Oracle® Retail Brand Compliance Management Cloud Service

User Guide

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Oracle Retail Brand Compliance Management Cloud Service User Guide, Release 19.15

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Primary Author: Bernadette Goodman

Contributing Authors: Simon Tucker, Aidan Ratcliffe

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Contents

Send Us Your Comments

Preface

Audience vii
Documentation Accessibility vii
Related Documents vii
Improved Process for Oracle Retail Documentation Corrections viii
Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com) viii
Conventions viii

1 Introduction

IDCS or OCI IAM Integration for Authentication 1-1
Passwords 1-2
Language Support 1-3

2 Getting Started

Login 2-1
- Login using IDCS 2-1
  - Activating your User Profile 2-3
  - Changing your Password 2-3
- Login using OCI IAM 2-5
  - Activating your User Profile 2-7
  - Changing your Password 2-8

Home Page 2-11
- Navigation Bar 2-12
- Apps Available on the Home Page 2-13
  - Manage Apps Link 2-14
  - Create a New App 2-15
  - Manage News Link 2-15
  - Refresh Workspace 2-16

Changing the Layout of the Home Page 2-16
Session Timeout 2-16
Logout 2-16

3 User Information

Changing your Password 3-1
Changing your Email Address 3-1
Changing your Email Address using IDCS 3-1
Changing your Email Address using OCI IAM 3-3
Editing your Profile 3-4
Editing your Preferences 3-5

4 News App

Personalize the News App 4-3

5 Managing Actions

Urgent Items Manager 5-1
Using the UIM 5-1
Working with Urgent Item Categories 5-3
Alert Response Items 5-3
Audit/Visit Items 5-3
Document Items 5-4
News Items 5-5
Project Items 5-6
Scorecard Items 5-6
Supplier and Site Management Items 5-6
User Items 5-7
Tasks App 5-7
Supplier Tasks 5-8
Alerts 5-8
Audits and Visits 5-8
Scorecards 5-8
Sites 5-8
Product Tasks 5-8
Product Specifications at Status 5-8
Produce Specifications 5-9
Surveillance 5-9
Project Tasks 5-9

Library Tasks 5-10

6 List Views

Changing the List View 6-2
Searches 6-3
Simple Search 6-3
Advanced Search 6-5

7 Change History Logs

Table 7-2
Status 7-3
Attachment Manager 7-4
Product Specification 7-5

8 Library

Locating a Document 8-2
Reading a Document 8-3
Marking a Document 8-3
Marking a Document as Read 8-3
Marking a Document as Accepted 8-5
Viewing the Reader Log 8-6
Viewing the Accept Log 8-7

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Oracle Retail Brand Compliance Management Cloud Service User Guide, Release 19.15

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Preface

This document describes the Oracle Retail Brand Compliance Management Cloud Service user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

> **Note:**
>
> **IDCS Update to Identity Provider**
>
> References in the text or images within this document, to IDCS, IDCS or OCI IAM, Identity Cloud Service, or Identity Management have been replaced by Identity Provider within the actual application.

Audience

This document is intended for users of the Oracle Retail Brand Compliance Management Cloud Service modules.

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Related Documents

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

- *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Implementation Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Release Readiness 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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If a more recent version of the document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)

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

`https://docs.oracle.com/en/industries/retail/index.html`

(Data Model documents can be obtained 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.
- Reports - reporting tool for reporting across the system, using standard templates and custom reports.

For more information on any of these modules, see the module User Guide. For information on Library, see Library.

> **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.

IDCS or OCI IAM Integration for Authentication

From release 18.2, the authentication of user and external system identity for access to Oracle Retail Brand Compliance Management Cloud Service is managed by Oracle Identity Cloud Service (IDCS) or Oracle Cloud Infrastructure Identity and Access Management (OCI IAM). This strategic initiative is a move towards most Oracle Retail Cloud Service applications using IDCS or OCI IAM for authentication, thus paving the way for single sign-on across the product range. In the meantime, Brand Compliance will implement IDCS or OCI IAM as a standalone means of identity authentication.

> **Note:**
>
> When IDCS or OCI IAM integration is implemented, it becomes the sole means of authentication for users and external systems. In the event of the IDCS or OCI IAM tenant not being available to perform authentication, access to Brand Compliance will not be permitted.

The key features of the IDCS or OCI IAM authentication for Brand Compliance are as follows:

- All users and external systems log in to Brand Compliance using an individual IDCS or OCI IAM profile.
- Each Brand Compliance portal instance has dedicated IDCS or OCI IAM tenants, for its production and staging/UAT environments.
- New users are created in Brand Compliance, which automatically triggers creation of an IDCS or OCI IAM profile.
- User roles map to groups in IDCS or OCI IAM to control users' level of access.
- All maintenance of passwords and email addresses is carried out by the user in IDCS or OCI IAM.
- The user maintains all other account details in Brand Compliance.
- An hourly batch job automatically synchronizes changes between Brand Compliance and IDCS or OCI IAM.
- External systems accounts, used to access the Brand Compliance APIs, are treated the same as users.

> **Note:**
>
> User documentation for IDCS can be found at the *Oracle Identity Cloud Service* page on Oracle Help Center:
>
> https://docs.oracle.com/en/cloud/paas/identity-cloud/
>
> User documentation for OCI IAM can be found at the *Oracle Cloud Infrastructure Identity and Access Management* page on Oracle Help Center:
>
> https://docs.oracle.com/en-us/iaas/Content/Identity/home.htm

Passwords

From release 18.2, all Brand Compliance password management is handled by IDCS or OCI IAM. The system administrator configures the rules for password format strength and expiry within IDCS or OCI IAM. For example, you may need to enter a password that is at least five characters and includes at least one numeric character. Also, you may be prevented from reusing a previous password. For information on your password requirements, consult your system administrator.

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

Language Support

Oracle Retail Brand Compliance Management Cloud Service supports multiple languages. The Login page is displayed in the language derived from the user's browser settings. Once logged in, the pages are displayed in the language selected for the user. For information on selecting the language, see Editing your Profile. The system supports the UTF-8 character set.

> **Note:**
>
> Users operating with their locale (language) set to Argentina (es_AR), Brazil (pt_BR), or Chile (es_CL) will see numbers formatted with a comma as the decimal point separator; all other locales use a period as the separator. All locales use a comma as the thousands separator.

2
Getting Started

This chapter provides an introduction to accessing and using Oracle Retail Brand Compliance Management Cloud Service. The following topics are covered in this chapter:

- Login
- Home Page
- Session Timeout
- Logout

Login

To log in using IDCS, see Login using IDCS.

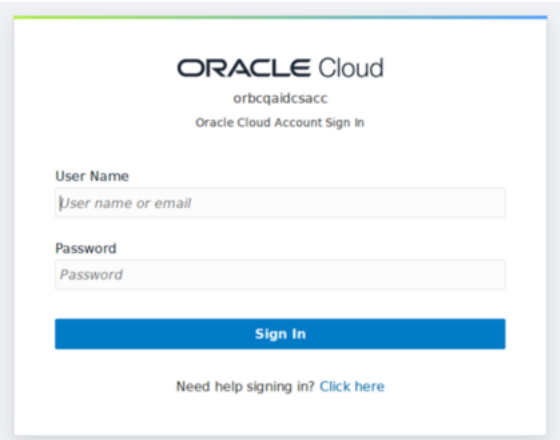
To log in using OCI IAM, see Login using OCI IAM.

Login using IDCS

To log in to Oracle Retail Brand Compliance Management Cloud Service:

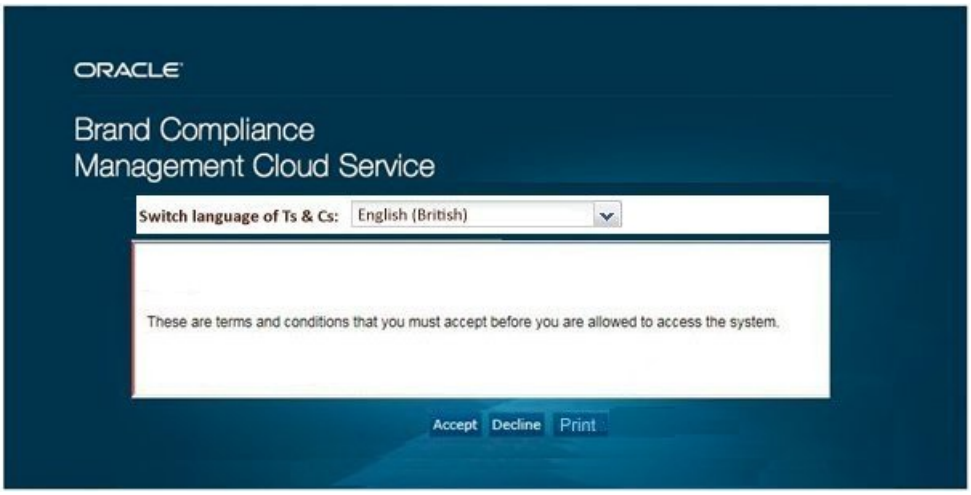
1. To start the application, open a web browser. Enter the URL for your Oracle Retail Brand Compliance Management Cloud Service application. The IDCS login page appears.

Figure 2-1 IDCS Login Page



2. Enter your user name and password and then click **Sign In**.
3. If the Brand Compliance Terms and Conditions page appears, you must accept the Terms and Conditions. Read the terms and conditions. You may choose to view the terms and conditions in any of the supported languages. To continue with the login, select **Accept**.

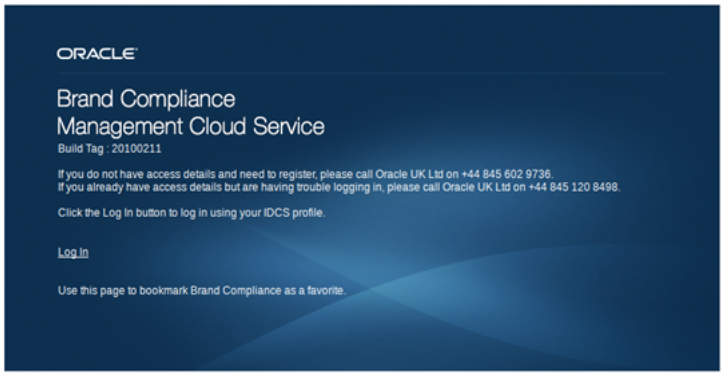
Figure 2-2 Terms and Conditions Page



The Home page appears. See Home Page

To bookmark Brand Compliance, navigate to the Landing page by logging off and use this page to add Brand Compliance to your browser favorites.

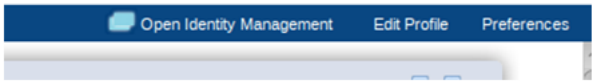
Figure 2-3 Brand Compliance Landing Page



If your Brand Compliance user account has been disabled, you will see a page preventing login, and instructing you to contact your administrator.

To log in to Identity Cloud Service (IDCS), click **Open Identity Management** in the Brand Compliance navigation bar.

Figure 2-4 Identity Management Link



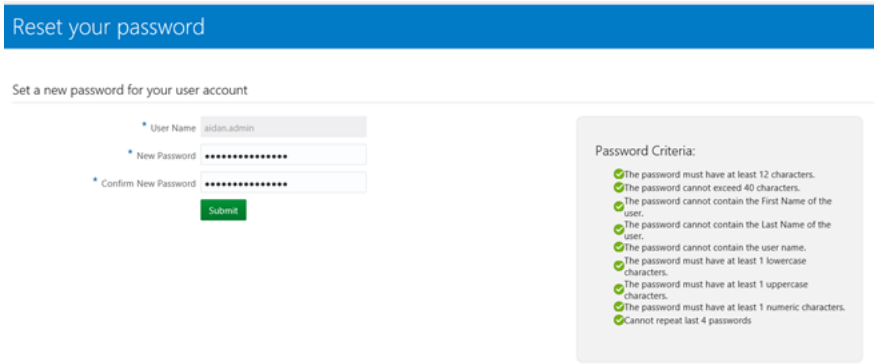
Activating your User Profile

When your user account has been created in Brand Compliance, it will automatically create an Identity Cloud Service (IDCS) user profile, where you will manage your password and email address.

Once the profile has been created, you will receive a *Welcome* email.

1. From the *Welcome* email, click **Activate Your Account** in the email to open the Reset Password page.

Figure 2-5 IDCS Reset Password Page



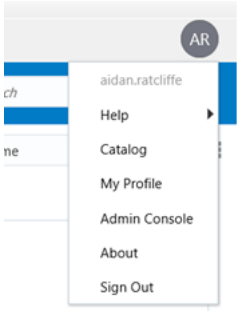
2. Enter a new password. The Password Criteria on the right will indicate when your new password meets the necessary criteria.
3. Click **Submit** to confirm the change. You will receive a *Password has been reset* email.

Changing your Password

To change your password within IDCS:

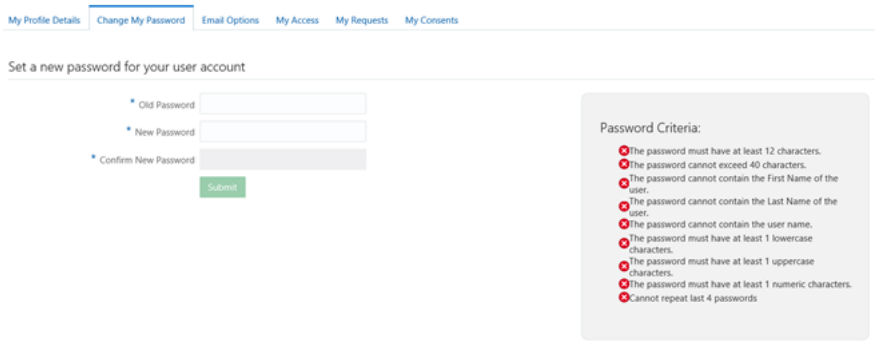
1. Click the icon showing your initials, in the top right hand corner, to open the IDCS profile menu.

