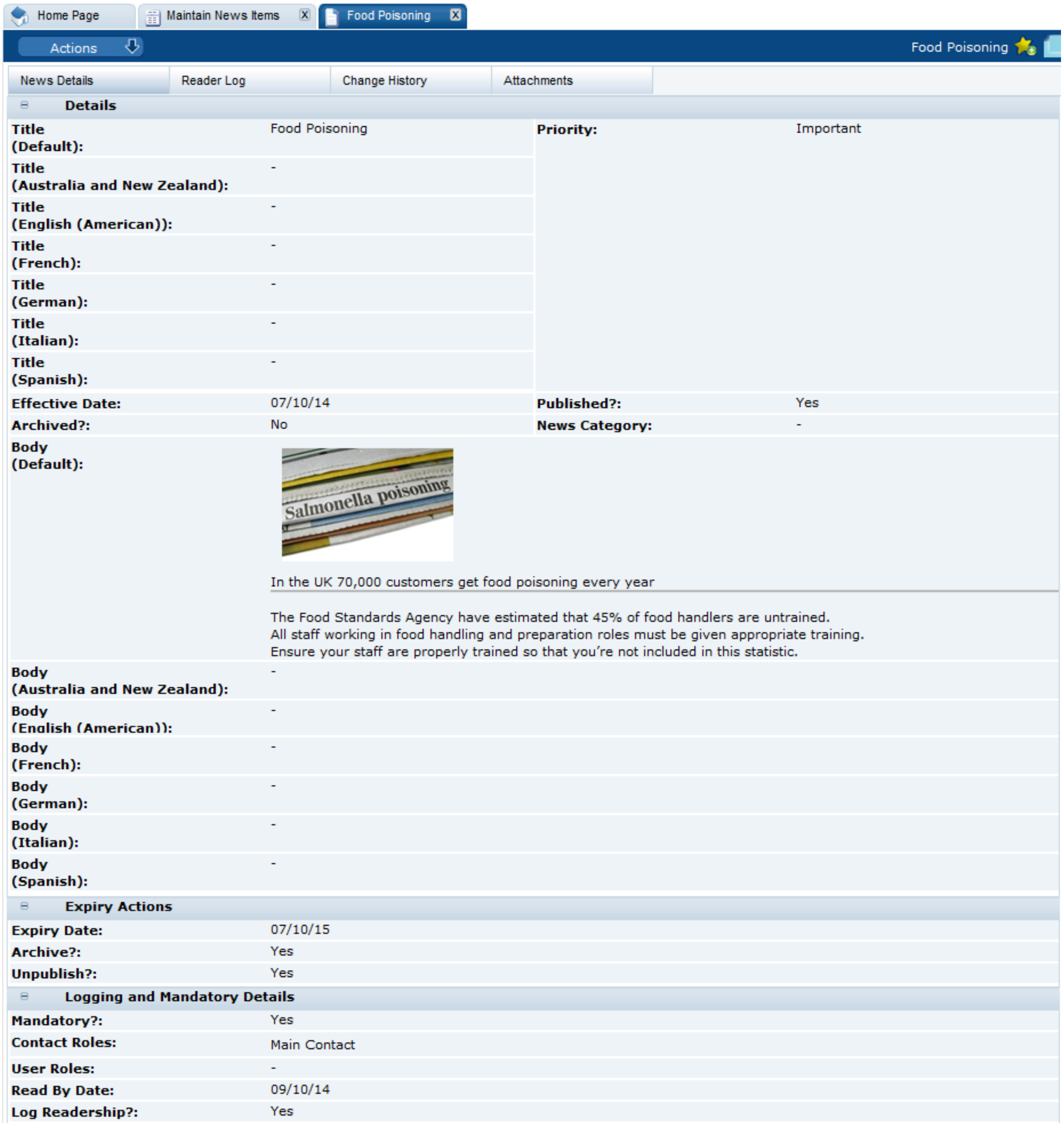
*Table 6–1 (Cont.) Information Needed to Create a News Item*

| 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***

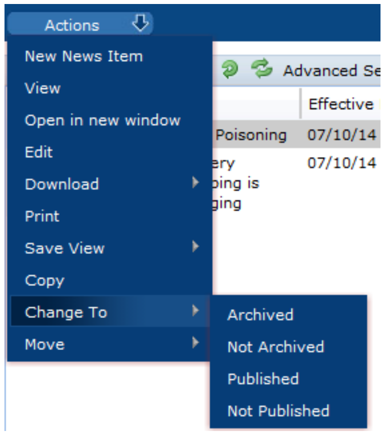



## Publish a News Item

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:

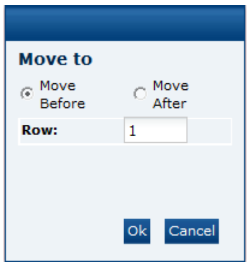
1. Select the rows in the list.
2. Select the Change To action. See Figure 6–4.
3. Select the change to be made:
   - Archived: The Change to archived dialog box appears. To confirm the change to archived, select **Ok**:
     - The Archive field in the news item record is checked.
     - The item is 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***

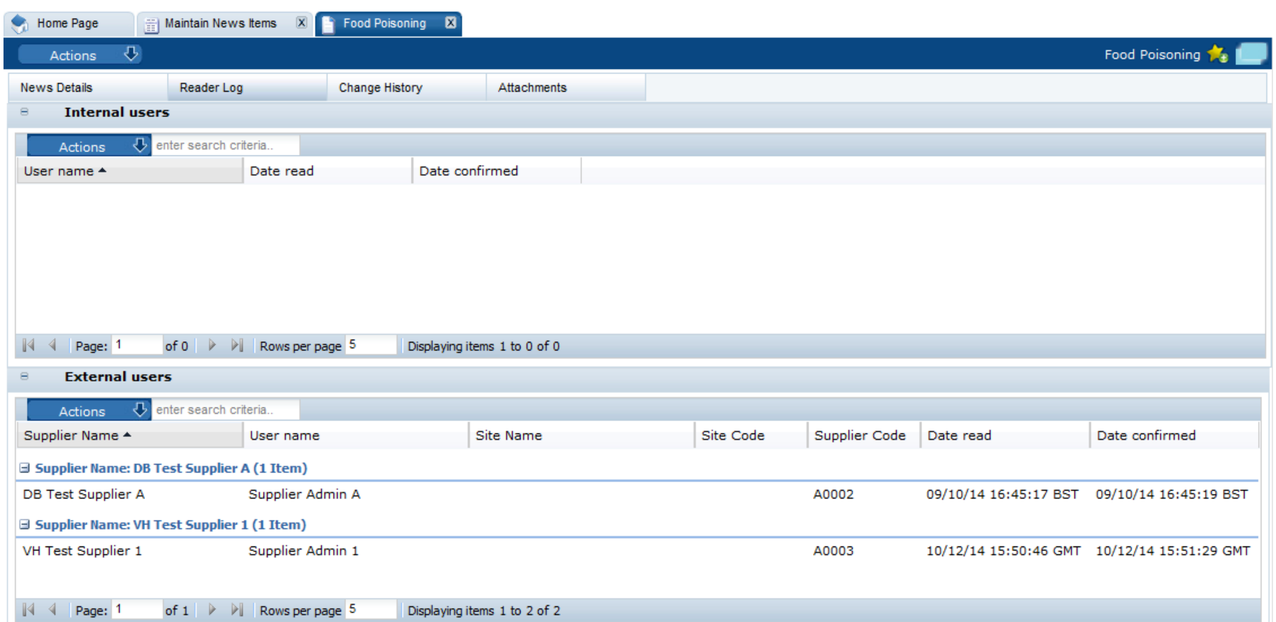



Table 6–2 describes the fields in the reader log. The Internal Users list is sorted by User Name. The External Users list is sorted by Supplier Name and then by User Name within each supplier.

***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

# Supplier 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
- Delete Supplier
- Delete Site

## Billing Codes

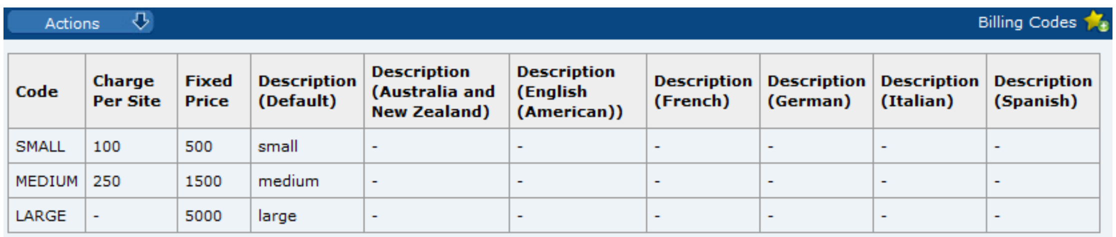
This option is used to define the billing codes used when creating a new supplier. The billing code determines how costs are calculated during the registration process. Billing codes are optional. If billing is not applicable or a portal, a code could be defined with a zero charge.

During the registration of a new supplier in the Supplier 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 *Oracle Retail Brand Compliance Management Cloud Service Supplier 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.

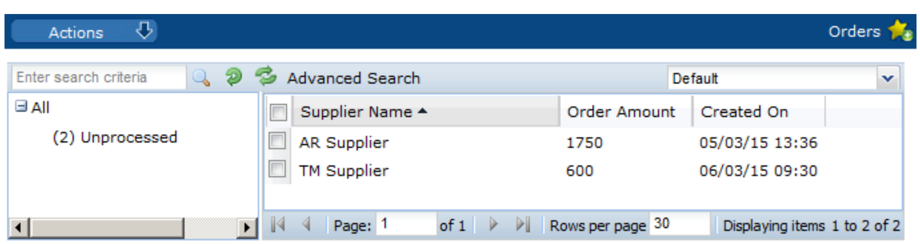
## Order Requests

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.

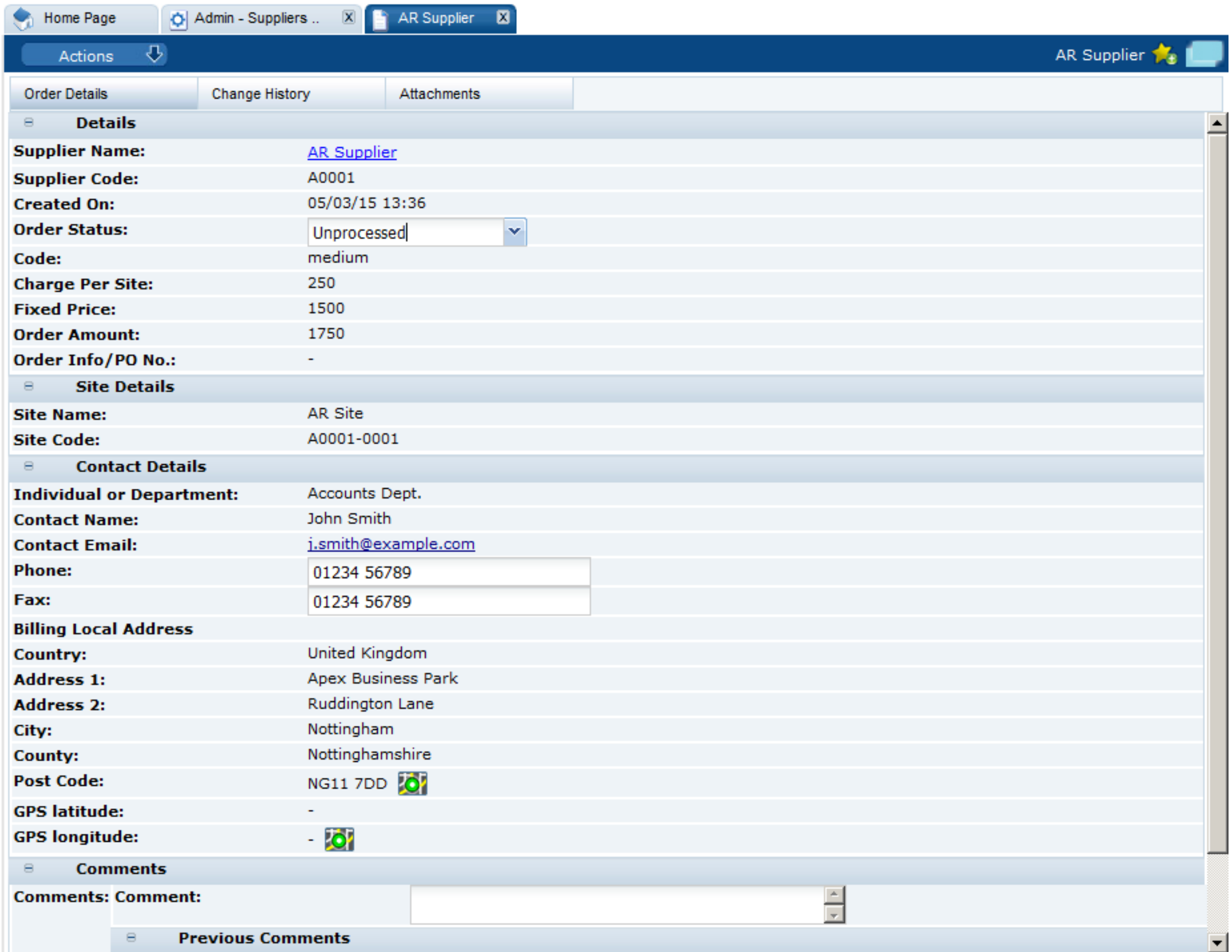
***Figure 7–3 Orders Page***




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*

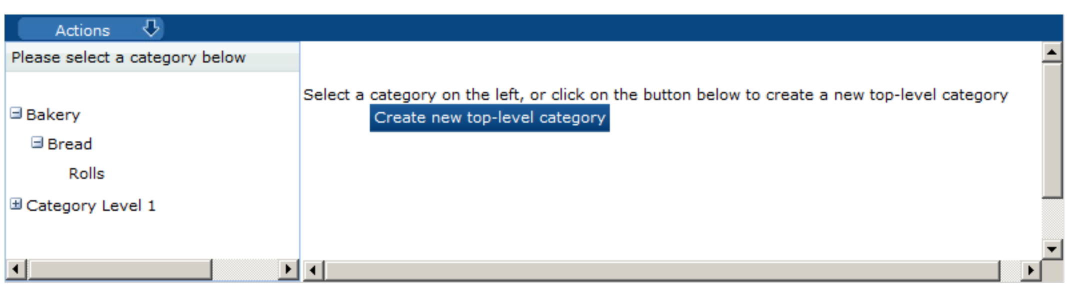
Actions | Site Statuses

| 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*

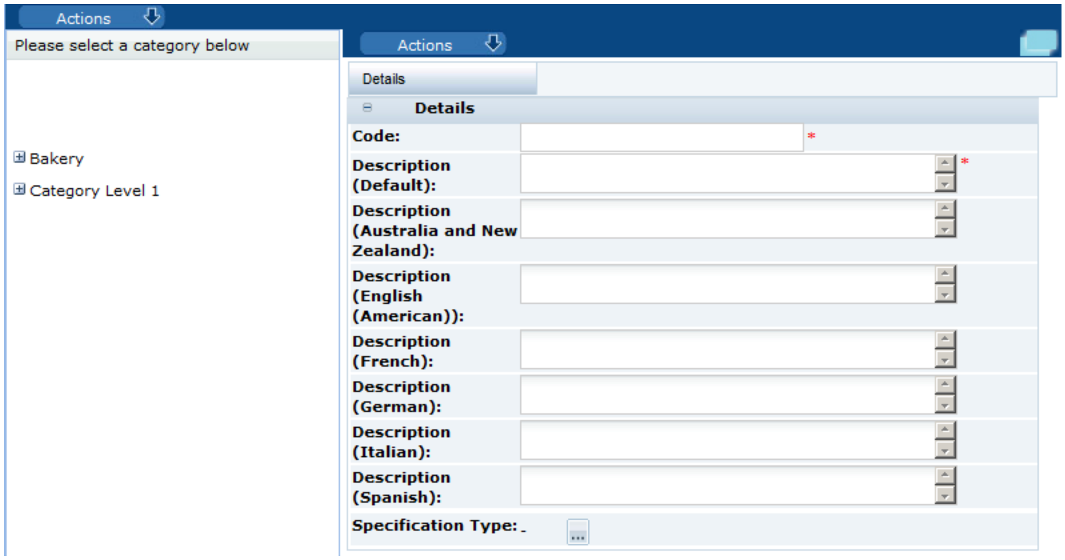



To edit a category entry, select the entry in the left pane and then select the Edit action in the right pane. The category opens in edit mode. The descriptions and specification types can be edited. For an example of the content of this page, see Figure 7–8.

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***

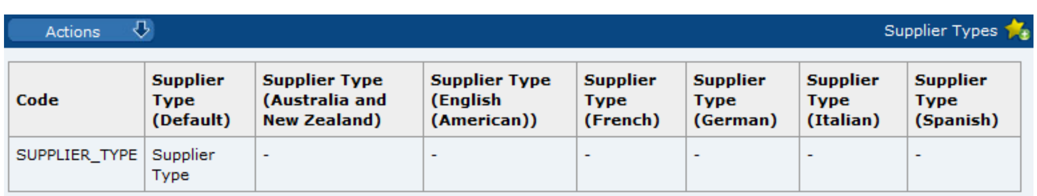



2. Enter the details for the new category:
   - Enter the code. This is a mandatory field.
   - Enter the description for the default language. This is a mandatory field. Enter any translations.
   - To select the specification types for this level, click the icon. The Select Specification Types dialog 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***

| 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

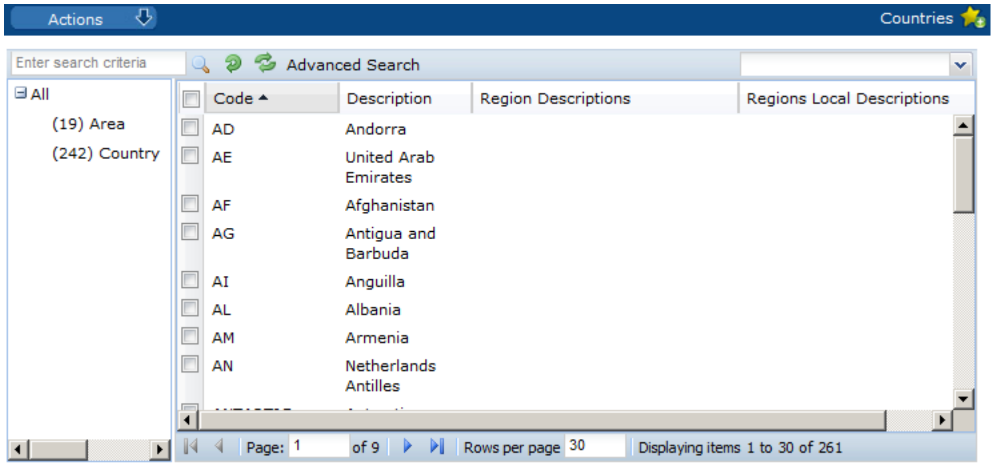
This option is used to define the list of countries used throughout the system (in addresses, countries of origin, countries of manufacture, and so on).

