EPA CDX SmartLabel Builder
User Guide
Version 1

(*Revised 20 September 2016*)

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1. Introduction

The Environmental Protection Agency (EPA) SmartLabel Builder is a Structured Product Label (SPL) document builder, located within the EPA's Central Data Exchange (CDX). The SmartLabel SPL Builder is the Agency's publicly offered tool to build, validate, and submit structured xml files to the EPA for review and registration.

Other tools may be programed to build and validate SmartLabel xml files by external groups using the technical specifications provided in the _Structured Product Labeling (SPL) Implementation Guide with Validation Procedures_ (IG-User Guide). Files created using external builders must still pass validation and be submitted through the Agency's CDX portal.

2. Builder Procedures

The instructions herein apply only to the use of the CDX Builder. Directions and guidance on how to extract label information into the model are found in the IG-User Guide.

[_Note, the Builder currently works best using the Google Chrome Browser. There have been issues with other browsers, especially Internet Explorer. The Agency suggests using Google Chrome for extraction._]

2.1   Accessing the builder

- Navigate to the CDX Builder website:
   https://test.epacdx.net
- Enter your user name and password to sign in.

2.2   Loading a template or file

- Use the **Choose an SPL document** drop down menu to load a blank template (End-Use Pesticide Label, or Use Index).
- Use the **Load a document** to choose and load a previously saved zip file.

2.3   Identifying the document

Header

Document ID	654f12d7-2ab6-4384-96f2-d498d124c2d4
Set ID	15b10df3-daf1-44d6-a29b-cef770a9e41a
Effective Date	2016-09-13
Version	1

Author

Company Name	Name
EPA Company Number	EPA Company Number

Local File

Filename	Name of file

This field is optional and its value is not submitted. The Document->Save action will use this value instead of the default {Document ID}.xml filename.

- **Document ID** identifies the specific document. This 28 character unique identification (UID) must be unique for every document or version submitted to the database.
  - The Document ID is automatically generated for new files.

  - When using a previously created file as a starting template, click the [C] button to generate a new UID.

- **Set ID** identifies the EPA registered product label, and remains static throughout version updates. It is also a 28 character UID.
  - The Set ID is automatically generated for new files.
  - When using a previously entered label as a template for another label, click the [C] button to generate a new UID.

- **Author** identifies the company to which the label is registered, using the Company, and EPA Company Number.

- **Local File** can be used to designate a file name for locally saved zip files. This information is not submitted to the Agency, it is purely for the benefit of the user. If no entry is made, the (28 character) Document ID will be used to name the locally saved zip files.

2.4 Navigating the builder

A navigation pane to the left of the data entry window can be used to move between sections of the document. Header levels of the models, which contain subsections, can be collapsed by clicking the - sign, or expanded by clicking the + to the left of the term.
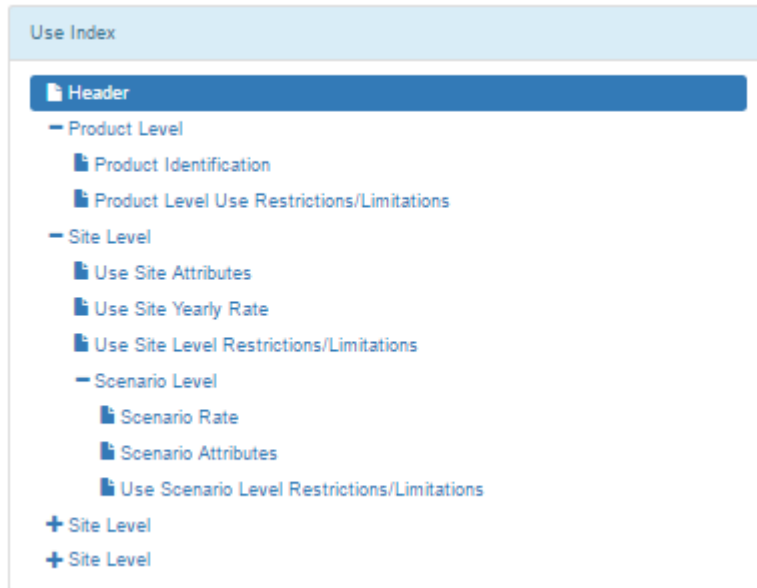
- **Section Nicknames:** sections that can be duplicated can be renamed in the builder in order to aid navigation. These nicknames are saved in local files, but are not saved in the submitted document. When this is an option, a Section Nickname or Tile entry box will be available in the entry window. Text entered here will then appear in the navigation pane. For example:
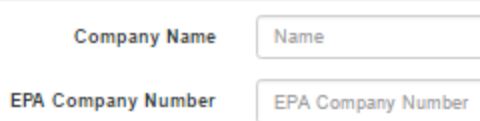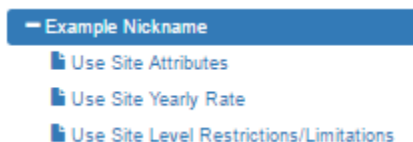

  - In the Label Content builder, the Use Site Application Instructions sections can be named in the Title entry box.
  - In the Use Site Index builder, the Site Level and Scenario Level sections can be named in the Section Nickname entry box.

