

EPA CDX SmartLabel Builder
User Guide
Version 2
(Revised 18 April 2018)

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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. Users can prepare two SmartLabel document types:

- End Use Pesticide Label
- Use-Index

A copy of your generated SmartLabel XML file can be saved for storage and submission, or for upload later into the SmartLabel builder to continue working on the file.

Other tools may be programmed to build and validate SmartLabel xml files by external organizations 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. Requirements

- A supported web browser with Java Script enabled and pop-up blockers disabled

For best results, use Google Chrome 44 or above to get to the Pesticide Submission Portal (PSP). However, you can also use Microsoft Edge, Mozilla Firefox 3.5 or above, or Safari 4 or above.

- A CDX Username and Password. See CDX for instructions on obtaining an account.

3. Builder Procedures

These instructions apply only to the use of EPA's CDX Builder. Directions and guidance on how to use the model to develop other tools are found in the IG-User Guide.

3.1. SmartLabel User Roles

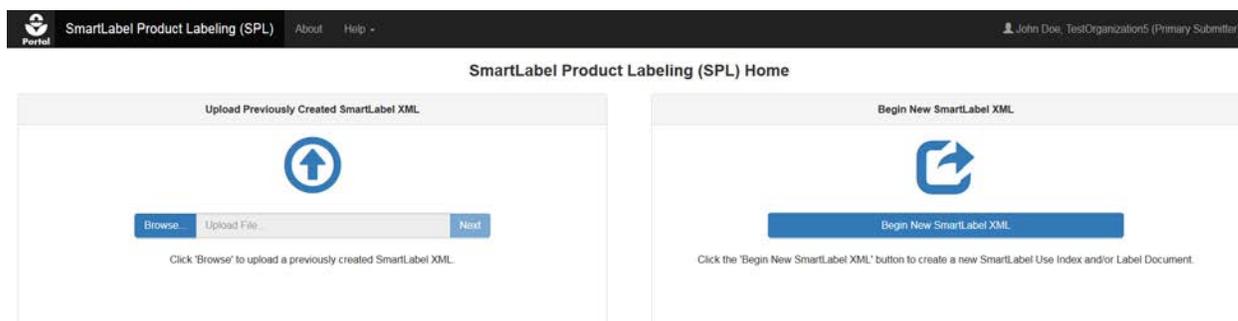
- Users can access the SmartLabel application via PSP as one of two roles - Primary Submitter and Authorized Agent. As a Primary Submitter, you can create new SmartLabel documents, upload and edit existing documents using SmartLabel, and sponsor and maintain Authorized Agent users' access to PSP.

- For more information about user roles and CDX registration, please refer to the ‘OPP CDX Pesticide Submission Portal Registration User Guide’ below:
https://cdx.epa.gov/content/documents/PSP/OPP_CDX_Pesticide_Submission_Portal_Registration_UserGuidev1.0p.pdf

3.2. Accessing the Builder

- You can access the **SmartLabel application** via the **Pesticide Submission Portal (PSP)** from the **CDX ‘Home’** screen: <https://cdx.epa.gov/>.
- Enter your CDX user name and password to sign in.
- Click a blue link under the ‘Role’ column to access the PSP as either ‘Primary Submitter’ or ‘Authorized Agent’ (*as applicable*).
- Choose the organization name, company role/number, and then click ‘Proceed’ to go to the PSP ‘Home’ screen.
- Click the **SmartLabel** icon on the PSP ‘Home’ screen
- Now, on the SmartLabel Product Labeling (SPL) ‘Home’ screen you can either ‘Begin New SmartLabel XML’ or ‘Upload Previously Created SmartLabel XML’.

3.3. Begin New or Upload Existing SmartLabel Documents



- Choose ‘Begin New SmartLabel XML’ button to start a **NEW** SmartLabel document and go to the ‘Document Information’ screen. Then choose either ‘Product Label’ or ‘Use Index,’ or both, and hit ‘Add Document.’
- Upload an **Existing** SmartLabel XML file – click ‘Browse’ button where you can locate and select your existing XML file for upload. Once you have selected the XML file for upload, click the ‘Next’ button and your document will be added.
- Now in ‘Document Information,’ your documents can be deleted (‘x’) or edited (pen icon).

SmartLabel Product Labeling (SPL) | About | Help | View Modes | John Doe, TestOrganization5 (Primary Submitter)

2e92740c-d15d-4641-b8e2-bd7522a800ea

Document Information

Please enter Package Information in the fields below.

