

Oracle® Retail Supplier Evaluation Cloud Service Process User Guide



Release 22.2.401.0

F70176-01

October 2022

The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE®

F70176-01

Copyright © 2022, Oracle and/or its affiliates.

Primary Author: Bernadette Goodman

Contributing Authors: Simon Tucker, Aidan Ratcliffe

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Send Us Your Comments

Preface

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

1 Introduction

Accessing Process	1-1
Getting Started	1-2

2 Retailer Users

Activities Option	2-2
Processes Option	2-2
Creating a New Process	2-3
Adding a Process to an Existing Process	2-7
Adding an Activity and Schedule	2-7
Schedule Processes	2-7
Editing an Existing Process	2-12
Adding Users	2-12
Replacing a Team	2-13
Adding Activities	2-13
Removing Activities	2-13
Moving a Process	2-13
Adopting Information from a Parent Process	2-13
Distributing Information from a Parent Process	2-14
Adding and Removing Links to Records	2-14

Unlinking Multiple Records	2-14
Changing Status of Multiple Processes	2-15
End Processes Option	2-15
Hierarchy Option	2-15
Hierarchy All Option	2-16
Copying a Process	2-17

3 Supplier and Site Users

Activities Option	3-1
Processes Option	3-1
End Processes Option	3-1
Hierarchy Option	3-2

4 All Users

Process Links	4-1
Process Briefs	4-1

A Appendix: Workflows

Send Us Your Comments

Oracle Retail Supplier Evaluation Cloud Service Process User Guide, Release 22.2.401.0

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).



Note:

Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Help Center (docs.oracle.com) web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our web site at <http://www.oracle.com>.

Preface

This document describes the Oracle Retail Supplier Evaluation Cloud Service Process 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 Supplier Evaluation Cloud Service Process module.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Supplier Evaluation Cloud Service documentation set:

- *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Implementation Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Release Readiness Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Security Guide*
- *Oracle Retail Supplier Evaluation Cloud Service User Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Workspace User Guide*

For information on the Oracle Retail Supplier Evaluation Cloud Service modules, see the following documents:

- *Oracle Retail Supplier Evaluation Cloud Service Reports User Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Supplier User Guide*

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Help Center (docs.oracle.com) Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

Oracle Retail documentation is available on the Oracle Help Center (docs.oracle.com) at the following URL:

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

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of the document is available, that version supersedes all previous versions.

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

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

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

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<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

Process is a process management system based on the use of predefined templates for Processes, Briefs, and Activities:

- Processes can be a single process or a combination of sub-processes.
- Within each of these elements, in the Process or End Process template, there are key details entered plus a list of activities.
- Each Activity has a specified number of working days, responsibilities, keys, gates (locks), Activity indicators, and so on, which when added together, create a critical path and process time line.
- Wherever possible, the commencement/completion of an Activity automatically updates the Process workflow. This reduces the need for users to access the process plan and separately confirm tasks have been commenced/completed.

Accessing Process

After logging into the system, users see an option to access Process from the main navigation bar at the top of the screen.

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

Figure 1-1 Process Drop-Down List



The Process Administrator and Process Manager roles are only given to Retailer users. Supplier users have access to processes associated to their supplier/site.

Access to Process functionality is restricted by the following roles:

Process Administrator

This can be assigned to Retailer users who need to configure Process, End Process, and Activity templates and the associated administration options.

If you have been assigned the Process Administrator Authority Profile, you can do the following:

- Access the Administration area and create, amend, or delete what has been set up for Process, such as, templates, teams, and pick list values.
- Create, amend, or delete Processes, Activities and Briefs.
- Schedule processes.
- Unlink records from a process.
- Access and maintain the system calendar.
- Access the Global Changes option to reassign the process managers.

Process Manager

This can be assigned to users who need to create processes and edit schedules.

If you have been assigned the Process Manager Authority Profile, you can do the following for those processes for which you are responsible:

- Access the Administration area and view what has been set up for Process, such as, templates, teams, and pick list values.
- Create, amend, or delete Processes, Activities and Briefs.
- Schedule processes.
- Unlink records from a process.

Getting Started

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

2

Retailer Users

This chapter describes how the Process options are used by Retailer users. For information on each option, see the following section:

- [Activities Option](#)
- [Processes Option](#)
- [End Processes Option](#)
- [Hierarchy Option](#)
- [Hierarchy All Option](#)

For users with Administrator access for Process, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*.

The list views have the following options in the View Selector drop-down list:

- **Associated:** You can select to see entries for which you have been assigned as Owner, Responsible, or Viewer.
- **Owner:** You can select to see only the entries for which you have been assigned as Owner.
- **Responsible:** You can select to see only the entries for which you have been assigned as Responsible.

Some lists include Key and Gate columns. These are used within an Activity to force completion of previous activities so that the activities adhere to the critical path. An Activity Gate can be locked, that is, cannot be completed without previous Activity (key or keys) being completed.

[Table 2-1](#) describes the icons in those columns.

Table 2-1 Icons for Key and Gate Columns

Icons	Description
	Indicates this is a Process record.
	Indicates this is an End Process record.
	Indicates the Activity Key field is set to Yes.
	Indicates that the Activity Gate field is set to Yes and preceding keys are complete.
	Indicates that the Activity Gate field is set to Yes and preceding keys are not all complete.