Figure 2-6 IDCS Profile Menu



2. Click **My Profile** and select the Change My Password tab to open the Change My Password page.

Figure 2-7 IDCS Change My Password Page

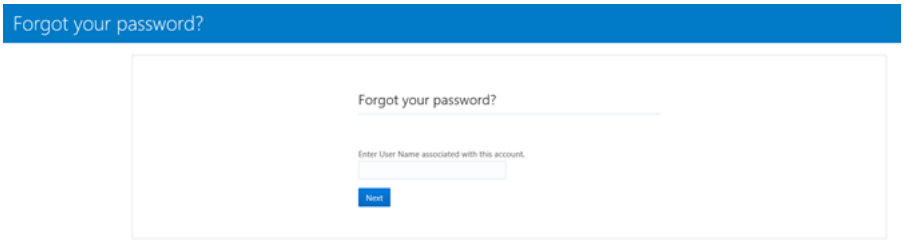


3. Enter your current password and the new password. The Password Criteria on the right will indicate when your new password meets the necessary criteria.
4. Click **Submit** to confirm the change and return to your profile.

To change your password if you cannot remember the password:

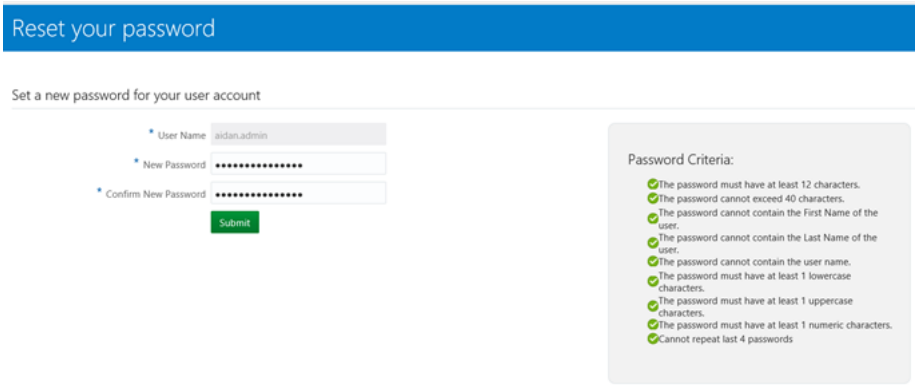
1. Select the **Can't sign in?** link on the IDCS Login page.
2. Enter your user name in the Forgotten Password page.

Figure 2-8 IDCS Forgotten Password Page



3. Click **Next**, then click **Submit**.
4. You will receive a *Please reset your password* email. Click **Reset Password** in the email to open the Reset Password page.

Figure 2-9 IDCS Reset Password Page



5. Enter a new password. The Password Criteria on the right will indicate when your new password meets the necessary criteria.
6. Click **Submit** to confirm the change, then click **Click here to continue** on the confirmation page to proceed to the IDCS Login page. You will receive a *Password has been reset* email confirming the password has been reset.

If your profile has been locked, you will receive an *Account is locked* email. Click **Password Reset** in the email and follow the above process to reset your password.

If your password has expired or your profile has been deactivated, you will see the message *Invalid username or password* when you attempt to log in. Contact your administrator.

If your IDCS profile is deactivated by the administrator, you will receive a *Your user profile has been deactivated* email.

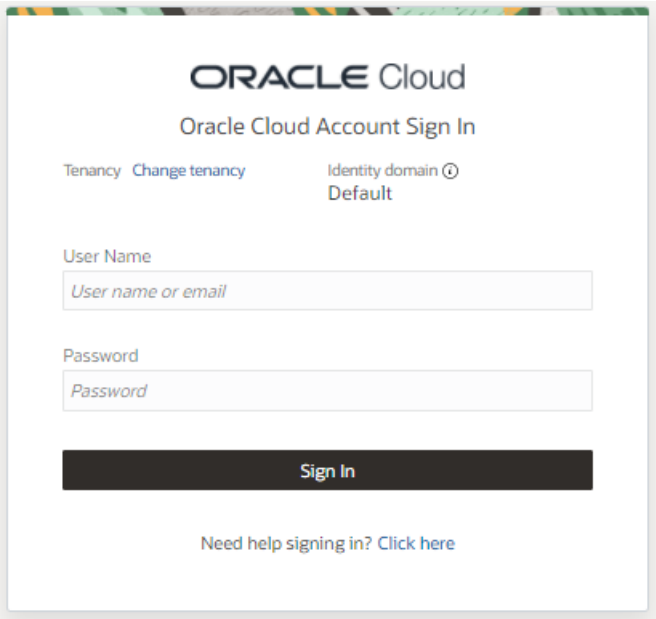
If the administrator reactivates your profile, you will receive a *Your account has been activated* email. Click **Home** in the email to log in to your IDCS profile.

Login using OCI IAM

To log in to Oracle Retail Brand Compliance Management Cloud Service:

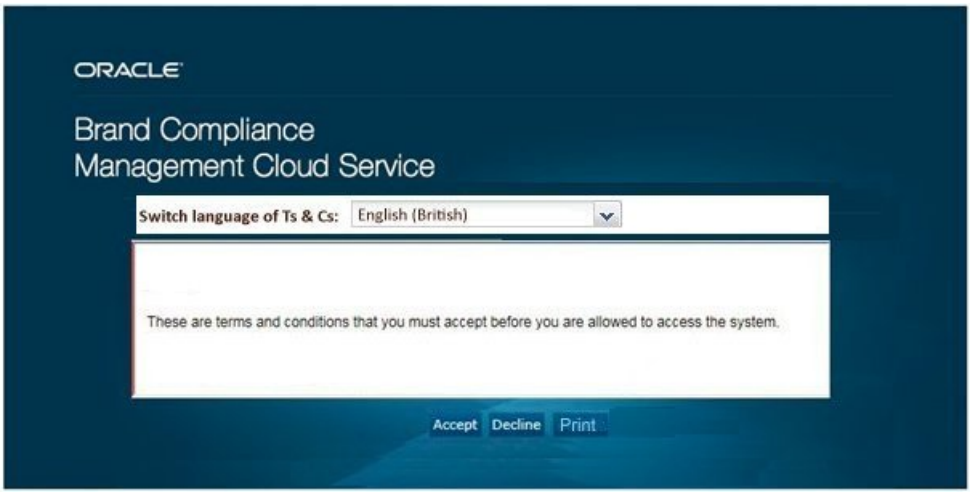
1. To start the application, open a web browser. Enter the URL for your Oracle Retail Brand Compliance Management Cloud Service application. The OCI IAM login page appears.

Figure 2-10 OCI IAM Login Page



2. Enter your user name and password and then click **Sign In**.
3. If the Brand Compliance Terms and Conditions page appears, you must accept the Terms and Conditions. Read the terms and conditions. You may choose to view the terms and conditions in any of the supported languages. To continue with the login, select **Accept**.

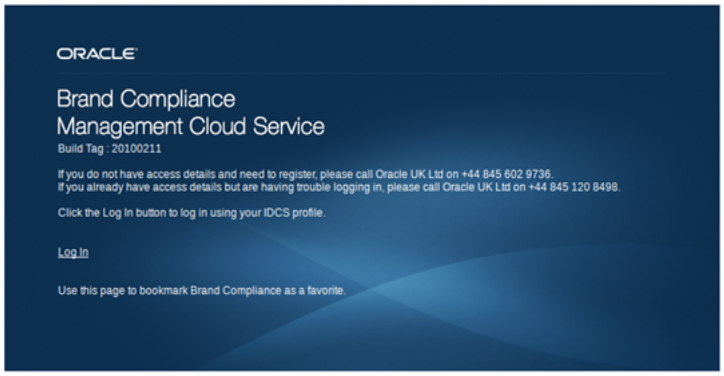
Figure 2-11 Terms and Conditions Page



The Home page appears. See Home Page

To bookmark Brand Compliance, navigate to the Landing page by logging off and use this page to add Brand Compliance to your browser favorites.

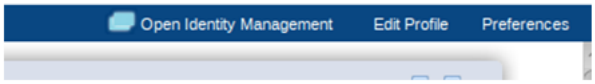
Figure 2-12 Brand Compliance Landing Page



If your Brand Compliance user account has been disabled, you will see a page preventing login, and instructing you to contact your administrator.

To log in to Oracle Cloud Infrastructure Identity and Access Management (OCI IAM), click **Open Identity Management** in the Brand Compliance navigation bar.

Figure 2-13 Identity Management Link



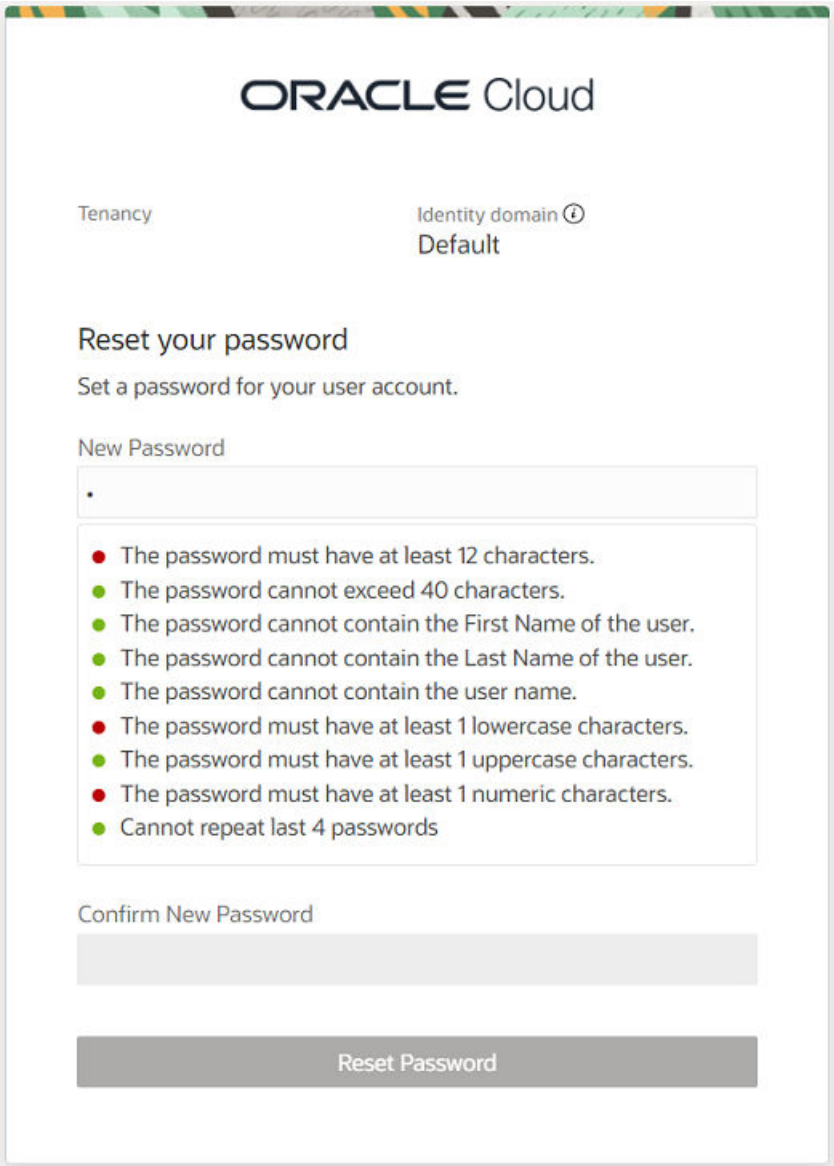
Activating your User Profile

When your user account has been created in Brand Compliance, it will automatically create an Oracle Cloud Infrastructure Identity and Access Management (OCI IAM) user profile, where you will manage your password and email address.

Once the profile has been created, you will receive a *Welcome* email.

1. From the *Welcome* email, click **Activate Your Account** in the email to open the Reset Password page.

Figure 2-14 OCI IAM Reset Password



2. Enter a new password. The Password Criteria will indicate when your new password meets the necessary criteria.
3. Enter the new password again to confirm it.

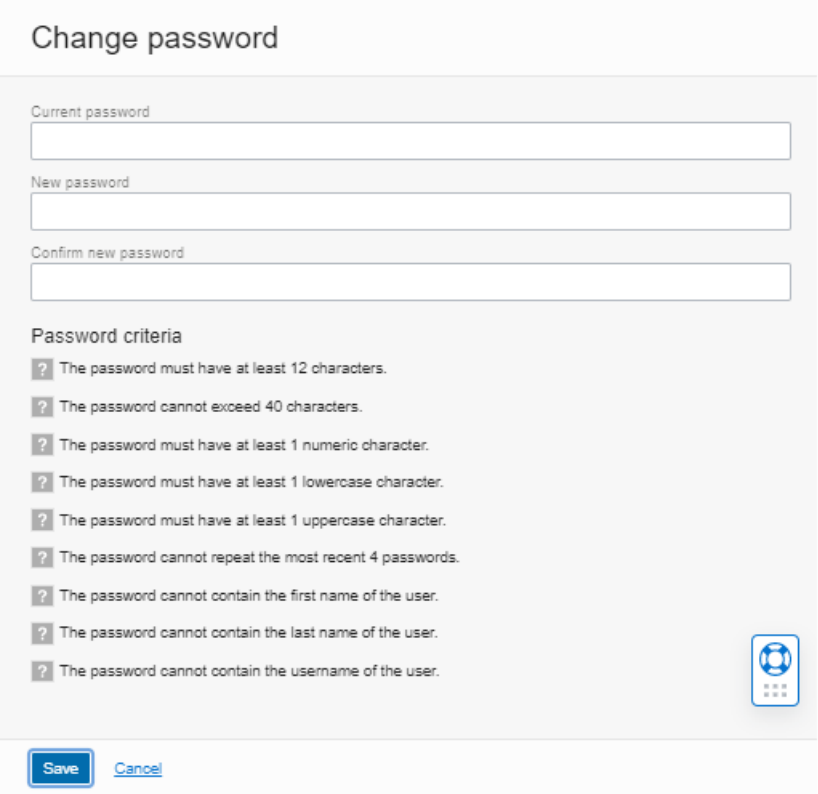
4. Click **Reset Password**. You will receive a *Password has been reset* email.

