

# Oracle® Retail Brand Compliance Management Cloud Service Supplier User Guide



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Oracle Retail Brand Compliance Management Cloud Service Supplier User Guide,  
Release 19.2

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# Preface

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

## Audience

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

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## Related Documents

For more information, see the following documents in the Oracle Retail Brand Compliance Management Cloud Service Release 19.2 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 Notes*
- *Oracle Retail Brand Compliance Management Cloud Service User Guide*

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

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

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(Data Model documents can be obtained through My Oracle Support.)

## Conventions

The following text conventions are used in this document:

| Convention      | Meaning                                                                                                                                |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b> | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.         |
| <i>italic</i>   | 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. |

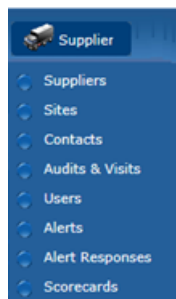
# 1

## Introduction

The Supplier module provides capabilities to manage suppliers including the identification, selection, and approval of suppliers.

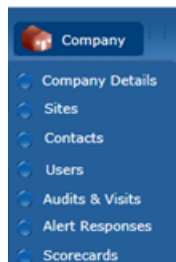
To access a Supplier option, select the option from the Supplier drop-down list.

**Figure 1-1 Supplier Drop-Down List**



The supplier user accesses the Supplier options through Company rather than Supplier.

**Figure 1-2 Supplier Options from Company Drop-Down List**



For information on the choices in the drop-down list, see the chapter shown in [Table 1-1](#). For information on the Users option, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

**Table 1-1 Description of Supplier Drop-Down Choices**

| Option    | Description                                  | Chapter                             |
|-----------|----------------------------------------------|-------------------------------------|
| Suppliers | Maintenance of the supplier account details. | <a href="#">Supplier Management</a> |

**Table 1-1 (Cont.) Description of Supplier Drop-Down Choices**

| Option                     | Description                                                                          | Chapter                              |
|----------------------------|--------------------------------------------------------------------------------------|--------------------------------------|
| Sites                      | Maintenance of the supplier's individual manufacturing and packing location details. | <a href="#">Site Management</a>      |
| Contacts                   | Maintenance of the individual contacts at the supplier and site locations.           | <a href="#">Contacts Management</a>  |
| Alerts and Alert Responses | Process for the retailer/portal owner to issue alerts and manage alert responses.    | <a href="#">Alerts Management</a>    |
| Audits & Visits            | Management of the regular auditing program for the supplier base.                    | <a href="#">Audits &amp; Visits</a>  |
| Scorecards                 | Management of the regular performance assessment program for the supplier base.      | <a href="#">Scorecard Management</a> |

## Available Options Based on Type of User

Retailer and supplier users may have access to the Supplier module. Based on the type of user, the options are typically presented in the following manner:

- **Retailer users**  
Retailer users see both Company (for the retailer) and Supplier (their suppliers).  
Under Company:
  - Company Details: Name and address details of the retailer.
  - Users: List of all retailer users.
  - Admin: Administration options if the user has access to any options.Under Supplier:
  - Suppliers: List of all supplier records.
  - Sites: List of all site records.
  - Contacts: List of all supplier/site contacts for all suppliers and sites.
  - Users: List of all supplier/site users for all suppliers and sites.
  - Audits & Visits: Work with audits and visits if the user has access to that module.
  - Alerts: Work with alerts if the user has access to that module.
  - Scorecards: Work with scorecards if the user has access to that module.
- **Suppliers users**  
Supplier users see Company (for their organization):
  - Company Details: Supplier record.
  - Sites: List of the supplier's sites with which the user is associated.
  - Contacts: List of the supplier's supplier and site contacts. A site user only sees the contacts for the sites with which they are associated.
  - Users: List of the supplier's supplier and site users. A site user only sees the users for the sites with which they are associated.

- Audits & Visits: Work with audits and visits if the user has access to that module.
- Alerts: Work with alerts if the user has access to that module.
- Scorecards: Work with scorecards if the user has access to that module.

## Authority Profiles

The following authority profiles are available for retailer users to provide access to maintain supplier and site records:

### **Supplier & Site Administrator**

The Supplier & Site Administrator Authority Profile is available to allow retailer users to edit all the fields in a supplier or site record. This authority profile can be assigned to a user role or a specific retailer user.

### **Supplier User Editor**

The Supplier User Editor Authority Profile is available to allow retailer users to edit all the fields in a supplier user record, except for roles and permissions. This authority profile can be assigned to a user role or a specific retailer user.

### **Supplier Contacts Administrator**

The Supplier Contacts Administrator Authority Profile is available to allow retailer users to create, edit, and delete supplier contacts. This authority profile can be assigned to a user role or a specific retailer user.

## Getting Started

Before using Supplier, be sure that you are familiar with the user interface. If you need more information, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*. This User Guide covers the login, home page, and user interface.

## 2 Supplier Management

To work with suppliers, select the Suppliers option from the Supplier drop-down list. The Suppliers tab opens. This page shows the list of available suppliers.

Figure 2-1 Suppliers Page

| Name               | Code  | Country        |
|--------------------|-------|----------------|
| DB Test Supplier A | A0002 | United Kingdom |
| Test Supplier      | A0005 | -              |
| TM Supplier        | A0001 | -              |
| VH Test Supplier 1 | A0003 | United Kingdom |

The list shows the suppliers in order by supplier name. For each supplier, the supplier code and country are also shown.

The following actions are available:

- New Supplier: For more information, see [Registration](#).
- New Alert: For more information, see [Alerts Management](#).

To see the details for a specific supplier, double-click the row. A tab opens with the details. You can also select the View or Edit actions.

Figure 2-2 Supplier Details

| Supplier Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Contacts | Sites | Product Records | Custom Fields | Change History | Attachments |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------|-----------------|---------------|----------------|-------------|
| <b>Name:</b> PK TEST<br><b>Contact Name:</b> aaaa<br><b>Phone:</b> 951-653-2573<br><b>Supplier Type:</b> Supplier / Vendor<br><b>Website:</b> -<br><b>Lead Business Unit:</b> United States of America<br><b>Registered Company No:</b> PK TEST<br><b>Area:</b> F&E<br><b>Code:</b> A0038<br><b>Email:</b> patrick.kirkham@micros.com<br><b>Fax:</b> 951-656-1982<br><b>VAT Number:</b> -<br><b>Billing Code:</b> medium<br><b>Supplier Top Grade:</b><br><b>Comments:</b><br><b>Address:</b><br><b>Local Address:</b><br><b>Country:</b> United States |          |       |                 |               |                |             |

The following subtabs are available. Select a subtab to see the information for the supplier:

- Supplier Details
- Contacts: List of contacts for the supplier.
- Sites: List of the supplier's site locations.
- Product Records: If Product is purchased and implemented, list of product records.
- Linked Suppliers: If enabled, the number of linked suppliers is shown in parentheses on the subtab.
- Custom Fields
- Change History
- Attachments: List of documents attached to the supplier.

## Registration

This section covers the steps for registering a new supplier:

- [Adding a Supplier](#)
- [Viewing Registration Requests](#)
- [Accepting the Registration](#)

All of these steps are pertinent for retailer users. For supplier users, only accepting a registration is a pertinent step.

## Adding a Supplier

To add a supplier, select the New Supplier action. The Create Supplier/Site tab opens. From this page, a supplier can be added and sites for the supplier can be defined.

**Figure 2-3 Create Supplier/Site Page**

The screenshot shows the 'Create Supplier/Site' page in Oracle. The page has a breadcrumb trail: Home Page > Suppliers > Create Supplier/Site. There are two main sections: 'Add a new Supplier' and 'Add Site'. The 'Add a new Supplier' section has fields for Supplier Name, Supplier Code (A0008), Contact Name, Language (English (British)), Supplier Email, Confirm Email, Lead Business Unit, Supplier Type, Potential Supplier? (Yes/No), and Billing Code. The 'Add Site' section has fields for Site Name, Site Code (A0008-0001), Lead Business Unit, Site Type, Requires Maintenance Audit (Yes/No), Reason, Conducted By, EC Licence Number, Lead Technologist, Postal Code, and Site Categories. There are buttons for 'Clear all supplier fields', 'Clear all site fields', 'Add another Site', and 'Finished'.

Table 2-1 describes the fields used to add a new supplier.

