

Oracle® Retail Supplier Evaluation Cloud Service

Release Readiness Guide



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Contents

1 Feature Summary

Noteworthy Enhancements	1-1
Server Repave Notification	1-2
Merchandising Outbound Integration	1-2
Supplier Evaluation Reports and KPIs	1-3
Retail Data Store (RDS) Availability	1-5
Post Release Tasks & Impact on Existing Installation	1-5
System Text	1-6
Merchandising Outbound Integration	1-7
Supplier Evaluation Reports and KPIs	1-8
Database Update Scripts	1-8
Enabling User Roles	1-8
Enabling Artwork with SSO	1-9

2 Browser Requirements

3 Noteworthy Resolved Issues

Preface

This guide introduces the key features of the new Oracle Retail Supplier Evaluation Cloud Service.

Audience

This document is intended for the users and administrators of the Oracle Retail Supplier Evaluation Cloud Service.

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- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Oracle Help Center (docs.oracle.com)

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

Comments and Suggestions

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Oracle Retail Cloud Services and Business Agility

Oracle Retail Supplier Evaluation Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

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 Security Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Service Administrator Action List*
- *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 Process User Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Reports User Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Supplier User Guide*

1

Feature Summary

This chapter describes the feature enhancements in this release.

Noteworthy Enhancements

This guide outlines the information you need to know about new or improved functionality in the Oracle Retail Supplier Evaluation Cloud Service update and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.



Note:

Where new fields, User Interface (UI) changes, or glossary entries are introduced as part of a change, the portal owner may need to apply their own translations of the core system text.

Column Definitions

- **Feature:** Provides a description of the feature being delivered.
- **Module Impacted:** Identifies the module impacted associated with the feature, if any.
- **Scale:** Identifies the size of the feature. Options are:
 - **Small:** These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.
 - **Large:** These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.
- **Delivered:** Is the new feature available for use immediately after upgrade or must the feature be enabled or configured? If no, the feature is non-disruptive to end users and action is required (detailed steps below) to make the feature ready to use.
- **Customer Action Required:** You must take action before these features can be used. These features are delivered disabled and you choose if and when to enable them.

Table 1-1 Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Server Repave Notification	General	Small	Yes	No
Merchandising Outbound Integration	Supplier	Medium	Yes	Yes

Table 1-1 (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Supplier Evaluation Reports and KPIs	Reports	Medium	Yes	Yes
Retail Data Store (RDS) Availability	New Product	Medium	With License Purchase	Yes

Server Repave Notification

The application runs as part of a distributed cloud computing infrastructure. This infrastructure allows for automated switch-over in the event of failure, and for *repaving* switch-over for regular hardware rotation and patching. Periodically (typically every 14 days), the application will therefore repave to run on a different server instance. When this occurs, any open sessions are transferred to another running pod. The time taken to transfer these sessions is dependent upon the number of active users on the pod at that particular instance. In case of high usability, it is possible that a timeout on the browser could be experienced.

In order to handle the repaving in a way that the user gets the opportunity to reconnect to the new server instance prior to the point of switch-over, a notification is issued that the server has a limited lifetime remaining, so the user must save any changes and log out then log on again, otherwise risk being disconnected and losing any unsaved changes. When the user logs back on, the session will automatically connect to the new server instance and clear the notification.

When the system detects that repaving is imminent, the notification is shown as pop-out *toast* message. The message reads: *Warning: Your server connection is due to expire. Please log off and back on again.* If required, the default message system text may be overridden as a post release task.

Merchandising Outbound Integration

The outbound integration with the Merchandising system allows the data relating to certain events and calculated scores to be automatically fed to dashboards that enhance the existing supplier data with the latest Supplier Evaluation information.

When Documents, Assessments, and Audits are configured to capture supplier evaluation data, and calculate supplier evaluation scores, details of the related events and scores are automatically fed back to Merchandising (for sites that have been synchronized through the Supplier & Site Integration).

Different types of messages are sent to Merchandising as a result of events occurring and scores being calculated in Supplier Evaluation:

- Document is accepted, or is subsequently archived, unpublished, or republished
- Assessment is created, becomes due or overdue
- Assessment is no longer due or overdue
- Assessment is completed or uncompleted/deleted
- Audit is created, becomes due or overdue

- Audit is no longer due or overdue
- Assessment is completed or abandoned/not progressed
- Site status changes

The events and scores are categorized by Supplier Evaluation type (such as Ethical, Environmental, and Governance).