Activities Option

To navigate to the activities you need to complete, select the Activities option. When you select this option, a tab opens with a default list view of Activities for which you have been assigned as being Responsible. For each activity, the following information is shown:

- Proposed End Date
- Activity Name
- Process Title
- Description
- Process
- Sequence
- Proposed Start Date
- Actual Start Date
- Duration
- Status
- Sub Status
- Critical Path
- Key
- Gate

The following actions are available on this page:

- View: Select an activity from the list. The Activity record opens in read only mode.
- Edit: Select an activity from the list. The Activity record opens in edit mode.
- Change Status and Exit

There are two ways to update the status for activities:

- Select multiple entries in the list. Select the Change Status and Exit action by either right-clicking or selecting it from the Actions menu. Then, select the status change from the list.
- Open an activity in edit mode. Select the Change Status and Exit action by either right-clicking or selecting it from the Actions menu. Then, select the status change from the list.

To navigate to the activities you need to complete, you can select Assignments on the Workspace page. For more information, see the *Oracle Retail Supplier Evaluation Cloud Service Workspace User Guide*.

Processes Option

When you select this option, a tab opens with a default list view of Processes that meet the following requirements:

- The Process has activities that have not been completed.

- You have been assigned as being Responsible.
- The Process has not been cancelled or completed.

For each process, the following information is shown:

- Parent Process
- Process Title
- Process Type
- Template Type
- Proposed Start Date
- Actual Start Date
- Proposed End Date
- Proposed Launch Date

The following actions are available on this page:

- New Process: See [Creating a New Process](#).
- Add Process: See [Adding a Process to an Existing Process](#).
- Schedule Processes: See [Schedule Processes](#).
- Edit: See [Editing an Existing Process](#).

Creating a New Process

For information on creating Process Templates, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*.

To create a new process:

1. Select the New Process action. The Create Process dialog box opens:
 - a. Select the folder containing the relevant process templates. Click the icon. In the Select Folder dialog box, select a folder from the list and click **Ok**.
 - b. Choose the template from the selected folder. Click the icon. In the Select Template dialog box, select the process template and click **Ok**.
 - c. The list of activities from the selected template are shown. Click **Ok**. The New Process tab opens.

Figure 2-1 New Process Page

The screenshot shows the 'New Process Page' with the following fields and values:

- Process Id:** -
- Process Title:** [Empty text box with a red asterisk indicating it is mandatory]
- Status:** Created
- Parent Process:** -
- Master Process:**
- Template Used:** DEVELOPMENT (approved supplier)
- Template Type:** Project
- Template Folder:** Development
- Process Type:** [Dropdown menu]
- Master Concept:** -
- Process Concept:** [Empty text box]
- Target Consumer:** [Empty text box]
- Process Manager:** Bernie G [User selection icon]

General Product Details

- Proposed Products:** [Empty text box]
- Product Range Information:** [Empty text box]
- Packaging:** [Empty text box]
- Spec Type:** [Dropdown menu]
- Brand:** [Dropdown menu]
- Sub Brand:** [Dropdown menu]
- Categories:** - [User selection icon]
- New Category Comments:** [Empty text box]
- Supplier:** - [User selection icon]
- Site:** -

2. Enter the process details:

- Process Id: The system assigns this ID when the process is created.
- Process Title: The title must be unique within the system. This field is mandatory.
- Status: The Status is set to Created.
- Parent Process: If this new process is being added to an existing process, the parent process is shown here. The Parent Concept field is also shown.
- Master Process: If this process is a master process within a hierarchy of processes, check the box.
- Template Used: This is the name of the template that was selected for this process in Step 1.
- Template Type: This is the type assigned to that template, that is, Process or End Process.

- Template Folder: Location of the template.
 - Process Type: Select the type from the drop-down list.
 - Master Concept: If this process is selected to be a master process, enter an overview of the concept in this field.
 - Process Concept: Enter an overview of this process concept.
 - Target Consumer: Enter a description of the target consumer for this process.
 - Process Manager: This is initially set to the user who is creating the process. To change a process manager, click the icon.
3. Open the Teams page.

If the process template used to create this process had any activities specified, all the user roles specified in the activities linked to the process template are shown here.

Figure 2-2 Teams Page

Role	Users
Product Development Manager	P.D. Manager 
Process Manager	M Project 
External Role(s)	Supplier Responsible, Supplier Viewer 

To select users for each role, click the icon. The Select Users dialog box opens. Select the users from the list and click **Ok**.

4. Open the Activities page. Activities that were set up for the template are shown here.

Figure 2-3 Activities Page

Sequence...	Activity Name	Status	Duration	Start Date	End Date	Critical Path	Key	Gate	Responsible User Roles	External Role
100.0	Upload Project Brief in Attachments	Not Started	1	-	-	No	-	-	Coordinator	-
200.0	R&D	Not Started	120	-	-	Yes	-	-	Product Developer	Supplier Responsible
250.0	Specification Status set to "Collaborative Draft"	Not Started	0	-	-	No	-	-	Product Developer	Supplier Viewer
255.0	Link Specification to Project	Not Started	2	-	-	No	-	-	Coordinator	-
290.0	R&D Final Review	Not Started	0	-	-	Yes	-	-	Product Developer	-
400.0	QA Review	Not Started	20	-	-	Yes	-	-	Wegmans Brand QA Technologist, Wegmans Brand QA Manager, Wegmans Brand QA Technician	-

You can add and remove activities from the list:

- To add activities, select the Add Activity action. The Add Activity dialog box opens. Select the activities from the list and click **Ok**.
 - To remove activities, select the entries in the list and then select the Remove Activity action. The Confirmation dialog appears. Click **Ok**.
5. Open the Process Schedule page.