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***

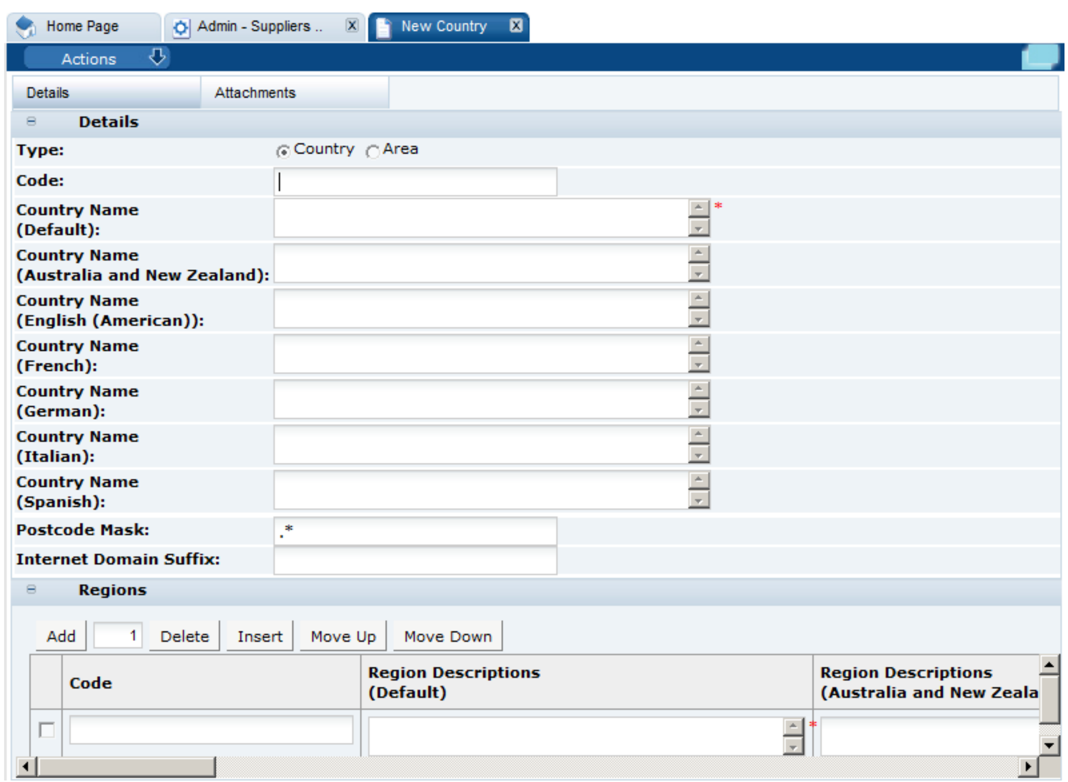



To edit a country entry, select the entry in the list and then select the Edit action. A tab opens in edit mode. Translated descriptions that do not already exist and additional regions can be added. For an example of the content of this page, see Figure 7–13.

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.

## Delete Supplier

This option is used to delete suppliers. In order for a supplier to be deleted, the following criteria must be met:

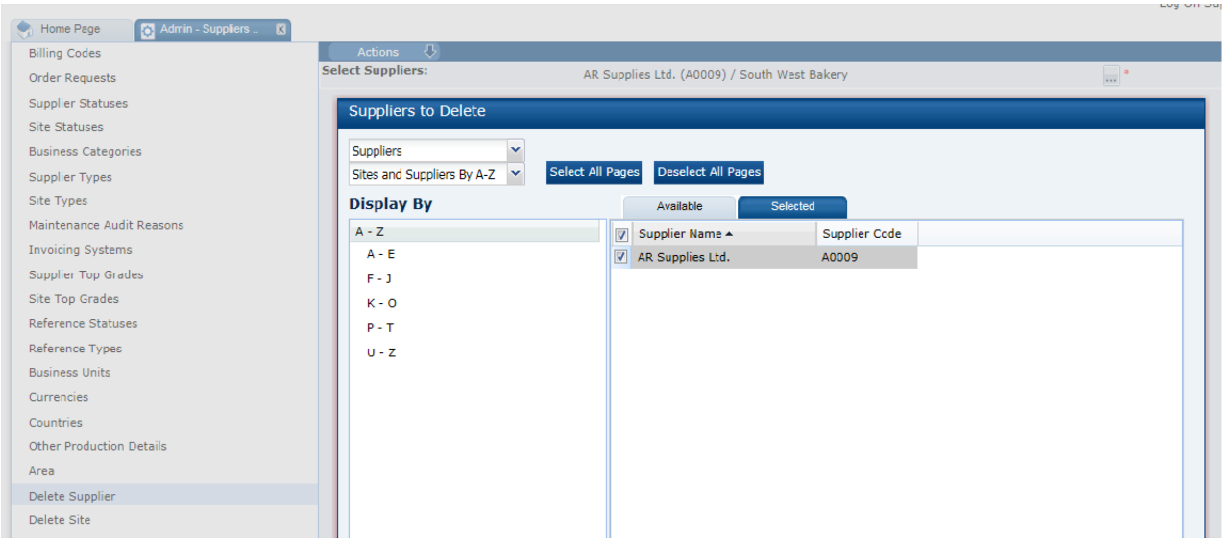
- The supplier has not gone through the registration process, that is, only a supplier with sites at a status of AWAITING REGISTRATION can be deleted.
- There is no Alert Response record beyond the status of OUTSTANDING for the supplier being deleted.
- There are no Scorecards beyond the status of FUTURE for any of the sites of a supplier being deleted.

To delete a supplier:

1. Select the Delete Supplier option from the Admin drop-down list. The Select Suppliers page appears.

2. To display the list of suppliers, select the icon. The Suppliers to Delete page appears.

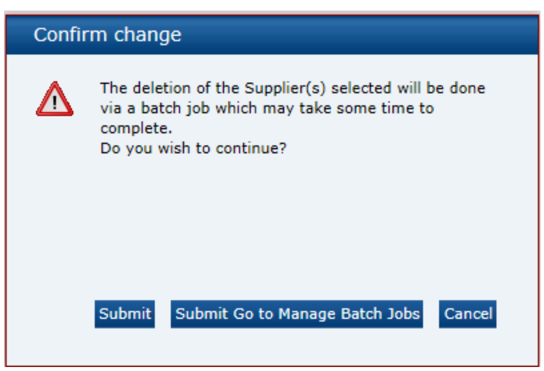
***Figure 7–14 Suppliers to Delete Page***




3. Select the suppliers to be deleted and click **Ok**. The selections are shown in the right pane.

4. To delete the suppliers, select the Submit action. A dialog box appears to enable you to confirm the deletion. To confirm the deletion, click **OK**. A batch job is submitted to perform the deletion.

***Figure 7–15 Delete Suppliers Confirm Change Dialog Box***




## Delete Site

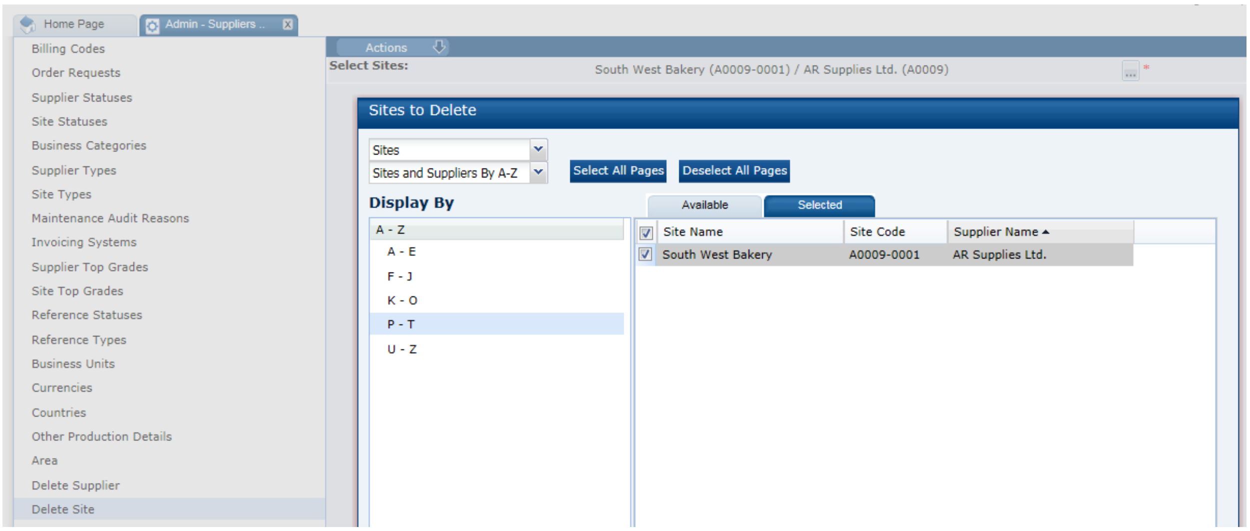
This option is used to delete sites. In order for a site to be deleted, the following criteria must be met:

- The site has not gone through the registration process, that is, only sites at a status of AWAITING REGISTRATION can be deleted.
- There is no Alert Response record beyond the status of OUTSTANDING for the site being deleted.
- There are no Scorecards beyond the status of FUTURE for the site being deleted.

To delete a site:

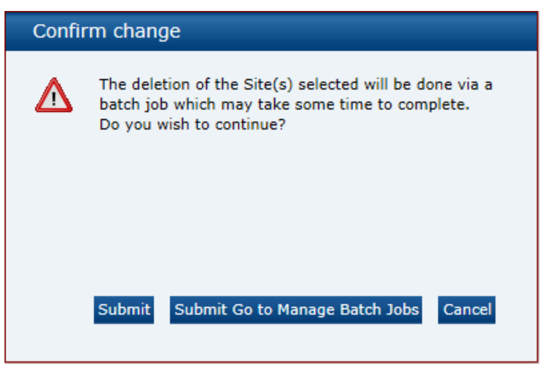
1. Select the Delete Site option from the Admin drop-down list. The Select Sites page appears.
2. To display the list of sites, select the icon. The Sites to Delete page appears.

***Figure 7–16 Sites to Delete Page***




3. Select the sites to be deleted and click **Ok**. The selections are shown in the right pane.
4. To delete the sites, select the Submit action. A dialog box appears to enable you to confirm the deletion. To confirm the deletion, click **OK**. A batch job is submitted to perform the deletion.

***Figure 7–17 Delete Sites Confirm Change Dialog Box***



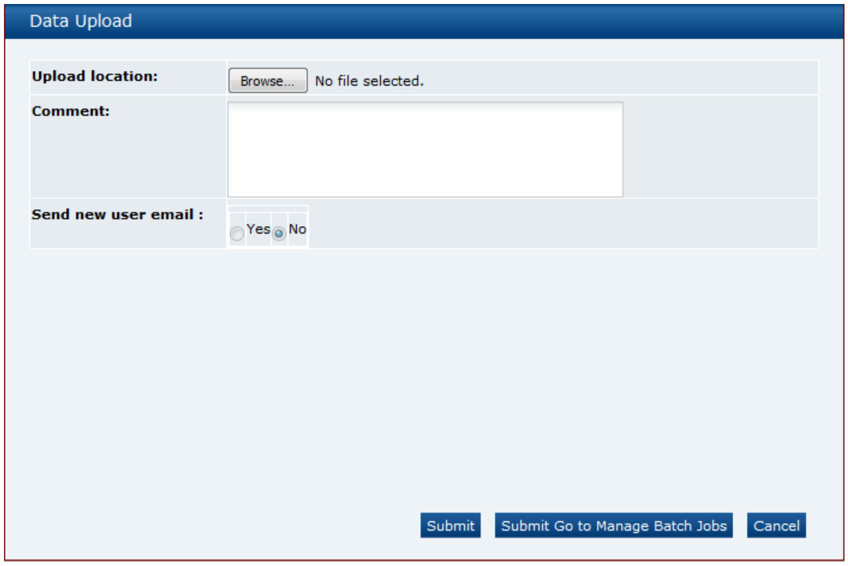

## Upload Supplier and Site Data

Retailer users with the Upload Administrator authority profile have access to the Upload Data option within the Admin menu for the upload of suppliers and sites.

To upload new suppliers and sites:

1. Select the Import action from the Suppliers List View actions menu. The Data Upload dialog box opens.

*Figure 7–18 Data Upload Dialog Box*




2. Click Browse to search for the upload file.
3. Enter any comments to describe the reason for the upload.
4. Select whether the system is to automatically send email to the primary contact user of each newly created supplier/site on successful completion of the upload. The email will invite the user to register on the portal. The default is No, which will not send an email.
5. To upload the file, select either the **Submit** or **Submit Go to Manage Batch Jobs** action. At this point, the system will create a background job to process the spreadsheet. The spreadsheet used to upload the data will be stored within the Attachments tab of the batch job.

> **Note:** An email will be sent to the job submitter if the date within the upload file fails validation.

## Download Supplier and Site Upload Spreadsheet

Retailer users with the Upload Administrator authority profile also have access to the option to download a blank spreadsheet.

To download the latest version of the upload spreadsheet:

1. Select the Download Blank Spreadsheet action from the Suppliers List View actions menu. An operating system specific dialog box opens with the option to either open or save the file.
2. Select the save option to download the ZIP file to your desktop.

> **Note:** The ZIP file contains a spreadsheet workbook with the first tab used to upload the data. The second tab contains guidance notes and the remaining tabs contain the valid glossary values.
>
> The column heading text shown on the first tab is in the user's language. If translations are not present for the user's language, the system the portal's default language is substituted. An asterisk (*) is shown in a column heading if an entry is mandatory.

# Scorecards

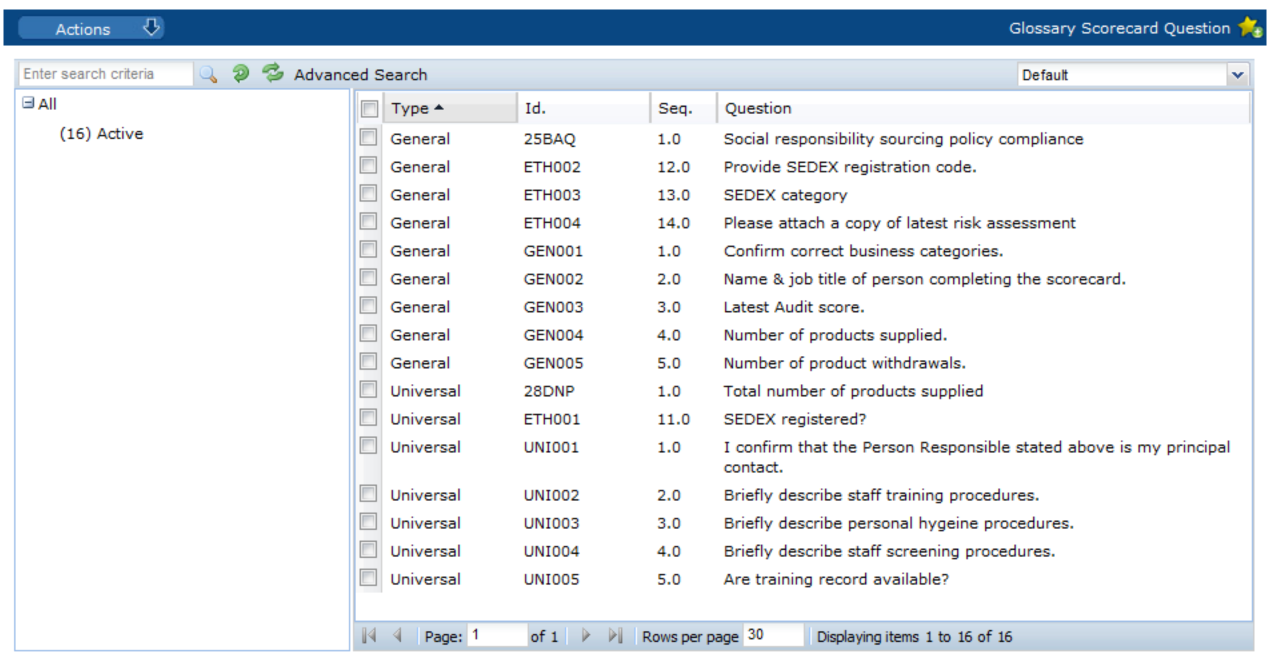
Select the Scorecards option from the Admin drop-down list. The following options are available in the left pane:

- 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 7–19 Glossary Scorecard Question Page***

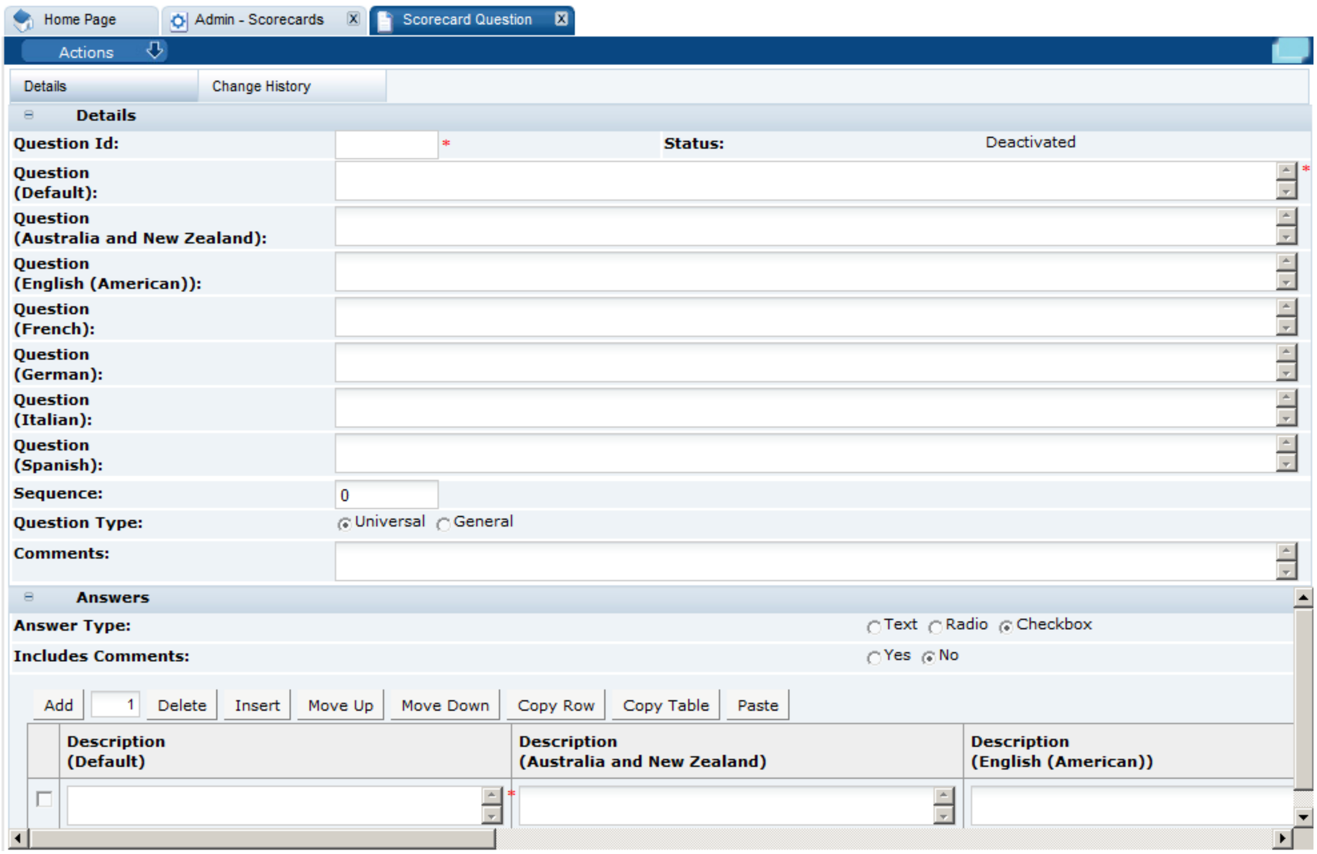



To edit a question, select the question and then select the Edit action. A tab opens with the record in edit mode.