For the outbound integration to be enabled, various system configuration is required. See Post Release Tasks.

Supplier Evaluation Reports and KPIs

A selection of reports with a focus on the evaluation of supplier sites using assessments, audits, and documentation are provided.

Report	Description
CR100 Site Assessment Latest Completed Scores	<p>The report focuses on the Assessment Score, for the Assessment Types selected in the filters.</p> <p>For each Site, the report output will contain:</p> <ul style="list-style-type: none"> • The <i>latest completed</i> Assessment of each Assessment Type • The <i>next</i> Assessment of the required Assessment Type. <p>The report output will contain a maximum of two rows per Site per Assessment Type.</p> <p>The default report granularity is the assessment record. If elements from the Supplier/Site Billing Detail tables are included in a bespoke report the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.</p>
CR101 Site Assessments Latest Completed Responses	<p>Similar to Site Assessments Latest Completed Scores report in outputting just the <i>latest</i> and <i>next</i> Assessments for each Assessment type, but this report will also output the questions and responses for each qualifying Assessment.</p> <p>For each Site, the report output will contain:</p> <ul style="list-style-type: none"> • The <i>latest completed</i> Assessment of each Assessment Type. • The <i>next</i> Assessment of the required Assessment Type. <p>The report output will contain a maximum of two rows per Site per Assessment Type multiplied by the number of questions.</p> <p>The report will include columns for Question Id, Question, Response (Score), and Comments, to give a row per Question.</p> <p>The Response column will be populated with the selected responses from the Assessment, with multiple selected checkbox responses concatenated.</p> <p>The Response column will include the score for the selected response if available.</p> <p>If no response has been given yet, the Response column will be blank.</p> <p>The default report granularity is the assessment record question. If elements from the Supplier/Site Billing Detail tables are included in a custom report the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.</p>

Report	Description
CR102 Site Assessments All Responses	<p>Similar to Site Assessments Latest Completed Responses report in focusing on the Assessment Questions and Responses, but this report will allow the responses to any Assessments to be included, with no restrictions to just the <i>latest</i> and <i>next</i> Assessments of each type.</p> <p>The report will include columns for Question, Response, and Question Score, to give a row per Question.</p> <p>The Response column will be populated with the selected responses from the Assessment, with multiple selected checkbox responses concatenated.</p> <p>The Response column should include the score for the selected response if available.</p> <p>If no response has been given yet, the Response column will be blank.</p> <p>The default report granularity is the assessment record question. If elements from the Supplier/Site Billing Detail tables are included in a custom report the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.</p>
CR103 Site Audits Latest Completed Scores	<p>The report focuses on the Audit Score, for the Audit Templates selected in the filters.</p> <p>For each Site, the report output will contain:</p> <ul style="list-style-type: none"> • The <i>latest completed</i> Audits of the required template. • The <i>next</i> Audit of the required template. <p>The report output will contain a maximum of two rows per Site per Audit Template.</p> <p>The default report granularity is the audit record. If elements from the Supplier/Site Billing Detail tables are included in a custom report the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.</p>
CR104 Site Audits Latest Issues	<p>Similar to the Site Audits Latest Completed Scores report in outputting just the <i>latest</i> and <i>next</i> Audits for each type, but this report will also output the Issues/Corrective Action Details for each qualifying Audit.</p> <p>For each Site, the report output will contain:</p> <ul style="list-style-type: none"> • The <i>latest completed</i> Audits of the required template. • The <i>next</i> Audit of the required template. <p>The report output will contain a maximum of two rows per Site per Audit Template multiplied by the number of issues.</p> <p>The default report granularity is the audit issue record. If elements from the Supplier/Site Billing Detail tables are included in a custom report the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.</p>
CR105 Policy Document Acceptance	<p>The report focuses on the acceptance log for External Users - Supplier & Site acceptance of the document (fields from the Internal Acceptance table will not be included).</p> <p>A single report output will contain the acceptance details for multiple Library Documents, dependent on any filters.</p> <p>Only Library Documents that have one or more entries in the External Users Acceptance table will be included.</p>

Report	Description
CR106 Supplier Evaluation Site Summary Scores	<p>The report focuses on each Site and will show summary-level data for each site's Supplier Evaluation Type scores:</p> <p>Soft coded columns will be available to expand the report.</p> <ul style="list-style-type: none"> • Soft coded columns for the <i>latest completed</i> Assessment Score for each of the selected Assessment Types. • Soft coded columns for the <i>latest completed</i> Audit Score for each of the selected Audit Types. • Soft coded columns for the list of Accepted Documents for the Site.