Document Name: 2e92740c-d15d-4641-b8e2-bd7522a800ea

Company Name: * TestOrganization5

Registration Number: N/A

Company Number: Product Number *

Document Type	Document Version	Document Id	Set Id	Actions
Product Label	1	328fb393-58dd-4c28-9030...	1e111083-3e7d-4ef5-a2ed...	
Use Index	1	bff04f4-2b48-4f8a-8906-6e...	5dfad6cc-7b8d-49f9-b39d-0...	

Product Label

Use Index

+ Add Document(s)

Mark for Review

Next

This provides basic information for the identity of the particular document, its type, title, date and versioning as a member of a document set.

Preview XML | Preview PDF | Save to Local | Validate

CDX Links

- Edit Document:** Click 'Edit' to open the 'Edit Document Information' window. You can change the Document ID, Version, Set ID, and Effective Date. Click 'Save' in the window to update the document and close the window. Click 'Cancel' to close the window without saving any changes.
 - Document ID** identifies the specific document and is automatically generated for new files.
 - Set ID** identifies the EPA registered product label, is automatically generated for new files, and remains the same throughout version updates. It is also a 28-character UID.
 - When using a previously created file as a starting template, click the  button to generate a new UID.
 - Local File** can be used to designate a file name for locally saved zip files (on your own computer). This local file name is not submitted to the Agency, it is for the convenience of the user. If no entry is made, the (28 character) Document ID will be used to name the locally saved zip files.
 - Author** identifies the company to which the label is registered, using the Company, and EPA Company Number.
- Delete Document:** Click 'Delete' icon - you will be prompted to confirm deletion in the pop-up window, which will erase the document XML and all associated screens. **Deleted documents are unrecoverable unless they have been saved locally on your computer!** To do this hit 'Save to Local' at the bottom of the SmartLabel application before deleting. You will need to upload the document again to continue working on it.

3.4. Navigating the Builder

- A navigation tree to the left of the data entry window can be used to move between sections of the document (screens and sub-screens).
- Collapse and Expand List of Screen Links: Header levels contain subsections, that can be collapsed by clicking the minus (-) sign, or expanded by clicking the plus (+) sign to the left of the term.
- Navigate Between Screens - There is a link in the navigation tree to each screen in the application
- If there are required or invalid inputs to fields on a screen that haven't been entered or corrected, you will get a confirmation prompt if you try to leave the screen, where you can choose to 'Continue' or 'Return to Screen'.
 - Click 'Continue' to move you to the new screen selection, and mark the current screen for later review.
 - Click 'Return to Screen' to close the confirmation prompt so you can make any corrections needed, which will have been marked with validation errors in red text.
- Section Nicknames: sections that can be duplicated (described below) can be renamed in the builder for convenience. These nicknames are saved in local files on your computer, but are not saved in the document submitted to EPA. When section duplication and renaming is an option, a Section Nickname or Title entry box will be available in the entry window. The new name/title will then appear in the navigation pane. For example:
 - In the Label Content builder, the 'Use Site Application Instructions' sections can be duplicated, and named in the Title entry box.
 - In the Use Site Index builder, the 'Site Level' and 'Scenario Level' sections can be duplicated, and named in the Section Nickname entry box.

3.5.Entering Information

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

When invalid inputs are made to a text field, the text in the field will turn red and an error message will display below the field. The error message will explain why the entry to the field is invalid. Correcting the issue will cause the message to go away and the red text to return to black.

For example:

Document Information

Please enter Package Information in the fields below.

Document Name: 7f081eaf-7f6b-4ece-8316-abb9f520bd40

Company Name: * CGI-Lafayette

Registration Number: 26804 EPA Company Number

Product Number * 123456

- **Text** is entered directly into entry fields. Some fields only allow unformatted text, while other fields offer several 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 if the box is not checked. For example:

Rotational Crop or Rotational Crop

- **Dropdown Picklist selections** are made in several ways.
 - **Standard picklist entries:** to bring up a picklist, click in the field. You can scroll through the list that comes up, or start typing in the field to narrow the options as more information is entered. When the desired term appears, it can be selected by clicking on it or highlighting it and pressing 'Enter.'
 - **Single select:** only one term can be chosen and added to the document.
 - **Multiple entries (multi-select):** some field allow multiple entries. Simply click back into the field and follow the same procedure for single select fields to choose more terms to add.
 - **Delete:** click the 'X' icon in the field next to the term you want to delete.
 - **Multiple hierarchical (multi-select tree) picklists:** some longer hierarchical picklists are displayed as a series of related terms – examples: the 'Geographic Restrictions' at each level and 'Use Sites' on the Use Site Attributes screen. These lists can be expanded or collapsed by clicking the arrows to the left of the term, to locate the desired terms.