Changing your Password

To change your password within OCI IAM:

1. Click the Profile icon, in the top right hand corner, to open the OCI IAM profile menu.
2. Click **My Profile** and then select **Change password** to open the Change Password page.

Figure 2-15 OCI IAM Change Password

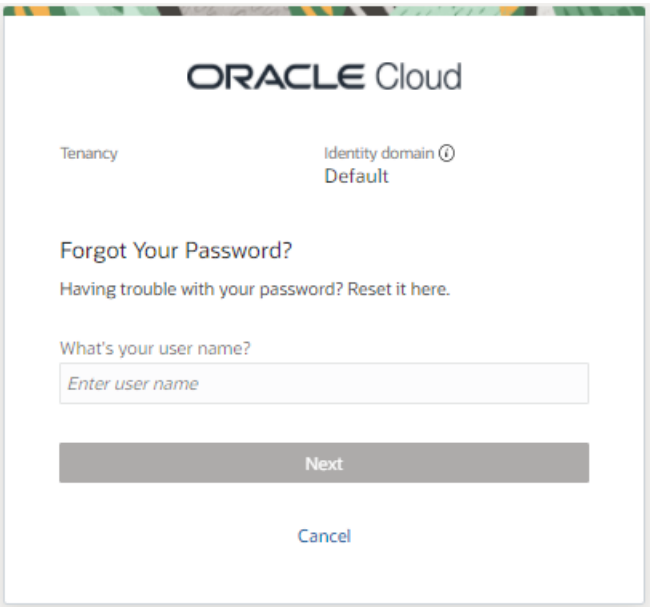


3. Enter your current password and the new password. The Password criteria will indicate when your new password meets the necessary criteria.
4. Click **Save** to confirm the change and return to your profile.

To change your password if you cannot remember the password:

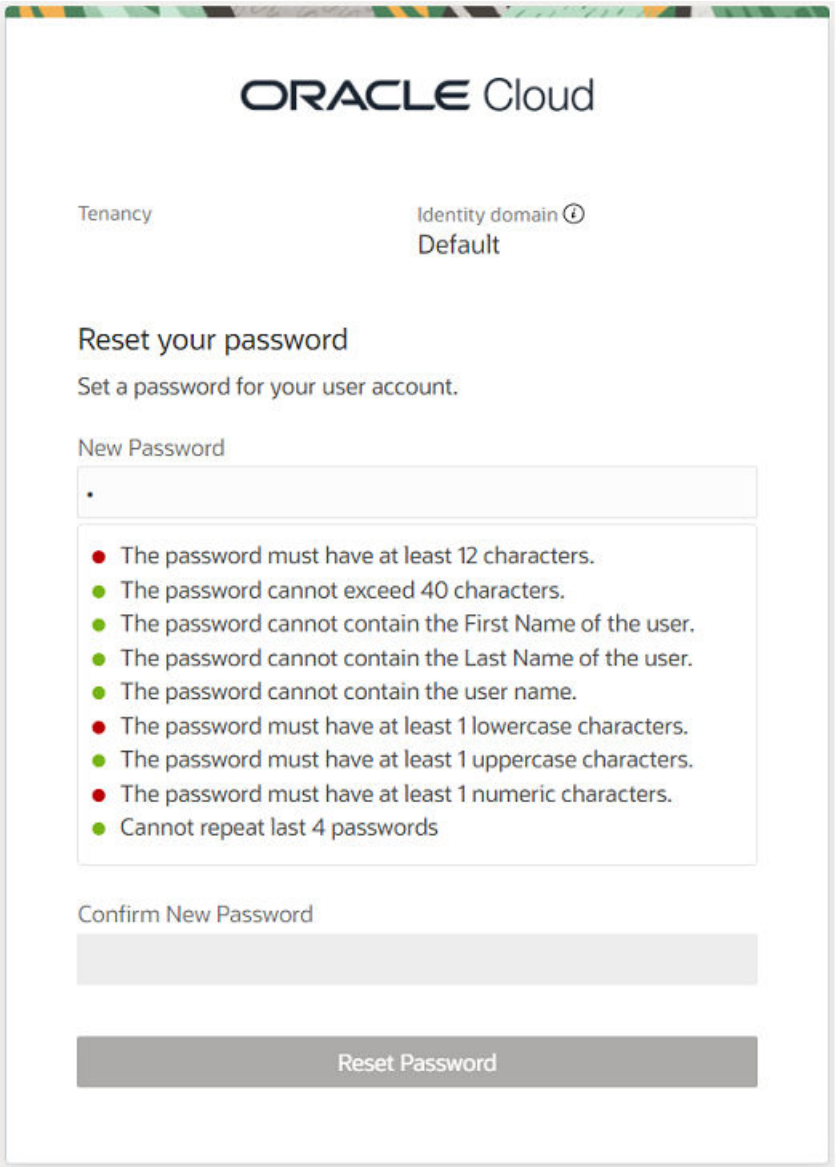
1. Select the Need help signing in? **Click here** link on the OCI IAM Login page. The Forgot Your Password page is displayed
2. Enter your user name in the Forgot Your Password page.

Figure 2-16 OCI IAM Forgot Your Password



3. Click **Next**. A password reset notification is sent to your email address. In the email, click **Password Reset**. The Reset Password page is displayed.

Figure 2-17 OCI IAM Reset Password



4. Enter a new password. The Password Criteria will indicate when your new password meets the necessary criteria.
5. Enter the new password again to confirm it.
6. Click **Reset Password**. You will receive a *Password has been reset* email.

If your profile has been locked, you will receive an *Account is locked* email. Click **Password Reset** in the email and follow the above process to reset your password.

If your password has expired or your profile has been deactivated, you will see the message *Invalid username or password* when you attempt to log in. Contact your administrator.

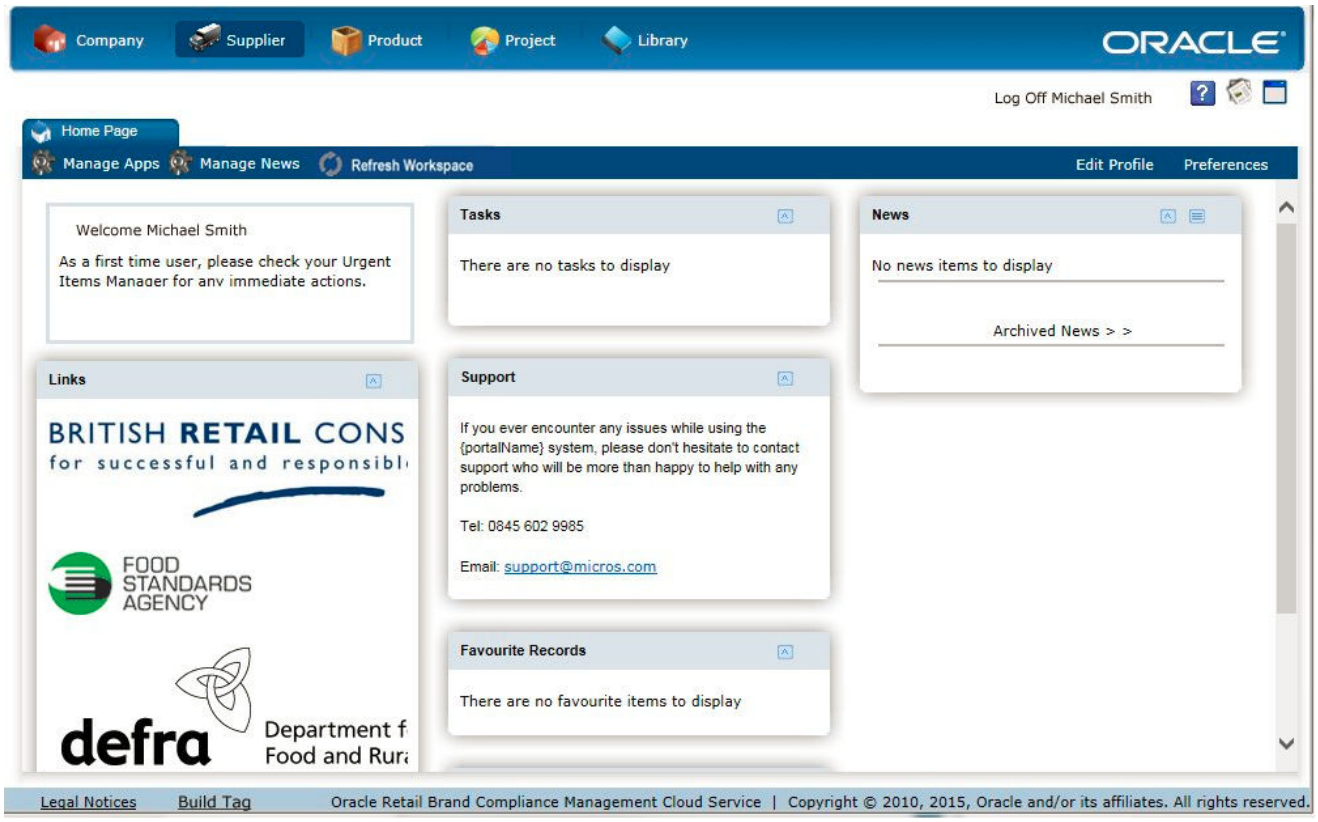
If your OCI IAM profile is deactivated by the administrator, you will receive a *Your user profile has been deactivated* email.

If the administrator reactivates your profile, you will receive a *Your account has been activated* email. Click **Home** in the email to log in to your OCI IAM profile.

Home Page

After successfully logging in, the Home page appears.

Figure 2-18 Home Page

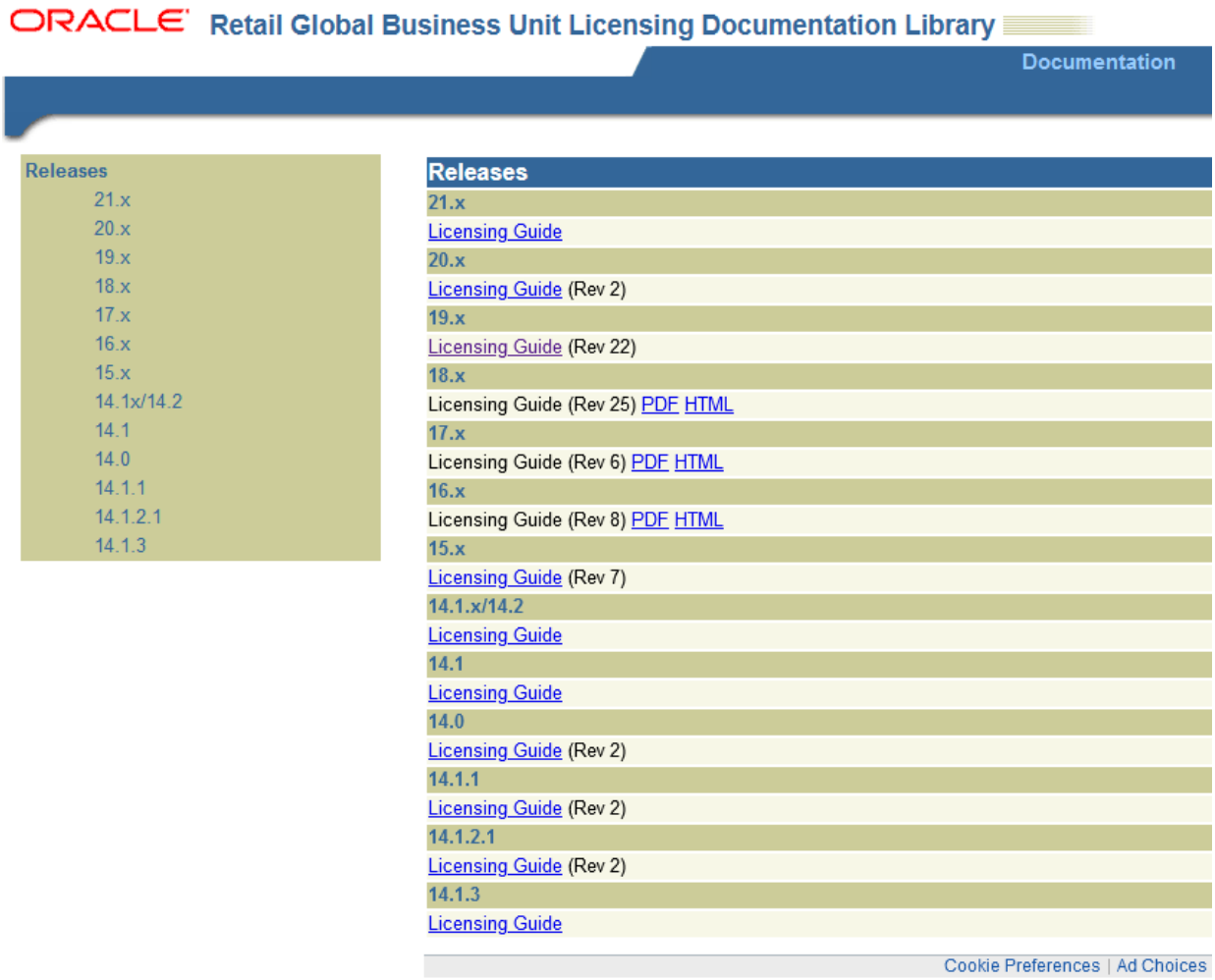


Clicking the Legal Notices link at the bottom of the page displays a message box containing options to display details of all third-party software components that are used within the system.