To create a new scorecard question:

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

*Figure 7–20 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.

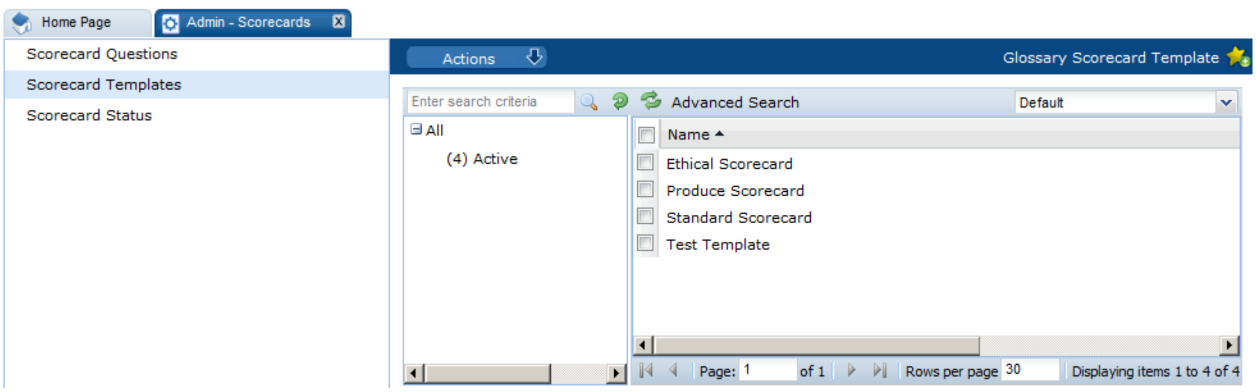
## Scorecard Templates

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 7–21 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 7–22.

To create a new template:

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

*Figure 7–22 New Scorecard Template Page*

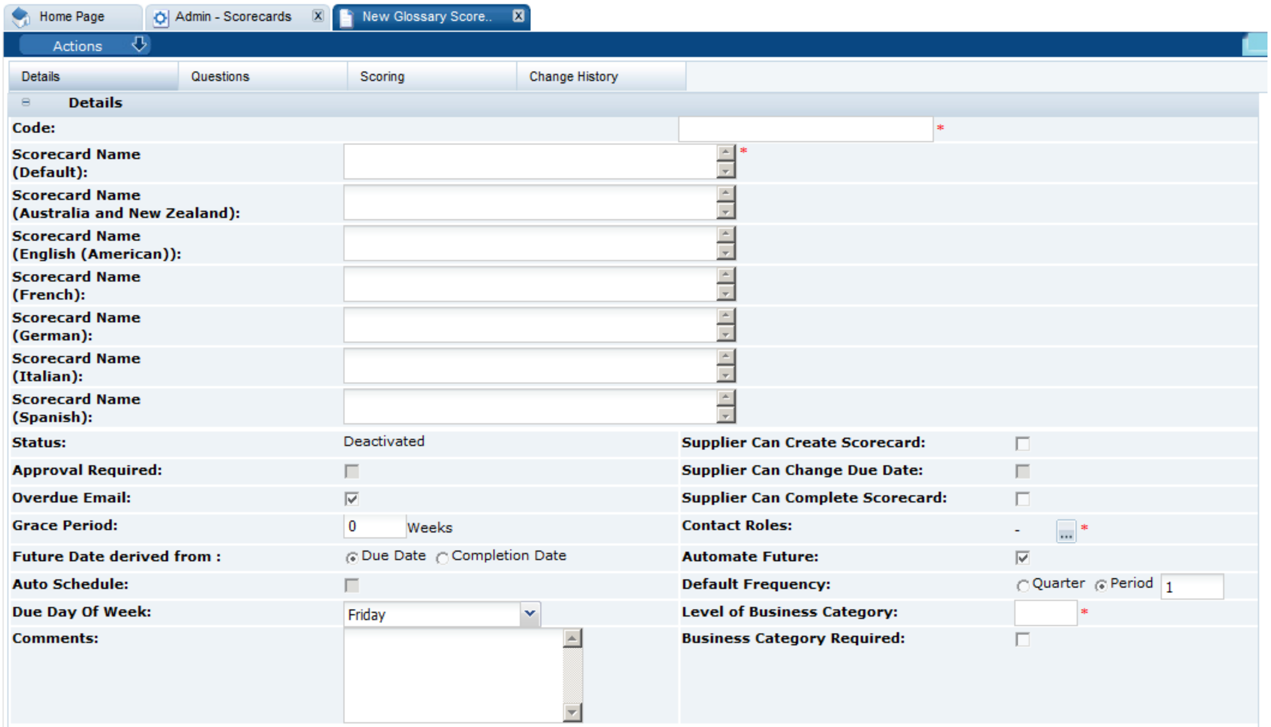



Table 7–1 describes the fields in the Details section.

*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

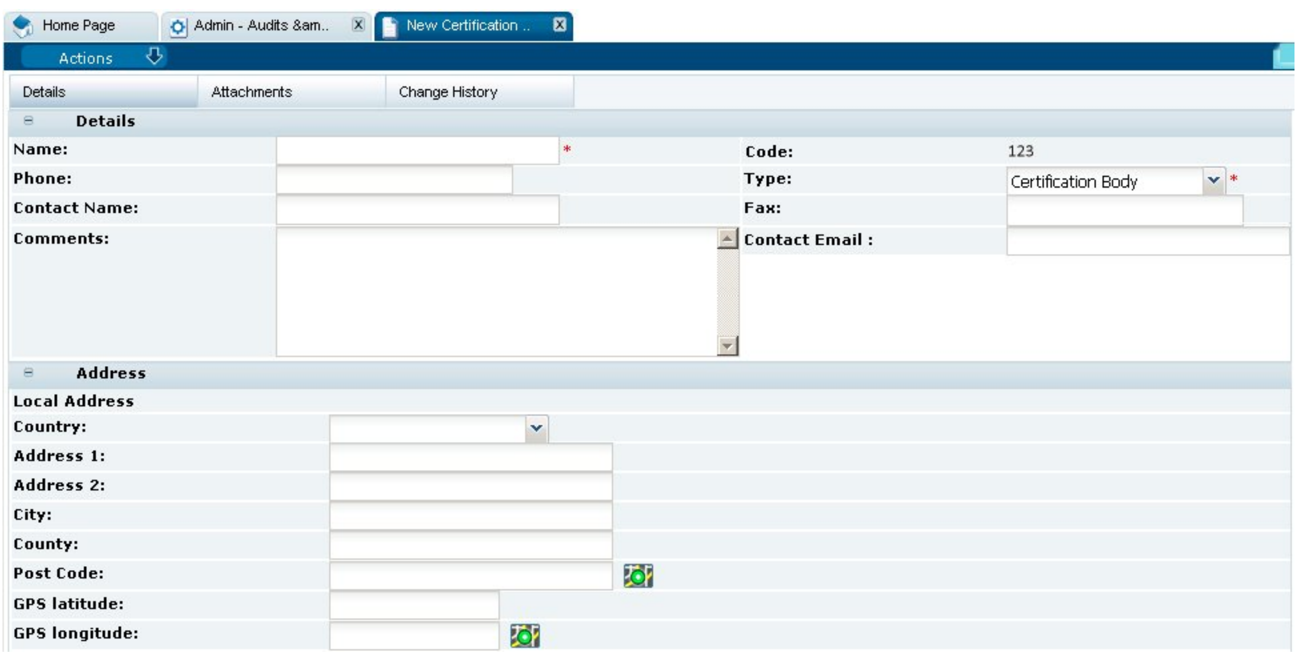
## Certification Bodies

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 7–23.

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.

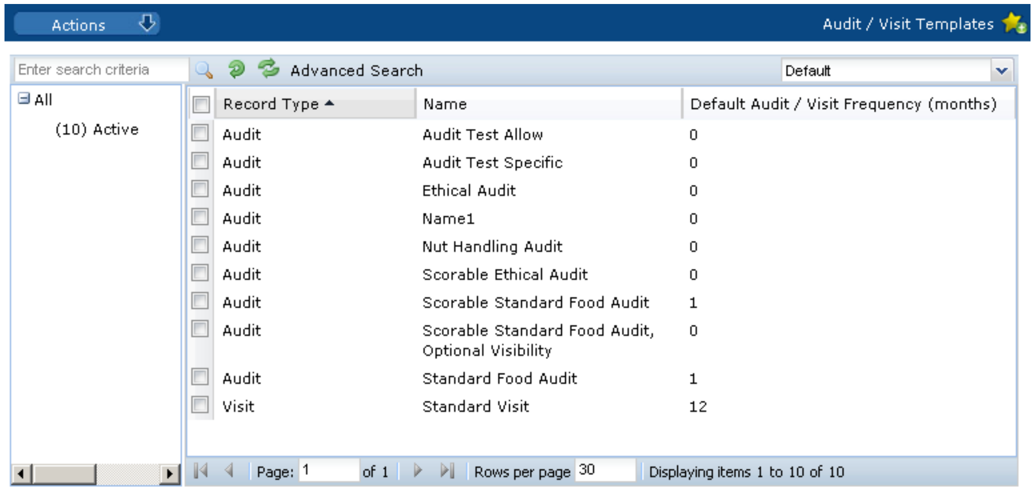
***Figure 7–23 New Certification Body Page***




## 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 7–24 Audit/Visit Templates Page*

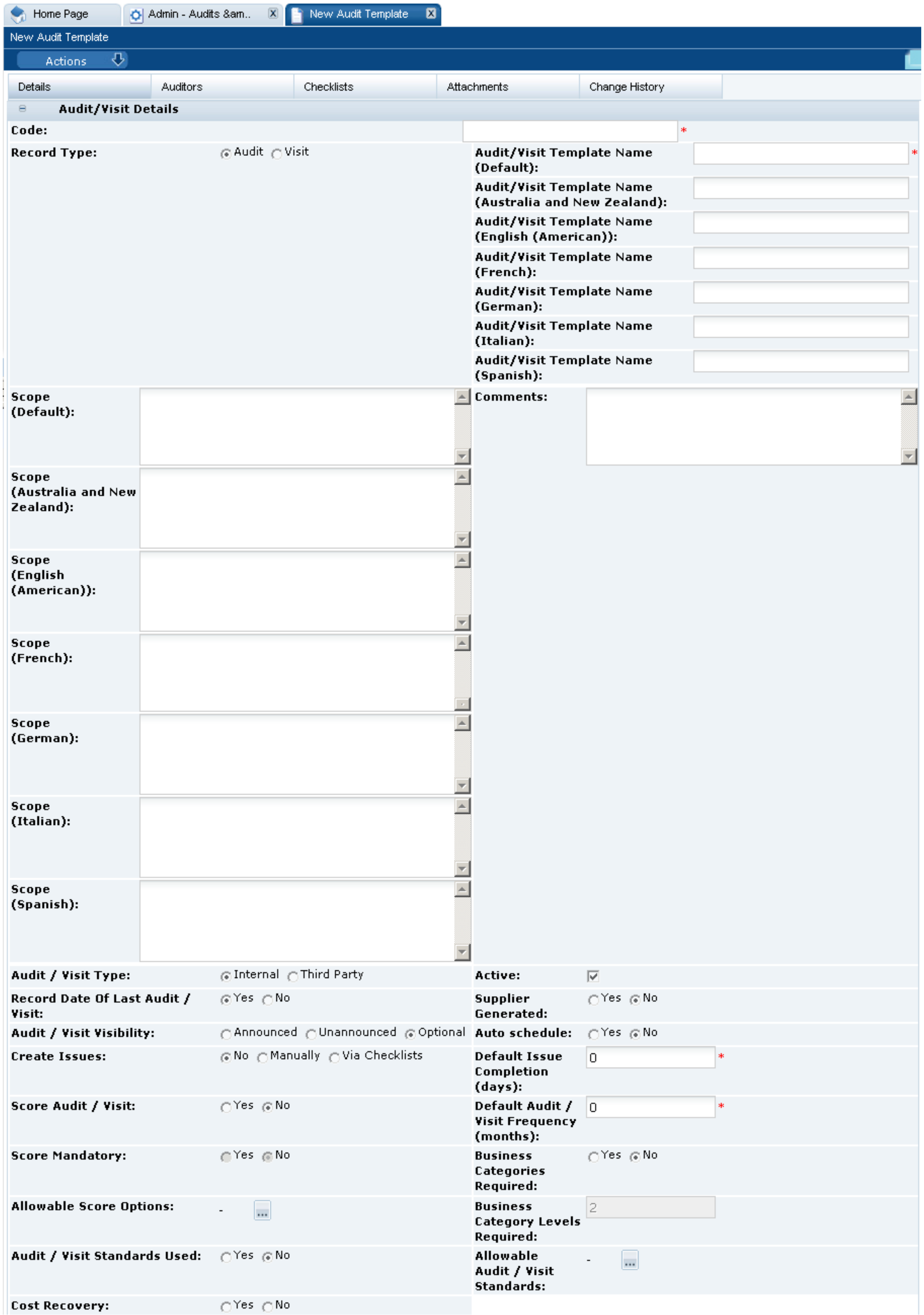



To edit a template, select the entry and then select the Edit action. A tab opens in edit mode to enable you to edit the template. For an example of the content, see Figure 7–25.

To create a new template:

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

*Figure 7–25 New Audit Template Page*



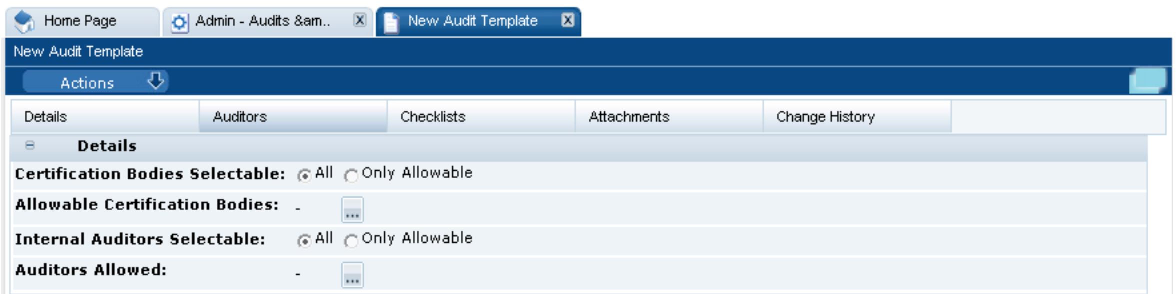

2. Table 7–2 describes the fields in the Audit/Visit Details section.

***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.<br>■ 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 7–26 New Audit Template Auditors Subtab***



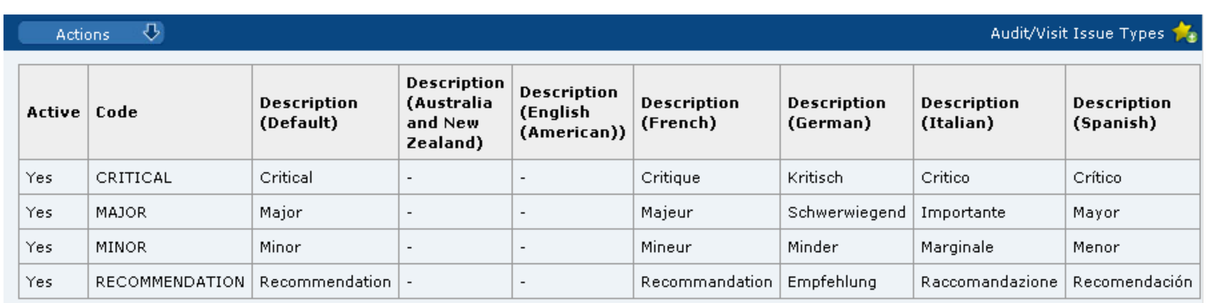

4. Select the Checklists subtab. Add any checklists to be used for the audit. When an audit/visit is created, if its template has checklists assigned, the checklists are automatically created as Audit/Visit Checklist records for completion during the audit/visit.
5. In the Attachments subtab, attach 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 7–27 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 7–27.

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 7–27.

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 7–27.

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 7–27.

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 7–28 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 7–28.

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 7–27.

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 7–27.

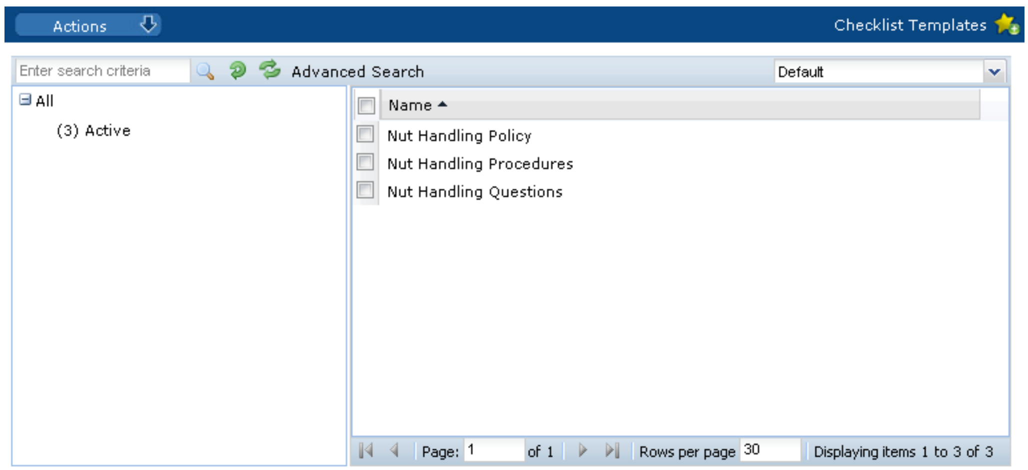
To edit the list of reasons, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

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 7–29 Checklist Templates Page***

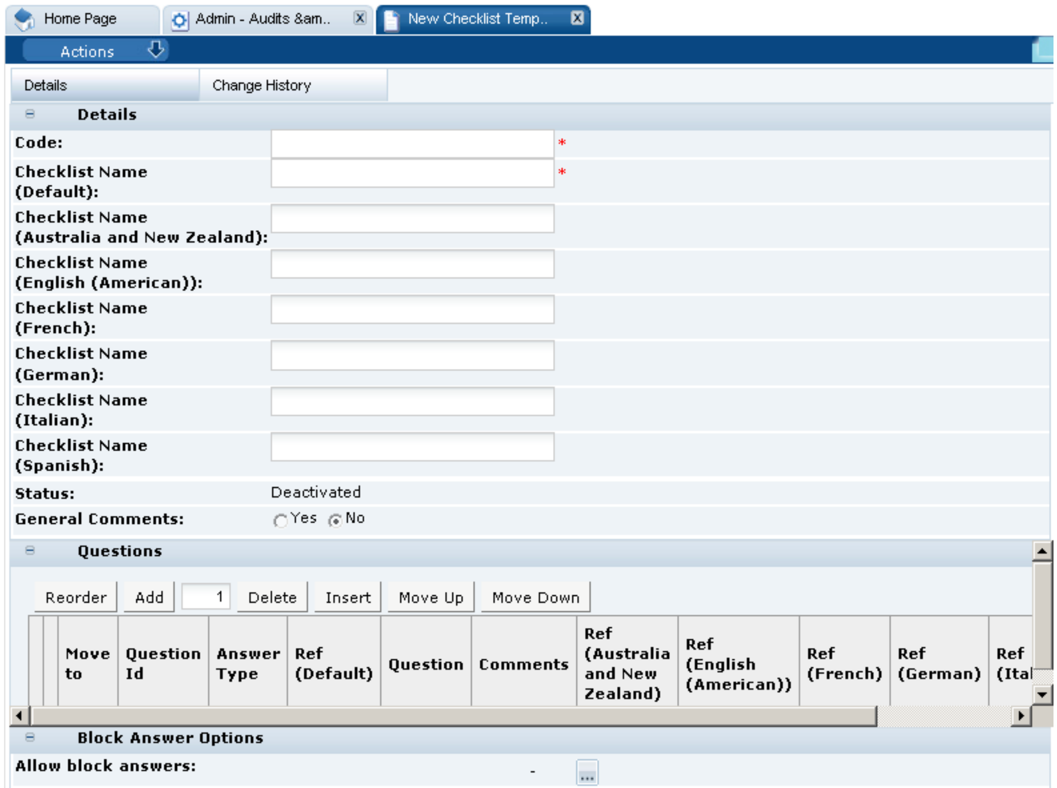



To edit a template, select the Edit action. The template record opens in edit mode.