- For example:
 - ▾ States
 - Alabama

- In Geographic Restrictions, clicking in the first box, ‘There are no Geographic Restrictions’ will select all areas within the United States and its territories. Clicking in the second box, ‘Some Geographic Restrictions apply’ will expand a new multi-select tree menu below. Here, once you have made your selections, hit the arrow to include them in your document. You can uncheck either box to withhold any geographic restriction information at that level.

Product Level Use Restrictions/Limitations

Geographic Area(s)

There are no Geographic Restrictions at this level.
This applies to the entire United States and its territories.

Some Geographic Restrictions apply.
Select to add any Level Geographic Restrictions.

Geographic Restrictions
All areas are "allowed" by default.
Move areas between allowed/disallowed containers by checking their respective checkboxes and clicking the appropriate arrow button.

Geographic Areas Allowed

- ▾ United States
 - ▾ States
 - Alabama
 - Alaska
 - Arizona
 - Arkansas
 - California
 - Colorado
 - Connecticut
 - Delaware

▸

▹

Geographic Areas Disallowed

Selecting a higher-level term automatically selects all lower terms.

- ‘Use Sites’ has the same basic structure.
- Sites on the left will *not* be included in the document, and must be moved to the right by checking the boxes and clicking the arrow to be included.

Move sites between allowed/disallowed containers by checking their respective checkboxes and clicking the appropriate arrow button.

Use Sites

- ▾ 1: Root and Tuber Vegetables Group
 - 1A: Root Vegetables Subgroup
 - 1B: Root Vegetables (Except Sugarbeet) Subgroup
 - 1C: Tuberous and Corm Vegetables Subgroup
 - ▾ 1D: Tuberous and Corm Vegetables (Except Potato) Subgroup
 - Arracacha
 - Arrowroot
 - Artichoke, Chinese
 - Artichoke, Jerusalem
 - Canna, Edible
 - Cassava
 - Cassava, Roots
 - Chayote
 - Chayote, Roots
 - Chufa
 - Dandelion, Roots
 - Dasheen
 - Dasheen, Corm
 - Ginger

▸

▹

Selected Use Sites

Filter

Use Site Filter

Filter

Allowed Use Site Filter

Entering Active ingredient (picklist): Active Ingredients and Factoring Term Ingredients can be added in the 'Product Identification' screen in the Use Index. Click '+Add Active Ingredient' to search for/select your active ingredient(s). You can search by Name or CAS number by choosing the appropriate radio button. Name includes chemical, common name, EPA name, or 'other' approved name. Search results and search times are improved by entering more information, but you must type in at least 3 characters to search by Name, or the entire CAS number with or without dashes.

- Select your active ingredient by checking the box next to it and add % active ingredient. The 'OK' button will not activate until a numeric value of 100 or less is entered.

Search Results

<input type="checkbox"/>	CAS Number	EPA Registry Name	Systematic Name
<input checked="" type="checkbox"/>	8008-51-3	Camphor oil	Oils, camphor
<input type="checkbox"/>	8002-66-2	German chamomile oil	Oils, chamomile, German
<input type="checkbox"/>	8013-10-3	Cade oil	Oils, cade
<input type="checkbox"/>	8037-19-2	Tobacco oil	Oils, tobacco
<input type="checkbox"/>	90640-86-1	Heavy coal tar distillates	Distillates (coal tar), heavy oils
<input type="checkbox"/>	8006-78-8	Bay oil	Oils, bay
<input type="checkbox"/>	8016-36-2	Olibanum oil	Oils, olibanum
<input type="checkbox"/>	8006-80-2	Sassafras oil	Oils, sassafras
<input type="checkbox"/>	132538-94-4	Citrus sinensis orange juice oil	Oils, orange-juice, Citrus sinensis
<input type="checkbox"/>	8008-79-5	Spearmint oil	Oils, spearmint
<input type="checkbox"/>	8002-09-3	Pine oil	Oils, pine