**Table 2-1 Add a New Supplier Fields**

| Field               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Supplier Name       | Name of the supplier to be added. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Supplier Code       | <p>Identifies the supplier account. Mandatory field.</p> <p>Depending on the Registration system parameter settings, the code may be automatically assigned by the system, may be automatically assigned and the user permitted to change it, or be manually entered by the user on creation of the account.</p> <p>The format of a supplier code is a letter followed by a 4-digit sequence number with leading zeroes. The supplier codes start from the letter A and 0001. For example, A0001, A0002, and so on.</p> <p>Only retailer users with edit access to Supplier records may change the code (where permitted); validation ensures the code is unique.</p> |
| Contact Name        | Name to be assigned to the first supplier user created. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Language            | <p>Language of the initial supplier user. The language is selected from the list of languages supported for the module. This value defaults to the module's base language.</p> <p>Text is presented in the selected language when the user logs in to complete the registration process and in the initial registration request email.</p>                                                                                                                                                                                                                                                                                                                            |
| Supplier Email      | An email is sent to this address inviting the first supplier user to complete the registration process. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Confirm Email       | Supplier email address reentered for confirmation. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Lead Business Unit  | Classification of the supplier. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Supplier Type       | Select the type of supplier from the drop-down list. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Potential Supplier? | Setting that determines if this supplier is a potential supplier. Potential suppliers are billed when their first site is approved, rather than when registration is completed. The default is No. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Billing Code        | <p>An optional field to assign a billing classification to the supplier. Selection is made from the Billing Codes glossary, but has no functional use within the system.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

Table 2-2 describes the fields used to define a site for the new supplier.

**Table 2-2 Add a New Site Fields**

| Field     | Description                                    |
|-----------|------------------------------------------------|
| Site Name | Name of the site to be added. Mandatory field. |

**Table 2-2 (Cont.) Add a New Site Fields**

| Field                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Site Code                  | <p>Identifies the site account. Mandatory field.</p> <p>Depending on the Registration system parameter settings, the code may be automatically assigned by the system, may be automatically assigned and the user permitted to change it, or be manually entered by the user on creation of the account.</p> <p>Other Registration system parameters control the format of the site code and whether it must be unique across the entire portal, or just within its supplier account.</p> <p>The default coding method generates a 4-digit sequence number with leading zeroes, starting from 0001. For example, 0001, 0002, and so on; however, an alpha alternative sequencing such as AAAA, AAAB, and so on, may be used.</p> <p>The site code may also be automatically prefixed with the supplier code, such as A0001-0001.</p> <p>Only retailer users with edit access to Site records may change the code (where permitted); validation ensures the code is suitably unique.</p> |
| Lead Business Unit         | Classification of the supplier.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Site Type                  | Select the type of site from the drop-down list. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Requires Maintenance Audit | Settings that determines if a maintenance audit is required. The default is No.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Reason                     | Select a reason for the maintenance audit.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Conducted By               | Name of the person who conducts the maintenance audit.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| EC License Number          | License number for the site location.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Lead Technologist          | Name of the lead technologist for the site location. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Postal Code                | Postal code for this site location.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Site Categories            | Select the business category associated with this site. Mandatory field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

To add a new supplier:

1. Enter the information for the new supplier. For a description of the fields, see [Table 2-1](#).
2. Enter the information for a site for the supplier. For a description of the fields, see [Table 2-2](#).
3. If additional sites are needed, click **Add another site**. An additional section for information for that site appears. See Step 2.
4. When all the information is added, click **Finished**. The supplier and site information is validated.

If any site within the system contains the same value found within the Postal Code or EC Licence Number fields, the following mandatory field must be completed. The information entered for this field is added to the site's comment field.

**Figure 2-4 Reason for This Site Request Field**

5. If no errors are found, the Confirmation page appears.

**Figure 2-5 Add a New Supplier Confirmation Page**

- To add another supplier, click **Add another Supplier**. See Step 1.
- To edit the details shown on the confirmation page, click **Edit Supplier Details**. A tab is opened in edit mode for this supplier.

Upon completion of the registration request, the following is done:

- A Supplier record is created for the supplier with the status set to Awaiting Registration.
- A Site record is created for each site with the status set to Awaiting Registration.
- A User and Person record is created for the supplier contact, using the contact name and email address:
  - The User record has the job role set to Supplier Administrator.
  - The online help option is set to enabled so that any help text is available when the user initially logs in to complete the registration process.
  - The user's language is set to the language selected in the registration request or the default language if none was selected.
  - The EC Licence Number is assigned to the Certificate Number field within the References table against the Reference Type called EC Licence Number.
- A Logon ID is generated from the User Name field. If a person with the same Logon ID exists, an incremental number is added to the end until the Logon ID becomes unique.
- The corresponding IDCS user profile is created; the user will receive an email, instructing them to set their password in IDCS.

## Viewing Registration Requests

The retailer user can view a list of all registration requests that are waiting to be completed by the supplier by selecting Supplier/Sites and then the Site Awaiting Registration view. [Figure 2-6](#) shows an example of the list.

**Figure 2-6 View Registration Requests**

| Site Name | Site Code  | Supplier Name | Country | Lead Technologist | Site Status           |
|-----------|------------|---------------|---------|-------------------|-----------------------|
| Test Site | A0005-0001 | Test Supplier | -       | Julian            | Awaiting Registration |

The retailer can send a reminder email message to any suppliers who have yet to complete the registration. To send the reminder, select the Re-send Registration Request action. The email message is not sent if the supplier has already registered.

## Accepting the Registration

To accept the registration request:

1. In the request email message, select the link and log in using the user ID and password.

**Figure 2-7 Registration Page**

myOwnBrandLogo  
STRAPLINE

Welcome to Core 0\_3. There are 5 steps to register.  
**You are at step 1.**

> 1. Enter your supplier code

2. Enter your company details

3. Enter your billing details

4. Enter your contact details

5. Accept the terms and conditions

Please enter your supplier code. This is the code you received from your technologist

**Welcome to the Core 0\_3**

When you sign up to the Core 0\_3 you will benefit from a dedicated system created to help you manage your site and product information in an effective way. This will provide you with many advantages, such as:

- The Document Area, which includes the Technical Policies and Codes of Practice.
- The Audits & Visits process, which records and tracks the progress and status of your site Audits and Visits. This provides you with access to monitor and follow up non conformances and for Core 0\_3 to close the Audit or Visit once it is complete.
- An interactive Alerts system, which provides a method for Core 0\_3 to communicate and collect responses to urgent consumer scares and issues and provide your site with important technical information.
- Access to the Product Specification process, which includes:
  - Multiple format specifications to accommodate food and non-food products
  - Generation of Pack Copy, which is electronically issued to artwork companies to provide on-pack labelling requirements
  - Online validation, to ensure product specifications conform to Core 0\_3 rules prior to submission for approval by a Technologist
  - The Core 0\_3 can also import specifications that have been created using certain Recipe Management Systems (RMS)
- The Homepage, which includes your personal task list and news items that Core 0\_3 want you to be aware of, please check these news items every time you logon.

If you are having trouble with the registration process please call the Core 0\_3 helpline on +44 845 602 9731 or alternatively e-mail

Cancel Registration Next Step >>

There are five steps in the process. The current step is displayed in bold.

2. Enter the unique supplier code and select **Next Step**.

If the entered supplier code is not valid, the Validation Errors dialog box appears. Select **Cancel** and reenter the supplier code.

**Note:**

The supplier code is communicated to the initial supplier user outside of the system, usually through a phone call or letter. This acts as a security measure. If the auto-generated e-mail is intercepted, access cannot be gained without the supplier code.

3. Enter the company details. The registered company name is mandatory. Select **Next Step**.

**Figure 2-8 Company Details**

Registered company number:  \*

VAT number:

**Head office address**

Country:

Address 1:

Address 2:

City:

County:

Postal/Zip Code:

GPS latitude:

GPS longitude:

Cancel Registration Next Step >>

4. Enter the billing details. To copy the corporate address for the company as the billing address, select **Copy company address**. Select **Next Step**.

Figure 2-9 Billing Details

Individual or department bills should be addressed to:

**Billing Address**

Country:

Address 1:

Address 2:

City:

County:

Postal/Zip Code:

GPS latitude:

GPS longitude:

[Copy company address](#)

[<< Previous Step](#) [Cancel Registration](#) [Next Step >>](#)

5. Enter the contact details. The company contact details are mandatory. To use the same company contact details as the billing contact details, select **Copy company contact details**. Select **Next Step**.