To add a new checklist:

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

***Figure 7–30 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 7–31 Checklist Answers***

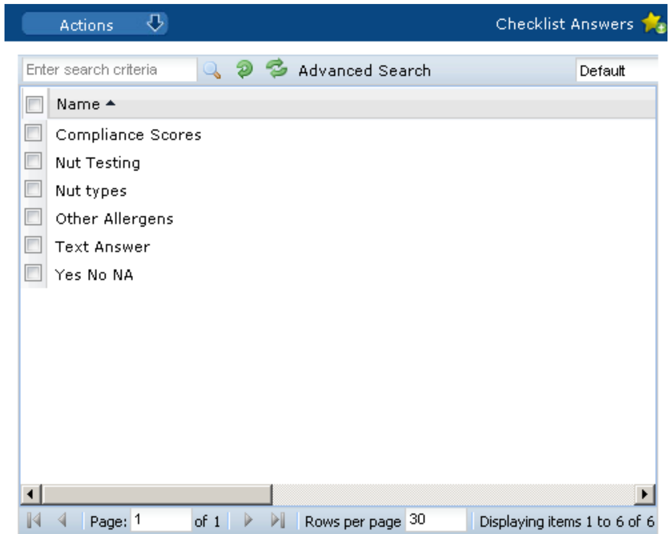
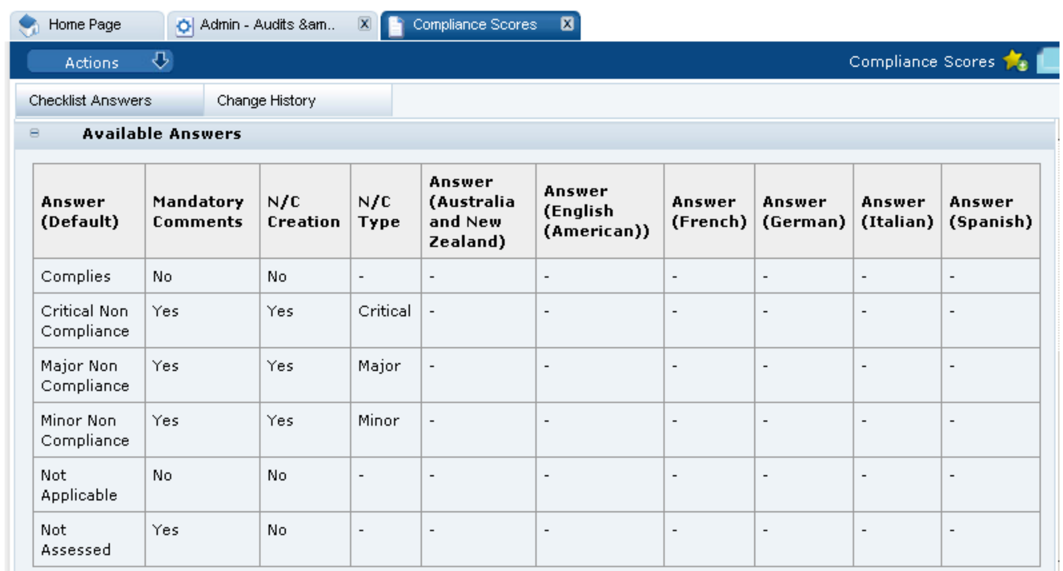



Figure 7–32 shows an example of checklist answers.

***Figure 7–32 Checklist Answers Example***



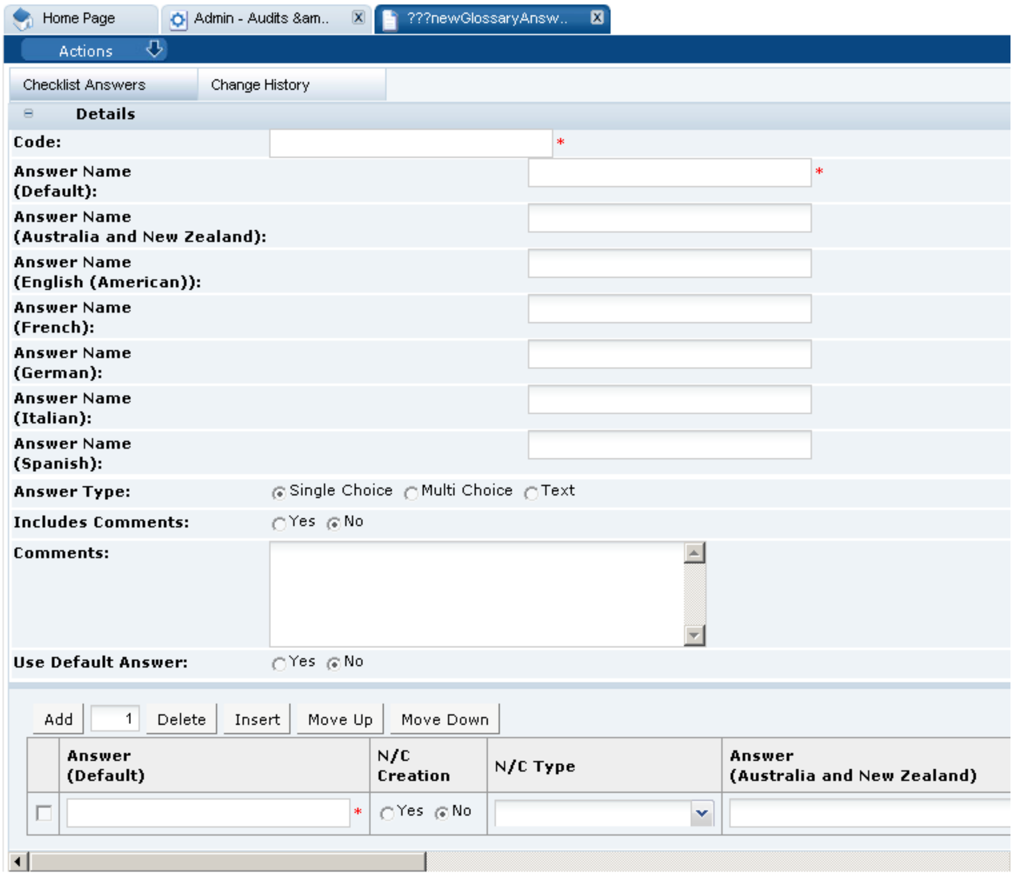

| Answer (Default) | Mandatory Comments | N/C Creation | N/C Type | Answer (Australia and New Zealand) | Answer (English (American)) | Answer (French) | Answer (German) | Answer (Italian) | Answer (Spanish) |
|---|---|---|---|---|---|---|---|---|---|
| Complies | No | No | - | - | - | - | - | - | - |
| 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 7–33 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:

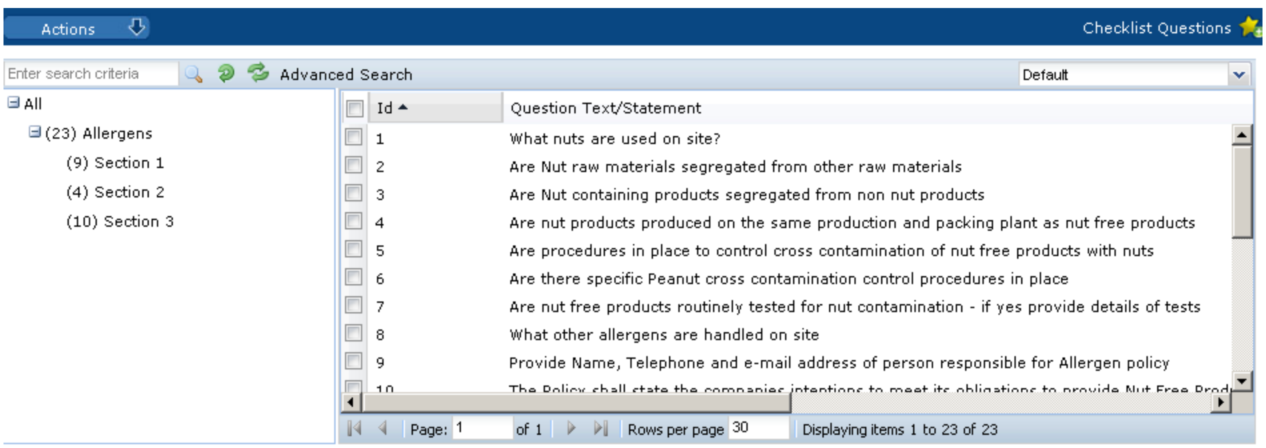
   - Enter the answer in the default language. This field is mandatory.
   - The N/C Creation field determines whether, when the chosen answer is given to this question, the system should generate an issue for the question.
   - The N/C Type field determines for what issue type an issue is automatically 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 7–34 Checklist Questions***

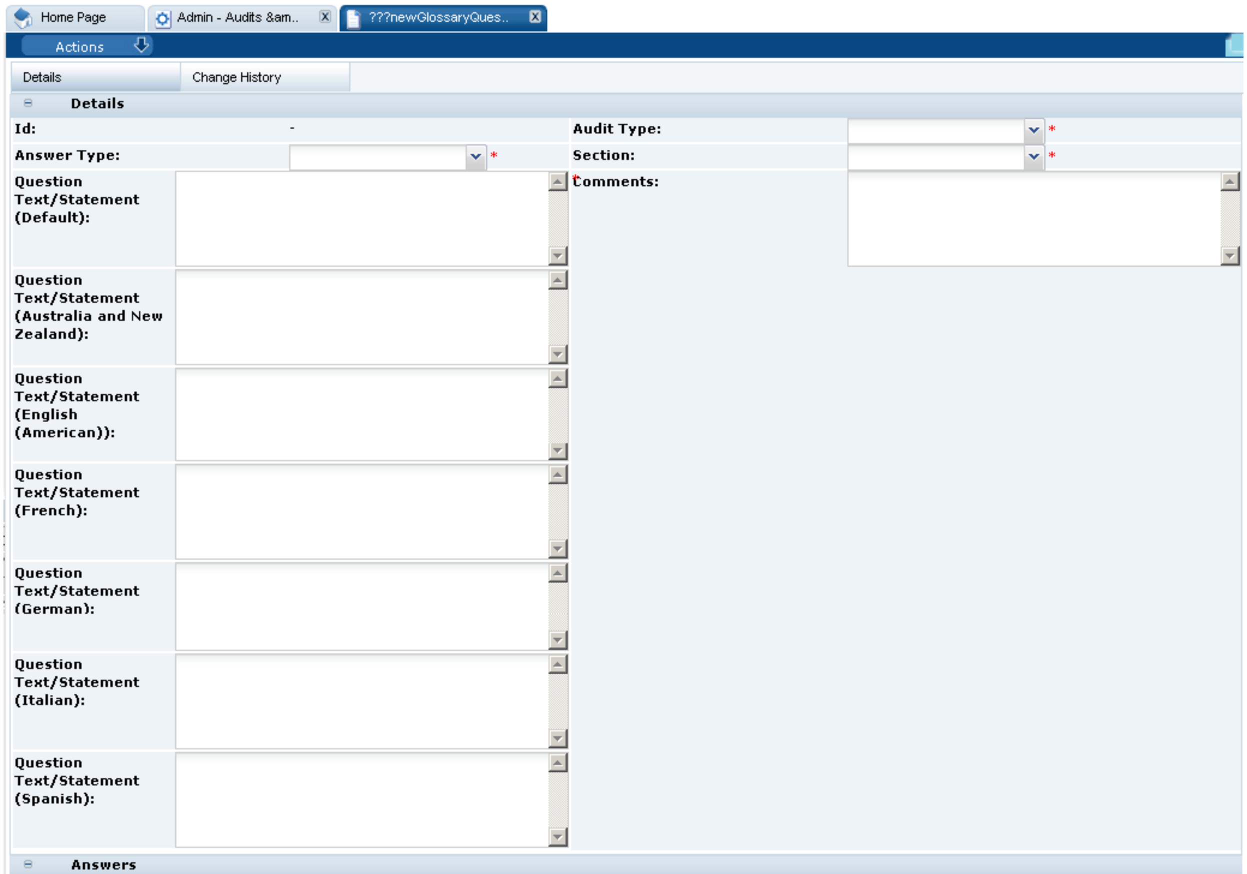



To edit a checklist question, select the entry and then select the Edit action. The question record opens in edit mode.

To add a checklist question:

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

*Figure 7–35 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.

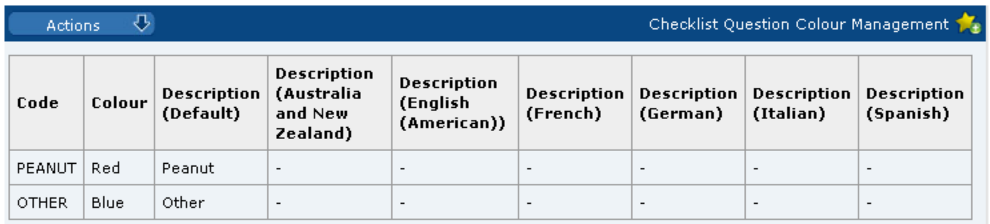
## Checklist Question Colour Management

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 7–36 Checklist Question Colour Management***



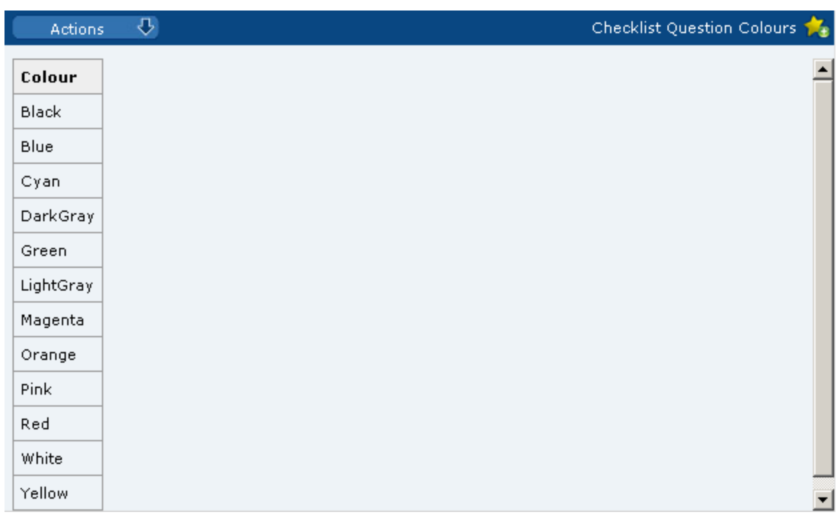

| Code | Colour | Description (Default) | Description (Australia and New Zealand) | Description (English (American)) | Description (French) | Description (German) | Description (Italian) | Description (Spanish) |
|---|---|---|---|---|---|---|---|---|
| PEANUT | Red | Peanut | - | - | - | - | - | - |
| 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 7–37 Checklist Question Colours***

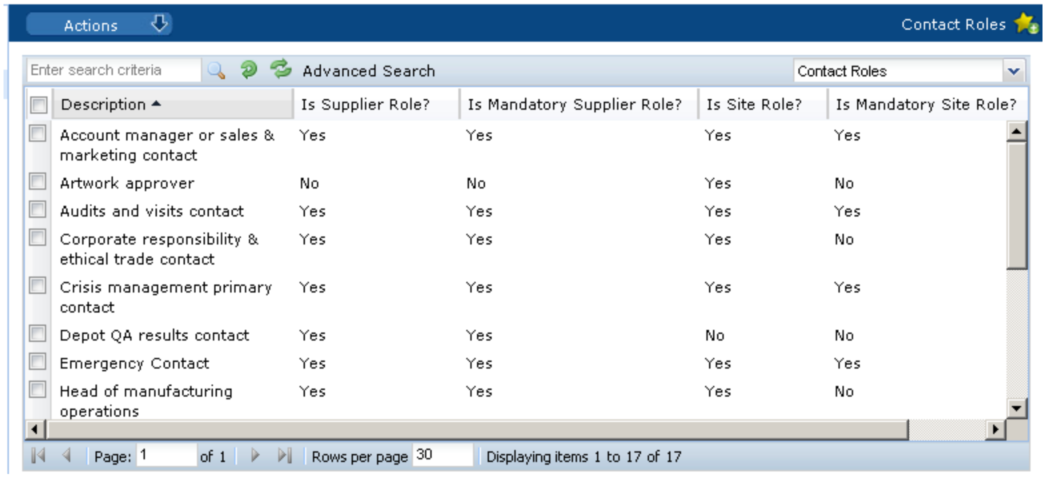



| Colour |
|---|
| Black |
| Blue |
| Cyan |
| DarkGray |
| Green |
| LightGray |
| Magenta |
| Orange |
| Pink |
| Red |
| White |
| Yellow |

# Roles and Permissions

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

***Figure 7–38 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 Supplier, 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 Supplier.