Active Ingredient

158105 Oils, camphor

Percent Active Ingredient * 50 %

Add Percent Factoring Term

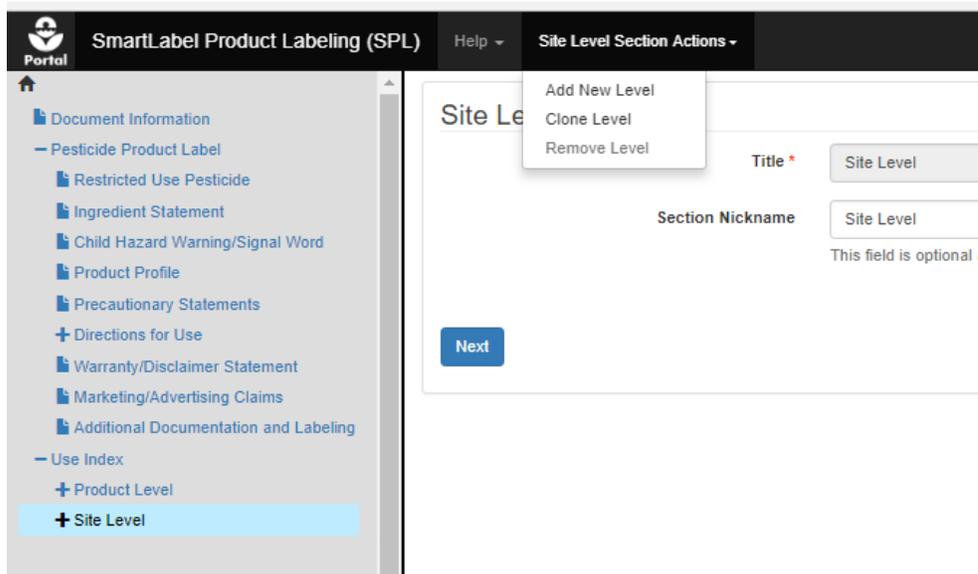
OK Cancel

- 'Add Percent Factoring Term' checkbox will allow you to input information for the respective Factoring Term Ingredient. You cannot add a Factoring Term Ingredient without first selecting its parent Active Ingredient.
- 'Edit' or 'Delete' active ingredients from the staging table. Clicking to 'Edit' an active ingredient will generate the 'Active Ingredient' modal, while clicking to

'Delete' an active ingredient will generate a prompt to confirm deleting the active ingredient.

4. 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:

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

5. Document Actions – Save, View, etc.

There are buttons at the bottom of your screen that you can use any time to do several things:

- **Preview XML:** Click this button to generate the XML view of each added documents in a new browser tab.

Example:



- **Preview PDF:** Click this button to generate the PDF view of each added document in a new browser tab.
- **Save to Local:** Click to save a version of your document(s) locally (on your computer), in XML format. Clicking the button will zip the file(s) and put them in your local 'Downloads' folder.
 - If you have changed the document name on the 'Document Information' screen, then this will be the Zip filename.
 - Otherwise, the Zip filename will be the random GUID assigned to the document at the time of the save.
 - Each document added to the application will save as a separate XML file inside the Zip file.
- **Validate:** This checks the information entered in the builder against the rules of the SmartLabel model. Click to check for validation errors throughout all screens in the document(s) where either there is an invalid input or a required field is left blank. A pop-up window will list any validation errors with links to navigate to the screen(s) where the error(s) are located. The identified errors must be corrected, and the document must pass validation before it can be submitted.
- **CDX Links:** Click to get pop-up menu with web links to open a new tab in the browser and navigate you to other screens, such as CDX Homepage, EPA Homepage, etc.

6. Exiting

At the top of your screen there are three links you can use to leave the SmartLabel application, accessible at any time. Clicking these will generate a pop-up window for you to confirm leaving the application, with or without saving, or return you to your current screen.

- **Portal (PSP) Icon:** in the far-left corner.
- **SmartLabel Product Labeling (SPL):** next to the PSP icon.
- **Logout:** in the far-right corner. Clicking the link will generate a pop-up window for you to confirm logging out or canceling. Canceling will return you to your current screen; **confirming will end your current session and bring you to the CDX Logout screen without Saving. To save before you Logout – click Save to Local'** button at the bottom of your screen.