Figure 2-10 Company Contact Details

**Company contact details**

This is the person we will contact for general enquiries

Name:

Telephone number:

Fax number:

Email:

Confirm Email:

**Billing contact details**

This is the person we will contact with any specific billing enquiries

Name:

Telephone number:

Fax number:

Email:

[Copy company contact details](#)

[<< Previous Step](#) [Cancel Registration](#) [Next Step >>](#)

6. Accept the terms and conditions:
  - a. If required to accept the terms and conditions, check the box. You may choose to view the terms and conditions in any of the supported languages.
  - b. Under Other Information, enter the purchase order number.
  - c. Under Data Protection, check to box if you do not wish to receive information on software and services.

d. Select **Accept**.

To log out without completing the process, select the log out link at the top of the window. The details on the previous windows are validated and saved. The user is logged out.

Figure 2-11 Accept Terms and Conditions

[Log out \(your progress will be saved\)](#)

There are 5 steps to register.  
You are at step 5.

1. Enter your supplier code
2. Enter your company details
3. Enter your billing details
4. Enter your contact details
- > 5. Accept the terms and conditions

### Please check your details and accept the terms and conditions

#### You Will Be Charged £5000 To Register 1 Site

##### Company Details

Name: Magic Supplier

Registered company number: rtetertert

VAT number: -

Country: -

Address 1: -

Address 2: -

City: -

County: -

Postal/Zip Code: -

GPS latitude: -

GPS longitude: -

##### Billing Details

Individual or department bills should be addressed to: ghjghjghjh

Country: -

Address 1: -

Address 2: -

City: -

County: -

Postal/Zip Code: -

GPS latitude: -

GPS longitude: -

##### Company Contact

Name: Fred

Telephone number: 4534534

Fax number: 345345

Email: magic@org.com

##### Billing Contact

Name: Fred

Telephone number: -

Fax number: -

Email: magic@org.com

Switch language of Ts & Cs: English (British)

☐ I accept the [TERMS AND CONDITIONS](#)

#### Other Information (including purchase order number)

Please enter your purchase order number and any other information in the box below.

#### Data Protection

Micros Retail & Manufacturing Ltd. takes the protection of your personal data seriously. We will hold and process any personal information which you provide to us on the Site in order to facilitate and enhance the services which we provide to you. We may also use such information for the purposes of market research and direct marketing. We may from time to time make your personal information available to other Micros Retail & Manufacturing Ltd. partners and group companies and other carefully selected third parties. We or other such trustworthy third parties may, from time to time, contact you for the purposes of market research or to provide details of services which may be of interest to you.

☐ Please tick this box if you do **NOT** wish Micros Retail & Manufacturing Ltd. to send you information about other software and services which may be of interest to you.

[<< Previous Step](#)
[Cancel Registration](#)
[Accept](#)

Once **Accept** is selected, the acceptance process completes:

- The site status is set to Awaiting Approval.

## Approving the Registration

Once registered, a site must be approved by the Technologist before the account is fully functional.

When the supplier completes the registration process, the Technologist responsible for the site is notified that the approval is needed. Notification may be made using email or with a task in the Technologist's Task App. For information on Task App, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*.

In the email message or task, a link is provided to the Sites Awaiting Approval view. This view lists all sites with the Awaiting Approval status.

**Figure 2-12 Sites Awaiting Approval**

| Site Name    | Site Code  | Supplier Name    | Country | Lead Technologist | Last Audit | Last Visit | Last Audit Score | Last Visit Score |
|--------------|------------|------------------|---------|-------------------|------------|------------|------------------|------------------|
| Magic Site 1 | A0006-0001 | Magic Supplier 1 | -       | Angelo            | -          | -          | -                | -                |

From this view, the Technologist can approve sites individually or approve a number with a single action. To approve a number of sites, select each sites and then select the Set To Active action. If the status change fails for one or more of the selected sites, an error dialog box appears.

There may be cases where the retailer believes that the supplier has not met the necessary standards and elects to reject the supplier. This is done by setting the status of the sites to Unapproved. This can be done by opening the record in Edit mode and selecting the Set to Unapproved action.

## Completing the Approval of the Site

When one site or multiple sites are set to Active, the Site Status Change dialog box appears.

**Figure 2-13 Site Status Change**

Table 2-3 describes the fields in the Site Status Change dialog box.

**Table 2-3 Site Status Change Fields**

| Field          | Description                                                                                                                                                                                             |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sites          | When multiple sites are selected, the supplier and site codes are listed in ascending order by the site code.                                                                                           |
| Comment        | Enter a comment describing the status change. Mandatory field.                                                                                                                                          |
| Schedule Audit | Used to select whether the initial audit is to be scheduled for each of the sites being approved.                                                                                                       |
| Template       | Select the type of audit from the drop-down list.                                                                                                                                                       |
| Announced      | Select whether the audit is announced. The default is set based on the selected type of audit in the Template field. If Optional or no value was selected for Template, the user must select Yes or No. |

**Table 2-3 (Cont.) Site Status Change Fields**

| Field                  | Description                                                                                               |
|------------------------|-----------------------------------------------------------------------------------------------------------|
| Audit Date             | Due date of the audit calculated based on the default of the selected audit template.                     |
| Lead Business Category | If the audit type requires a business category, Lead Business Category must be selected. Mandatory field. |
| Business Categories    | If the audit type requires a business category, Business Categories must be selected. Mandatory field.    |

After making all the selections, select **Ok**:

- The selected sites are set to Active.
- The entered comments are appended to the site's comments field.
- The Change History log is updated.
- If the option to schedule an audit was selected, an audit is created for the selected type against the site with the announced/unannounced flag and due date set as appropriate. The Lead Technologist and Business Category are carried through to the Audit record.
- When the first site of a potential supplier is approved, the Order record is updated to set the status to Unprocessed. For potential suppliers, this is done as part of the approval process rather than when the supplier completes the registration process.

## Adding Additional Sites

When additional sites are required for a supplier, a Retailer user can add the additional sites. To add an additional site:

1. Select the Suppliers option from the Supplier drop-down list. The Suppliers tab opens.
2. Double-click the supplier name. A tab opens for that suppliers
3. Select the Sites subtab. The Sites page opens. This page lists the sites defined for the supplier.
4. Select the New Site action. The New Site tab opens.

Figure 2-14 New Site Page

Home Page Suppliers AR Supplier New Site

### Supplier Details

|                      |                                                              |
|----------------------|--------------------------------------------------------------|
| Supplier Name:       | AR Supplier                                                  |
| Supplier Code:       | A0001                                                        |
| Contact Name:        | John Smith                                                   |
| Supplier Email:      | <a href="mailto:j.smith@example.com">j.smith@example.com</a> |
| Lead Business Unit:  | UK                                                           |
| Supplier Type:       | Supplier Type                                                |
| Potential Supplier?: | No                                                           |
| Billing Code:        | medium                                                       |

Clear all site fields

### Add Site

|                             |                                                               |   |
|-----------------------------|---------------------------------------------------------------|---|
| Site Name:                  |                                                               | * |
| Site Code:                  | A0001-0002                                                    | * |
| Lead Business Unit:         |                                                               |   |
| Site Type:                  |                                                               | * |
| Requires Maintenance Audit: | <input type="radio"/> Yes <input checked="" type="radio"/> No |   |
| Reason:                     |                                                               |   |
| Conducted By:               |                                                               |   |
| EC Licence Number:          |                                                               |   |
| Lead Technologist:          | -                                                             | * |
| Postal Code:                |                                                               |   |
| Site Categories:            | -                                                             | * |

Add another Site

Finished

The Supplier Details section is filled in with the details of the selected supplier. These fields are read only.

5. In the Add Site section, enter the details for the new site. The Site Code is generated by the system and cannot be changed. For information on these fields, see [Table 2-2](#).
6. To add another site, click **Add another Site**. Another Add Site section is added to the page.
7. When you have finished entering the new sites, click **Finished**. The new site records are assigned to the Awaiting Registration status. For information on registering the new sites, see [Registration](#).

**Note:**

Additional sites do not need to go through the full registration process. The additional sites just need to be approved.

## Deleting Suppliers and Sites

If a supplier/site account has been created in error or was created and never used, administrator users with the Power Administrator authority profile may delete the supplier and site accounts, but only where there are no associated records such as Products, Specifications, Audits, and so on. For more information, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

# 3

## Site Management

To work with sites, select the Sites option from the Supplier drop-down list. The Sites tab opens. This page shows the list of available sites.