Figure 2-19 Legal Notices

To view the legal notices, click the link. A page appears containing links to the Oracle Retail Licensing Information documents, which describe the third-party software components. An example is shown in Figure 2-20.

Figure 2-20 Example of Legal Notices



Clicking the Build Tag link at the bottom of the home page displays a message box containing the full Oracle Retail Brand Compliance Management Cloud Service release version that the portal is currently running.

Figure 2-21 Example of Build Tag

Navigation Bar

The navigation bar shows the Oracle Retail Brand Compliance Management Cloud Service modules that you can access. To access a module, select the icon in the

navigation bar or an option from the actions available for the module. A new tab is opened to enable you to access the module.

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

- Company Details. The details, such as contact name and address, can be viewed and edited.
- Users. The Company Users tab opens. For more information on working with user information, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide.*
- Admin. For more information on administration functionality, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide.*

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

Table 2-1 Icons on Home Page

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

Apps Available on the Home Page

The following Apps are available on the home page:

Welcome

Displays a welcome message.

Links

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

Tasks

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

Support

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

Favourites

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

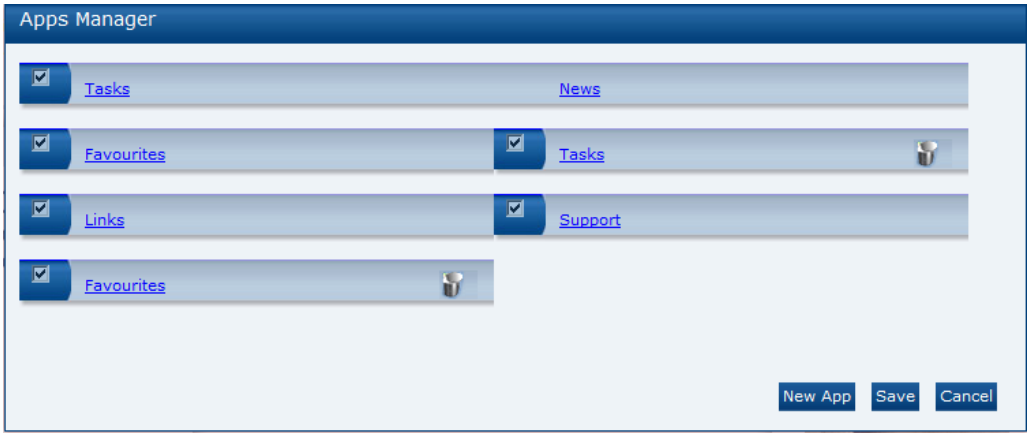
News

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

Manage Apps Link

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

Figure 2-22 Apps Manager Dialog Box



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

The following functionality is available for System Administrators:

- The title and other details for the App can be edited. Click the link and a tab opens. For an example of the content, see Figure 2-23.
- If a delete icon is displayed for the App, click the icon to delete the App. The Confirm Delete dialog box appears. Select **Ok**.

- A new App can be created. For more information, see Create a New App.

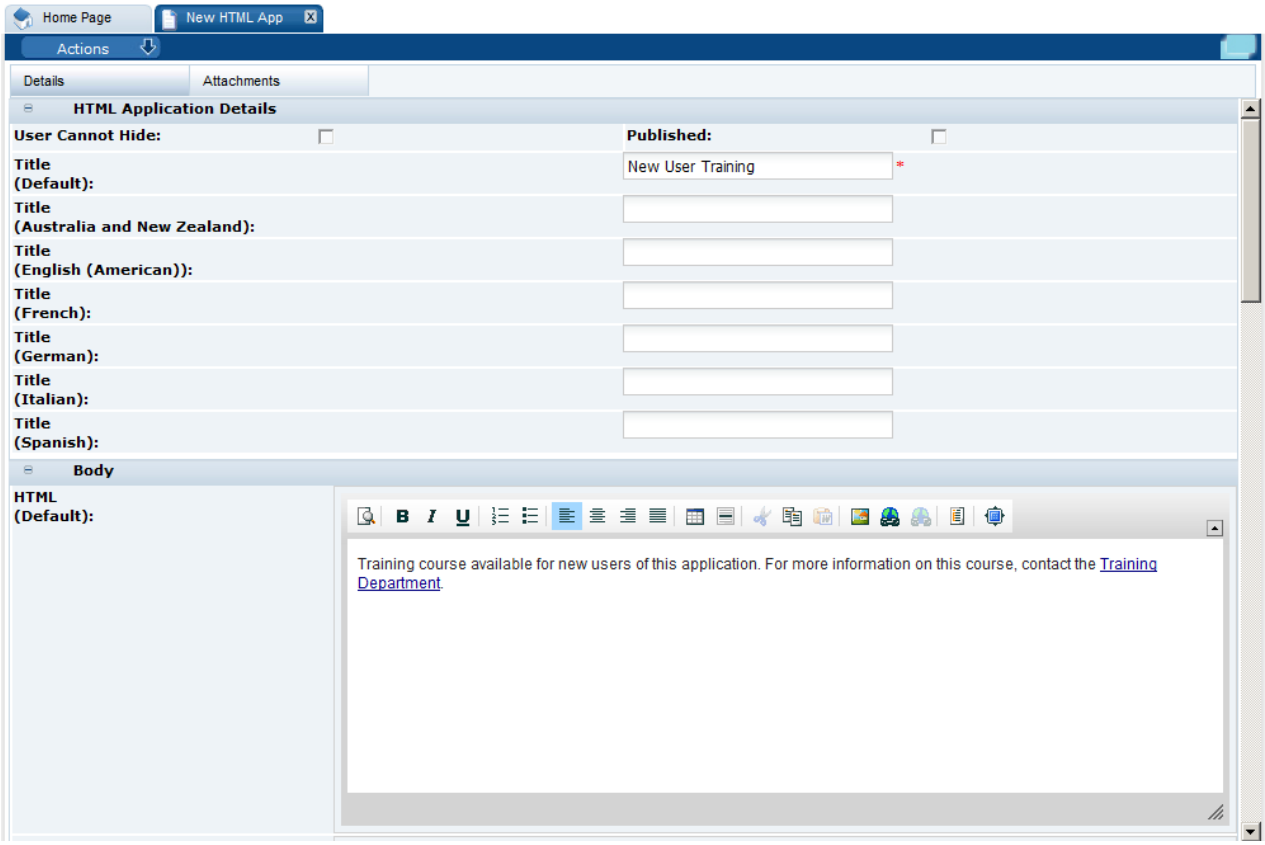
When you have made all your updates, select **Save**.

Create a New App

To create a new App:

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

Figure 2-23 New HTML App Page



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

Manage News Link

For information on this functionality, see News App.

Refresh Workspace

Refresh Workspace refreshes the contents of your Task, UIM, and News apps, and the Favorites and Recent Items lists.

> **Note:**
>
> Automatic refreshing of these items may have been disabled in order to reduce unnecessary server workload.
>
> If your portal has been configured to not perform refreshes automatically, the contents will only refresh when you log in or click Refresh Workspace; otherwise, they will be automatically refreshed whenever the contents change.
>
> The refresh option is hidden if auto-refresh is enabled for the portal.

Changing the Layout of the Home Page

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

Session Timeout

The system can define a timeout interval for sessions. If the user does not interact with the session within that interval, the user is automatically logged out. The session timeout is handled by IDCS or OCI IAM. The session expiration time is configurable, however the standard default is 480 minutes (8 hours). Regardless of how much you interact with the system, once you reach the time limit you will be logged out of Brand Compliance and IDCS or OCI IAM. To avoid the timeout, periodically log off and on again, to reset the expiration time.

> **Note:**
>
> IDCS or OCI IAM does not issue a warning prior to session timeout. Any unsaved edits will be lost.
>
> The Brand Compliance timeout is not configurable, but is set to 8 hours, to match the IDCS or OCI IAM default.

Logout

To log out of Brand Compliance, select **Log Off** in the top right hand corner. A confirmation message box is presented.

Figure 2-24 Confirm Log Out

Click **Yes** to confirm logout. You will be taken to the Brand Compliance Landing page.

Logout using IDCS

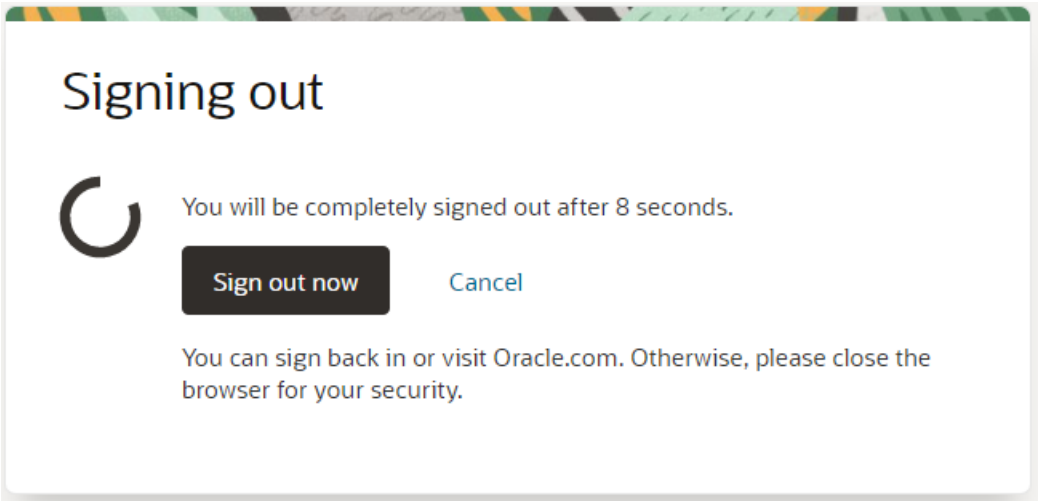
To log out of IDCS, select **Sign Out** from the IDCS profile menu. You will be returned to the IDCS Login page.

> **Note:**
>
> If you log out of IDCS with any unsaved edits pending, you will not be prompted, and the edits will be lost.

Logout using OCI IAM

To log out of OCI IAM, select **Sign Out** from the OCI IAM profile menu. The Signing out page is displayed.

Figure 2-25 Signing Out



Once you are signed out, the Sign in page is displayed.

> **Note:**
>
> If you log out of OCI IAM with any unsaved edits pending, you will not be prompted, and the edits will be lost.

3
User Information

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

The following topics are covered in this chapter:

- Changing your Password
- Changing your Email Address
- Editing your Profile
- Editing your Preferences

Changing your Password

To change your password, see Changing your Password.

Changing your Email Address

Your user details are maintained in your Brand Compliance user account, other than your password and email address, which are maintained in your IDCS or OCI IAM profile.

> **Note:**
>
> Brand Compliance and IDCS or OCI IAM use different formats for storing names: Brand Compliance has a single name field; IDCS or OCI IAM has three separate fields. Therefore, there is no synchronization of the name fields.
>
> When your IDCS or OCI IAM profile is created, the First Name field is populated with the full name from Brand Compliance; the Middle Name and Last Name fields are set to blank or a dash. You can subsequently change these in IDCS or OCI IAM, without affecting the name in Brand Compliance.
>
> The Login Id cannot be changed; it provides the unique link between the Brand Compliance user account and the IDCS or OCI IAM user profile.

To change your email address using IDCS, see Changing your Email Address using IDCS.

To change your email address using OCI IAM, see Changing your Email Address using OCI IAM.

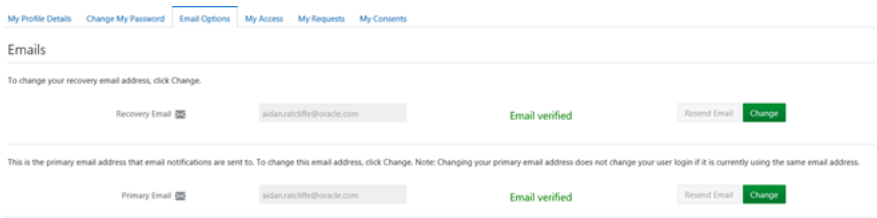
Changing your Email Address using IDCS

To change your email address:

1. Open your IDCS profile.

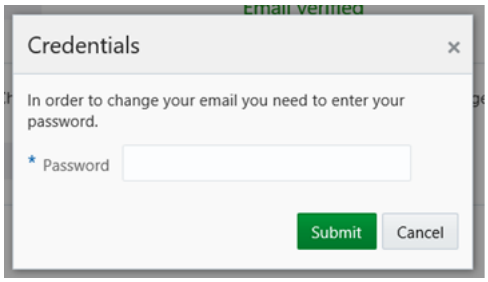
2. Click the icon showing your initials, in the top right hand corner, to open the IDCS profile menu.
3. Click **My Profile** and select the Email Options tab to open the Emails page.

Figure 3-1 IDCS Emails Page



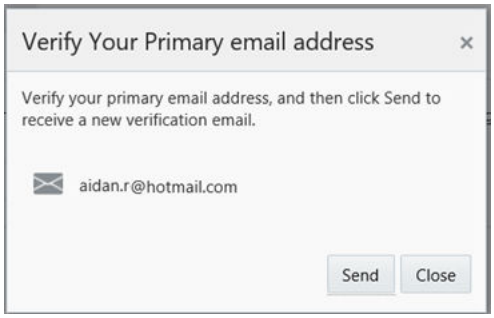
4. The page contains your primary email address and an optional alternative recovery email address. Click **Change** for the primary email address.
5. Enter your password in the Credentials dialog box, and click **Submit**.

Figure 3-2 IDCS Credentials Dialog Box



6. Enter the new email address and click **Save & Verify**.
7. Click **Send** on the Verify Email Address dialog box. You will receive a *Please verify your email address* email.

Figure 3-3 IDCS Verify Email Address Dialog Box



8. Click **Email Verification** in the email, and then click the link on the confirmation to proceed to the IDCS Login page.