Figure 2-4 Process Schedule Page

Process Schedule					
Planned Working Days: 0					
Process Dates					
	Launch Date	Year	Week	Start Date	End Date
Proposed	<input type="text"/>	-	-	18/03/15 *	18/03/15 *
Actual	<input type="text"/>	-	-	<input type="text"/>	<input type="text"/>

The Start and End dates are mandatory fields. These dates are used for scheduling activities:

- Planned Working Days is initially set to zero. To calculate the number of working days, select the Schedule action. The number of planned days for activities on the critical path are added up and shown here.
 - When a launch date is selected, the year and week are shown here based on the system calendar.
- Open the Briefs page. Briefs that were set up for the process template are shown here. If additional activity briefs need to be added to the process, this can be done by adding an activity to the process which contains the additional briefs.
 - Open the Linked Records page. This page lists any links the process has with any records within the system. For information on adding and deleting linked records, see [Adding and Removing Links to Records](#).
 - Open the Attachments page. This page shows a list of documents that are attached to a process. [Table 2-2](#) describes the columns on this page.

Table 2-2 Columns for Attachments

Column	Description
Download	Double-click the icon to download the file. The icon indicates the type of file, for example, Microsoft Excel spreadsheet or Word document.
File Name or URL	File name or the URL to the file.
Description	Description of the file.
Bytes	Number of bytes in the file.
Attached By Id	Name of the person who attached the file.
Attached On	Date and time the file was attached.

You can add, delete, and edit the list:

- To add an attachment, select the New Attachment action. The Add/Edit Attachment dialog box appears. Enter the information about the file and click **Save**.
- To edit an attachment, select the entry in the list and then select the Edit action. The Add/Edit Attachment dialog box appears. The information for the selected file is shown. Make any changes and click **Save**.

- To delete an attachment, select the entry in the list and then select the Delete action. The Confirm Delete Attachment dialog box appears. Click **Ok**.
9. Open the Template Attachments page. This is a list of files attached to the template being used to create this process. For a description of the columns on this page, see [Table 2-2](#). The same options are available to add, delete, and edit the list as provided on the Attachments page.
 10. When you have made all your entries for the new process, select the Save action. The new process is added to the process hierarchy at the root level.

Adding a Process to an Existing Process

A process can be added under an existing process. To add a process, select the parent process in the left pane and then select the Add Process action. A tab opens to enable you to create the process. For information on completing this page, see [Creating a New Process](#). The new process is added to the process hierarchy under the selected parent process.

Adding an Activity and Schedule

To schedule or reschedule activities:

1. Select the processes and then select the Add Activity & Schedule action. The Add Activity dialog box opens.
2. Select the activities and then click **Ok**. The Schedule Activities dialog box opens.
3. Select the scheduling method. The following choices are available:
 - Forwards from the Start Date (with non-critical Activities Starting on same date)
 - Forwards from the Start Date (with non-critical Activities Ending on same date)
 - Backwards from the end date (with non-critical Activities Starting on same date)
 - Backwards from the end date (with non-critical Activities Ending on same date)
 - Forwards from Last Completed Activity Date (with non-critical Activities Starting on same date)
 - Forwards from Last Completed Activity Date (with non-critical Activities Ending on same date)
4. Click **Ok**. A Confirmation dialog box appears.
5. Click **Ok**. The selected activities are added to the processes. The system calculates the start and end dates for each activity.

Schedule Processes

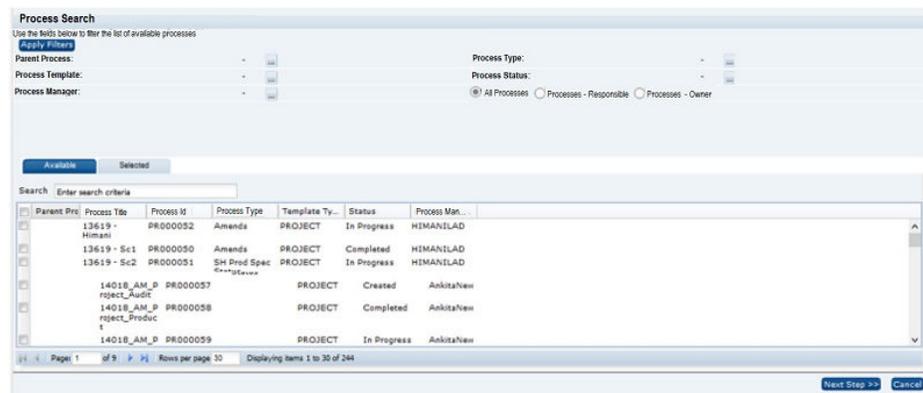
The multiple process update wizard provides a method of updating and scheduling processes, including the following features:

- Add Activities
- Remove Activities
- Amend Activity Duration
- Set Process Start/End Date
- Schedule Process

To update multiple processes and/or schedule in a single process:

1. Open Processes or End Processes under the Process menu.
2. Select the **Schedule Processes** option under the Actions menu.
 - a. A Process Search window opens presenting a list of processes:
 - When selected from the Processes page, it will contain both Process and End Process types (as defined by their templates).
 - When selected from the End Processes page, it will only contain End Process types (as defined by their templates).
 - b. Select the processes to be updated and/or scheduled. To search the list of available processes, select the filters to use and then click Apply Filters, or use the search box to search the contents of the columns.
 - c. Click the Selected tab to view the selected processes. Unchecking in the Selected tab deselects the process.