**Figure 3-1 Sites Page**

| Site Name                   | Site Code  | Supplier Name      | Country        | Lead Technologist    | Site Status           | Last Audi... | Last Visit... | Last Audit Sc... | Last Visit Score |
|-----------------------------|------------|--------------------|----------------|----------------------|-----------------------|--------------|---------------|------------------|------------------|
| DB Test Supplier A - Site 1 | A0002-0001 | DB Test Supplier A | United Kingdom | Product Technologist | Active                | -            | -             | -                | -                |
| DB Test Supplier A - Site 2 | A0002-0002 | DB Test Supplier A | United Kingdom | Product Technologist | Active                | -            | -             | -                | -                |
| DB Test Supplier A - Site 3 | A0002-0003 | DB Test Supplier A | United Kingdom | Product Technologist | Active                | -            | -             | -                | -                |
| Test Site                   | A0005-0001 | Test Supplier      | -              | Julian               | Awaiting Registration | -            | -             | -                | -                |
| TM Site                     | A0001-0001 | TM Supplier        | -              | Angelo               | Awaiting Approval     | -            | -             | -                | -                |
| TM Site 2                   | A0001-0002 | TM Supplier        | -              | TM Tech              | Awaiting Approval     | -            | -             | -                | -                |
| TM Site 3                   | A0001-0003 | TM Supplier        | -              | TM Tech              | Awaiting Approval     | -            | -             | -                | -                |
| VH Test Supplier 1 - Site 1 | A0003-0001 | VH Test Supplier 1 | United Kingdom | Vikas                | Active                | 10/12/14     | -             | -                | -                |

The following actions are available:

- **New Alert:** For information on creating a new alert, see [Alerts Management](#).
- **Change Status:** Select one or more sites from the list and select the Change Status action. Select the new status for the sites from the list. Only Retailer users can change the status.

To see the details for a specific site, double-click the row. A tab opens with the details. You can also select the View or Edit actions.

Figure 3-2 Site Details Page

The screenshot shows the 'Site Details' page for 'DB Test Supplier A'. The page has a top navigation bar with tabs: Home Page, Sites, and DB Test Supplier A. Below this is a sub-tab bar with: Actions, DB Test Supplier A - Site 1, and a plus icon. The main content area has a sub-tab bar with: Site Details (selected), Contacts, Product Records, Specifications, Audits & Visits, Scorecards, Linked Sites (0), and Sourcing Details. The 'Site Details' sub-tab is expanded, showing the following fields:

|                        |                                                                       |
|------------------------|-----------------------------------------------------------------------|
| <b>Details</b>         |                                                                       |
| Supplier Name:         | <a href="#">DB Test Supplier A</a>                                    |
| Site Name:             | DB Test Supplier A - Site 1                                           |
| Site Code:             | A0002-0001                                                            |
| Site Type:             | Site Type <input type="text" value="***"/>                            |
| Phone:                 | 0123 456789                                                           |
| Site Top Grade:        | <input type="text" value=""/>                                         |
| <b>Other</b>           |                                                                       |
| Comments:              | <input type="text" value=""/>                                         |
| <b>Address</b>         |                                                                       |
| Use Supplier Address?: | Yes                                                                   |
| Local Address          |                                                                       |
| Country:               | United Kingdom                                                        |
| Address 1:             | Apex House, Apex Business Park                                        |
| Address 2:             | Ruddington Lane                                                       |
| City:                  | Nottingham                                                            |
| County:                | Nottinghamshire                                                       |
| Post Code:             | NG11 7DD                                                              |
| GPS latitude:          | 1.234500                                                              |
| GPS longitude:         | 9.876500                                                              |
| <b>Categories</b>      |                                                                       |
| Categories:            | Category Level 1 / Category Level 2a <input type="text" value="***"/> |
| Lead Technologist:     | Product Technologist <input type="text" value="***"/>                 |
| Other Technologists:   | - <input type="text" value="***"/>                                    |
| Business Unit:         | UK <input type="text" value=""/>                                      |

The following subtabs are available. Select a subtab to see the information for the site:

- Site Details
- Contacts: List of contacts for the site.
- Product Records: If Product is purchased and implemented, list of product records.
- Specifications: List of product specification documents and the status.
- Audits & Visits: List of audits and visits and the status.
- Scorecards: List of scorecards and status.
- Linked Sites: The number of linked sites is shown in parentheses on the subtab.
- Sourcing Details: Billing and production details.
- References: List of certificates and the status.
- Project Links: If Project is purchased and implemented, list of projects and status.
- Custom Fields
- Change History
- Attachments: List of documents attached to the site.

The following actions are available:

- New Audit: For information on creating a new audit, see [Audits & Visits](#).
- New Visit: For information on creating a new visit, see [Audits & Visits](#).
- New Scorecard: For information on creating a new scorecard, see [Scorecard Management](#).

# 4

## Contacts Management

This chapter covers managing contacts:

- Contacts are usually created by a Supplier user, however Retailer users can be granted the Supplier Contacts Administrator authority profile to allow them to create contacts.
- Contacts are created by the Supplier users that have the Supplier Administrator or Site Administrator roles/authority profiles.
- Supplier users access contacts through the Contacts tab on their Company / Company Details record and their Site records. They only have visibility to the contacts in their organization and only the sites with which they are associated.
- Retailer users access contacts through the Supplier/Contacts list view or Contacts tab in the individual supplier and site records. They have visibility to all contacts for all suppliers and sites.
- Contacts can be assigned to the supplier and/or the site by creating a single contact record and assigning the relevant roles. Site contacts can be assigned to all or just specific sites, however when they are created as a user, they may have been associated to specific sites, in which case they would only be able to be a contact for those sites.
- A contact may or may not be a user of the system. This allows, for example, a contact of a CEO to be created for reference purposes without the need to set them up as a user of the system.
- When a contact is created, the pick-list allows an existing user of the system or the name of a non-user to be selected.
- The set of contact roles is configurable. Each portal can build their own set of roles that contacts are to be recorded for at the supplier and site levels:
  - The roles may be set as mandatory, in which case, a contact must be assigned to that role for the supplier/site account to be approved.
  - Some roles are mandatory because they are used by the system to automatically notify the relevant users as part of the system's workflow. For example, a Specification Main Contact would be notified when a product specification requires action.
  - Where there are mandatory roles that have not been assigned a contact, the supplier/site administrator is alerted through the Urgent Item Manager (UIM) app.

This chapter covers the following topics:

- [Creating a Contact](#)
- [Editing a Contact](#)
- [Deleting a Contact](#)

## Creating a Contact

A contact can be created starting either from the supplier or site record. To create a new contact:

1. Select the New Contact action. The Contact Details page appears.

**Figure 4-1** Contact Details Page for Creating a New Contact

The screenshot displays the 'New Contact' page within the 'Abacus Trading' application. The page has a blue header with 'Home Page' and 'Abacus Trading' tabs. Below the header, there's a 'New Contact' button and an 'Actions' dropdown. The main content area is divided into 'Contact Details' and 'Change History' tabs. The 'DETAILS' section contains the following fields:

- Name:** Jenny Smith (with a dropdown arrow and a red asterisk, and a 'Clear' button)
- Email:** js@org.com (with a red asterisk)
- Alternate Email:** (empty text box)
- Mobile Phone Number:** (empty text box)
- Phone Number:** 6546464 (with a red asterisk)
- Fax:** (empty text box)
- Job Title:** (empty text box)
- Is this contact a Supplier Contact:** Yes
- Supplier Contact Roles:** - (with a dropdown arrow)
- Is this contact a Site Contact:** ☒ Yes ☐ No
- Site Selection:** ☒ Selected Sites ☐ All Sites
- Sites:** - (with a dropdown arrow)
- Site Contact Roles:** Artwork approver (with a dropdown arrow)
- Comments:** (large text area)

The 'ADDRESS' section is partially visible at the bottom of the page.

Table 4-1 describes the fields in this page.