If you wish to set an alternative recovery email address in the event of your primary email address being unavailable, repeat the above steps for the recovery email address.

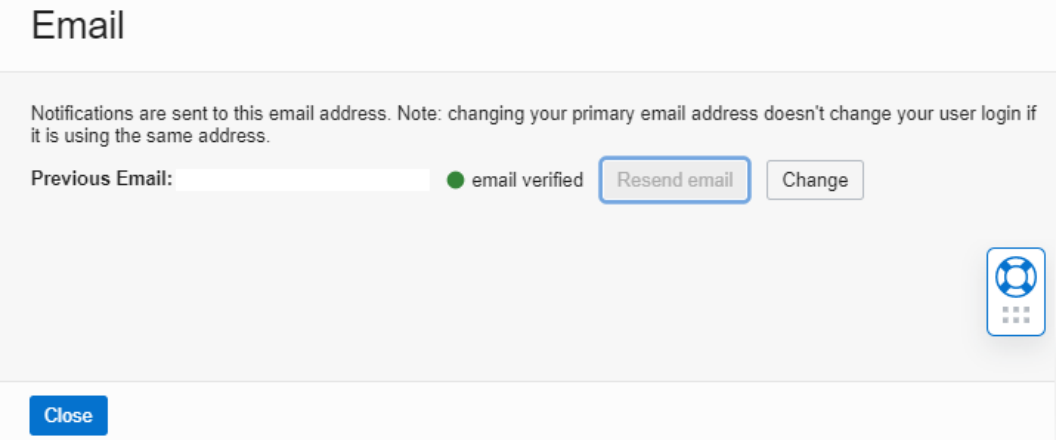
When your make changes to your IDCS profile you may receive a *Your user profile has been updated* email. Click **View Changes To My Profile** in the email to log in to IDCS and view your profile.

Changing your Email Address using OCI IAM

To change your email address:

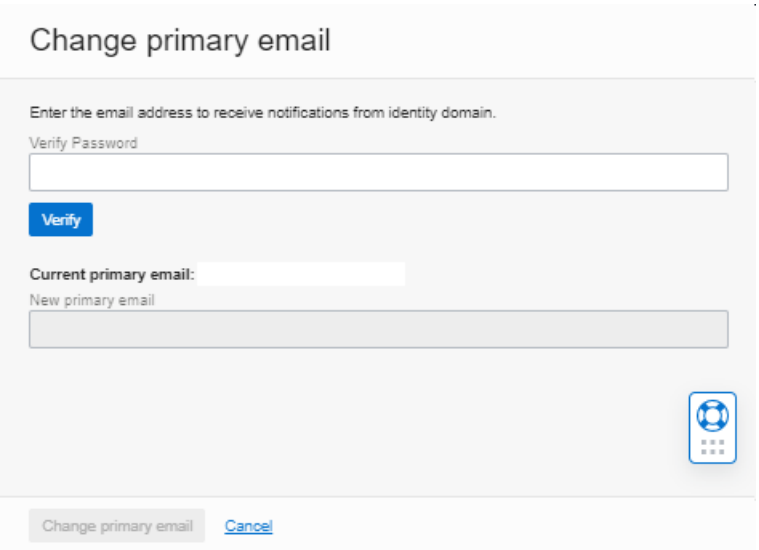
1. Click the Profile icon, in the top right hand corner, to open the OCI IAM profile menu.
2. Click **My Profile**. On the My Profile page, click **Select More Actions** and then select **Edit email** from the menu. The Email page is displayed.

Figure 3-4 OCI IAM Email Page



3. On the Email page, select **Change**. The Change Primary Email page is displayed.

Figure 3-5 OCI IAM Change Primary Email



4. Enter the password and click **Verify**.

5. Once the password is verified, enter the New primary email address and select **Change primary email**.

When your make changes to your OCI IAM profile, you may receive a *Your user profile has been updated* email. Click **View Changes To My Profile** in the email to log in to OCI IAM and view your profile.

Editing your Profile

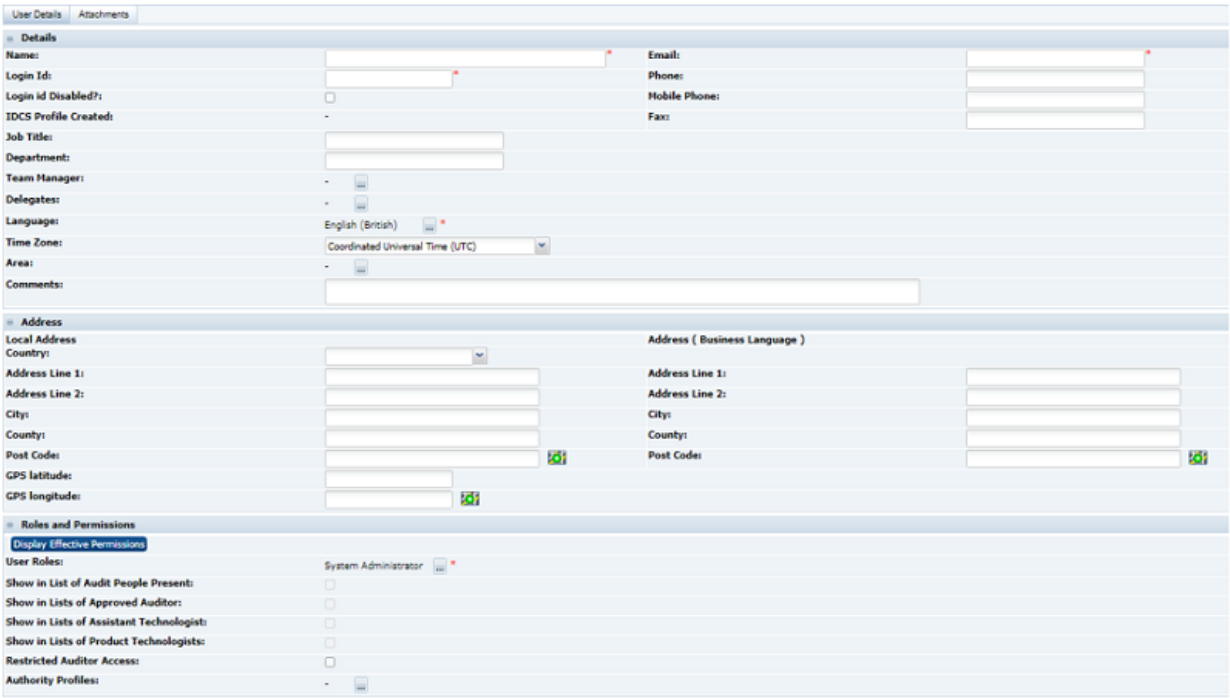
To edit your user profile, select **Edit Profile**. Your user record opens in edit mode. You can edit any of the fields except for the following:

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

The following actions are available on this page:

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

Figure 3-6 User Record



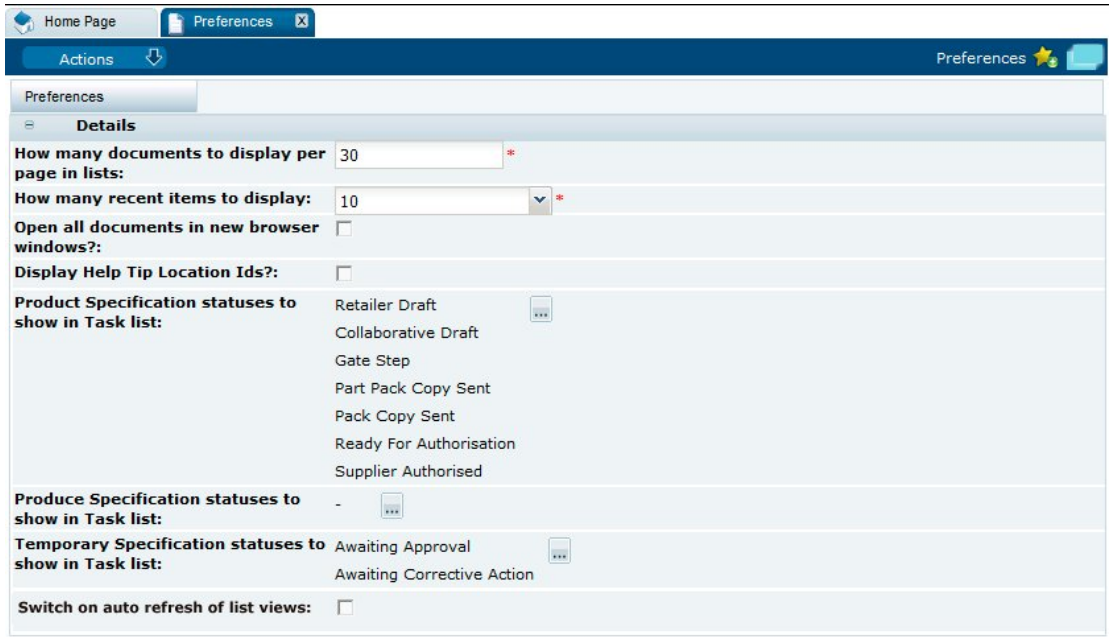
Editing your Preferences

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

The following actions are available on this page:

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

Figure 3-7 Preferences Page



Note:

The Switch on auto refresh of list views option will only appear if the feature is enabled for the portal. If used, it potentially improves performance by eliminating the constant rebuilding of lists.

If it is enabled, check the option if you wish to have the contents of list automatically refreshed each time you open the list during the session.

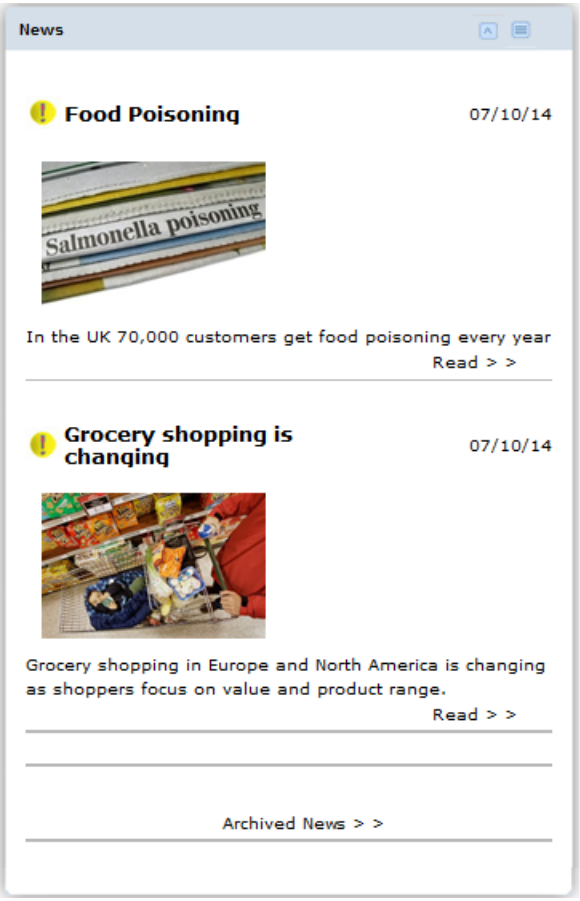
If unchecked, the contents of list views will be automatically refreshed when you initially open the list during the session, but if you switch to another page and return to the list, the contents will only refresh if you use the Refresh action (or close and reopen the list view).

4
News App

This chapter covers the News App on the Home page.

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

Figure 4-1 Example of News App



The following information is displayed for each news item:

- Title

  If a news item is deemed to be important, the title is preceded by an icon with an exclamation point.
- Date of publication
- Description
- Link to read the item:

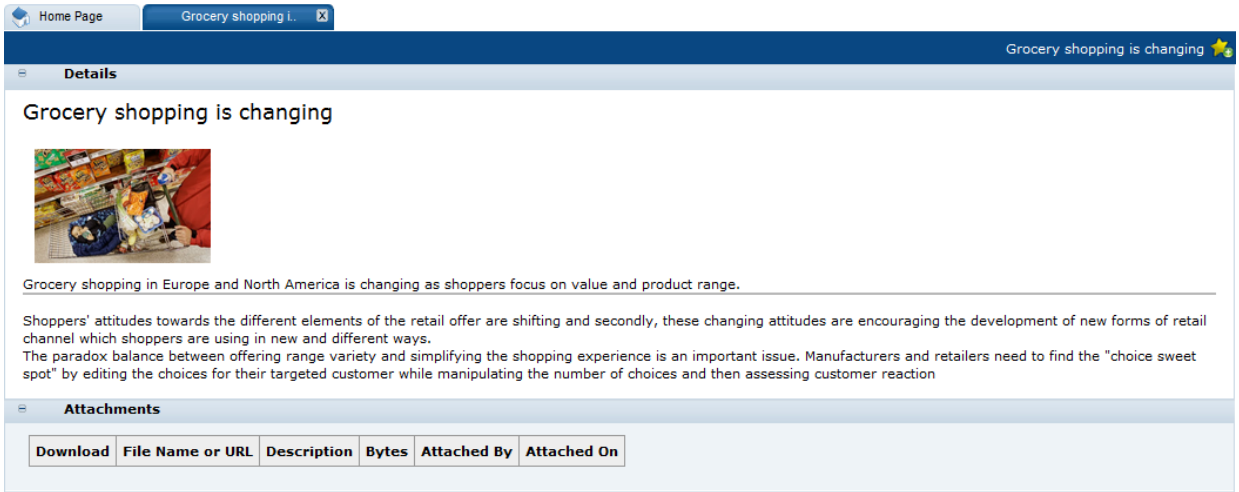
- Read
- Read and confirm

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

> **Note:**
>
> The Mark as Read action cannot be taken on an archived News item.