Figure 2-5 Schedule Processes Wizard Step 1



Ensure that at least one process has been selected and then select **Next Step**. The wizard moves to Step 2 for selecting the process update options.

3. A window opens, presenting a checkbox list of options for updating and/or scheduling processes:
 - Add Activities and Schedule
 - Remove Activities and Schedule
 - Amend Durations and Schedule
 - Amend Start or End Dates and Schedule
 - Schedule

Figure 2-6 Schedule Processes Wizard Step 2

Ensure that at least one option has been selected and then select **Next Step**. The wizard takes you through the updates options selected.

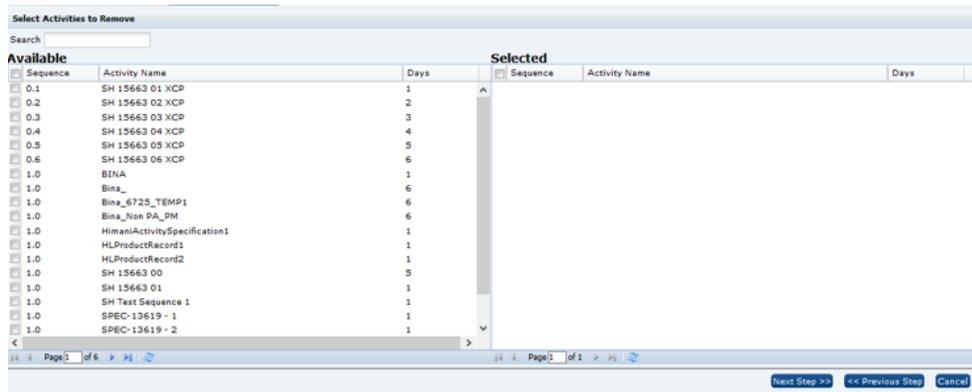
4. If **Add Activities and Schedule** was selected as an update option, a window for Step 3 of the wizard opens presenting a list of active activity templates for the user to select from to add to processes. Select at least one activity and then select **Next Step**. The wizard moves to the next selected update option.

Figure 2-7 Schedule Processes Wizard Step 3

Sequence	Activity Name	Days
<input type="checkbox"/>	SH 15663 01 XCP	1
<input type="checkbox"/>	SH 15663 02 XCP	2
<input type="checkbox"/>	SH 15663 03 XCP	3
<input type="checkbox"/>	SH 15663 04 XCP	4
<input type="checkbox"/>	SH 15663 05 XCP	5
<input type="checkbox"/>	SH 15663 06 XCP	6
<input type="checkbox"/>	BINA	1
<input type="checkbox"/>	Bina_	6
<input type="checkbox"/>	Bina_6725_TEMP1	6
<input type="checkbox"/>	Bina_Non PA_PM	6
<input type="checkbox"/>	HimaniActivitySpecification1	1
<input type="checkbox"/>	HLPProductRecord1	1
<input type="checkbox"/>	HLPProductRecord2	1
<input type="checkbox"/>	SH 15663 00	5
<input type="checkbox"/>	SH 15663 01	1
<input type="checkbox"/>	SH Test Sequence 1	1
<input type="checkbox"/>	SPEC-13619 - 1	1
<input type="checkbox"/>	SPEC-13619 - 2	1

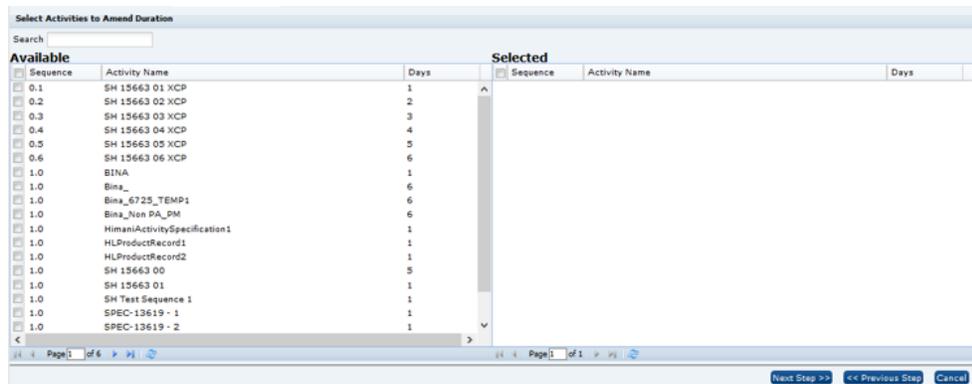
5. If **Remove Activities and Schedule** was selected as an update option, a window for Step 4 of the wizard opens, presenting a list of active activity templates for removal from processes. Select at least one activity and then select **Next Step**. The wizard moves to the next selected update option.