**Table 4-1** Contact Details Fields for Adding a New Contact

| Field               | Description                                                             |
|---------------------|-------------------------------------------------------------------------|
| Name                | Enter a name or select a name from the drop-down list. Mandatory field. |
| Email               | Enter the email address for this contact. Mandatory field.              |
| Alternate Email     | Enter an alternate email address, if available.                         |
| Mobile Phone Number | Enter a mobile phone number, if available.                              |
| Phone Number        | Enter the phone number for this contact. Mandatory field.               |

**Table 4-1 (Cont.) Contact Details Fields for Adding a New Contact**

| Field                              | Description                                                                                                                                                                                                                                                                                                                     |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fax                                | Enter a fax number, if available.                                                                                                                                                                                                                                                                                               |
| Job Title                          | Enter a job title, if available.                                                                                                                                                                                                                                                                                                |
| Is this contact a Supplier Contact | <ul style="list-style-type: none"><li>When creating a contact from the Supplier record, this field is set to Yes.</li><li>When creating a contact from the Site record, this field is set to No.</li></ul>                                                                                                                      |
| Supplier Contact Roles             | Select the supplier-level roles for this contact from the list of available roles. This field is only available when creating a contact from the Supplier record. Mandatory field.                                                                                                                                              |
| Is this contact a Site Contact     | <ul style="list-style-type: none"><li>When creating a contact from the Supplier record, this field is set to No.</li><li>When creating a contact from the Site record, this field is set to Yes.</li></ul>                                                                                                                      |
| Site Selection                     | <ul style="list-style-type: none"><li>When set to Selected Sites, the sites must be chosen in the Selected Sites field.</li><li>When set to All Sites, this contact is used for all sites for this supplier, including any sites added later.</li></ul>                                                                         |
| Selected Sites                     | Select the sites to be assigned to the contact. This field is only displayed when Site Selection field is set to Selected Sites. Mandatory field.                                                                                                                                                                               |
| Site Contact Roles                 | Select the site-level roles for this contact from the list of available roles. This field is only available when creating a contact from the Site record. Mandatory field.                                                                                                                                                      |
| Comments                           | Enter any comments.                                                                                                                                                                                                                                                                                                             |
| Address                            | If a name is selected from the list of users, the address is automatically filled in: <ul style="list-style-type: none"><li>When creating a contact from the Supplier record, this field is set to the supplier address.</li><li>When creating a contact from the Site record, this field is set to the site address.</li></ul> |

2. Enter the information for this contact. When all the information is entered, select the Save action. The new contact is created.

## Editing a Contact

Supplier users can edit supplier contacts and site contacts. Site users can only edit site contacts.

### Editing a Supplier Contact

To edit a supplier contact:

1. Navigate to the contact record. Select Company, Company Details, and then Contacts. The Contacts page appears.

**Figure 4-2 Supplier Contacts Page**

Home Page

Alconera U.K. Ltd

Alconera U.K. Ltd

Actions

Company Details

Contacts

Sites

Product Records

Change History

Attachments

Actions

| Name         | Supplier Contact Role                                                                             | Phone          | Email Address:                                             | User |
|--------------|---------------------------------------------------------------------------------------------------|----------------|------------------------------------------------------------|------|
| Ben Short    | Managing Director or Chief Executive<br>Head of technical function<br>Product development manager | 121 2321313132 | <a href="mailto:ben@org.com">ben@org.com</a>               | ✗    |
| Suzanne Hall | Specification admin contact                                                                       | 0123456789     | <a href="mailto:110376@example.com">110376@example.com</a> | ✓    |
| Terry Booth  | Head of technical function                                                                        | 3131 454546646 | <a href="mailto:tb@org.com">tb@org.com</a>                 | ✗    |

2. Select the relevant contact.
3. Select the Edit action. The Contact Details appear.
4. Make any needed updates and select the Save action.

### Editing a Site Contact

To edit a site contact:

1. Navigate to the contact record. Select Company, Company Details, and then Sites. The Sites page appears.
2. Select Contacts. The Contacts page appears.

**Figure 4-3 Site Contacts Page**

Home Page

Wares Farm

Wares Farm

Actions

Site Details

Contacts

Product Records

Specifications

Audits & Visits

Scorecards

Sourcing Details

References

Project Links

Change History

Attachments

Actions

| Name         | Supplier Contact Role | Site Contact Role                | Phone No.    | Email                                                      | User |
|--------------|-----------------------|----------------------------------|--------------|------------------------------------------------------------|------|
| Suzanne Hall |                       | Emergency Contact                | 9876543210   | <a href="mailto:110376@example.com">110376@example.com</a> | ✓    |
|              |                       | Specification admin contact      |              |                                                            |      |
|              |                       | Head of manufacturing operations |              |                                                            |      |
|              |                       | Artwork approver                 |              |                                                            |      |
| Tom Short    |                       | Specification admin contact      | 4445 8787888 | <a href="mailto:ts@org.com">ts@org.com</a>                 | ✗    |
|              |                       | Head of manufacturing operations |              |                                                            |      |
|              |                       | Artwork approver                 |              |                                                            |      |
| Will         |                       | Specification admin contact      | 34534534     | <a href="mailto:will@org.com">will@org.com</a>             | ✓    |
|              |                       | Head of manufacturing operations |              |                                                            |      |
|              |                       | Artwork approver                 |              |                                                            |      |
|              |                       | Head of technical function       |              |                                                            |      |

3. Select the relevant contact.
4. Select the Edit action. The Contact Details appear.
5. Make any needed updates and select the Save action.

## Deleting a Contact

Supplier users can delete supplier contacts and site contacts. Site users can only delete site contacts.

### Deleting a Supplier Contact

To delete a supplier contact:

1. Navigate to the contact record. Select Company, Company Details, and then Contacts. The Contacts page appears. See [Figure 4-2](#).

2. Select the relevant contact.
3. Select the Edit action. The Contact Details appear.
4. Select the Delete action. The Delete Contact dialog box appears. To confirm the deletion, select **Ok**.

 **Note:**

This could result in sites losing a mandatory contact as this contact may be a supplier-level contact that has been set as a contact covering one or more sites. Site users logging in see an action in the Urgent Items Manager stating that a mandatory contact is missing. For more information on the Urgent Items Manager, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*.

### Deleting a Site Contact

To delete a site contact:

1. Navigate to the contact record. Select Company, Company Details, and then Sites. The Sites page appears.
2. Select Contacts. The Contacts page appears. See [Figure 4-3](#).
3. Select the relevant contact.
4. Select the Edit action. The Contact Details appear.
5. Select the Delete action. The Delete Contact dialog box appears. To confirm the deletion, select **Ok**.

# 5

## Alerts Management

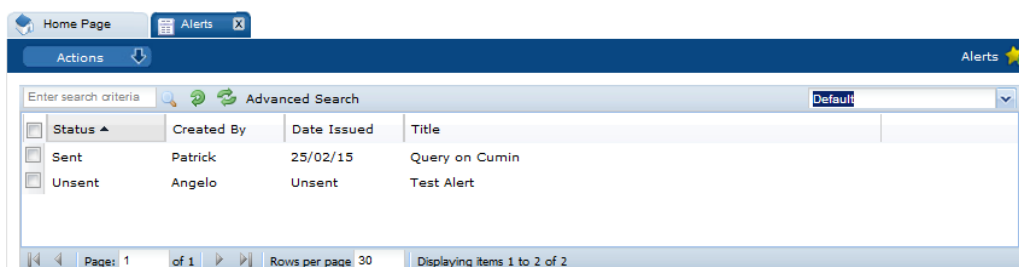
Alerts are a means of communication between the retailer and its supplier base for the management of urgent issues, such as food scares, and capture of feedback using a customized form, for example, whether the supplier uses a particular ingredient or process in the manufacture of its products. Alerts can be created from the list of Alerts or from the lists of Suppliers or Sites. Alerts are distributed using email and can be targeted at specific sets of suppliers and their manufacturing sites.

This chapter covers managing and responding to alerts.

### Managing Alerts

To manage alerts, select the Alerts action. The Alerts tab opens.

**Figure 5-1 Alerts Page**



The screenshot shows the Alerts page in a web application. At the top, there are tabs for 'Home Page' and 'Alerts'. Below the tabs is a blue header bar with 'Actions' and 'Alerts' (with a star icon). The main content area has a search bar with 'Enter search criteria' and 'Advanced Search' options. Below the search bar is a table with the following data:

| Status | Created By | Date Issued | Title          |
|--------|------------|-------------|----------------|
| Sent   | Patrick    | 25/02/15    | Query on Cumin |
| Unsent | Angelo     | Unsent      | Test Alert     |

At the bottom of the table, there is a pagination bar showing 'Page: 1 of 1', 'Rows per page: 30', and 'Displaying items 1 to 2 of 2'.

For each alert, the following information appears:

- Status of the alert.
- Name of the user who created the alert.
- Date the alert was issued or Unsent.
- Title of the alert.

### Create a New Alert

An alert can be created starting either from the Suppliers or Sites tab. To create an alert, select the New Alert action. The New Alert tab opens.