***Table 7–3 System Parameters to Support Supplier***

| 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.<br><br>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).<br><br>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 Supplier*

| 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).<br>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.<br>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).<br>If set to No, any scoring has to be assigned directly within the Audit/Visit record.<br>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.<br>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 Supplier*

| Subtab | Parameter | Description |
|---|---|---|
| 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. |
| Registration | Registration Ts & Cs Active | If set to Yes, suppliers are required to accept the portal's terms and conditions during the supplier registration process. Default is Yes.<br>This parameter can only be seen and maintained by users with the Oracle Authorized Administrator authority profile. |
| Registration | Supplier Code Allocation (See 1.) | If Auto, the system will automatically assign supplier codes to new Suppliers.<br>If Auto/Edit, the system will automatically assign supplier codes, however the auto-allocated code may be manually changed to a unique alternative during the creation process.<br>If Manual, the retailer user must assign a unique supplier code during the creation process.<br>Default is Auto. |
| Registration | Supplier Code Editable (See 1.) | If checked, the supplier code may be edited in the Supplier record after the account has been created.<br>If Supplier Code Allocation is set to Auto, this parameter is set as unchecked and cannot be changed. Default is unchecked. |
| Registration | Site Code Allocation (See 1.) | If Auto, the system will automatically assign site codes to new Supplier sites.<br>If Auto/Edit, the system will automatically assign site codes, however the auto-allocated code may be manually changed to a unique alternative during the creation process.<br>If Manual, the retailer user must assign a unique site code during the creation process.<br>Default is Auto. |
| Registration | Site Code Editable (See 1.) | If checked, the site code may be edited in the Site record after the account has been created.<br>If Site Code Allocation is set to Auto, this parameter is set as unchecked and cannot be changed.<br>Default is unchecked. |
| Registration | Site Code Format (See 1.) | If Numeric, the site coding will follow an incrementing number sequence, starting at 1 for each supplier (with leading zeroes), such as, 0001 > 0002 … 9999 > 10000 …<br>If Alpha, the site coding will follow an incrementing alpha code sequence, starting at AAAA for each supplier, such as, AAAA > AAAB … AAAZ > AABA … AZZZ > BAAA …<br>This parameter cannot be changed once the first site has been created. Default is Numeric. |

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

| Subtab | Parameter | Description |
|---|---|---|
| Registration | Prefix Site Code with Supplier Code (See 1.) | If checked, the supplier code is automatically prepended to the site code when creating a Site account, with a hyphen, such as A0001-AABD.<br><br>This parameter cannot be changed once the first site has been created. Default is checked. |
| Registration | Site Code Unique Across Portal (See 1.) | If checked, the system will continue incrementing the site code across the entire portal rather than just within the supplier, to ensure the uniqueness across the portal. For example:<br><br>If site codes are not required to be unique across the portal, the coding may be:<br><br>**Supplier** **Site**<br><br>A0001 0001 or AAAA<br>A0001 0002 or AAAB<br>B0001 0001 or AAAA<br><br>If site codes are required to be unique across the portal, the coding would be:<br><br>**Supplier** **Site**<br><br>A0001 0001 or AAAA<br>A0001 0002 or AAAB<br>B0001 0003 or AAAC<br><br>This parameter cannot be changed once the first site has been created. Default is unchecked. |
| Registration | Minimum Site Code Length (See 1.) | The minimum number of digits or characters in the site code.<br><br>This parameter cannot be changed once the first site has been created. Default is 5. |
| Registration | Registered Company Number Mandatory at Registration | Use this to control whether the Registered Company Number is mandatory or optional when the supplier completes the Registration wizard.<br><br>Default is checked/Yes (mandatory). |
| 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. |

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

| Subtab | Parameter | Description |
|---|---|---|
| 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. |
| **1.** This parameter is only editable by users with the Power Administrator authority profile. | | |

# 8

# Product Administration

The following topics are covered in this chapter:

- Global Glossaries
- Spec Glossaries
- Spec Configuration
- Business Category Configuration
- Surveillance
- System Parameters

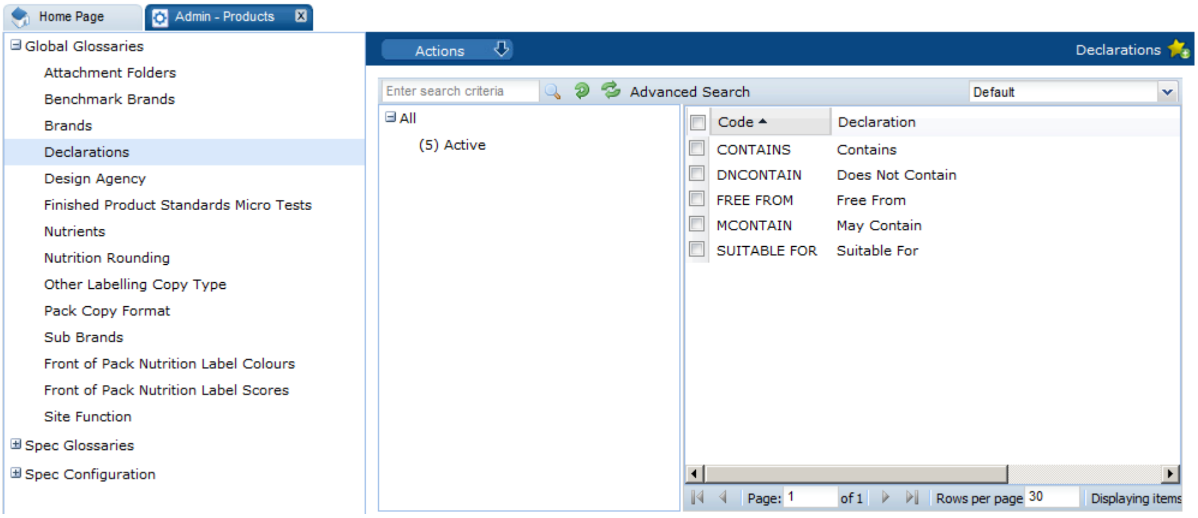
## Global Glossaries

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

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*

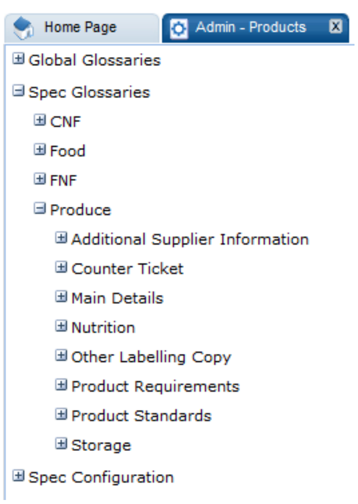



## Spec Glossaries

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 Product 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

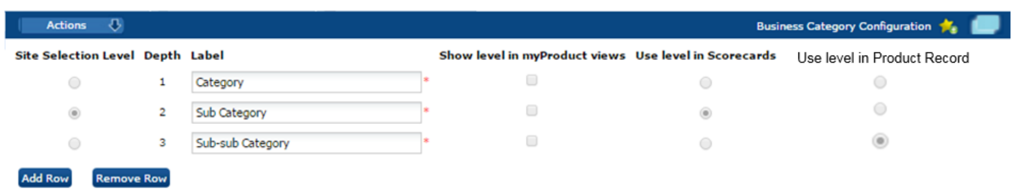
There are other options, currently only available to Brand Compliance Management Cloud Service/Oracle Administrators, to set the specification types available for the portal and which sections are mandatory or optional within each specification type.

## 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 Product, 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 Product views, check the box for that level. The maximum number of levels is five.

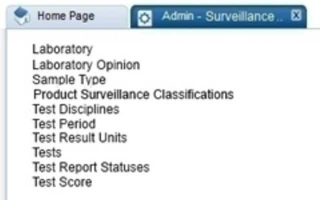
The Use level in Product Record radio button controls the number of levels of business category used within the Product Record.

## Surveillance

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

Select Product Surveillance to open the Product Surveillance Admin tab.

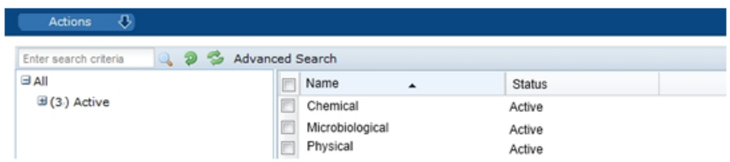
***Figure 8–4  Admin - Surveillance Options***




## Test Disciplines

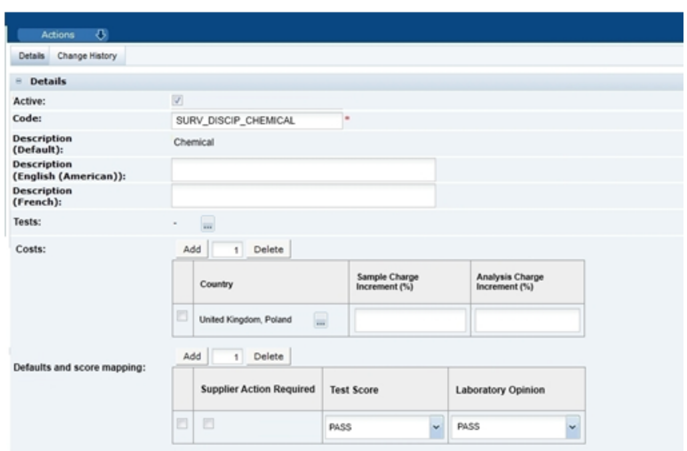
The Test Disciplines within Product Surveillance are the categories of testing carried out on products.

***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 Brand Compliance Management Cloud Service 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.

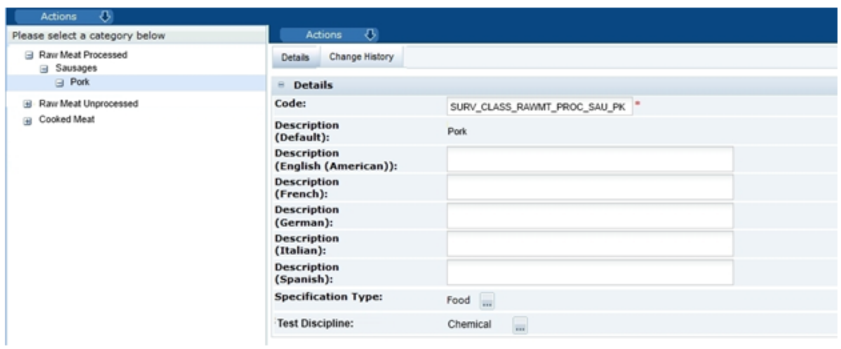
The Default and Score Mapping table defines the default for the Test Score and Supplier Action Required fields in the Results Summary when a result is imported into the system. The available values are held in the respective Laboratory Opinion and Test Score glossaries. There is a validation check when 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.

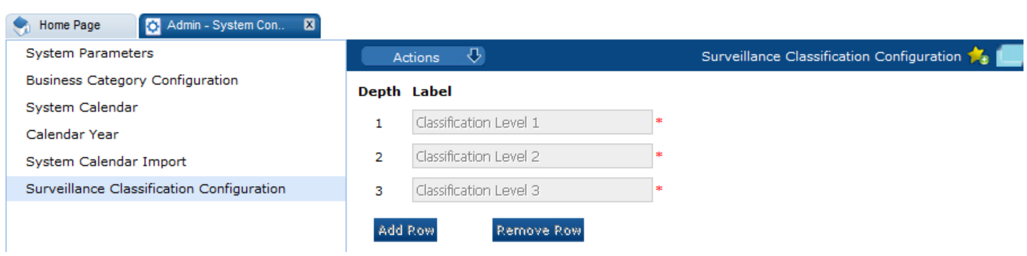
The following figure shows an example product surveillance classification hierarchy for Raw Meat under the product surveillance discipline of Microbiological.

***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 Product, 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 Product.

***Table 8–1 System Parameters to Support Product***

| Subtab | Parameter | Description |
|---|---|---|
| Products | Notify Supplier on Product Creation | If Yes, generate an email for the supplier when a product is created.<br>Default is Yes. |
| Products | Notify Retailer on Product Creation | If Yes, generate an email for the retailer when a product is created.<br>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.<br>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.<br>Default is Yes. |
| Products | Pack Copy Format | Data file format used for a Produce specification's pack copy file. |
| 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.<br>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.<br>Default is No. |

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

| Subtab | Parameter | Description |
|---|---|---|
| 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.<br>Default is No. |
| Products | Allow Creation of multiple Products<br>(See 1.) | Allows multiple products to be associated to a single Product Record. Default is off (single product per Product Record).<br>This is locked once the first Product Record or Specification is created. |
| Products | Capture Declarations<br>(See 1.) | Controls whether a reason for not declaring a table appears in the Specification. Default is on (the table appears). |
| Products | Set Pack Copy Language<br>(See 1.) | Control whether Pack Copy files can be created in alternative languages. Default is off (Pack Copy files are solely created in the system's business language). |
| Products | System Uses Single Legislation<br>(See 1.) | If set, the system uses a single legislation. Default is off (the required legislation can be selected). |
| Products | Legislation<br>(See 1.) | If the System Uses Single Legislation parameter is set on, this field must be set to one of the legislations available for the portal. |
| Products | Product Record Controls Countries Field<br>(See 1.) | Allows the Countries Where Sold to be specified in the Product Record and automatically cascaded to the associated Specifications. Default is off (the Countries Where Sold field is hidden in the Product Record and is editable in the Specification). |
| Products | Show Lead Business Category in Product Record<br>(See 1.) | If set on, the system will show a Lead Business category field in the Product Record and Specification, and relabel the Business Category field to Other Business Category in both records. This approach is also taken in the Site record. |
| Products | Are Nutrient Targets Used?<br>(See 1.) | Controls whether Nutrient Targets (such as Salt Targets) are enabled within the Specification's Nutrition section. Default is off. |
| Products | FoP Nutrition Labelling Used?<br>(See 1.) | Controls whether Front of Pack Nutrition (such as Traffic Lights) is enabled within the Specification's Nutrition section. Default is off.<br>If set on, the relevant glossaries become visible, the FoP table is present in the Specification for the data entry and calculations to take place, and the FoP data is included in the Pack Copy file. |
| Products | Legislations Supporting Nutrition Targets<br>(See 1.) | The legislations used in the calculation of Nutrition Targets. Must be set to one or more if Nutrition Targets are used. Default is EU. |

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

| Subtab | Parameter | Description |
|---|---|---|
| Products | Enable Sustainability | If a specification type is selected, the ability to capture sustainability-related information is enabled for that type of product specification (additional columns and pages appear in the Recipe/Formulation sections).<br>Only Food and/or Formulated Non Food specification types may be selected.<br>The initial default for new implementations is Food; otherwise none are selected.<br>If a specification type is deselected, after previously being enabled, any Sustainability data that has already been entered will no longer be shown on screen, but will remain accessible through reports. |
| Products | Barcode Regular Expression Validation<br>(See 1.) | Validation rule for Barcodes. The default is:<br>`(^([0-9]{8})$)|(^([0-9]{13})$)`<br>Validation is applied to ensure the entered value is a valid regular expression.<br>If a value is present, validation is applied to Barcodes in the Product Record and Specification. |
| Products | OLC Shipping Case Code Regular Expression Validation<br>(See 1.) | Validation rule for Shipping Case code. The default is: `([0-9]{14})$`<br>Validation is applied to ensure the entered value is a valid regular expression.<br>If a value is present, validation is applied to Barcodes in the Product Record and Specification. |
| Products | Validate Bar Code Check Digit | A checkbox which defaults to checked, that is, On. |
| Products | Validate Shipping Case Code Check Digit | A checkbox which defaults to checked, that is, On. |
| Products | Validate for Cutter Guide Attachment?<br>(See 1.) | If switched on, when a Specification is validated to move from Collaborative Draft to Pack Copy Sent, a check is made to ensure a Cutter Guide attachment is present, resulting in an error if not present. Default is off (the Cutter Guide is optional). |
| Products | Exclude FPS As Sold Page from Spec Types | Select specification types to have the page hidden in the Finished Product Standards section for that specification type.<br>The selection is specification type (such as Food or BWS), not specification format (such as Pre-packed Food or Counter Ticket). |
| Products | Exclude FPS As Consumed Page from Spec Types | |
| Products | Exclude FPS Benchmarks Page from Spec Types | |

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

| Subtab | Parameter | Description |
|---|---|---|
| Products | Allergen Override Approval fields not Mandatory at Status | Use this to control at which statuses the approval of allergen overrides (that is, completion of the Allergen Override Approval and Comments fields) becomes mandatory in the D&A specification section.<br>Any prior statuses must be specified, for example, for the status Collaborative Draft, statuses Supplier Draft and Retailer Draft must also be included.<br>Default is Supplier Draft, Retailer Draft, Collaborative Draft. |
| Products | Product Number read only in Product Record at Status | Use this to enable the ability to make the Retailer Product Number in the Product Record read-only to Supplier users when it is linked to a product specification of a certain status. This prevents the Supplier changing the product number beyond a certain stage in the workflow.<br>Select one or more specification statuses; none are selected by default. If none are selected, the feature is not enabled. |
| Products | Show Alt. Product No. in Product Record and Specification (See 1.) | If set to Yes, the Alt. Product No. field will be enabled within the Product Record and the Product Specification, which is typically used to hold an alternative product identifier such as a GTIN code. Default is No.<br>If enabled and subsequently disabled, any values previously saved in the fields are retained; if then re-enabled, the values will then reappear. |
| Products | Show Division in Product Record and Specification (See 1.) | If checked, the Division field will be enabled within the Product Record and the Product Specification, which is typically used to provide an additional categorization of the product by selecting from a glossary of Division. Default is No.<br>If enabled and subsequently disabled, any values previously saved in the fields are retained; if then re-enabled, the values will then reappear. |
| Products | Cascade Product Number from Non-Produce Product Record to Specification (See 1.) | If Yes, the Retailer Product Number is updated in a Specification if it is changed in the associated Product Record. Validation prevents this being set if the show Alt. Product Number and Show Division parameters are not checked. Default is No.<br>This would typically be used where the Retailer Product Number holds the product's identifier from an external system, such as an Article Number. If this updating is enabled, when a Product Record is saved, any rows in associated Specifications that have the same Alt. Product Number/GTIN and Division values have the Retailer Product Number/Article Number replaced with the corresponding value from the Product Record. |

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

| Subtab | Parameter | Description |
|---|---|---|
| Products | Cascade Product Number from Produce Specification to Product Record (See 1.) | If Yes, the Retailer Product Number is updated in a Produce Product Record if it is changed in the associated Specification. Validation prevents this being set if the show Alt. Product Number and Show Division parameters are not checked. Default is No.<br>This would typically be used where the Retailer Product Number holds the product's identifier from an external system, such as an Article Number. If this updating is enabled, when a Product Specification is saved, any rows in associated Product Records that have the same Alt. Product Number/GTIN and Division values have the Retailer Product Number/Article Number replaced with the corresponding value from the Product Record. |
| Global | Show Business Language Fields | If set to Yes, the system does the following:<br>▪ Adds Spec Name in Bus Language to Spec Main Details (and Pack Copy).<br>▪ Adds Prod Title in Bus Language to Product Record.<br>▪ Adds Supplier and Site Name in Bus Language to Registration Wizard.<br>▪ Adds extra text to email templates.<br>▪ Adds Name in Bus Language to Supplier and Site records.<br>▪ Shows two addresses in the address component.<br>Default is No. |
| Global | Background Polling Interval (ms) (See 1.) | This is the time in milliseconds which the system will use to poll to the server to check for updates.<br>May be set to greater than 500, however the default of 500 is the recommended setting. |
| Global | Portal Code (See 1.) | The portal's identifier.<br>If the allocation of Supplier and Site account codes is configured to include a prefix, the portal code is used as the prefix. |
| Global | Use Alternative Code for Product SOAP API (See 1.) | Use this to enable a facility that provides a means of cross-referencing supplier codes when creating or updating Product Records using the Product Inbound SOAP API. This feature is of use where the external system does not hold the ORBC supplier codes.<br>Options are Yes and No. Default is Yes (enabled).<br>If enabled, it allows alternative supplier codes to be added to the Invoicing Information table in the Supplier record; when transactions are submitted to the API, if the Supplier record cannot be located using the ORBC supplier code, a secondary lookup is performed to locate the Supplier record using the alternative codes. |

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

| Subtab | Parameter | Description |
|---|---|---|
| Global | Allow Duplicate Product Codes for Product SOAP API (See 1.) | Use this to control whether multiple Product Records can have the same product identifier when submitted using the Product Inbound SOAP API.<br><br>Options are Yes and No. Default is Yes (enabled).<br><br>If enabled, when Product Records are created using the API, the same Retailer Product Number may be present on multiple Product Records (as long as the supplier is different); otherwise the API will validate that the Retailer Product Number is unique across all suppliers. |
| 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.<br><br>If the global parameter Use Site Code is False, any Site Contacts selected will be ignored. |
| Surveillance | Use Site Codes (See 1.) | This is set when the portal is implemented. The options are Yes and No. Default is No.<br><br>When set to Yes, the import of Surveillance test results will validate the site code to ensure it is associated to the respective Product Record, resulting in an error if not.<br><br>If this parameter is set to No, the site code is ignored during the import, and the site code and site name will be blank in the imported test report. |

**1.** This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Retailer users with the Oracle Authorized Administrator authority profile will see a Settings parameters tab. This tab displays core parameters, what their purpose is, which area of the system they are used in, and what value they are set to.