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

Figure 4-2 News Item Opened for Reading



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

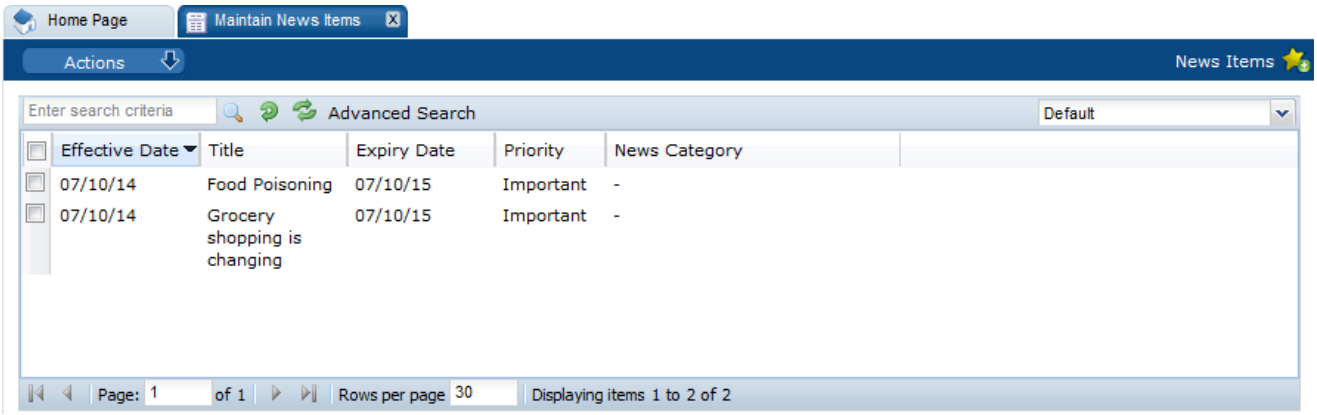
Table 4-1 Columns for News Item Attachments

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

Personalize the News App

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

Figure 4-3 Maintain News Items



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

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

5
Managing Actions

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

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

Urgent Items Manager

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

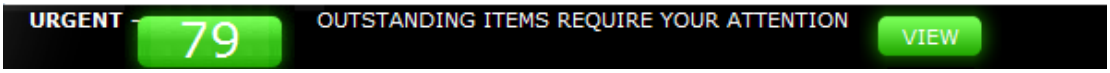
- Audit and visit issues that are overdue
- Audits and visits that are overdue
- Documents
- Mandatory contacts
- Mandatory user details
- News
- Password expiration
- Supplier and site details confirmation

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

Using the UIM

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

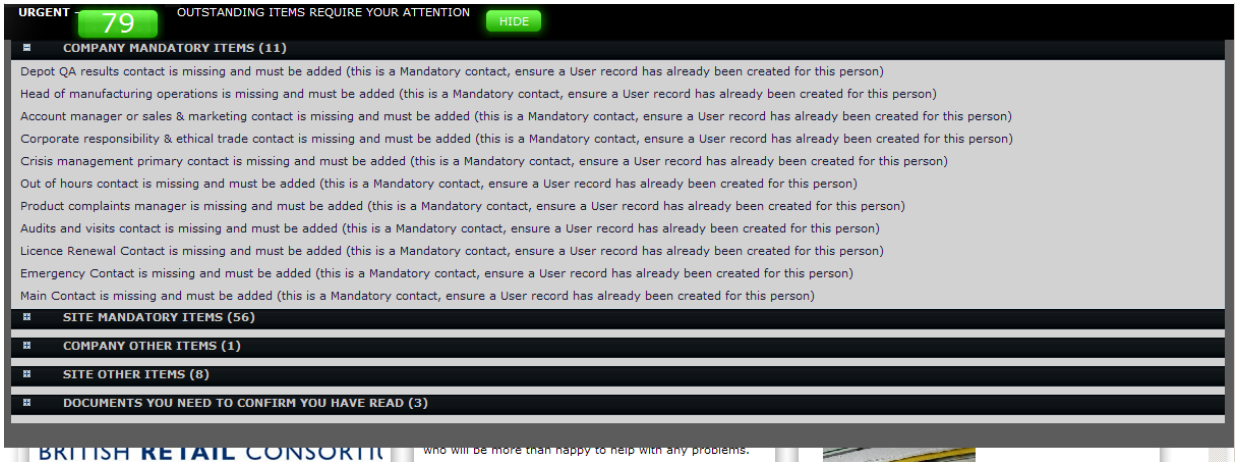
Figure 5-1 UIM Band



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

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

Figure 5-2 Expanded UIM Content

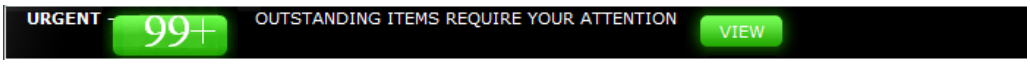


Note the following:

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

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

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



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

When the necessary work on an urgent item is completed:

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

Working with Urgent Item Categories

This section covers the following categories of items:

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

Alert Response Items

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

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

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

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

- Overdue Responses
- Urgent Alert Responses

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

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

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

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

Audit/Visit Items

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

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

  To resolve this item, click the item. The audit/visit record opens at the issues.

- The audit/visit due date has been reached or exceeded. Overdue issues appear in the UIM for:
  - The lead technologist associated to the audit/visit.
  - Any Auditor user in the People Present table that has Restricted Audit Access set against their user record.

    Note that other Auditors in the People Present table will only receive the UIM notification if they are the lead technologist associated to the site.

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

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

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

Document Items

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

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

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

Figure 5-4 Document Items

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

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

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

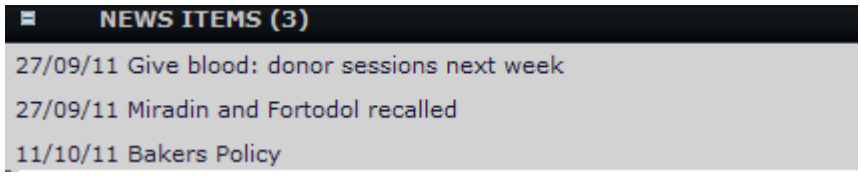
News Items

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

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

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

Figure 5-5 News Items



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

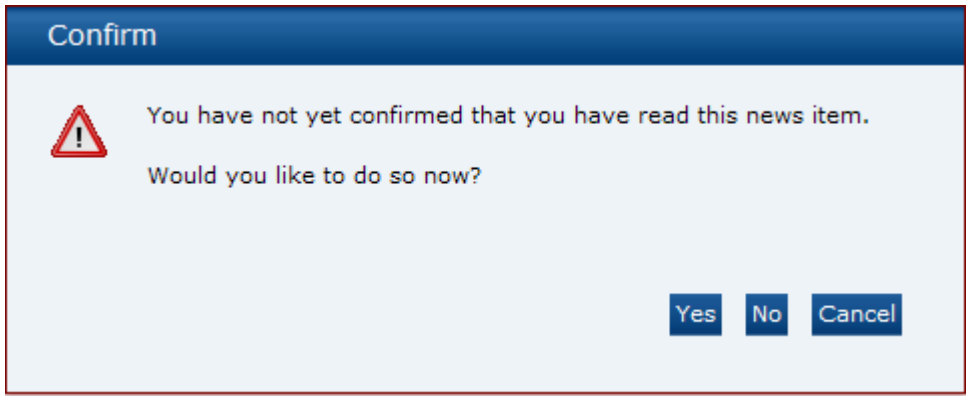
To read an item, click the item. The news item is opened in a new tab in read mode.

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

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

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

Figure 5-6 Confirm Dialog Box



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

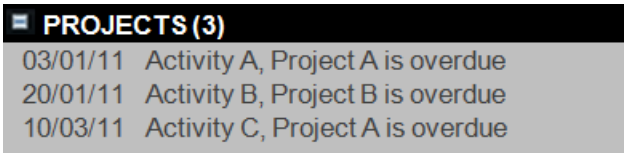
Project Items

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

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

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

Figure 5-7 Project Items



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

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

Scorecard Items

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

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

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

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

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

Supplier and Site Management Items

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

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

The items are only available for supplier users.

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

- Mandatory Contacts

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

- Supplier & Site Details Confirmation

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

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

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

User Items

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

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

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

Figure 5-8 User Items

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

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

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

Tasks App

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

- Supplier Tasks
- Product Tasks
- Project Tasks
- Library Tasks

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

Figure 5-9 Tasks App on the Home Page

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

Supplier Tasks

Tasks may be created for the following:

Alerts

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

Audits and Visits

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

Users with Restricted Auditor Access against their user record will only receive notifications for Audits where they are an Auditor user in the People Present table.

Scorecards

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

Sites

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

Product Tasks

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

The Product tasks do not appear in the UIM.

Product Specifications at Status

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

- You have 4 Product Specifications requiring review

- There are 5 Product Specifications at status xxx

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

To remove a task from the list, the status for the product specification must be updated to the next step in the acceptance process. For more information on product specifications, see the *Oracle Retail Brand Compliance Management Cloud Service Product User Guide*.

Produce Specifications

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

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

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

Surveillance

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

- There are 2 product surveillance test reports awaiting supplier action

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

- There are 4 product surveillance test reports awaiting approval

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

- There are 2 imported test reports awaiting review

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

Project Tasks

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

- Projects:

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

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

- Products:

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

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

- Activities:

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

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

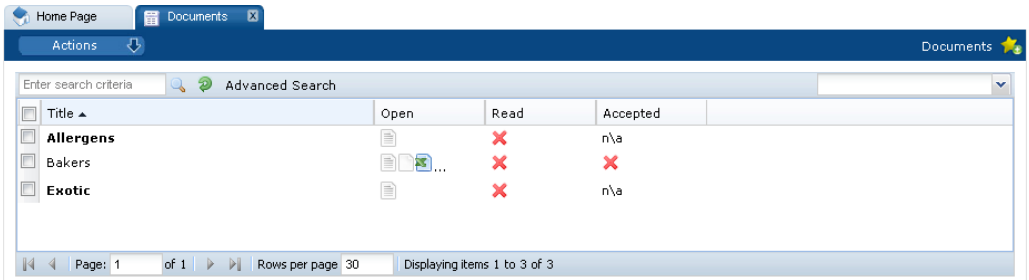
Library Tasks

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

You have 3 document(s) requiring attention

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

Figure 5-10 Documents Tab



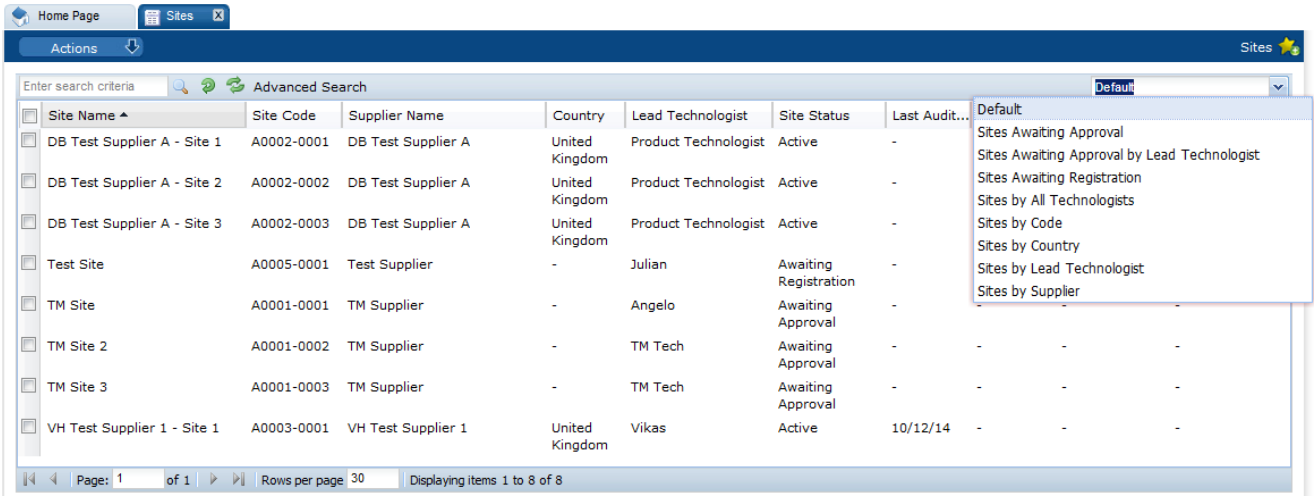
In the Open column, you can select to open a document. To mark the document as read or accepted, select the Mark as Read or Mark as Accepted action.

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

6
List Views

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

Figure 6-1 List View Example



Note the following about views:

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

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

Table 6-1 List View Icons

Icon	Description
	Select this icon to search the list based on the search criteria.

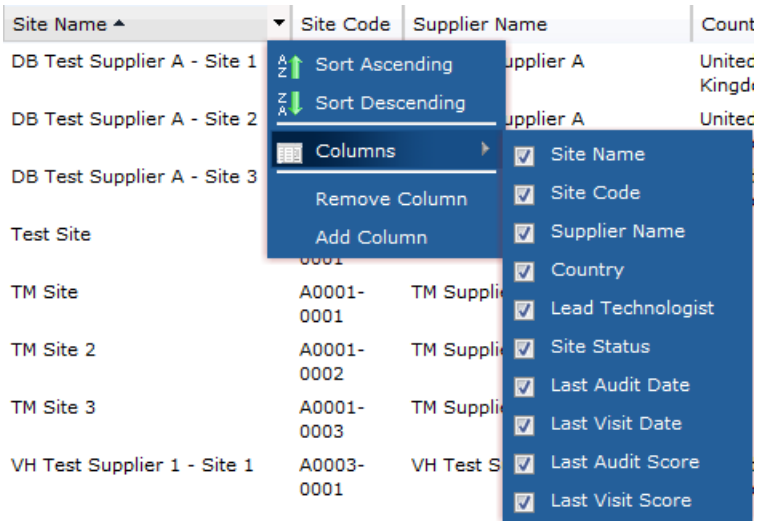
Table 6-1 (Cont.) List View Icons

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

Changing the List View

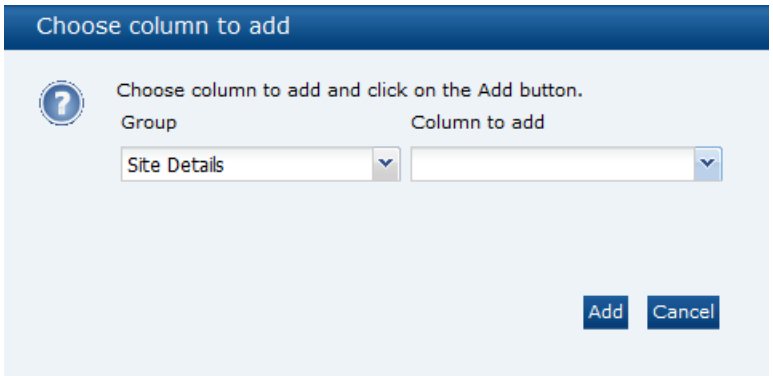
Options are available to change how columns and rows displayed in the list view.