2.5   Entering Information

There are multiple types of information entry in the builder: text, numeric, and picklist selection. Light grey text in data entry fields help direct the user what type of information is appropriate.

For example:

| Company Name | Name |
| EPA Company Number | EPA Company Number |

- **Text** is entered directly into entry fields. Some fields only allow unformatted text, while other fields offer a number of standard formatting options at the top of the input field.
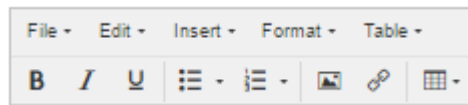
- **Numerical** information is entered directly into entry fields without formatting.
- **Presence/Absence selections** are made by checking the selection box. Absence is automatically assumed, unless the box is checked. For example:
  Rotational Crop ☐ or Rotational Crop ☑
- **Picklist selections** are made in several ways.
  - o **Standard picklist entries:** the majority of picklists are brought up by beginning to type your selection. Options are narrowed as more information is entered. When the desired term appears, it can be selected using your cursor.
    - ▪ **Multiple entries:** some field allow multiple entries. These fields are indicated with a **+** button on the right of the entry field. When this button is pressed, or Enter is hit, the selected term drops down and a new blank entry field is generated. If multiple entries are acceptable, the **+** button must be pressed in order to select the element, even if multiple entries are not desired.
  - o **Dropdown picklist:** some picklists are displayed with a dropdown that displays all possible options. These entry fields do not allow any text entry, but display the dropdown picklist when they are clicked. A selection is then made by clicking on the desired term.
  - o **Multiple hierarchical selection picklists:** some longer hierarchical picklists are displayed as a series of related terms. These lists can be expanded or collapsed by clicking the arrows to the left of the term, in order to locate the desired terms.

    For example: ˅ ☐ States
                     ˃ ☐ Alabama   .

    Terms can also be located by entering text in the filter entry box to the right of the selection field.

Filter

Geographic area filter

For example:

Selections are made by checking the box to the left of the term.

✔ ⊟ States
For example: ❯ ☑ Alabama .

Selecting a higher level term automatically selects all lower terms.

- o **Active ingredient picklist:** the initial search string must be at least three characters long. Search results and search times are improved by entering more information. The magnifying glass icon on the left of the entry box

  Q must be clicked, or Enter must be hit, to bring up a list of results. The desired term must be highlighted and OK must be clicked, or Enter must be hit, in order to select the desired ingredient.

  [*Currently the Builder only accepts the technical active ingredient name from the SRS. If you do not know the technical name, you can find it by searching the PC code or common name of the chemical on Chem Search (https://iaspub.epa.gov/apex/pesticides/f?p=chemicalsearch:1). In the resulting chemical profile, the technical name is the name written in black under the common name.*]

  ## Strychnine

  For example: Strychnidin-10-one

Some information is required to pass validation, while other fields are optional. In the Use Index this in indicated as follows:

- **Optional entries** are indicated with a toggle to the upper right of the entry field.

  These fields are automatically set to Off ⬭ Off . In order to enter information

  they must be switched to On ⬤ . If switched on, data must be entered in order for the document to pass validation.
- **Required entries:** all fields that do not have the on/off toggle are required terms.

2.6   Section Actions

This dropdown menu is used to add, clone, or remove certain levels of the model. When a level has these options, the Section Actions menu will appear in the Main Menu bar at the top of the screen when the level is highlighted in the navigation pane.
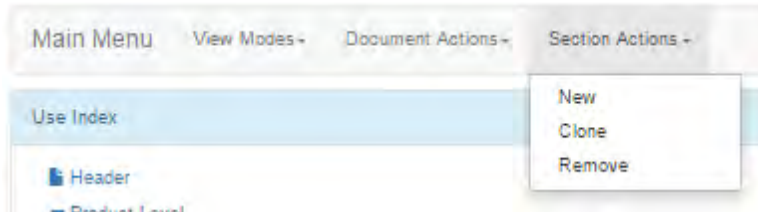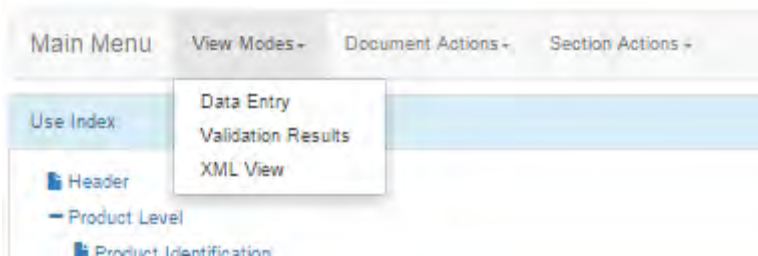
There are three options:

- **New:** adds a new blank template of the selected level.
- **Clone:** duplicates the selected level.
- **Remove:** deletes the selected level.

2.7   View Modes

This dropdown menu is used to select the form in which the document is viewed.