Figure 2-8 Schedule Processes Wizard Step 4



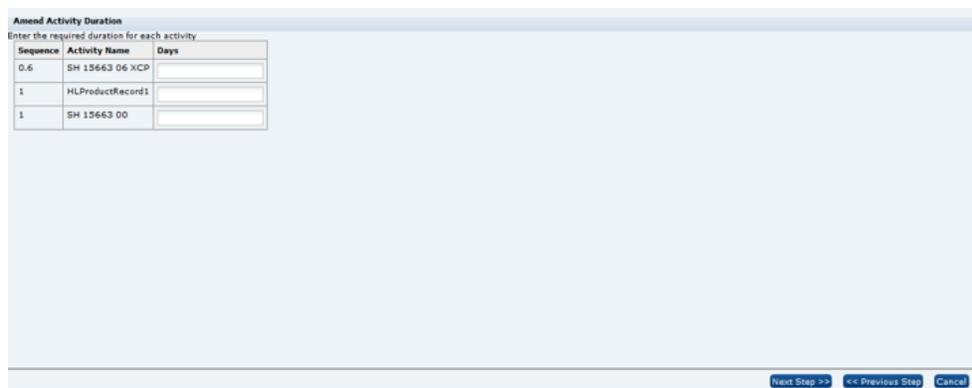
- If **Amend Durations and Schedule** was selected as an update option, a window for Step 5 of the wizard opens presenting a list of active activity templates to select for amending the activity duration. Select at least one activity and then select **Next Step**. The wizard moves to part 2 of this step.

Figure 2-9 Schedule Processes Wizard Step 5 Part 1



A list of activities selected in the first part of this step is presented, to allow entry of the *Days* duration for each activity.

Figure 2-10 Schedule Processes Wizard Step 5 Part 2



After entering a value in the Days field for each of the activities, select **Next Step**. The wizard moves to the next selected update option.

7. If **Amend Start or End Dates and Schedule** was selected as an update option, a window for Step 6 of the wizard opens presenting the date selection fields for applying to the processes.

Figure 2-11 Schedule Processes Wizard Step 6

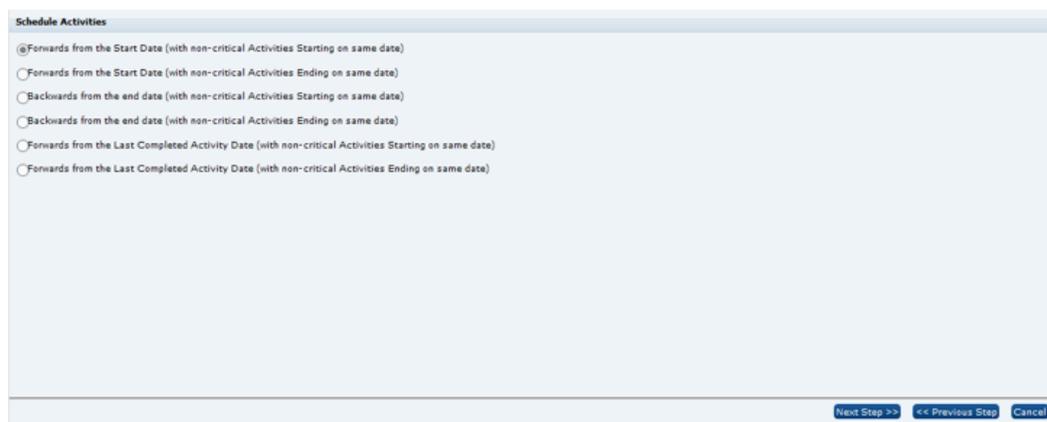


The screenshot shows a window titled "Select Process Start/End Date" with the instruction "Enter start and/or end date(s) for processes". It contains two input fields: "Start Date:" and "End Date:". At the bottom right, there are three buttons: "Next Step >>", "<< Previous Step", and "Cancel".

Enter a start and/or end date and select **Next Step**. The wizard moves to the Schedule Activities step.

8. The Schedule Activities step will always be presented, regardless of which options are selected in Step 2. The following window is presented to allow one of the scheduling methods to be selected for the Processes. The default option is the first option in the list.

Figure 2-12 Schedule Processes Wizard Step 7



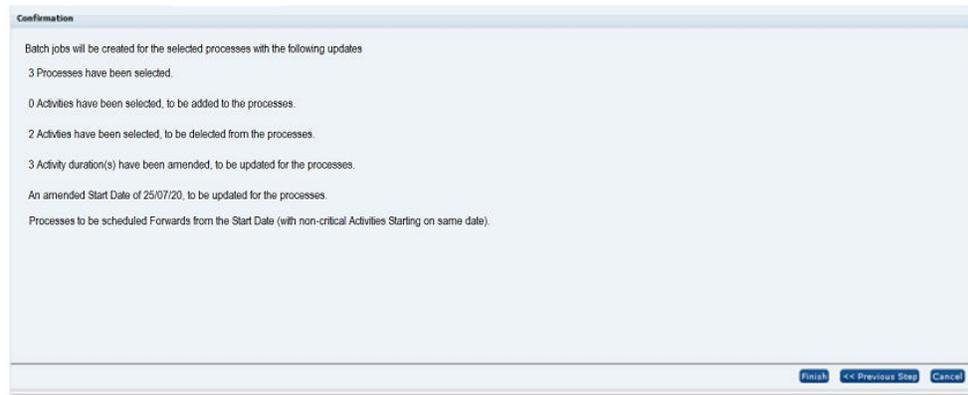
The screenshot shows a window titled "Schedule Activities" with a list of radio button options:

- Forwards from the Start Date (with non-critical Activities Starting on same date)
- Forwards from the Start Date (with non-critical Activities Ending on same date)
- Backwards from the end date (with non-critical Activities Starting on same date)
- Backwards from the end date (with non-critical Activities Ending on same date)
- Forwards from the Last Completed Activity Date (with non-critical Activities Starting on same date)
- Forwards from the Last Completed Activity Date (with non-critical Activities Ending on same date)

At the bottom right, there are three buttons: "Next Step >>", "<< Previous Step", and "Cancel".

After choosing a scheduling option, select **Next Step**. The wizard displays a confirmation window.

9. The Confirmation window provides a summary of the updates that will be applied to the selected processes and the method of scheduling.

Figure 2-13 Schedule Processes Wizard Confirmation

Selecting **Finish** results in the window closing and a job being scheduled to process the updates. You will receive an email notification when the job has started and again when it has completed, including details of any exceptions.

Editing an Existing Process

Select the process and then select the Edit action. The process records open in edit mode. The following options are available:

- [Adding Users](#)
- [Replacing a Team](#)
- [Adding Activities](#)
- [Removing Activities](#)
- [Moving a Process](#)
- [Adopting Information from a Parent Process](#)
- [Distributing Information from a Parent Process](#)

Adding Users

If additional users are required for a process, you can add them. Open the Teams page. On the Teams page, select the Add Team action from the main actions menu. The Select Team dialog box opens. Select a team, click **Ok**, and then save the process:

- If you select a team that contains additional users to those users already in your process, these users are added to the relevant role within your process.
- If you add a team which does not contain roles used by your process, there is no effect on the process.
- If you add or remove a user, the user is added or removed from all the underlying activities of your process.

Replacing a Team

If a different set of users is required for a process, you can replace the team. Open the Teams page. On the Teams page, select the **Replace Team** action from the main actions menu. The Select Team dialog box opens. Select a team from the available teams, click **Ok**, and then save the process:

- All current users are replaced with the users specified by the selected team. However, current users assigned to user roles not contained within the selected team are retained.
- If you add or remove a user, the user is added or removed from all the underlying activities of the process.

Adding Activities

If additional activities are needed for a process, you can add them. Open the Activities page. From the Activities page, select the Add Activity action from the main actions menu. The Add Activity dialog box. Select the activities, click **Ok**, and then save the process.

Removing Activities

If activities are no longer required, you can remove them from a process. Only activities at Not Started status can be removed.

Open the Activities page. On the Activities page, select the activities to be removed and then select the Remove Activity action. Save the process.

Moving a Process

A process can be moved to a different parent process. To move a sub-process, open the sub-process in edit mode. Select the Change Parent Process action. The Select Parent Process dialog box appears. Select the new parent process, click **Ok**, and save the process.

Apart from the process name, the original data is retained. If you need to adopt information from the new parent, see [Adopting Information from a Parent Process](#).

Adopting Information from a Parent Process

You can replace process information for a sub-process from its parent process. Open the sub-process in edit mode. Select the Adopt Parent Information action and save the process. The following information is replaced from the parent process:

- Process Details:
 - Process Concept
 - Target Consumer
 - Business Category
- Process Schedule:
 - Proposed Launch Date
 - Proposed Year
 - Proposed Week (of period)

Distributing Information from a Parent Process

You can distribute information from a parent process to processes. To distribute the information, open the parent process in edit mode. Select the Distribute Parent Process. It will distribute the information to all processes that are one level down from the parent process. For the list of information that is distributed, see [Adopting Information from a Parent Process](#).

Adding and Removing Links to Records

The system allows activities (through setting an Activity Type) to be linked to a number of different records, which can be used to control the activity status, including the following:

- Sites
- Audits
- Assessments

To link an activity to a record:

1. Open the activity in edit mode.
2. Select the Go to for the record. The record opens in edit mode.
3. Select the Link to Process action. The Create Activity Link dialog box appears. It lists the process title, activity name, and linked record name.
4. Click **Ok**.

To remove a link to an activity:

1. Open the Linked Records page.
2. Select the linked records in the list to be removed.
3. Select the Unlink action.

Unlinking Multiple Records

Users with the Process Manager or Process Administrator Authority Profile can select a number of processes to be unlinked, using a single action.

To unlink multiple records from their processes, select the Unlink action, either when editing the Process's Linked Records page, or from the Process Links section / page when editing a linked record.

The process unlinks the record from the process activity, plus any other activities within the process that link to the record, where they share the same Linkage Group. The status of the activity is reset to Not Started, unless other records remain linked to it.