---

**Note:** These parameters are read-only; they cannot be edited.

---

***Table 8–2 Settings Parameters***

| Subtab | Parameter | Description |
|---|---|---|
| Products | Specification Draft Statuses | The statuses at which a Specification is considered to be a draft specification. These states influence field locking and snapshotting as well as validation.<br><br>Default is Supplier Draft, Retailer Draft, Collaborative Draft, Produce Draft. |

**Table 8–2 (Cont.) Settings Parameters**

| Subtab | Parameter | Description |
|---|---|---|
| Products | Specification Private Draft Statuses / Allergen Override Non Approval Statuses | These are the specification statuses at which an allergen override does not have to be approved in order to reach this status.<br>The default setting is: Supplier Draft, Retailer Draft. |
| Products | Specification Public Draft Statuses | The specification states that are considered to be draft, but visible to both parties.<br>Default is Collaborative Draft, Gate Step. |
| Products | Specification Statuses where Nutrition Sections are editable | The specification statuses at which the Nutrition section is editable.<br>Defaults is: Supplier Draft, Retailer Draft, Collaborative Draft, Produce Draft, Part Pack Copy Sent. |
| Products | Business Categories Mandatory Status (Non-Produce) | Controls at which status the business category becomes mandatory within a Specification (all specification types other than Produce).<br>The default setting is that it becomes mandatory at and beyond Gate Step. |
| Products | Business Categories Mandatory Status (Produce) | Controls at which status the business category becomes mandatory within a Produce Specification.<br>The default setting is that it becomes mandatory at Produce Pack Copy status. |
| Products | CNF Component Decimal Precision | Sets the number of decimal places shown in the Components table of a CNF Specification.<br>Default is 2. |
| Products | FPS Product Attribute Columns | This is used to control which of the three columns (red, amber, and green) are used within the Finished Product Standards section, and in which order they are shown.<br>Default is Red, Amber, Green. |
| Products | Require Active Ingredient Statuses | The statuses of the Specification where ingredients must be active for the Specification to reach that status.<br>Default is Supplier Draft, Retailer Draft, Collaborative Draft, Gate Step. |
| Products | Report Missing Benchmark Message as a Warning? | If this is switched on, the system will report a missing Benchmark within a Product Record as a warning, not an error. Default is off. |
| Products | OLC Quantities Mandatory Status (Non-Produce) | Missing mandatory fields from the Quantities page in Specifications are raised as a warning before this status and as errors at or after this status.<br>This parameter is for all specification types other than Produce. Default is Gate Step. |
| Products | OLC Quantities Mandatory Status (Produce) | Missing mandatory fields from the Quantities page in Specifications are raised as a warning before this status and as errors at or after this status.<br>This parameter is for Produce specifications. Default is Produce Pack Copy. |

*Table 8–2 (Cont.) Settings Parameters*

| Subtab | Parameter | Description |
|---|---|---|
| Products | Pack Copy Generation Statuses | The specification states that can generate a Pack Copy file.<br><br>Default is Pack Copy Sent, Part Pack Copy Sent, Produce Pack Copy, Produce Approved. |
| Products | Product Record Other User Roles | Enables additional user roles to be used within a Product Record.<br><br>Default is Buyer, Product Development Manager. |
| Products | Product Record Technologist List Config | The List Configs used to show the names in the Product Technologist selector. |
| Products | Product Record Technologist Role Code | The code used within a Product Record that is considered to be the Product Technologist.<br><br>The Product Technologist user role plays an important role within the system. As the description may be changed to suit a portal owner's terminology, this code provides the system with a static identifier.<br><br>Default is: PRODUCT TECHNOLOGIST. |
| Products | Show Ingredient Separator After Forced Addition? | Modifies the formatting of the Ingredient Declaration. Default is off.<br><br>If switched on, a comma is added after a forced addition group finishes and there are further ingredient in the generated output.<br><br>Example with the ingredient separator:<br>Water, Colourings: Apricot, Magenta;, Sugar<br><br>Example without the ingredient separator:<br>Water, Colourings: Apricot, Magenta; Sugar |
| Products | Suppress Forced Addition Closing Character If Last In Group | Modifies the formatting of the Ingredient Declaration. Default is off.<br><br>If switched on, a closing character is applied when the forced addition group is the last member of the ingredient list or of a compound.<br><br>Example with the closing character present:<br>Water, Filling (Meat, Colourings: Apricot, Magenta;), Sugar<br><br>Example without the closing character present:<br>Water, Filling (Meat, Colourings: Apricot, Magenta), Sugar |
| Supplier | Supplier Linking Enabled | If switched on, a Supplier Linking page will be shown in the Supplier record. Default is off. |

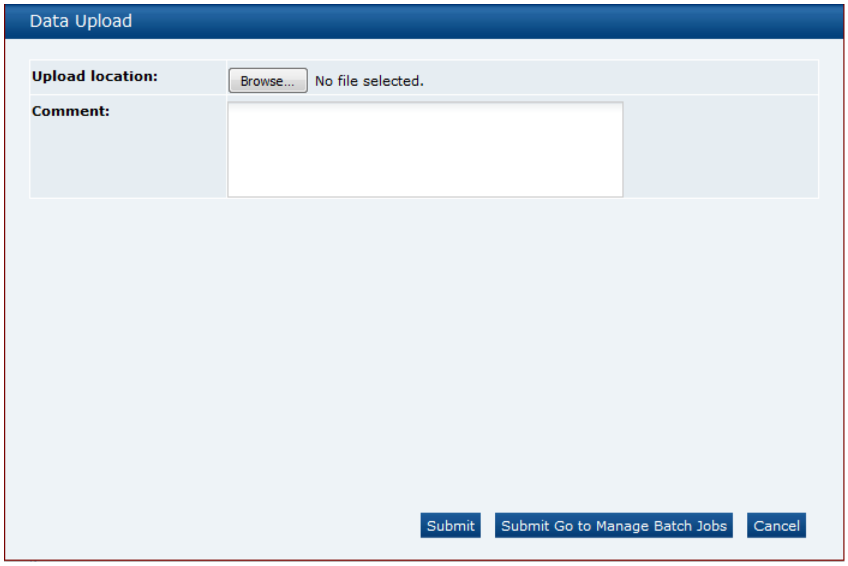
# Upload Product Record Data

Retailer users with the Upload Administrator authority profile have access to the Upload Data option within the Admin menu for the upload of products.

To upload new Product Records:

1. Select the Import option in the left hand pane. The Data Upload dialog box opens.

***Figure 8–9 Data Upload Dialog Box***




2. Click Browse to search for the upload file.
3. Enter any comments to describe the reason for the upload.
4. To upload the file, select either the **Submit** or **Submit Go to Manage Batch Jobs** action. At this point the system will create a background job to process the spreadsheet. The spreadsheet used to upload the data will be stored within the Attachments tab of the batch job.

> **Note:** An email will be sent to the job submitter if the data within the upload file fails validation.

# Download Product Record Upload Spreadsheet

Retailer users with the Upload Administrator authority profile also have access to the option to download a blank spreadsheet.

To download the latest version of the upload spreadsheet:

1. Select the Download Blank Spreadsheet action from the Product Records View actions menu. An operating system specific dialog box opens with the option to either open or save the file.
2. Select the save option to download the ZIP file to your desktop.

> **Note:** The ZIP file contains a spreadsheet workbook with the first tab used to upload the data. The second tab contains guidance notes and the remaining tabs contain the valid glossary values.
>
> The column heading text shown on the first tab is in the user's language. If translations are not present for the user's language, the system the portal's default language is substituted. An asterisk (*) is shown in a column heading if an entry is mandatory.

# 9 Project 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 Project, 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 Project Project Manager and Change Project 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 Project, 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 Project, 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:

- Project Folders
- Activity Status
- Activity Sub-Status

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

## Project 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 Project Folders Page***

Actions    Project Folders

| 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***

Actions    Activity Status

| 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.

> **Note:** The general sub-statuses for COMPLETED, MESSAGE SENT, MESSAGE ACCEPTED, and MESSAGE FAILED must be configured. If these sub-statuses are not present, integration with the Artwork module will fail.

# Activity Type

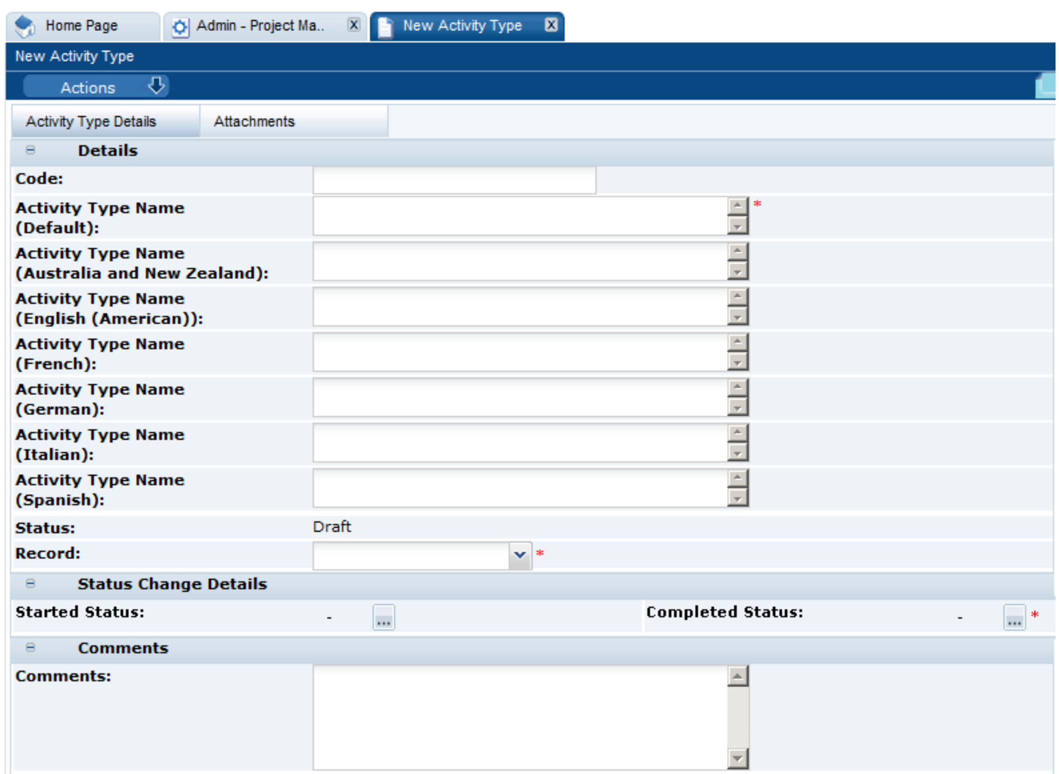
An activity is a defined task or link. Activities can be used to link to other elements within the system (such as, Specification request) and can be auto-completed using the status changes of linked elements. Activity Type names appear in the Activity Type pick-list on the Activity Template record.

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:

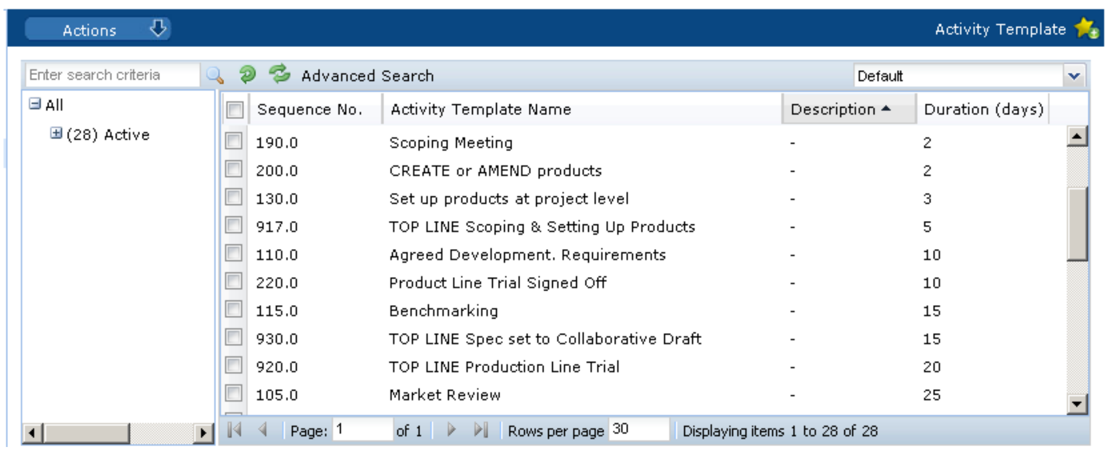
   - To select the triggers for Started status, click the icon. The Select Started Statuses dialog box appears. Select the statuses and then click **Ok**.
   - To select the triggers for Completed status, click the icon. The Select Completed Statuses dialog box appears. Select the statuses and then click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

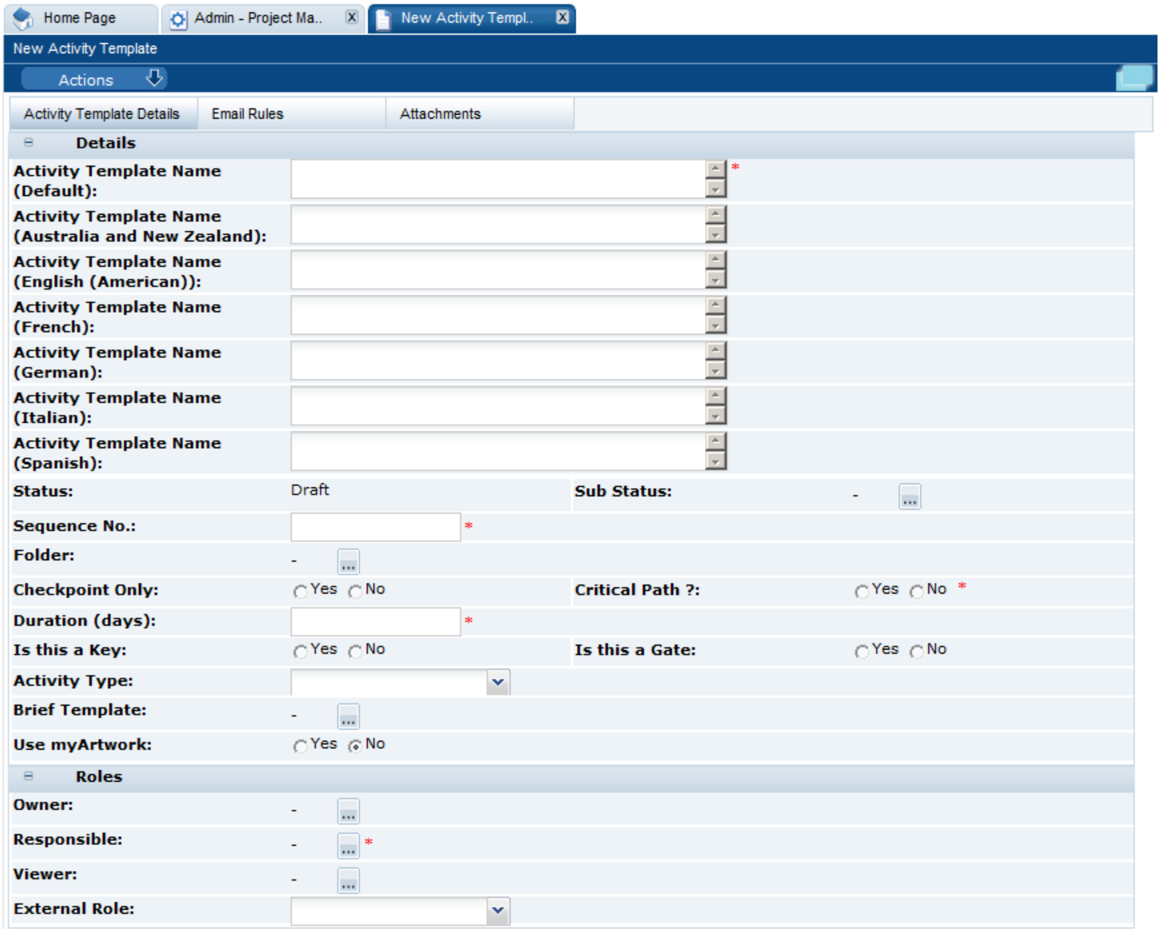



To edit an existing template, select the template and then select the Edit action. A tab opens in edit mode.

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 Artwork: Select whether the Artwork 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.

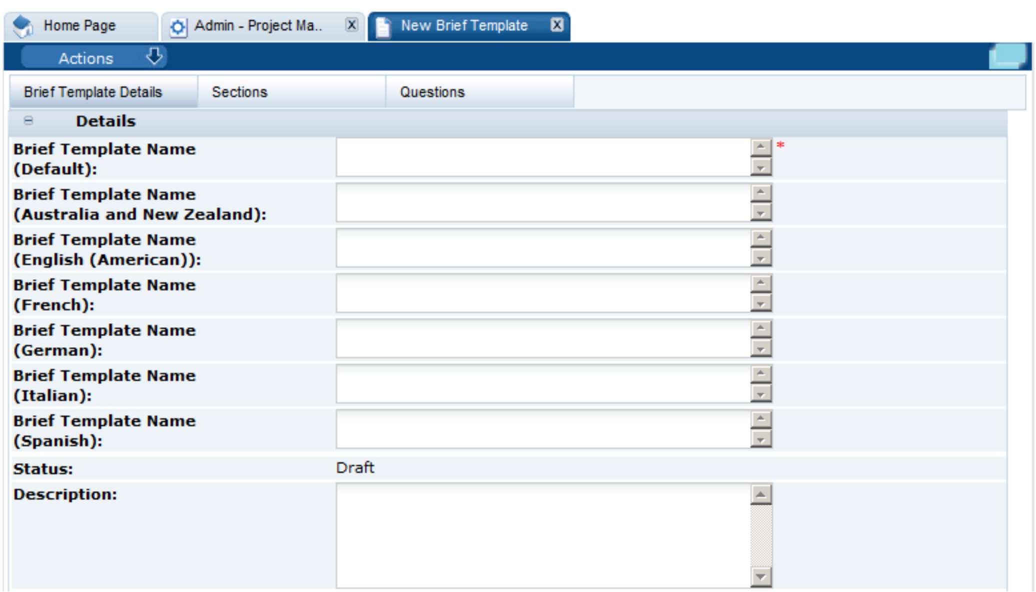
## Brief Templates

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.

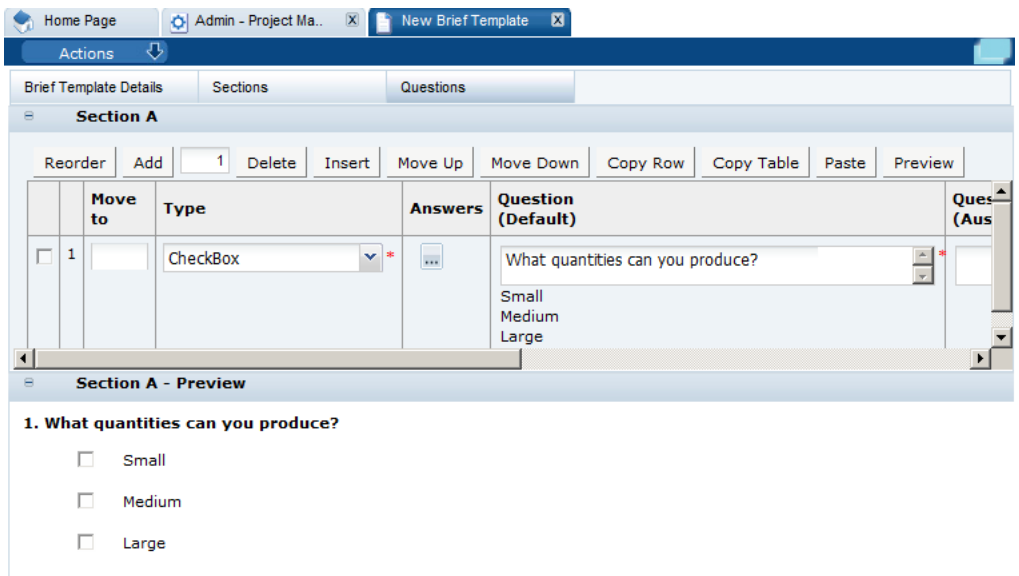
***Figure 9–6 New Brief Template Page***




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.