The following queries now include the Billing Details tables fields:

- Audit
- Assessment
- Site
- Site Reference
- Supplier

The following queries include the Supplier Evaluation Type field:

- Audit
- Assessment

The following query includes the Site Summary field SE Score:

- Site

Retail Data Store (RDS) Availability

Oracle Retail Data Store enables retailers to unlock the value of their data through a comprehensive set of tools, enabling virtually unlimited extensibility while abstracting those workloads from those of the original Oracle Retail cloud services. This toolset allows the retailer to create a wide variety of functionality that they can tailor specifically to their own business processes. Examples include custom web services to expose specific data elements, custom integration (inbound and outbound), reporting and analytics, and custom user interfaces for capture of retailer-specific data.

A separate subscription different from Supplier Evaluation Cloud Service is required for Oracle Retail Data Store, which is composed of two parts:

- Oracle Retail Data Compute Cloud Service – this portion of the subscription covers compute resources available to the cloud service and allows a retailer to add compute to their solution as necessary for their extensions.
- Oracle Retail Data Storage Cloud Service – this portion of the subscription covers data storage resources available to the cloud service and allows a retailer to add storage to their solution as necessary for these extensions.

For more information about RDS, see its documentation set on the Oracle Help Center.

Post Release Tasks & Impact on Existing Installation

The following post release tasks and impact on an existing installation must be taken into account as part of this release.

System Text

Apply any custom overrides to the core default system text or language translations for the new Server Repave warning message.

The Supplier Evaluation Reports and KPIs feature introduced new System Text records:

CR100 Site Assessments Latest Completed Scores report:

orbcmReports.siteAssessmentLatestCompletedScores=Site Assessments Latest Completed Scores

orbcmReports.assessmentScore=Assessment Score

orbcmReports.assessmentValue=Assessment Value

CR101 Site Assessments Latest Completed Responses report:

orbcmReports.siteAssessmentLatestCompletedResponses=Site Assessments Latest Completed Responses

orbcmReports.assessmentQuestion=Question

orbcmReports.assessmentQuestionId=Question ID

orbcmReports.assessmentResponse=Response (Score)

orbcmReports.assessmentComments=Comments

CR102 Site Assessments All Responses report:

orbcmReports.siteAssessmentAllResponses=Site Assessments All Responses

CR103 Site Audits Latest Completed Scores report:

orbcmReports.siteAuditsLatestCompletedScores=Site Audits Latest Completed Scores

orbcmReports.leadTechnologist=Lead Technologist

orbcmReports.auditTemplate=Template

CR104 Site Audits Latest Issues report:

orbcmReports.siteAuditsLatestIssues=Site Audits Latest Issues

CR105 Policy Document Acceptance report:

orbcmReports.policyDocumentAcceptance=Policy Document Acceptance

orbcmReports.documentTitle=Title

orbcmReports.documentFolder=Folder

orbcmReports.documentAcceptedBy=User Name

orbcmReports.documentAcceptedOn=Date Read

CR106 Supplier Evaluation Site Summary Scores report:

orbcmReports.supplierEvaluationSiteSummaryScores=Site Summary Scores

orbcmReports.supplierEvaluationType=SE Type

orbcmReports.supplierEvaluationSiteScore=Score

Note: The system text records are added automatically during the release process, however any translation overrides must be added manually, by the retail administrator.

Merchandising Outbound Integration

When preparing to implement the outbound integrations with Merchandising, the following system configuration tasks must be taken into account.