If other records remain linked, the status of the remaining linked records (in the same Linkage Group) is considered, and compared to the Started and Completed statuses defined in the corresponding Activity Type glossary to check whether the activity statuses should remain the same, or be set back to Not Started:

- If one or more remaining records match the *Started* status, the activity remains Started (or is set to Started, if previously Complete). It is not reset to Not Started.
- If all remaining records match the *Completed* status, the activity remains Completed. It is not reset to Not Started.
- If none of the remaining records match either the *Started* or *Completed* status, the activity is reset to Not Started.

Changing Status of Multiple Processes

Users with the Process Manager or Process Administrator Authority Profile can select a number of processes in the view and then, either by right-clicking or by selecting a status from the Actions menu, change the status of the processes. A confirmation dialog must be accepted in order for the updates to be submitted.

End Processes Option

When you select this option, a tab opens with a default list view showing End Processes that have activities that meet the following requirements:

- The Process Type set to End Process.
- The Process has activities that have not been completed.
- You have been assigned as being Responsible.
- The Process has not been cancelled or completed.

For each End Process, the following information is shown:

- Parent Process
- Process Title
- Process Type
- Proposed Start Date
- Actual Start Date
- Proposed End Date
- Proposed Launch Date

The following actions are available on this page:

- New Process: See [Creating a New Process](#).
- Add Process: See [Adding a Process to an Existing Process](#).
- Add Activity & Schedule: See [Adding an Activity and Schedule](#).
- Edit: See [Editing an Existing Process](#).

Hierarchy Option

When you select this option, a tab opens with a three panel view showing a list of Processes in the left pane that meet the following requirements:

- You have been assigned as being either Responsible, Owner, or Viewer.
- The Process has activities that have not been completed.

- The Process has not been cancelled or completed.

For an example of this page, see [Figure 2-14](#).

The following actions are available on this page:

- New Process: See [Creating a New Process](#).
- Add Process: See [Adding a Process to an Existing Process](#).
- Edit: See [Editing an Existing Process](#).

Hierarchy All Option

For Process Managers or Process Administrators, when you select this option, a tab opens with a three panel view showing all Processes. The left panel displays a hierarchical list of the processes. The top right panel shows the activities for the process selected in the left pane. The bottom right panel shows the process details.

Figure 2-14 Hierarchy All Page

Seq	Activity Name	Status	Start Date	End Date	Actual End Date	Days	Critical Path	Key	Gate
210.0	Spec Request end link	Not Started	09/03/15	20/03/15	-	10	Yes	-	-
220.0	Product Line Trial Signed Off	Not Started	23/03/15	03/04/15	-	10	Yes	🔑	-
240.0	Spec set to Collaborative Draft	Not Started	06/04/15	07/05/15	-	24	Yes	🔑	-
250.0	Pack Copy Creation	Not Started	08/05/15	04/06/15	-	20	Yes	🔑	-
260.0	Artwork/approval & Files released	Not Started	05/06/15	11/08/15	-	48	Yes	-	🔒
280.0	Launch	Not Started	12/09/15	22/09/15	-	30	Yes	-	-
300.0	12 week review	Not Started	22/09/15	14/12/15	-	60	No	-	-

Process Id:	PD000001
Process Title:	Test subProject
Status:	Created
Template Used:	Product progression to Launch
Template Folder:	Selection & launch
Process Type:	-
Master Concept:	-
Parent Concept:	-
Process Concept:	-
Target Consumer:	-
Process Manager:	Tom M

Proposed Products:	-
Product Range Information:	-
Packaging:	-
Spec Type:	-
Brand:	-
Sub Brand:	-
New Category Comments:	-
Supplier:	TM Supplier

Planned Working Days:	142
------------------------------	-----

	Launch Date	Year	Week	Start Date	End Date
Proposed	-	-	-	09/03/15	22/09/15
Actual	-	-	-	-	-

The following actions are available on this page:

- New Process: See [Creating a New Process](#)
- Add Process: See [Adding a Process to an Existing Process](#)
- Edit: See [Editing an Existing Process](#)
- Copy a Process

Copying a Process

To copy a process:

1. Select the process in the left panel and select the Copy action. The Copy Process dialog box appears.
2. Enter the number of copies that are required. Click **Ok**. The dialog box is updated with a Process Title field for each copy.
3. Enter the titles and click **Ok**. A tab is opened for each new process.
4. For each new process, make updates as needed and then select the Save action. A new process is created at the same hierarchy level as the process being copied.

3

Supplier and Site Users

This chapter describes how the Process options are used by Supplier and Site users. For information on each option, see the following section:

- [Activities Option](#)
- [Processes Option](#)
- [End Processes Option](#)
- [Hierarchy Option](#)

For more information on the functionality of the options, see [Retailer Users](#). Note that only Retailer users can create processes and templates.

Activities Option

To navigate to the activities you need to complete, you can select the Activities option on the Process menu. When you select this option, a tab opens with a list view of Activities that meet the following requirements:

- The External Role is set to Supplier Responsible.
- The supplier or site is named in the Process.

You can also select the Processes option on the Process menu and then open activities from the Activities page.

Processes Option

When you select this option, a tab opens with a list view of Processes that have activities that meet the following requirements:

- The External Role is set to Supplier Responsible.
- The supplier or site is named in the Process.
- The Process has not been cancelled or completed.

End Processes Option

When you select this option, a tab opens with a list view showing End Processes that have activities that meet the following requirements:

- The External Role is set to Supplier Responsible.
- The supplier or site is named in the Process.
- The Process has not been cancelled or completed.