Figure 5-2 New Alert Page

The screenshot shows the 'New Alert' page in the Oracle Alerts application. The page is divided into several sections. At the top, there are tabs for 'Home Page', 'Alerts', and 'New Alert'. Below these is a 'New Alert' header with an 'Actions' button. The main content area has tabs for 'Alert Details', 'Recipients', 'Questions', 'Responses', 'Custom Fields', 'Change History', and 'Attachments'. The 'Alert Details' tab is active, showing the following fields:

- Title:** A text input field with a red asterisk indicating it is mandatory.
- Description:** A text input field with a red asterisk indicating it is mandatory.
- Response Required By:** A date input field showing '03/03/15' with a red asterisk indicating it is mandatory.
- Time (Optional):** A time input field.
- Urgent:** A checkbox.
- Status:** A dropdown menu showing 'Unsent'.
- Select From:** Radio buttons for 'Sites', 'Suppliers', and 'Suppliers & Sites'. 'Sites' is selected.
- Site Contact Roles:** A dropdown menu showing '-'. A red asterisk is next to it.
- Requires Acknowledgment:** Radio buttons for 'Yes' and 'No'. 'No' is selected.
- Automatic Reminders:** A section with a 'Send Reminder' checkbox. 'Yes' is selected.

Table 5-1 describes the fields on this page.

Table 5-1 New Alert Tab

| Field                    | Description                                                                                                                                                              |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Title                    | Title displayed for the alert. Mandatory field.                                                                                                                          |
| Description              | Description of the alert. Mandatory field.                                                                                                                               |
| Response Required By     | Date by which responses must be returned. Mandatory field.                                                                                                               |
| Time (Optional)          | Time by which responses must be returned on the due date. Optional field.                                                                                                |
| Urgent                   | Check this box if the alert should be marked as urgent in email and response views.                                                                                      |
| Status                   | Status of the alert, for example, Sent or Unsent.                                                                                                                        |
| Select From              | Select to target suppliers, sites, or both for this alert. Mandatory field.                                                                                              |
| Site Contact Roles       | List of site contact roles that can respond to this alert. Field not shown if suppliers is selected in the Select From field.                                            |
| Requires Acknowledgement | Check this box if an acknowledgement is required from the supplier.                                                                                                      |
| Send Reminder            | If Yes is selected, the Frequency and Send Reminders Until fields appear. Select how often to send a reminder and an ending date for reminders. An end date is required. |

The following subtabs are available:

- Alert Details
- Recipients: List of users who receive notification when the alert is created.
- Questions: Set of questions that need to be responded to.
- Responses: List of responses to this alert.
- Custom Fields

- Change History
- Attachments: List of documents attached to the alert.

The following actions are available:

- Create Mailing List
- Load Mailing List
- Import Recipients
- Save and Send

For information on mailing lists, see the *Oracle Retail Brand Compliance Management Cloud Service Management Administration Guide*.

## View or Edit an Existing Alert

Select an alert on the Alerts page. Select the View or Edit action. A tab opens for the selected alert.

**Figure 5-3 Alert Details Page**

The screenshot shows the 'Alert Details' page for an alert titled 'Query on Cumin'. The page has a top navigation bar with 'Home Page', 'Alerts', and 'Query on Cumin' tabs. Below the navigation bar is a 'Query on Cumin' header with an 'Alert' icon. The main content area is divided into subtabs: 'Alert Details', 'Recipients', 'Questions', 'Responses', 'Custom Fields', 'Change History', and 'Attachments'. The 'Alert Details' subtab is selected, showing a 'Details' section with the following fields:

|                                 |                                                                                                                                                                                                                                                                               |                              |          |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|----------|
| <b>Title:</b>                   | Query on Cumin                                                                                                                                                                                                                                                                |                              |          |
| <b>Description:</b>             | test                                                                                                                                                                                                                                                                          |                              |          |
| <b>Response Required By:</b>    | 25/02/15                                                                                                                                                                                                                                                                      | <b>Time (Optional):</b>      | 12:00    |
|                                 |                                                                                                                                                                                                                                                                               | <b>Urgent:</b>               | Yes      |
| <b>Status:</b>                  | Sent                                                                                                                                                                                                                                                                          |                              |          |
| <b>Select From:</b>             | Sites                                                                                                                                                                                                                                                                         |                              |          |
| <b>Site Contact Roles:</b>      | Crisis management primary contact<br>Emergency Contact<br>Main Contact<br>Head of product quality<br>Specification admin contact<br>Audits and visits contact<br>Out of hours contact<br>Account manager or sales & marketing contact<br>Managing Director or Chief Executive |                              |          |
| <b>Requires Acknowledgment:</b> | Yes                                                                                                                                                                                                                                                                           | <b>Block Responses:</b>      | No       |
| <b>Automatic Reminders</b>      |                                                                                                                                                                                                                                                                               |                              |          |
| <b>Send Reminder:</b>           | <input checked="" type="radio"/> Yes <input type="radio"/> No                                                                                                                                                                                                                 |                              |          |
| <b>Frequency:</b>               | Daily                                                                                                                                                                                                                                                                         | <b>Send Reminders Until:</b> | 28/03/15 |

For information on these fields and subtabs, see [Create a New Alert](#).

To see the question details, select the Questions subtab. The retailer user sees the table of the question details (the Alert Questions field-set) and a preview of how they will be presented to the supplier user (the Alert Answers field-set).

Figure 5-4 Alert Questions Page

| Alert Details                                                                                                                                                                                                                                | Recipients                                                                                                                                                                                                                             | Questions | Responses | Custom Fields | Change History | Attachments |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------|---------------|----------------|-------------|
| <b>Alert Questions</b>                                                                                                                                                                                                                       |                                                                                                                                                                                                                                        |           |           |               |                |             |
| Question / Answer                                                                                                                                                                                                                            |                                                                                                                                                                                                                                        |           | Type      |               |                |             |
| 1                                                                                                                                                                                                                                            | When designing an Alert, Question responses may be free text...                                                                                                                                                                        |           | Text      |               |                |             |
| 2                                                                                                                                                                                                                                            | Or radio buttons, requiring a single response to be given...<br>Yes (When designing an Alert, the Comments can be made mandatory for certain responses; in this case, the 'Yes' response requires a mandatory Comment.)<br>No<br>Maybe |           | Radio     |               |                |             |
| 3                                                                                                                                                                                                                                            | Or check box style, enabling multiple options to be given...<br>A<br>B<br>C (similar to radio button responses, it can be made mandatory for Comments to be given for certain check box responses).<br>D                               |           | Checkbox  |               |                |             |
| <b>Alert Answers</b>                                                                                                                                                                                                                         |                                                                                                                                                                                                                                        |           |           |               |                |             |
| 1. When designing an Alert, Question responses may be free text...                                                                                                                                                                           |                                                                                                                                                                                                                                        |           |           |               |                |             |
| <input type="text"/>                                                                                                                                                                                                                         |                                                                                                                                                                                                                                        |           |           |               |                |             |
| 2. Or radio buttons, requiring a single response to be given...                                                                                                                                                                              |                                                                                                                                                                                                                                        |           |           |               |                |             |
| <input type="radio"/> Yes (When designing an Alert, the Comments can be made mandatory for certain responses; in this case, the 'Yes' response requires a mandatory Comment.)<br><input type="radio"/> No<br><input type="radio"/> Maybe     |                                                                                                                                                                                                                                        |           |           |               |                |             |
| 3. Or check box style, enabling multiple options to be given...                                                                                                                                                                              |                                                                                                                                                                                                                                        |           |           |               |                |             |
| <input type="checkbox"/> A<br><input type="checkbox"/> B<br><input type="checkbox"/> C (similar to radio button responses, it can be made mandatory for Comments to be given for certain check box responses).<br><input type="checkbox"/> D |                                                                                                                                                                                                                                        |           |           |               |                |             |

## Responding to Alerts

To manage the responses to alerts, select the Alert Responses action. The Alert Responses tab opens.

Figure 5-5 Alert Responses Page

Home Page

Alert Responses

Alert Responses

Actions

Enter search criteria

Advanced Search

Default

| Alert Date | Title          | Status | Supplier Name      | Site Name                   | Responded On |
|------------|----------------|--------|--------------------|-----------------------------|--------------|
| 25/02/15   | Query on Cumin | ❌      | Test Supplier      | Test Site                   | -            |
| 25/02/15   | Query on Cumin | ❌      | TM Supplier        | TM Site                     | -            |
| 25/02/15   | Query on Cumin | ❌      | TM Supplier        | TM Site 2                   | -            |
| 25/02/15   | Query on Cumin | ❌      | TM Supplier        | TM Site 3                   | -            |
| 25/02/15   | Query on Cumin | ❌      | VH Test Supplier 1 | VH Test Supplier 1 - Site 1 | -            |
| 25/02/15   | Query on Cumin | ✅      | DB Test Supplier A | DB Test Supplier A - Site 1 | 25/02/15     |
| 25/02/15   | Query on Cumin | ✅      | DB Test Supplier A | DB Test Supplier A - Site 2 | 25/02/15     |
| 25/02/15   | Query on Cumin | ✅      | DB Test Supplier A | DB Test Supplier A - Site 3 | 25/02/15     |

Page: 1 of 1 Rows per page 30 Displaying items 1 to 8 of 8

Table 5-2 describes the columns in this page.