Figure 6-2 Options for Changing the List View



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

Figure 6-3 Choose Column to Add Dialog Box



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

Resize Column Width

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

Export a View

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

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

Only the columns shown in the view are exported.

View or Edit a Record

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

Searches

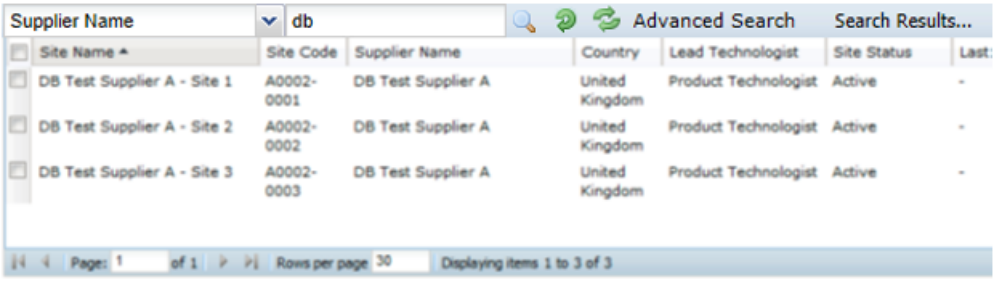
There are two types of searches, simple and advanced.

Simple Search

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

For example, if the Supplier Name column is selected and db is entered as the search criteria, the list shown in Figure 6-4 now only shows those entries that contain the text db.

Figure 6-4 Simple Search Results Example



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

Note:

The search is only applied to the selected column. If columns are added or removed, the list of selectable columns is adjusted accordingly.

The following columns are excluded:

- Columns that are derived from other records.

  Note that although the Product Specification's product coverage fields (Variant Name, Quantity, and Product Number) are derived from the associated Product Record, it is possible to search these values by adding columns to the list view from either the Header or Product Record groups of fields.

  The product coverage values in the Product Record group reflect the values on the Product Record. The values in the Header group are a snapshot of the Product Record's values at the time the specification progressed past Collaborative Draft status.

  Therefore, for specifications at a draft status, the snapshot values will not be searchable (because they are empty); for specifications beyond Collaborative Draft status, the snapshot values are searchable, but may not necessarily be the same as the Product Record's current values (because the Product Record may have been edited since the snapshot was taken).
- Date columns - the Advanced Search must be used, which has a specific date picker.
- Boolean (yes/no or true/false) columns - the Advanced Search must be used, which has a specific Boolean type selector.

The search is not applied if:

- Either the search column or the search criteria is missing.
- Text search criteria is entered for a numeric column (such as searching for Spec Number xyz).

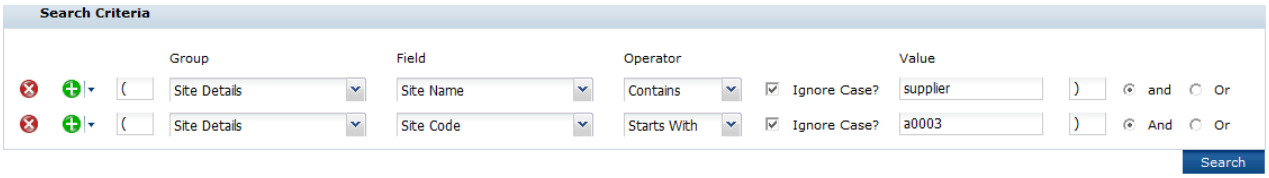
Advanced Search

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

To perform an advanced search:

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

Figure 6-5 Advanced Search Criteria Example

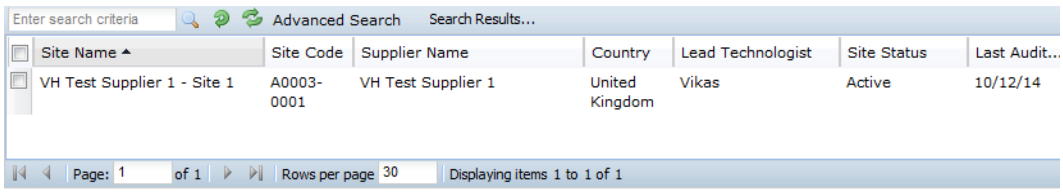


2. Enter the search criteria:
   - Group: Select a group from the drop-down list.
   - Field: Select a field from the drop-down list. The choices available in this list are dependent on the value selected from the Group list.
   - Operator: Select an operator from this list. This sets how the Value field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

   To add a row to the search criteria below the current row, select the icon with the plus sign. To delete a row, select the icon with the x on that line.
3. Select **Search**. The list is updated to only include those entries that meet the search criteria.

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

Figure 6-6 Advanced Search Results Example



7
Change History Logs

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

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

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

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

Figure 7-1 Change History Log for a Record

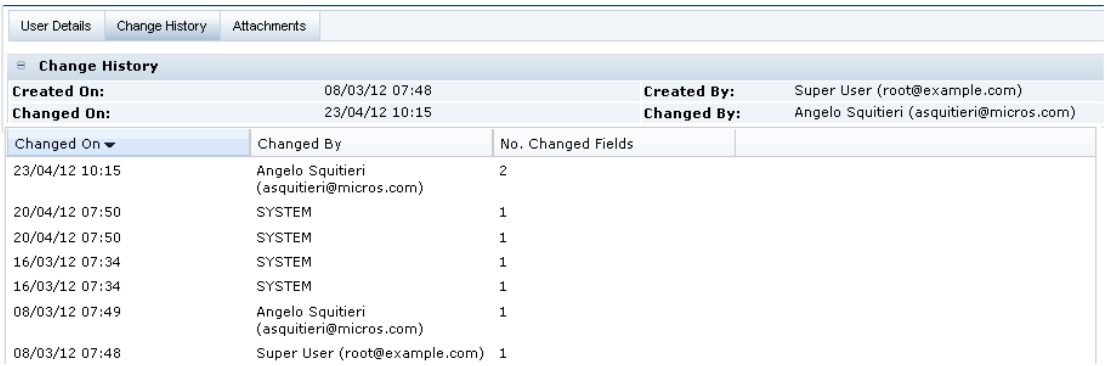


Table 7-1 describes the layout of this view. A field with multiple values is displayed as a comma-separated list.

Table 7-1 Layout of Change History Log

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

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

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

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

Figure 7-2 Change History for a Selected Entry

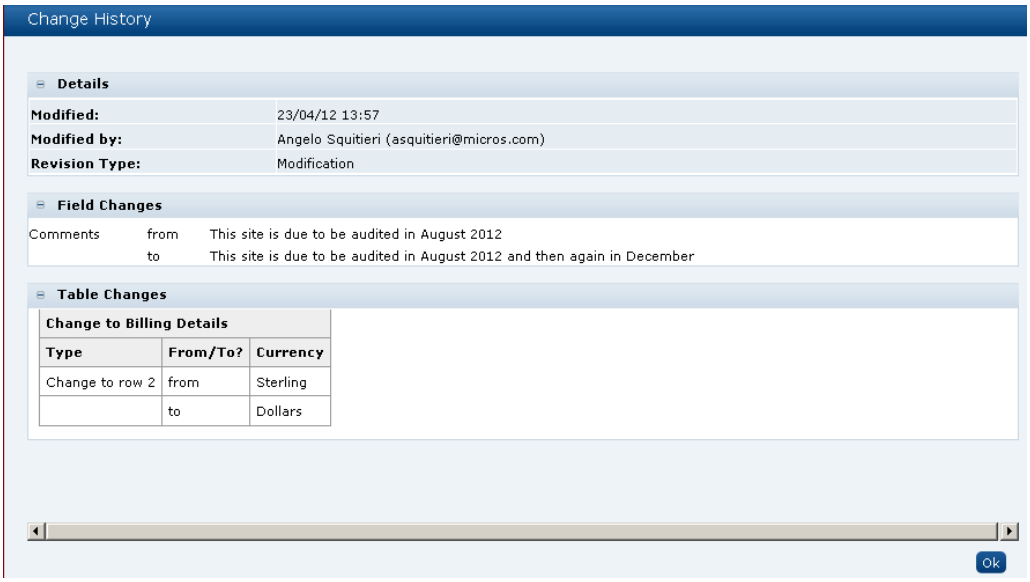


Table 7-2 describes the layout of this view.

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

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

Table

Changes to values within tables are logged in the same way as individual fields and are presented in the Change History view as a table. A separate log is shown for each

table that was updated during the transaction. The name of the changed table and changes by row number are shown. If the table was changed due to the Add or Delete table actions, the values of all columns are shown. For modifications, only the values for changed columns are shown. An example of a modification is shown in Figure 7-2.

Figure 7-3 Change History Log for a Table

Table Changes

Change to Billing Details

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

Change to References

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

Status

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

Figure 7-4 Change History Log for Status

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

Status Change History

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

Change History

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

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

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

Table 7-3 Layout of Change History Log for Status

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

Table 7-3 (Cont.) Layout of Change History Log for Status

Column	Description
Comments	Any comments entered by the user.

Attachment Manager

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

Figure 7-5 Change History Log for an Attachments Record

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

Table 7-4 describes the columns in this log.

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

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

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

Table Changes

Change to Attachments

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

Table 7-5 describes the columns in this log.

Table 7-5 Layout of Change to Attachments Section

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

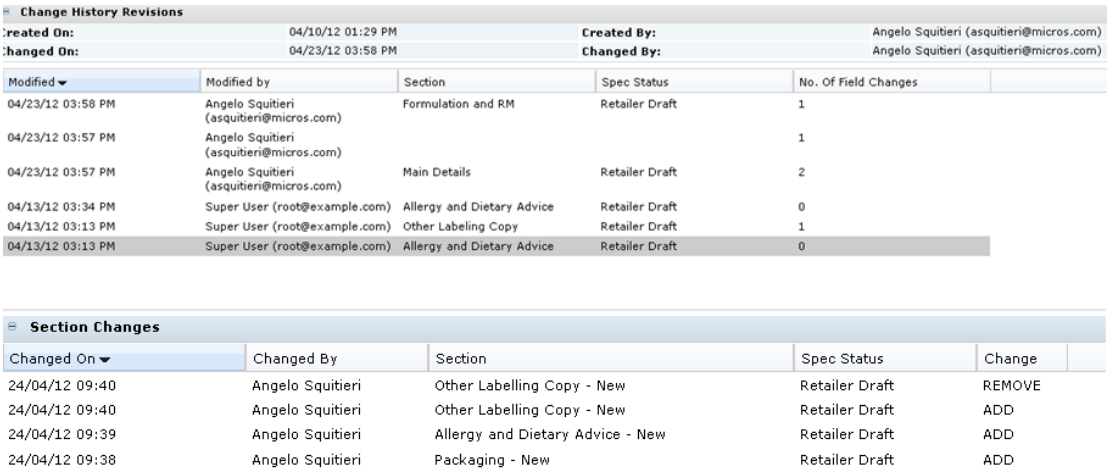
Table 7-5 (Cont.) Layout of Change to Attachments Section

Column	Description
Attached On	Date and time the file was attached.
Description	Description of the attachment.
File Name or URL	Name of the file or the URL to the file.

Product Specification

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

Figure 7-7 Change History Log for Product Specification



Change History Revisions

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

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

Section Changes

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

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

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

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

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

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

8
Library

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 8-1 shows an example of this page.

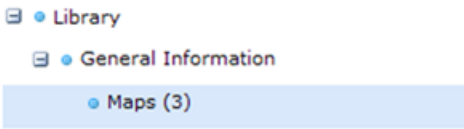
Figure 8-1 Library Tab

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 8-2 Folder Content Display

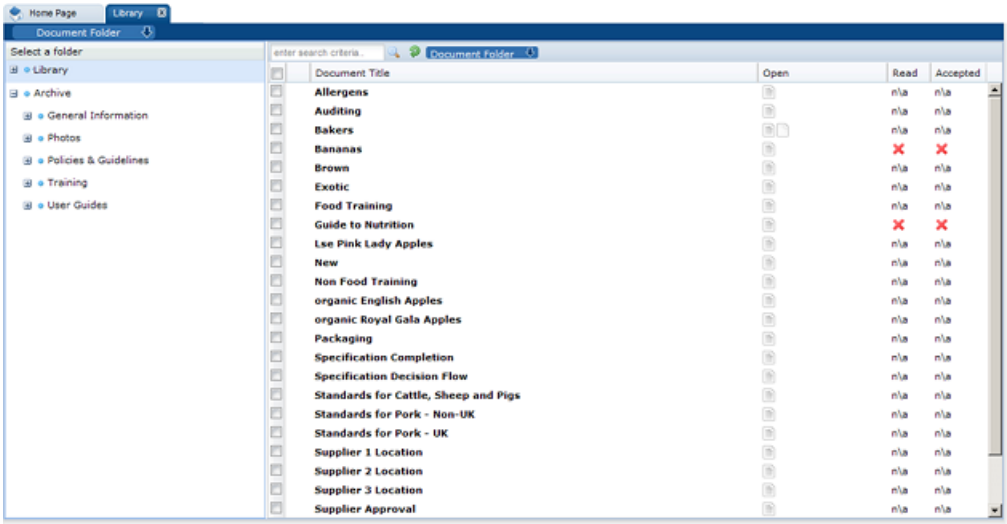


Table 8-1 describes the columns displayed for the selected folder.