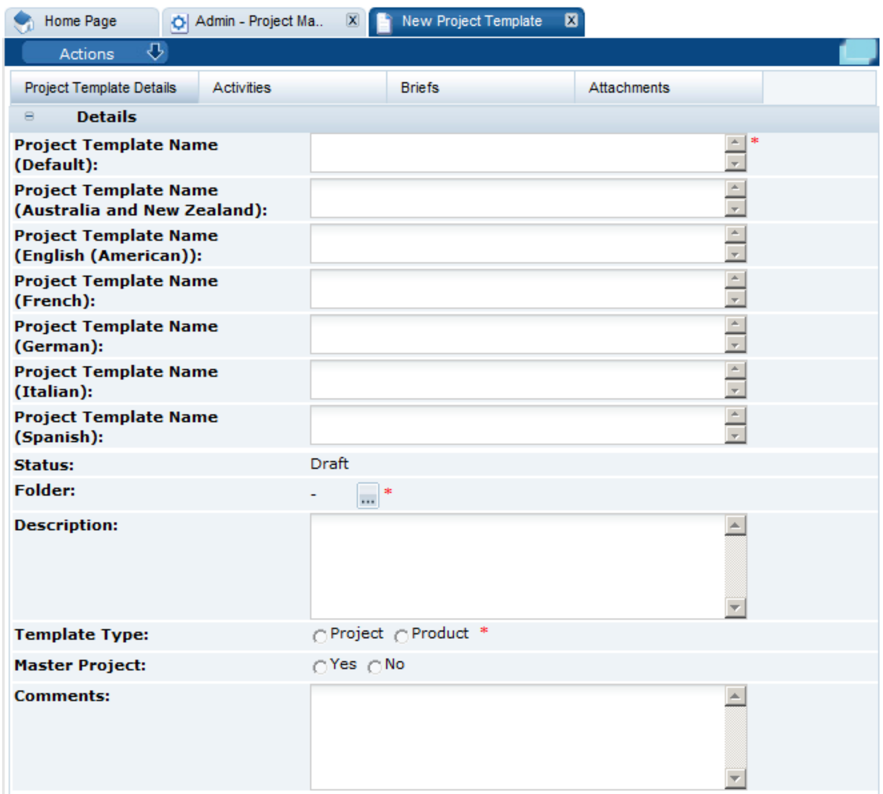
# Project Template

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, Artwork.
   - The initial project which can be the top level project for reports.
- Comments: Enter any comments. This fields is not mandatory.

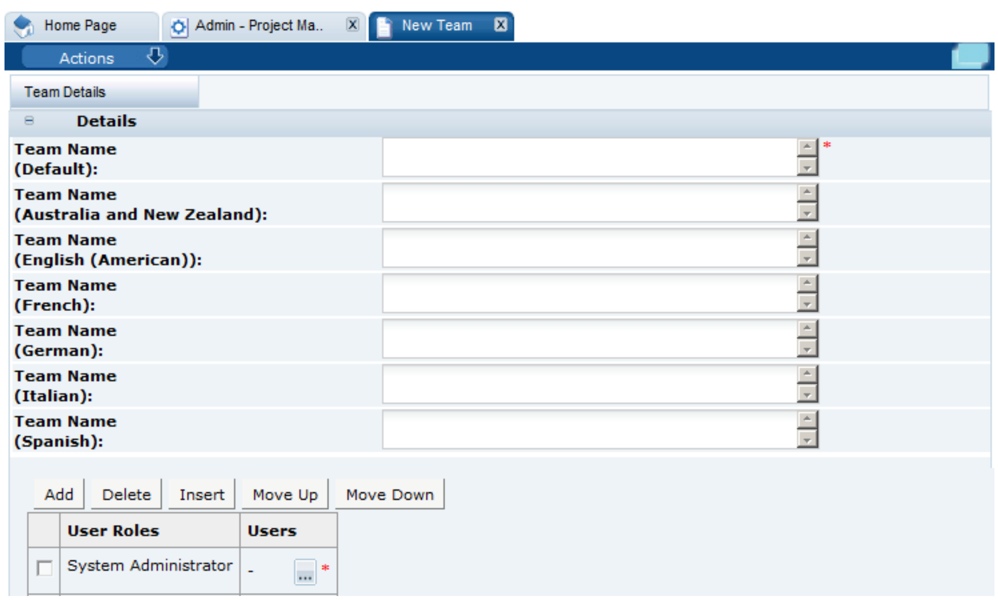
3. In the Activities subtab, add the activities to the template. Select the Add action. The Select Activity dialog box opens. Choose the activities and click **Ok**.
4. In the Briefs subtab, select the Brief templates to be added to this Project Template.
5. In the Attachments tab, add attachments to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

***Table 9–1 System Parameters to Support Project***

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

## Email Templates

The email templates used to notify users as projects and activities they are associated with progress through their workflow stages are:

- Activity Status Change email template (PROJECT1)
- Activity Notification email (PROJECT2)

The contents of the emails can be amended by the administrator in the Notifications / Email Templates page in Admin area.

The following parameters are also available for use in the Project email templates:

- $supplier_name - The name of the supplier, in the business language.
- $supplier_local_name - The name of the supplier, in the local language.
- $site_names - The names of the sites, in the business language.
- $site_local_names - The names of the sites, in the local language.
- $showInternationalNames - Whether international names are used.
- $project_id - The id of the project.
- $recipients - The list of recipients.
- $recipients.personName - The names of the recipients.
- $recipients.email - The email addresses of the recipients.

Table 9–2 shows an example of the parameters being used in the email template.

***Table 9–2 Usage of Parameters in Project Emails***

| Example Use in Template | Example Output in Email |
|---|---|
| Status: $activity_status | Status: Started |
| Use international names: $showInternationalNames | Use international names: true |
| Supplier Name: $supplier_name<br>Supplier Name Local: $supplier_local_name | Supplier Name: ABC Supplies Ltd.<br>Supplier Name Local: ABC Supplies Ltd. |
| Site Names:<br>$site_names | Site Names:<br>ABC Nottingham, ABC Leicester |
| Site Names Local:<br>$site_local_names | Site Names Local:<br>ABC Nottingham, ABC Leicester |
| Project ID: $project_id | Project ID: PR000009 |

*Table 9–2 (Cont.) Usage of Parameters in Project Emails*

| Example Use in Template | Example Output in Email |
|---|---|
| Recipients:<br>#foreach( $recipient in $recipients )<br>$recipient.personName ($recipient.email)<br>#end | Recipients:<br>John Smith (john.smith@example.com)<br>Joe Bloggs (joe.bloggs@example.com)<br>Joan Doe (joan.doe@example.com) |

# 10

# Library Administration

Users with the Library Administration authority profile use Library 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 Library, select Library 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.

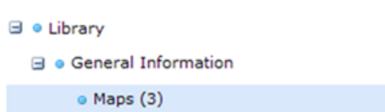
***Figure 10–1 Library Tab***


## 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***

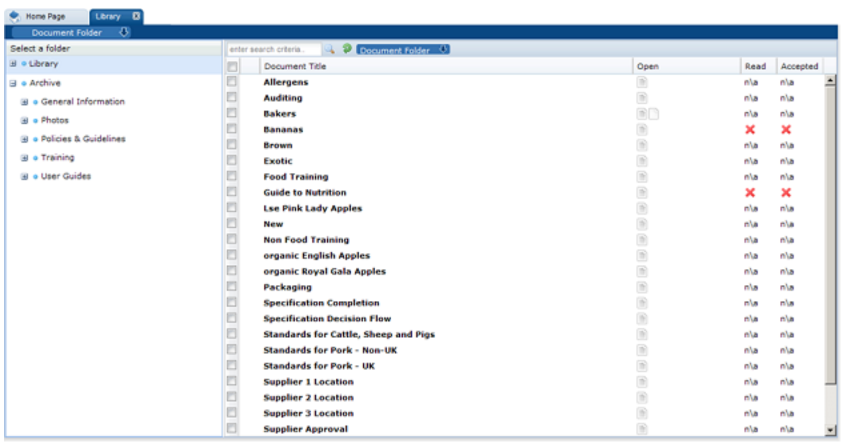



Table 10–1 describes the columns displayed for the selected folder.

***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.<br>Clicking a document title opens the summary document as a new tab. | |
| 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 |

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

| Column | Icons | Description |
|---|---|---|
| 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.

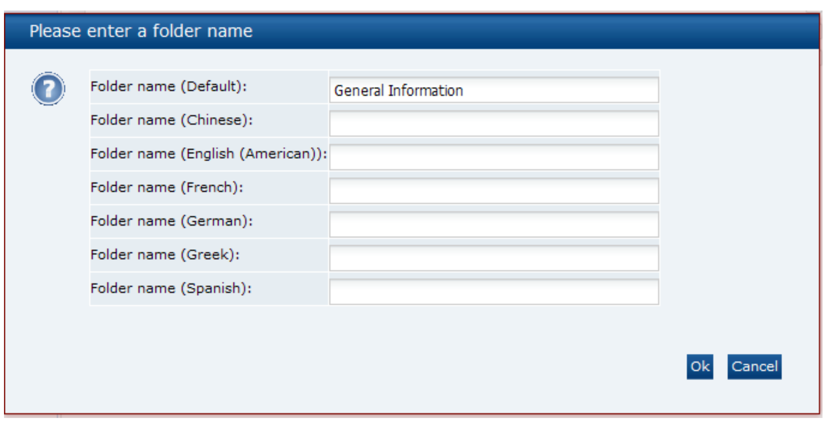
   If there are no errors, the folder is created in the Archive area.

## 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.

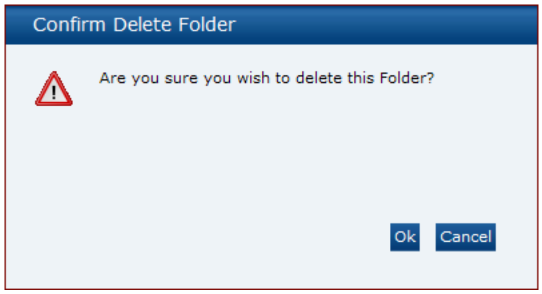
   If there are no errors, the folder names are updated.

### 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*

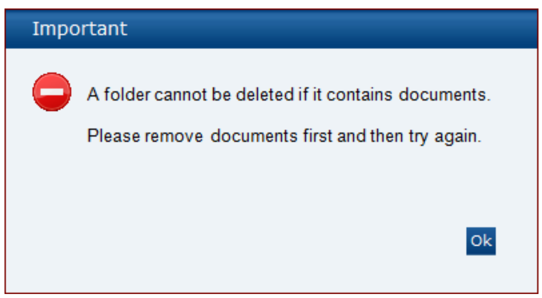



2. To delete the folder, select **Ok**.

   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 Library 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 Library 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***

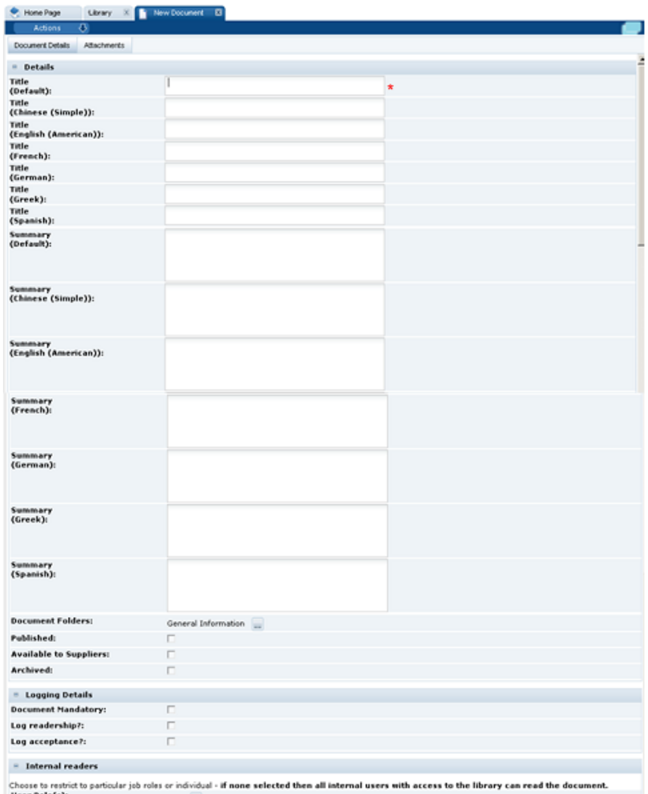


Table 10–2 describes the fields for this tab.

***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.<br>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." |

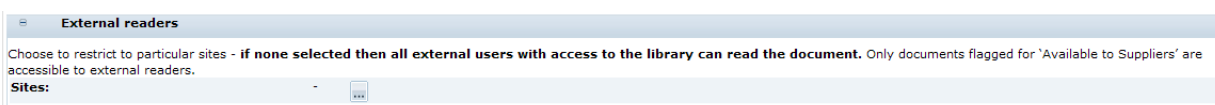
*Table 10–2 (Cont.) Fields in the New Document Tab*

| Field | Description |
|---|---|
| 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:<br>■ Log Readership is checked and greyed out.<br>■ 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 *Oracle Retail Brand Compliance Management Cloud Service User Guide*.<br>If Document Mandatory is not checked:<br>■ Log Readership will not be greyed out and remains checked.<br>■ The Read By field is no longer visible.<br>To log that users are to read this document, check Log Readership.<br>To log that users are to accept this document, check Log Acceptance.<br>Documents are only shown as mandatory for external users. Documents can be set as mandatory for specific external users by assigning contact roles.<br>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

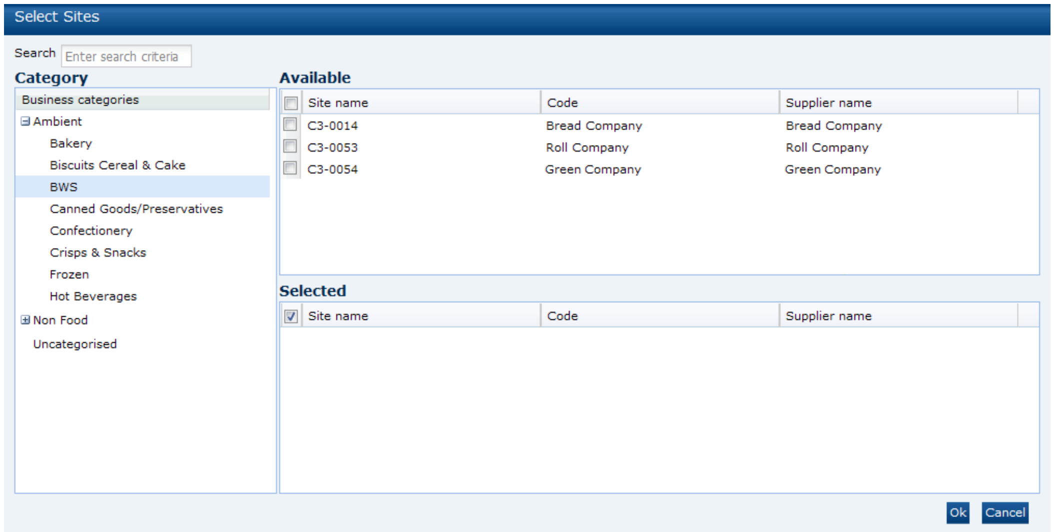
If this field is checked, the following field becomes available:

*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***



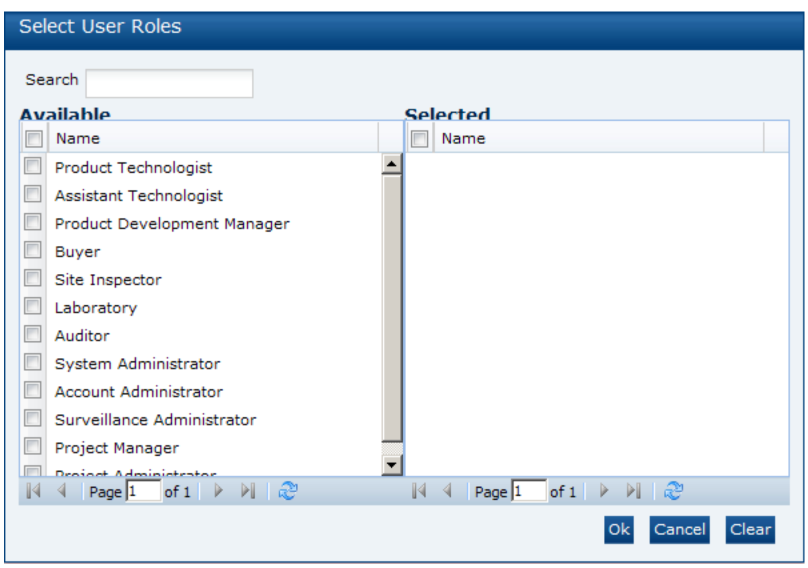

Any sites that have not been assigned a Business Category can be found by selecting Uncategorised shown at the bottom of the Category pane. Sites can be identified using the business categories shown in that pane. If there are no sites selected, all sites have visibility to the document.

## Internal Readers Field

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

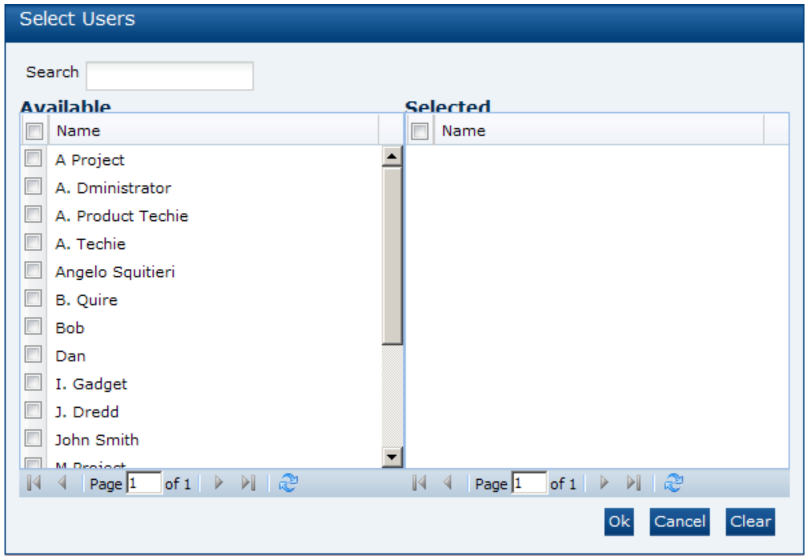
User Roles can be specified if the document is targeted to users with a particular user role. If none are selected, all internal users are able to read and see the document. The Select User Roles dialog box is used.