**Table 5-2 Alert Responses**

| Field         | Description                                                                                           |
|---------------|-------------------------------------------------------------------------------------------------------|
| Alert Date    | Date the alert was created.                                                                           |
| Title         | Title of the alert.                                                                                   |
| Status        | Status of the alert:                                                                                  |
|               |  Response is needed. |
|               |  Response received.  |
|               |  Urgent alert item.  |
|               |  No response needed. |
| Supplier Name | Name of the supplier that issued the response.                                                        |
| Site Name     | Name of the site that issued the response.                                                            |
| Responded On  | Date when a response was submitted.                                                                   |

To see the details on a specific alert response, double-click the row. A tab opens with the details of the response.

**Figure 5-6 Alert Response Details Page**



|                        |  |                             |                                       |
|------------------------|--|-----------------------------|---------------------------------------|
| Alert Response Details |  |                             |                                       |
| <b>Supplier:</b>       |  | DB Test Supplier A          | <b>Response Required By:</b> 25/02/15 |
| <b>Site:</b>           |  | DB Test Supplier A - Site 3 | <b>Respond By Time:</b> 12:00         |
| <b>Responded On:</b>   |  | 25/02/15                    | <b>Title:</b> Query on Cumin          |
| <b>Supplier User:</b>  |  | Supplier Admin A            | <b>Status:</b> Responded To           |
| <b>Email:</b>          |  | dbull@micros.com            | <b>Acknowledged:</b> Yes              |
| <b>Job Title:</b>      |  | Supplier Admin              | <b>Description:</b> test              |

# 6

## Audits & Visits

Audits and visits are created against suppliers' sites and are managed between the retailer and supplier users. Issues of non-conformance may be created to manage any necessary follow-up corrective actions. Once created, a predefined workflow process is used to manage the audit/visit and any non-conformances through their lifecycle, ensuring the appropriate users are notified and given access to the relevant data in order to complete their role in the process.

Audits and Visits are created from templates. For information on the templates, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*.

Audits and visits are created from within the Site record. A system parameter can be set to also allow them to be created from the list of sites.

To work with audits and visits, select the Audits & Visits option from the Supplier drop-down list. The Audits & Visits tab opens.

**Figure 6-1 Audit & Visits Page**

| Site Name                         | Site Code  | Template               | Status      | Due Date | Booked Date | From Date | To Date  | Lead Technol...         | Score/Grade |
|-----------------------------------|------------|------------------------|-------------|----------|-------------|-----------|----------|-------------------------|-------------|
| DB Test<br>Supplier A -<br>Site 1 | A0002-0001 | Ethical Audit          | In Progress | 06/11/14 | 06/11/14    | 06/11/14  | 06/11/14 | Product<br>Technologist | -           |
| VH Test<br>Supplier 1 -<br>Site 1 | A0003-0001 | Standard Food<br>Audit | Completed   | 10/12/14 | 10/12/14    | 10/12/14  | 10/12/14 | Vikas                   | -           |

The following columns are shown:

- Site Name
- Site Code
- Template
- Status
- Due Date
- Booked Date
- From Date
- To Date
- Lead Technologist
- Score/Grade

To edit an entry, select the row and then the Edit action. A tab opens in edit mode. For information on the fields shown for this tab, see [Table 6-1](#).

To view details on an audit, double-click a row. A tab opens with the details.

**Figure 6-2 Audit Details Page**

The screenshot shows the Oracle Audit Details page for 'Ethical Audit, DB Supplier - Site 1'. The page has a navigation bar with tabs: Home Page, Audits & Visits, and Ethical Audit, DB... The main content area is titled 'Ethical Audit, DB Supplier - Site 1' and contains a form with the following sections:

- Site Details:**
  - Supplier Name: DB Supplier
  - Supplier Code: A0002
  - Site Name: DB Supplier - Site 1
  - Site Code: A0002-0001
- Audit Details:**
  - Code: 20001
  - Status: In Progress
  - Announced: No
  - Lead Technologist: John Smith
  - Record Type: Audit
  - Template: Ethical Audit
  - Audit Type: Third Party
- Dates & Costs:**
  - Booked Date: 06/11/14
  - Due Date: 06/11/14
  - Cost Recovery: -
  - Audit Date: From Date: 06/11/14, To Date: 06/11/14
  - Time Spent (hours): -
- People Present:**

| Name | Job Title          | Company          | Auditor |
|------|--------------------|------------------|---------|
| Name | Certification Body | AB International | Yes     |

[Table 6-1](#) describes the fields in this view.

**Table 6-1 Audit Details**

| Field                    | Description                                                             |
|--------------------------|-------------------------------------------------------------------------|
| <b>Site Details</b>      |                                                                         |
| Supplier Name            | Name of the supplier.                                                   |
| Supplier Code            | Code assigned to the supplier.                                          |
| Site Name                | Name of the site.                                                       |
| Site Code                | Code assigned to the site.                                              |
| <b>Audit Details</b>     |                                                                         |
| Code                     | Unique identifier of the audit/visit.                                   |
| Record Type              | Type of audit/visit.                                                    |
| Template                 | Template used to create the audit.                                      |
| Status                   | Status of the audit.                                                    |
| Audit Type               | Indicates whether this is an internal or third-party audit.             |
| Announced                | Indicates whether the supplier knows that the audit/visit is scheduled. |
| Lead Technologist        | Retailer person responsible for the audit/visit.                        |
| <b>Dates &amp; Costs</b> |                                                                         |
| Booked Date              | Date the audit/visit is expected to take place. This is optional.       |
| Due Date                 | Date the audit/visit is due to be completed                             |
| Audit Date               | From and to dates when the audit took place.                            |

**Table 6-1 (Cont.) Audit Details**

| Field                 | Description                                                                                                                                                                                                                                             |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Time Spent (hours)    | Time the retailer spent working on the audit/visit.                                                                                                                                                                                                     |
| Cost Recovery         | Indicates whether the cost (all or part) of the audit/visit is recharged to the supplier. If Yes is selected, the Cost Recover Comments field appears. The amount to be recharged can be entered here.                                                  |
| <b>People Present</b> | <p>For each person present at the audit, the following information is listed:</p> <ul style="list-style-type: none"> <li>• Name of the person</li> <li>• Job title</li> <li>• Company name</li> <li>• Indicator if this person is an auditor</li> </ul> |

The following subtabs are available:

- Audit Details
- Checklists
- Issues: List of any issues found during the audit/visit.
- Summary & Comments: Information recorded during the audit/visit.
- Project Links: If Project is purchased and implemented, list of projects and status.
- Custom Fields
- Change History
- Attachments: Documents attached to this audit/visit.

To see the list of issues from the audit/visit, select the Issues subtab.

**Figure 6-3 Audit/Visit Issues Page**

| Issue Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Custom Fields | Change History                                         | Attachments |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|--------------------------------------------------------|-------------|
| <div> <div>Details</div> <div> <div>Supplier Name:</div> <div>DB Supplier</div> </div> <div> <div>Site Name:</div> <div>Site 1</div> </div> </div> <div> <div>Audit Type:</div> <div>Annual Supplier Audit</div> </div> <div> <div>Status:</div> <div>Open</div> </div>                                                                                                                                                                                                             |               |                                                        |             |
| <div> <div>Issue Type:</div> <div>Critical</div> </div>                                                                                                                                                                                                                                                                                                                                                                                                                             |               | <div> <div>Reference:</div> <div>7.9 High</div> </div> |             |
| <div> <div>Code:</div> <div>3376</div> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                       |               |                                                        |             |
| <div> <div>Description:</div> <div> <div> <div> <div>No Soap and water temp &lt;50 C</div> </div> </div> </div> </div>                                                                                                                                                                                                                                                                                                                                                              |               |                                                        |             |
| <div> <div>Corrective Action</div> <div> <div> <div>Required Action:</div> <div> <div>Assigned To (Name):</div> <div></div> </div> <div> <div>Assigned To (User):</div> <div>-</div> </div> <div> <div>Due Date:</div> <div>03/26/15</div> </div> </div> <div> <div>Action Taken:</div> <div> <div>Completed By (Name):</div> <div></div> </div> <div> <div>Completed By (User):</div> <div>-</div> </div> <div> <div>Completed Date:</div> <div></div> </div> </div> </div> </div> |               |                                                        |             |
| <div> <div>Comments</div> <div> <div>Add a comment:</div> <div> <div>Comment:</div> <div></div> </div> <div> <div>Previous Comments</div> <div> <div>Created On</div> <div>Created By</div> <div>Comment</div> </div> </div> </div> </div>                                                                                                                                                                                                                                          |               |                                                        |             |

The following subtabs are available. Select a subtab to see the information for the issue:

- Issue Details
- Custom Fields
- Change History
- Attachments: List of documents attached to the issue.