Table 8-1 Columns Displayed for a Selected Folder

Column	Icons	Description
First	Shows the status of the document.	
		This document is only visible to internal users, that is, the retailer's users. The document title in the next column is shown in red.
		This document is mandatory. This icon is only shown for supplier users.
		This document has not been published and is therefore only visible to users with the Library Administrator authority profile.
Document Title	The list of document titles is sorted by the icon in the first column. Clicking a document title opens the summary document as a new tab.	
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 8-1 (Cont.) Columns Displayed for a Selected Folder

Column	Icons	Description
		Portable Document Format (PDF) file
		Text Document
Read	Indicates if this document has been read by the user.	
		User has not read the document.
	n\a	Indicates the document has Log Readership set to NO.
		User has marked the document as read.
Accepted	Indicates the acceptance of the document by the user.	
		User has not accepted the document.
	n\a	Indicates the document has Log Readership set to NO.
		User has accepted the document.

The following actions are available in this pane:

- Mark as read
- Mark as accepted

Reading a Document

To read a document:

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

Marking a Document

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

Marking a Document as Read

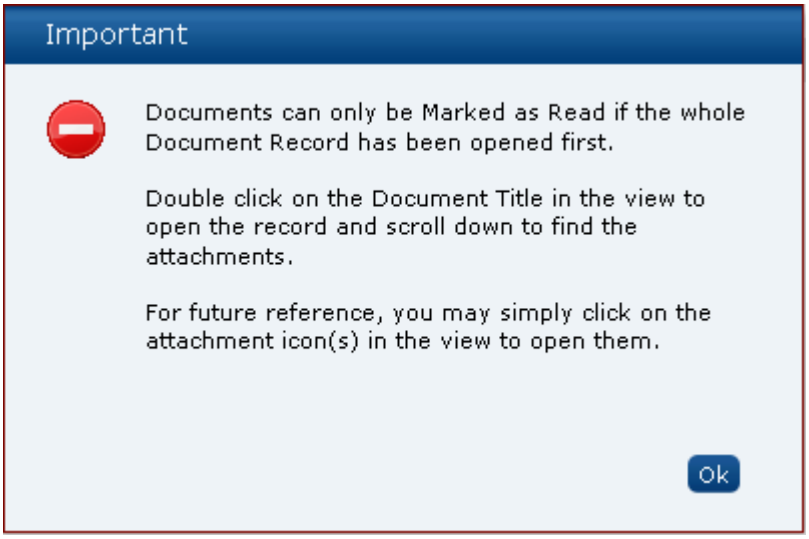
The read confirmation action is only applicable for mandatory' documents It can only be selected if the user has at some point opened the document or one of its attachments.

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

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

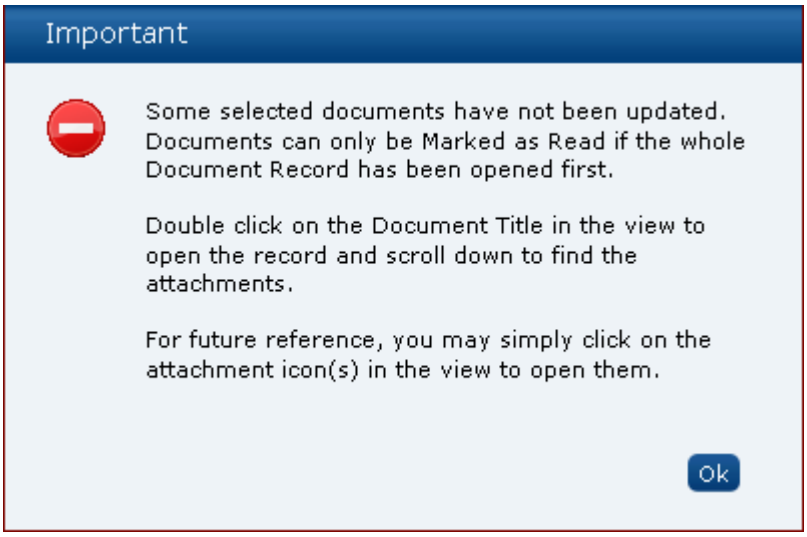
If the Mark as Read action is selected, but the document has not been opened the following error dialog box appears.

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



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

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



Marking a Document as Accepted

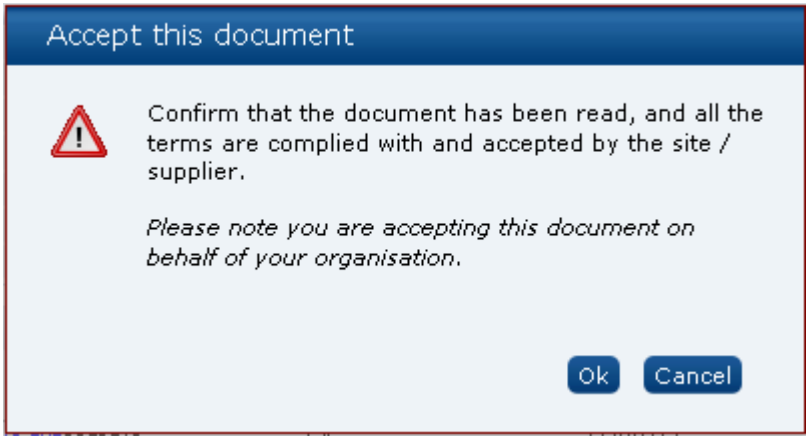
The accept confirmation action is only applicable for mandatory documents It can only be selected if the user has at some point opened the document or one of its attachments.

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

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

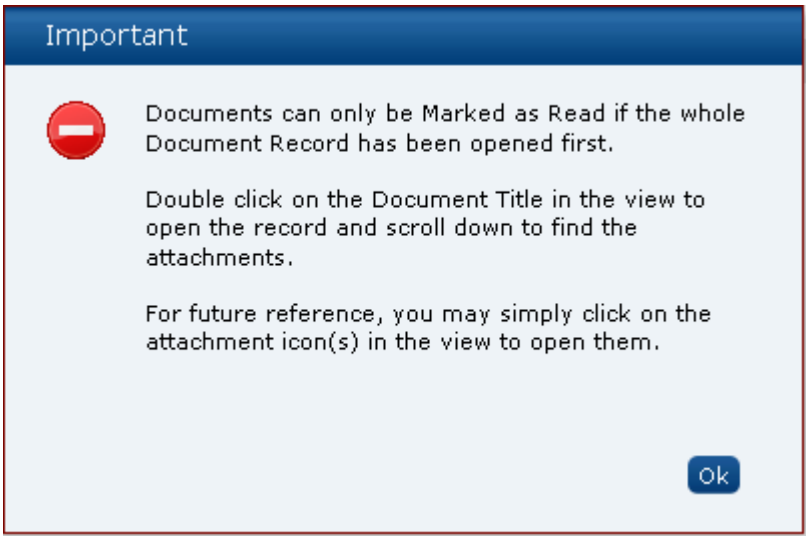
A dialog box appears to enable the user to confirm the acceptance. Select **Ok**.

Figure 8-5 Accept this Document Dialog Box



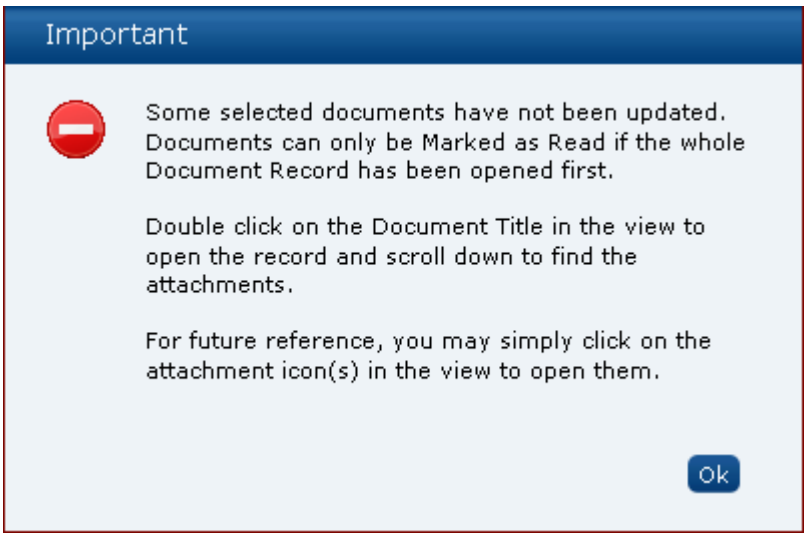
If the Mark as Accept action is selected, but the document has not been opened the following error dialog box appears.

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



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

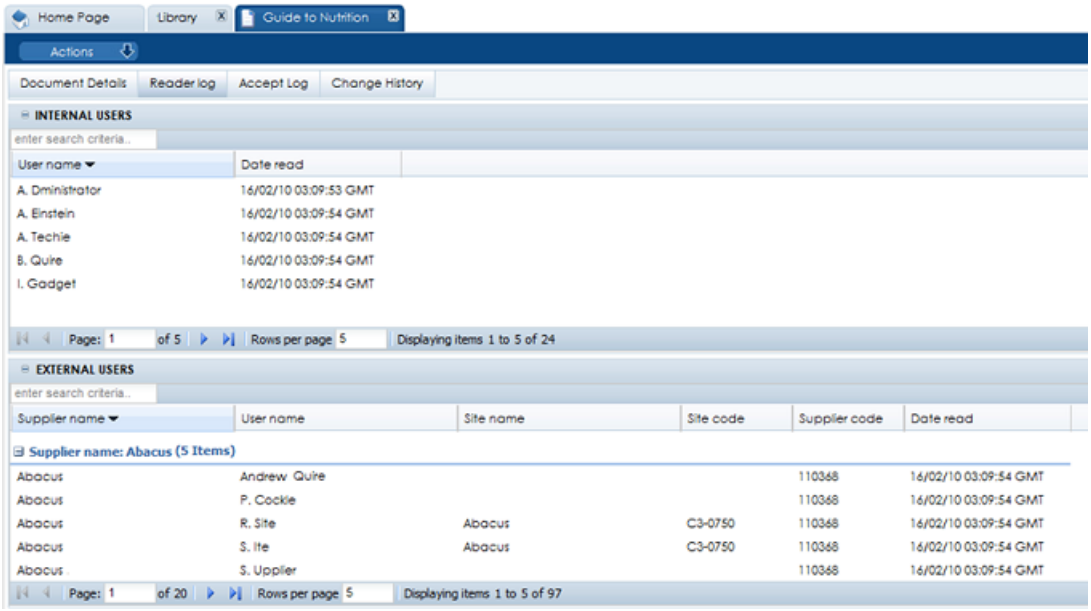
Figure 8-7 Mark as Accept Error Dialog for Not All Documents Marked



Viewing the Reader Log

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

Figure 8-8 Reader Log Page



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

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

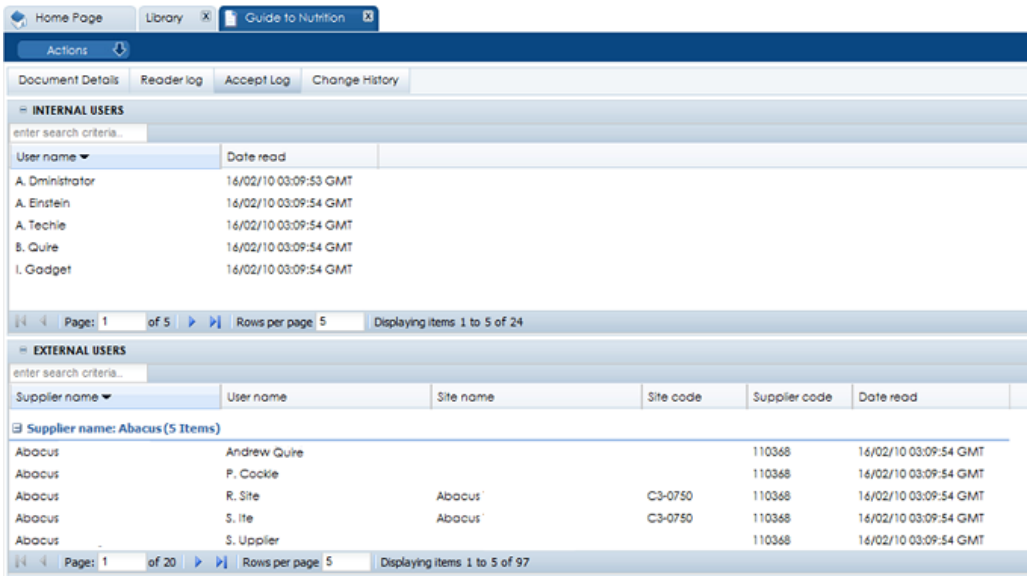
Users are able to perform a Quick Search on the full contents of the log and export the log to Microsoft Excel.

> **Note:**
>
> The Site code and Site Name columns are populated if the user is assigned to one or more individual sites. If the user is an All Sites user or is a Supplier user, they will not appear in the Read and Accept logs.

Viewing the Accept Log

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

Figure 8-9 Accept Log Page



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

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

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

> **Note:**
>
> The Site code and Site Name columns are populated if the user is assigned to one or more individual sites. If the user is an All Sites user or is a Supplier user, they will not appear in the Read and Accept logs.