***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

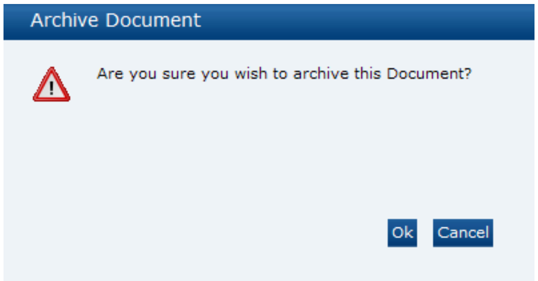
A document can be deleted if it does not contain any readership log details, other than the record of which users have opened it, or has been archived. To delete a document, select the Delete action. The Delete Document dialog box appears. Select **Ok**. The document is deleted:

- 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."

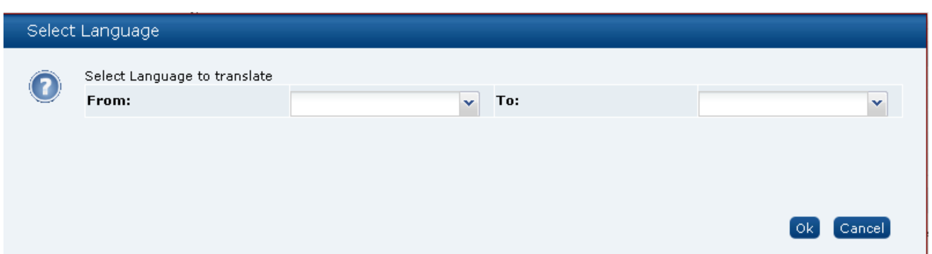
Translations for folders and documents can also be entered directly when the record is being edited.

## Translating Documents

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

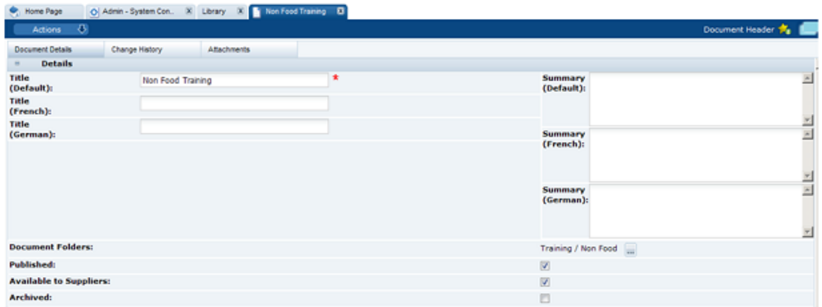
1. Open the document in Read mode. Select the Translate action. The Select Language dialog box appears.

***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***



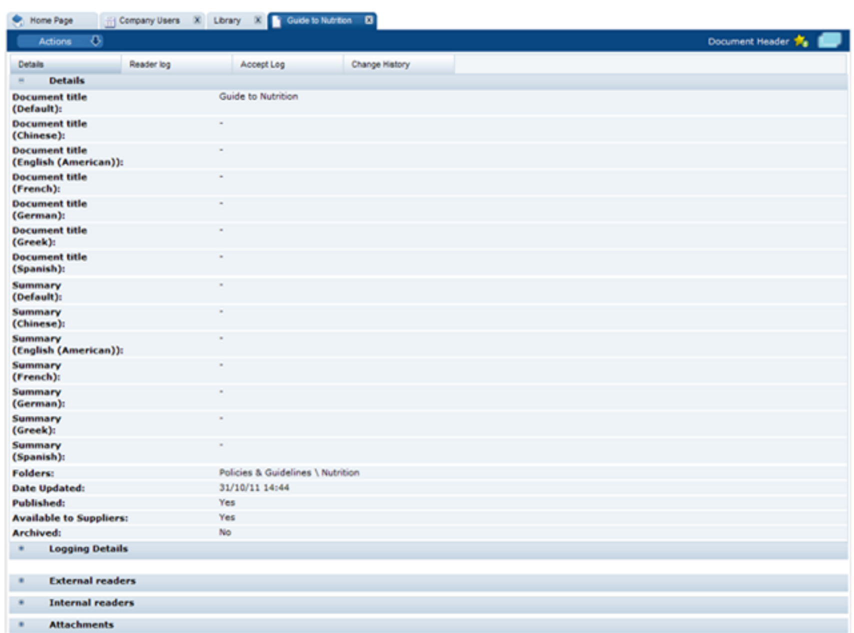
3. Enter the translations for the Title and Summary fields. Select **Ok** when completed.

### 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 Library, 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 Library.

***Table 10–3 System Parameters to Support Library***

| 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 Glossary Administration

The chapter deals with the administration of glossaries used within the system. The following topics are covered in this chapter:

- Bulk Glossary Export
- Single Glossary Export
- Bulk Glossary Import
- Single Glossary Import
- Using Glossary Import/Export to Populate a Clean System

## Bulk Glossary Export

Retailer users with the Glossary Administrator authority profile have access to the Import/Export option within the Admin menu.

To export all glossaries:

1. Select any glossary and then select the Export action from the actions menu. The Glossary Export dialog box opens.

***Figure 11–1 Glossary Export Dialog Box***


2. Set the Export Selection option to Bulk Glossary Export.
3. Set the following filters as required:

- Using the *Export Type* filter:

  This defaults to Base Only which means that all base files will be exported, and the following filters are set and locked to N/A:

  – Output to include Translations that are

  – Limit Languages to Export

  If set to Translations Only, this will export all translations files for any of the selected languages.

- Using the *Output to include Translations that are* filter:

  This defaults to Populated and Blank, which exports all glossaries that have a value for any of the selected languages.

  If set to Populated, the system will export all glossaries that have a value for any of the selected languages.

  If set to Blank, the system will export all glossaries that have no value for any of the selected languages.

- Using the *Languages to Export* filter:

  This always begins with no languages shown as it is assumed the export will be for all languages.

  Selecting one or more languages will limit the export to only those languages.

  ---

  **Note:** Selecting more than five languages will result in an error.

  ---

4. Click **Submit** or **Submit Go to Manage Batch Jobs**. A batch job is submitted to export glossaries using the filters set. All the relevant glossaries will be exported as XLS files which are compressed into a ZIP file and stored as an attachment on the job.

## Single Glossary Export

To export a single glossary:

1. Select the required glossary and then select the Export action from the actions menu. The Glossary Export dialog box opens.

***Figure 11–2 Glossary Export Dialog Box***


2. Set the following filters as required:

   - Using the *Export Type* filter:

     This defaults to Base Only which means that all base files will be exported, and the following filters are set and locked to N/A:

     – Output to include Translations that are

     – Limit Languages to Export

     If set to Base and Translations, this will export all base and translations files for any of the selected languages.

     If set to Translations Only, this will export all translations files for any of the selected languages.

   - Using the *Output to include Translations that are* filter:

     This defaults to Populated and Blank, which exports all glossaries that have a value for any of the selected languages.

     If set to Populated, the system will export all glossaries that have a value for any of the selected languages.

     If set to Blank, the system will export all glossaries that have no value for any of the selected languages.

   - Using the *Languages to Export* filter:

     This always begins with no languages shown as it is assumed the export will be for all languages.

     Selecting one or more languages will limit the export to only those languages.

---

**Note:** Selecting more than five languages will result in an error.

---

3. Click **Ok**. This will initiate the download of a ZIP file containing files according to the filters set.

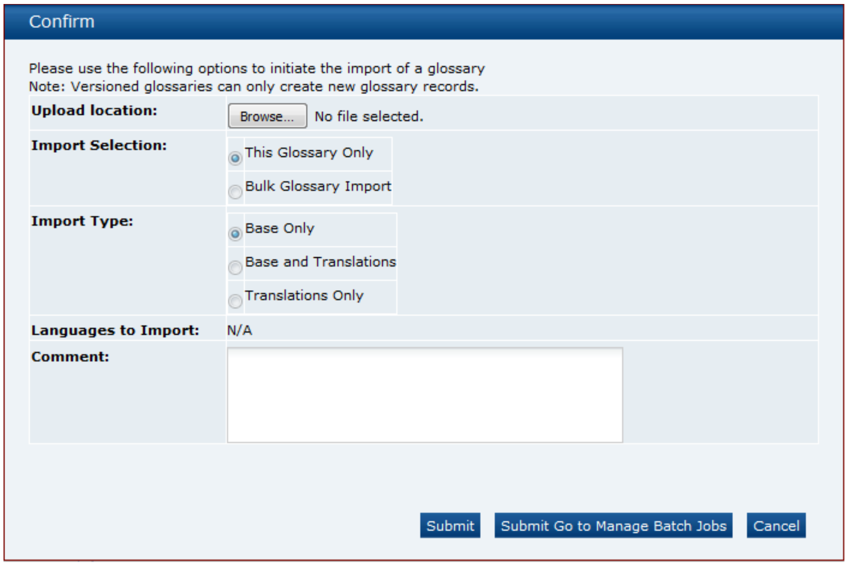
# Bulk Glossary Import

Retailer users with the Glossary Administrator authority profile have access to the Import/Export option within the Admin menu.

To import glossaries:

1. Select any glossary and then select the Import action from the actions menu. The Glossary Import dialog box opens.

***Figure 11–3 Glossary Import Dialog Box***




> **Note:** As the upload of files is limited to 10 MB, this may not be sufficient if you are attempting to upload all the glossaries for the system. An Administrator may therefore need to temporarily increase the *File attachment size limit* parameter.

2. Click **Browse** to locate and attached the file containing the glossary files.

> **Note:** The file being imported may be a single base file or a ZIP file containing one or more base and translation files. The system accepts CSV, XLS, or XLXS file formats.

3. Set the Import Selection option to Bulk Glossary Import.
4. Set the following filters as required:
   - Using the *Import Type* filter:

     This defaults to Base Only which means that all base files will be imported, and the following filter will be set and locked to N/A:

     – Limit Languages to Import

     If set to Base and Translations, this will import all base and translation files for any of the selected languages.

If set to Translations Only, this will import all translations files for any of the selected languages.

- Using the *Languages to Import* filter:

  This always begins with no languages shown as it is assumed the import will be for all languages.

  Selecting one or more languages will limit the import to only those languages.

5. Enter a suitable comment into the comment field.
6. Click **Submit** or **Submit Go to Manage Batch Jobs**. A batch job is submitted to import glossaries using the filters set. All the relevant glossaries will be imported which will be stored within a ZIP file and as an attachment on the job.

---

**Note:** If using the Glossary Import facility to load large numbers of additional ingredients to an Ingredients glossary that is already populated, the processing time may be significant due to the validation checks that are applied.

For example, uploading 4,000 additional ingredients could feasibly take around 2 hours to complete the processing.

In such a scenario, it may be desirable to split the uploads over multiple smaller batches.

---

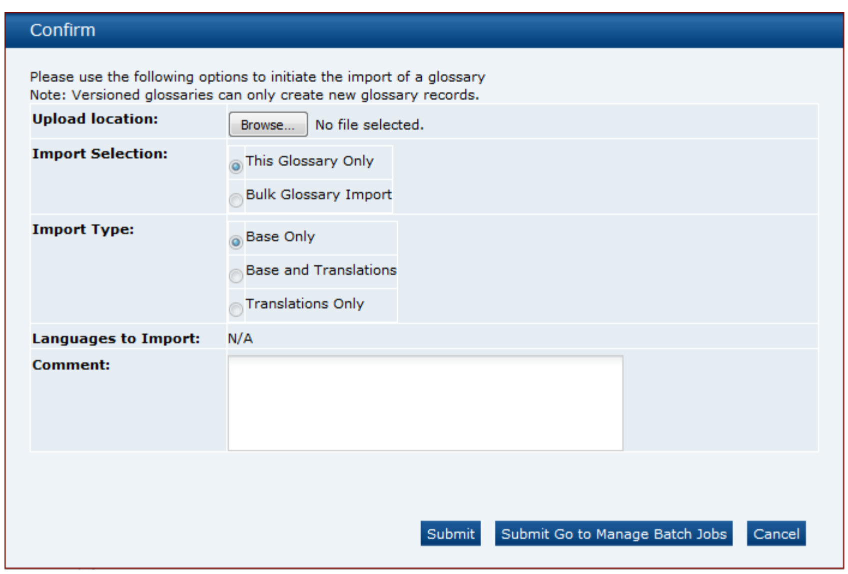
## Single Glossary Import

Retailer users with the Glossary Administrator authority profile have access to the Import option within the actions menu of any glossary list view.

To import a single glossary:

1. Select the glossary in the Admin area and then select the Import action from the actions menu. The Glossary Import dialog box opens.

***Figure 11–4 Glossary Import Dialog Box***




2. Click **Browse** to locate and attached the file containing the glossary files.

**Note:** The file being imported may be a single base file or a ZIP file containing one or more base and translation files. The system accepts CSV, XLS, or XLXS file formats.

3. Set the Import Selection option to This Glossary Only.
4. Set the following filters as required:
   - Using the *Import Type* filter:

     This defaults to Base Only which means that only the base file will be imported, and the following filter will be set and locked to N/A:

     – Limit Languages to Import

     If set to Base and Translations, this will import a base file and translation files for any of the selected languages.

     If set to Translations Only, this will import all translations files for any of the selected languages.
   - Using the *Languages to Import* filter:

     This always begins with no languages shown as it is assumed the import will be for all languages.

     Selecting one or more languages will limit the import to only those languages.
5. Enter a suitable comment into the comment field.
6. Click **Submit** or **Submit Go to Manage Batch Jobs**. A batch job is submitted to import a glossary using the filters set. All the relevant files will be imported which will be stored within a ZIP file and as an attachment on the job.

**Note:** If using the Glossary Import facility to load large numbers of additional ingredients to an Ingredients glossary that is already populated, the processing time may be significant due to the validation checks that are applied.

For example, uploading 4,000 additional ingredients could feasibly take around 2 hours to complete the processing.

In such a scenario, it may be desirable to split the uploads over multiple smaller batches.

# Using Glossary Import/Export to Populate a Clean System

The bulk import/export facility can be used to populate a new system with the glossary entries and their translations from another system, for example to load a UAT test system with data from the Live system.

**Note:** Remember to set system parameters as required prior to loading glossaries into a new system.

## Single Language Glossaries

The following steps and typical timings are for exporting, amending, and importing a single language glossary:

1. Log in as a user that has the Oracle Authorized User authority profile.
2. Open the glossary list view.
3. Select the Export action.

   Set the selection as Bulk Glossary Export and Base Only.
4. Click **Submit**.
5. Go to Batch Jobs / Manage Batch Jobs to check for completion of the export.

   The export should complete within a few minutes.
6. Save the ZIP file to your local drive and extract the glossary CSV file.
7. Make any updates, additions, or deletions to the glossary contents within the CSV file, then save, and optionally compress to a ZIP file.
8. Select the Import action within the glossary's list view.
9. Click **Browse...** and select the CSV or ZIP file to import.

   Set the selection as Bulk Glossary Import and Base Only.
10. Click **Submit**.
11. Go to Batch Jobs / Manage Batch Jobs to check for completion of the import.

    The job may take around 10 to 20 minutes, depending on volume of glossary data.

    Fix any errors and resubmit before moving on to import translations.
12. Refresh the glossary list view to see the new entries listed.

## Multi-Language Glossaries

The following steps and typical timings are for exporting, amending, and importing a multi-language glossary:

1. Log in as a user that has the Oracle Authorized User authority profile.
2. Open the glossary list view.
3. Select the Export action.

   Set the selection as Bulk Glossary Export, Translations Only, and Populated.

   Select the desired languages. A maximum of five languages can be selected for each Export. If more than five are required, run the export again to export the languages in batches of five.
4. Click **Submit**.
5. Go to Batch Jobs / Manage Batch Jobs to check for completion of the export.

   The job may take around 10 to 20 minutes, depending on volume of glossary data.
6. Save the ZIP file to your local drive and extract the glossary CSV file.
7. For the Ingredients glossary, remove unwanted translation files for the bwsIngredient, ingredient, fnfIngredient, and produceIngredient files. These glossaries contain a large amount of data and applying translations can be a lengthy process. Save and optionally compress to a ZIP file.
8. Select the Import action within the glossary's list view.
9. Click **Browse...** and select the CSV or ZIP file to import.

   Set the selection as Bulk Glossary Import and Base Only.

10. Click **Submit**.
11. Go to Batch Jobs / Manage Batch Jobs to check for completion of the import.

    The job may take around 10 to 20 minutes, depending on volume of glossary data.

    Fix any errors and resubmit before moving on to import translations.
12. Repeat the process to import the translations by setting the selection as Translations Only.

    Each set of five language translations should import in around 10 to 30 minutes depending on the volume of glossary data.

# 12 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 Oracle Retail Brand Compliance Management Cloud Service modules 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 module 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 Oracle Retail Brand Compliance Management Cloud Service modules have been translated into the following languages:

- Chinese-Simplified
- Dutch
- French
- German
- Italian
- Japanese
- Portuguese-Brazilian
- Russian
- Spanish-Worldwide

- Swedish

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.

# A

# Appendix: SSL Certificate Management

This appendix contains additional information related to the configuration of ORBC environments, such as the process for setting up SSL certificates for Production and UAT environments.

All Oracle Cloud Services must be securely accessed by using SSL Certificates. Oracle will accept individual Web Server Certificates or SAN Certificates. The use of wildcard certificates is not permitted.

## Domain (URL) Management

The Oracle Brand Compliance service (ORBC) typically requires four internet domains (URLs) to be registered in order to access the service:

- **Production**

  Domain 1: URL to access the primary ORBC web portal.

  Domain 2: URL to access the ORBC Reporting portal (this portal is only accessed from within the ORBC web portal).

- **UAT**

  Domain 3: URL to access the UAT primary ORBC web portal.

  Domain 4: URL to access the UAT ORBC Reporting portal (this portal is only accessed from within the ORBC web portal).

The above domains are registered and managed by you, the customer.

## Domain Mapping Example

Below is an example of how each domain is mapped in a DNS configuration.

There is a Common Name, which will be the primary domain name, such as orbc-customerdomain.com and then sub-domains. Each domain is then mapped to point to the Oracle CNAME record for each of the ORBC web portals.

### Domain Mapping Overview for orbc-customerdomain.com

- **Production**

```
Customer External Domain       Oracle Domain - CNAME Record
www.orbc-customerdomain.com    cou1-orbc-prod.retail.oracleindustry.com
rep.orbc-customerdomain.com    cou1-orbc-prod-rep.retail.oracleindustry.com
```

- **UAT**

```
External Domain                 Domain - CNAME Record
uat.orbc-customerdomain.com     cou1-orbc-uat.retail.oracleindustry.com
uatrep.orbc-customerdomain.com  cou1-orbc-uat-rep.retail.oracleindustry.com
```

The above is for guidance purposes only; you are free to choose the naming of your domains and the associated configuration.

# Procedure Summary

This procedure assumes the use of SAN based SSL certificates.

1. Ensure your DNS configuration is configured and propagated to the internet.
2. Provide Oracle with your domain registrant information and the Common Domain name to Oracle. See the required information format below.
3. Oracle will generate a Certificate Signing Request (CSR) file and will issue it to you, based on the information you provided in Step 2.
4. You will need to procure the SSL Certificate with your preferred SSL Certificate Authority (CA) vendor.
5. Ensure you request a SAN SSL Certificate and include all the required subdomains you have registered for the ORBC service to the certificate.
6. Once you have the CA signed SSL certificate, send the signed SAN Certificate (including any intermediate key chain certs) or URL web address (recommended) to retrieve the SSL, to Oracle.
7. Oracle will publish the SSL certificate and will inform you when completed.

### SSL Information Format Example

Organization Name: Acme UK Ltd.

Organization Unit: Logistics

State: Leicestershire

Locality: Leicester

Country Code: GB

Common Name: orbc-acme-logistics.com

The above information must be completely identical to the registrant information you have registered with your SSL Certificate Authority vendor.