# 7

## Scorecard Management

Scorecards provide a means for a retailer to assess their suppliers against a set of predefined criteria on an on-going or ad hoc basis. Scorecards are made up of a series of questions which may be answered by the supplier as a self-assessment or completed by the retailer.

Templates are available for creating scorecards. For information on the templates, see the *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*. Scorecards can be created from within the Site record or from the list of Sites.

To work with scorecards, select the Scorecards option from the Supplier drop-down list. The Retailer Scorecards tab opens. The following information is displayed for each scorecard:

- Supplier Name
- Supplier Code
- Site Name
- Site Code
- Status
- Year
- Period
- Due Date
- Scorecard Type
- Person Responsible
- Completed
- Scorecard Score

To view a scorecard, double-click a row in the list. A tab opens with the scorecard details.

**Figure 7-1 Scorecard Details Page**

| Details           | Questions                                                                                      | Scoring & Completion | Project Links | Custom Fields       | Attachments                                                                                             | Change History |  |
|-------------------|------------------------------------------------------------------------------------------------|----------------------|---------------|---------------------|---------------------------------------------------------------------------------------------------------|----------------|--|
| Site Details      |                                                                                                |                      |               |                     |                                                                                                         |                |  |
| Supplier Name:    | Academy                                                                                        |                      |               | Supplier Code:      | A0001                                                                                                   |                |  |
| Site Name:        | Academy                                                                                        |                      |               | Site Code:          | A0001-0004                                                                                              |                |  |
| Scorecard Details |                                                                                                |                      |               |                     |                                                                                                         |                |  |
| Scorecard Type:   | Pre-audit questionnaire                                                                        |                      |               | Extra Scorecard:    | No                                                                                                      |                |  |
| Status:           | In progress                                                                                    |                      |               | Frequency:          | Period                                                                                                  |                |  |
| Due Date:         | 31/03/11  * |                      |               | Person Responsible: | Technical Admin  * |                |  |
| Year:             | 2011                                                                                           |                      |               | Business Category:  | -                  |                |  |
| Period:           | 1                                                                                              |                      |               | Week:               | 2                                                                                                       |                |  |
| Completed By:     | -                                                                                              |                      |               | Completed On:       | -                                                                                                       |                |  |

Table 7-1 describes the fields on this page:

**Table 7-1 Scorecard Fields**

| Field                             | Description                                                                                                                                                                               |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Site Details</b>               |                                                                                                                                                                                           |
| Supplier Name                     | Name of the supplier.                                                                                                                                                                     |
| Supplier Code                     | Code assigned to the supplier.                                                                                                                                                            |
| Site Name                         | Name of the site.                                                                                                                                                                         |
| Site Code                         | Code assigned to the site.                                                                                                                                                                |
| <b>Scorecard Details</b>          |                                                                                                                                                                                           |
| Scorecard Type                    | Name of the template used to create the scorecard.                                                                                                                                        |
| Status                            | Status of the scorecard: <ul style="list-style-type: none"> <li>• Future</li> <li>• In progress</li> <li>• Awaiting approval</li> <li>• Awaiting amendment</li> <li>• Complete</li> </ul> |
| Due Date                          | Date the scorecard is due to be completed.                                                                                                                                                |
| Year                              | Year that corresponds to the due date based on the system calendar.                                                                                                                       |
| Period                            | Period that corresponds to the due date based on the system calendar.                                                                                                                     |
| Week                              | Week that corresponds to the due date based on the system calendar.                                                                                                                       |
| Quarter Start Date                | Quarter start date that corresponds to the due date based on the system calendar.                                                                                                         |
| Quarter End Date                  | Quarter end date that corresponds to the due date based on the system calendar.                                                                                                           |
| Extra Scorecard                   | Set if this scorecard was scheduled based on a frequency override.                                                                                                                        |
| Frequency                         | Frequency for scheduling this scorecard.                                                                                                                                                  |
| Person Responsible                | Name of the technologist responsible for the scorecard.                                                                                                                                   |
| Business Category                 | Business categories applicable to this scorecard.                                                                                                                                         |
| Auto generation of this scorecard | If the Status field is Future, select whether to automatically reschedule this scorecard when it is completed or becomes due.                                                             |
| Submitted by                      | Name of the user who submitted or completed the scorecard.                                                                                                                                |
| Submitted on                      | Date the scorecard was submitted or completed.                                                                                                                                            |

The following subtabs are available:

- Details
- Questions
- Scoring & Completion
- Attachments
- Change History

## Create a New Scorecard

To create a new scorecard:

1. Select the New Scorecard action. The Create Scorecard dialog box appears.
2. From the drop-down lists, select a template, supplier, and site. Click **Ok**. The details of the new scorecard, based on the template, appear.
3. Update the fields for the scorecard for the audit/visit and save the scorecard.

## Questions Subtab

To see the scorecard questions, select the Questions subtab. The questions are presented as configured in the scorecard's template for the supplier to provide their answers.

**Figure 7-2 Scorecard Questions Page**

The screenshot shows the 'Questions' subtab of a scorecard. It contains five questions with the following details:

- Question 1:** "1. Is your site *currently* approved to a nationally recognised standard eg SQF, BRC". It has two radio buttons: "Yes (0)" (selected) and "No(-100)". Below is a text area labeled "Enter Comments Here..." with a vertical scrollbar.
- Question 2:** "2. Indicate the process capabilities at this site". It has three checkboxes: "Growing / Harvesting" (unchecked), "Processing" (checked), and "Packing" (unchecked).
- Question 3:** "3. Is there a designated person responsible for food safety". It has two radio buttons: "Yes (please indicate name and job title)(0)" (selected) and "No(-100)". Below is a text area containing the text "hgagg" with a vertical scrollbar.
- Question 4:** "4. A documented traceability programme has been established". It has two radio buttons: "Yes(0)" (selected) and "No(-100)".
- Question 5:** "5. Describe your traceability process". It has four checkboxes: "A recall team is established(0)" (checked), "Mock recalls are conducted(0)" (checked), "A mock recall was conducted in the last 6 months(0)" (checked), and "No recall team exists(-10)" (checked).

## Scoring & Completion Subtab

To see the scores and completion status for the scorecard, select the Scoring & Completion subtab. The Scorecard Value and Calculated Score are automatically calculated based on the answers given and the scoring rules configured in the scorecard's template.

**Figure 7-3 Scoring & Completion Page**

| Details              | Questions | Scoring & Completion                                    | Project Links | Custom Fields | Attachments | Change History |
|----------------------|-----------|---------------------------------------------------------|---------------|---------------|-------------|----------------|
| <b>Score Details</b> |           |                                                         |               |               |             |                |
| Scorecard Value:     |           | -30                                                     |               |               |             |                |
| Calculated Score:    |           | Pass ( with concerns )                                  |               |               |             |                |
| Scorecard Score:     |           | Pass ( with concerns ) <input type="button" value="v"/> |               |               |             |                |
| <b>Comments</b>      |           |                                                         |               |               |             |                |
| Score Comments:      |           | <div></div> <div>^</div> <div>v</div>                   |               |               |             |                |
| General Comments:    |           | <div></div> <div>^</div> <div>v</div>                   |               |               |             |                |
| Further Comments:    |           | <div></div> <div>^</div> <div>v</div>                   |               |               |             |                |
| <b>Completion</b>    |           |                                                         |               |               |             |                |
| Completed:           |           | -                                                       |               |               |             |                |
| Completed By:        |           | -                                                       |               |               |             |                |

## Deleting a Scorecard

Scorecards at Future, In Progress, Awaiting Approval, and Awaiting Amendment status may be deleted by the retailer/portal owner user. Scorecards at Future and In Progress status may also be deleted by the supplier user, but only where the scorecard was originally created by the supplier.