Hierarchy Option

When you select this option, a tab opens with a three panel view showing Processes in the left pane that meet the following requirements:

- The Process has activities with the External Role set to Supplier Responsible or Supplier Viewer.
- The supplier or site is named in the Process.
- The Process has not been cancelled or completed.

4

All Users

This chapter describes Process options available to all users. For information on each option, see the following section:

- [Process Links](#)
- [Process Briefs](#)

Process Links

Any records that a Process is linked to show the links in the Process Links page.

If a row shows a link with greyed-out text, clicking it will do nothing. If shown in black text, it can be double-clicked to open the Process record.

Process Briefs

Within Processes and Activities, the Brief Extract action can be used to produce an extract containing the questions used. The extract can be based on new or previously saved selection criteria. Previous selection criteria that is no longer required can be deleted. The extract is saved in the Report Outputs area, and a link is emailed to the user.

A Brief Extract may also be scheduled as a report. See the *Oracle Retail Supplier Evaluation Cloud Service Reports User Guide*.

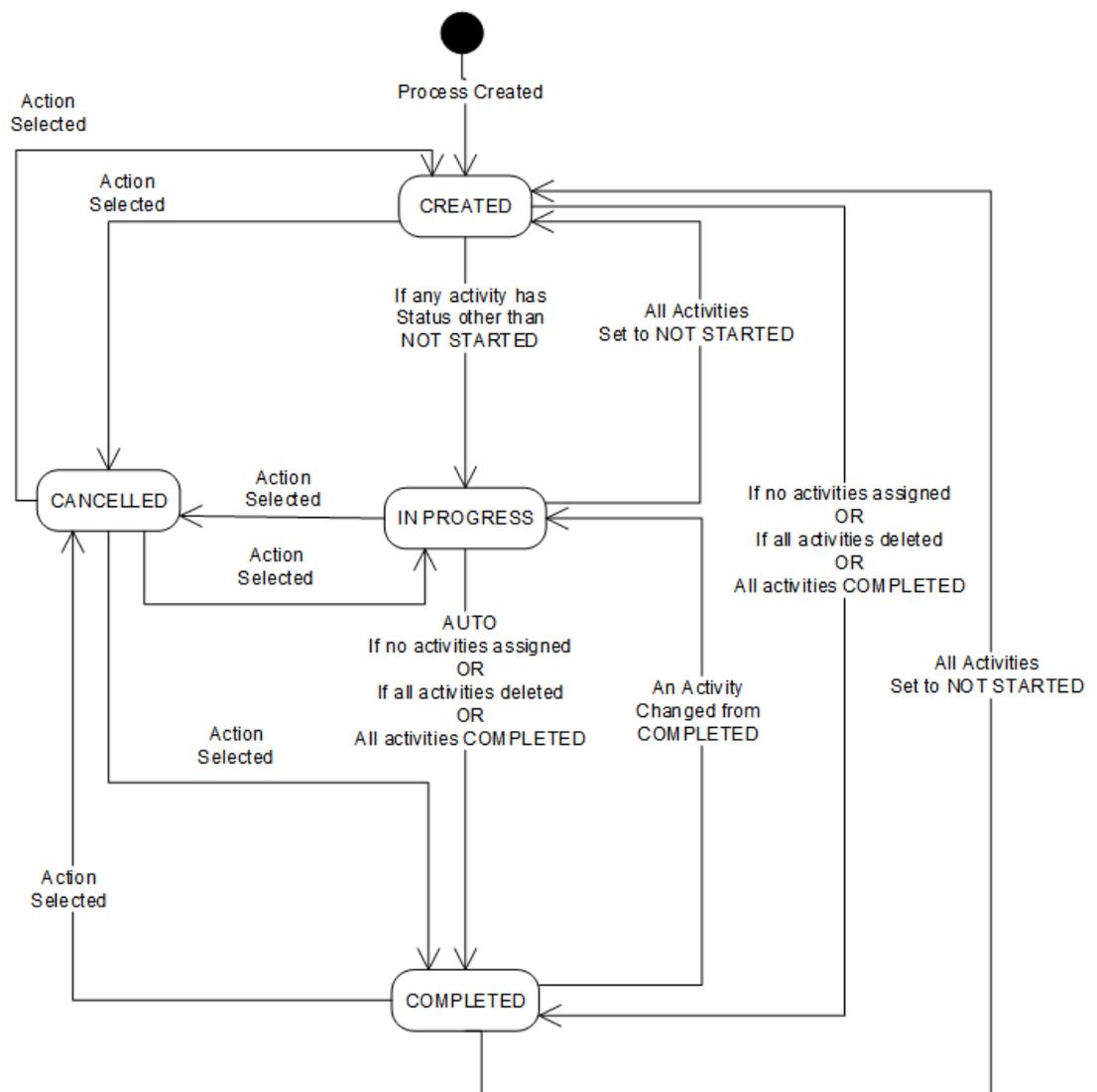
A

Appendix: Workflows

This appendix provides flow diagrams that illustrate how the status of processes and activities flows during the life of a process and activity.

Processes start in a Created status and move to Completed status.

Figure A-1 Process Status Workflow



Activities start in a Not Started status and move to Completed status.

Figure A-2 Activity Status Workflow