There are three options:

- **Data Entry** is used to enter information when building a document.
- **Validation Results** can be used to view the most recently run validation results.
- **XML View** can be used to view the raw xml format created by the builder.
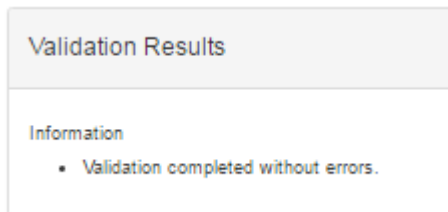
2.8 Document Actions

This dropdown menu is used to initiate document actions.
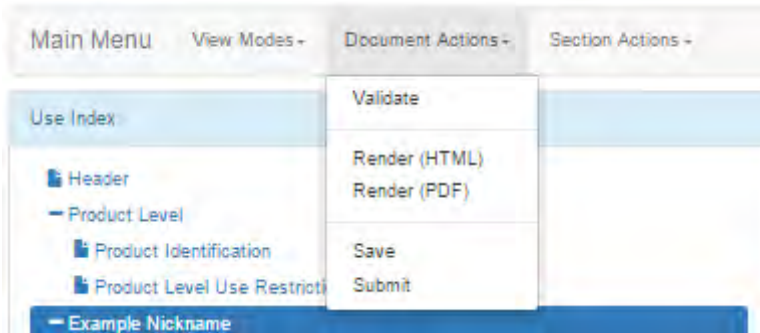
There are several options:

- **Validate** is used to check the information entered in the builder against the rules of the SmartLabel model. Selection of this option produces a Validation Results report. This report will either state that the file passes validation:


Or that the file does not pass validation and list the errors that must be corrected:
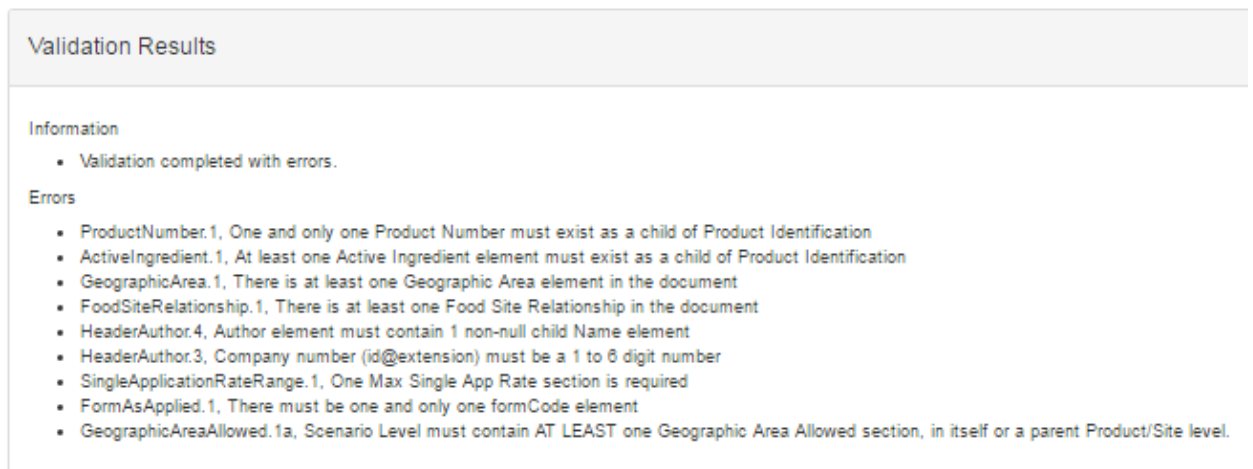

The identified errors must be corrected, and the document must pass validation before it can be submitted.

- **Render (HTML)** displays the information entered using the style sheet in HTML format.
- **Render (PDF)** displays the information entered using the styled sheet in PDF format, which can be downloaded.
- **Save** is used to save the information entered in the builder as a ZIP file on the user's local drive. These files can then be uploaded and viewed/edited in the builder at a later date.

- **Submit** is used to submit valid xml files to the CDX database. While the file is validating a progress bar will appear on the screen. [*It is important to pay attention during this process because after the progress bar disappears, a message that notifies the user if the submission was successful will appear in the upper right hand corner of the screen for 15 seconds.*]
  - If the document is submitted successfully, this message will appear:

    Document - aa53edc2-103d-4322-8d56-aa1854df9b22 submitted successfully. 8×
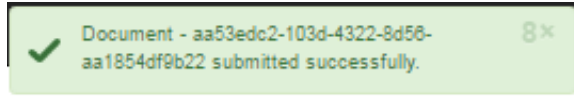
  - If the document has validation errors and does not submit successfully, this message will appear:

    Document - a598e17b-645c-4581-b0a6-3e1d57301ef1 has validation errors.
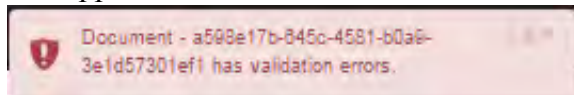
    If this message appears, run the validation report again, correct the identified errors, and try to submit the document again.