The instructions for downloading and uploading the amended Permissions spreadsheet are as follows:

System Parameters

The following system parameters must be set in order to enable the integration of Supplier Evaluation data:

1. Assign the Integration Administrator authority profile to the appropriate administrator users.
2. Check the Outbound Merch Integration option is set to enabled/disabled accordingly, and the API URL is set.
3. Set the number of messages to be sent per call. The default is 1.
4. Set the purging interval. The default is 90 days.
5. Set the Supplier Evaluation Types that are to be included in the integration.
6. Set the External Primary Language to correspond with the primary language of the Merchandising system.

Permissions

To grant Integration Administrator users access to the Outbound Message queue, add the following to the Supplier Evaluation Scoring tab of the Permissions spreadsheet.

Record (A)	Authority Profile (B)	Menu Option (C)	Sub Menu Option (D)	Action (E)	Data Record (F)	User Mode (L)	Access Level (M)
Admin	INTEGRATION ADMINISTRATOR				OUTGOING INTEGRATION MESSAGE	NORMAL	F
Admin	INTEGRATION ADMINISTRATOR	Admin	OUTGOING INTEGRATION MESSAGE			NORMAL	Y

Record (A)	Authority Profile (B)	Menu Option (C)	Sub Menu Option (D)	Action (E)	Data Record (F)	User Mode (L)	Access Level (M)
Admin	INTEGRATION ADMINISTRATOR			RETRY MESSAGE	OUTGOING INTEGRATION MESSAGE	NORMAL	Y
Admin	INTEGRATION ADMINISTRATOR			PERMANENTLY FAIL MESSAGE	OUTGOING INTEGRATION MESSAGE	NORMAL	Y

The instructions for downloading and uploading the amended Permissions spreadsheet are as follows:

1. Log in as an Oracle Authorized Administrator user and go to Company > Admin > Roles & Permissions.
2. Open the Permissions page.
3. Download the active spreadsheet by selecting the row with *true* in the Active Permissions column, click *Download Selected*, and save locally.
4. Edit the downloaded spreadsheet, make the changes described above, then save the spreadsheet.
5. Upload the edited spreadsheet by clicking *Upload Permissions*, select the spreadsheet, and click *Ok*.
6. Apply the changes by selecting the uploaded spreadsheet row, click *Process Selected*, and then click *Ok* to confirm.

Supplier Evaluation Reports and KPIs

For new reports to run, they need to be scheduled as required.

For KPI metrics to be generated from the new queries, they will need to be created, configured, and scheduled as required.

Database Update Scripts

There are no database upgrade scripts included within this release.

Enabling User Roles

If they do not already exist, configure the *Power User*, *Account Administrator*, *Assistant Technologist*, and *Site Inspector* user roles, and assign to the appropriate users.

The instructions for downloading and uploading the amended Permissions spreadsheet are as follows:

1. Log in as an Oracle Authorized Administrator user and go to Company > Admin > Roles & Permissions.
2. Open the Permissions page.
3. Download the active spreadsheet by selecting the row with *true* in the Active Permissions column, click *Download Selected*, and save locally.
4. Edit the downloaded spreadsheet, make the changes described above, then save the spreadsheet.
5. Upload the edited spreadsheet by clicking *Upload Permissions*, select the spreadsheet, and click *Ok*.
6. Apply the changes by selecting the uploaded spreadsheet row, click *Process Selected*, and then click *Ok* to confirm.

Enabling Artwork with SSO

Artwork is not a core Supplier Evaluation module, but a third-party add-on application. This process enables the integration with the third-party Artwork application, where it is used.

For existing installations that use the Artwork module, in order to configure single sign on (SSO) between Supplier Evaluation and the Artwork solution (using IDCS or OCI IAM authentication), the following steps must be taken by the Customer or their Partner:

1. Ensure the MYARTWORK external system has been created in Supplier Evaluation PROD and STAGE.
2. Raise an SR service requesting for creation of the Artwork Application for PROD and STAGE. The call back URLs and IDCS or OCI IAM URLs must be provided in the SR.
3. Once created, you will be able to gather the Client ID and Client Secret from IDCS or OCI IAM.

Refer to the Artwork chapter in the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide* for the full process for enabling Artwork with SSO.

2

Browser Requirements



Note:

Oracle Retail assumes that the retailer has ensured its Operating System has been patched with all applicable Windows updates.

The following browsers are supported:

- Mozilla Firefox
- Microsoft Edge
- Google Chrome (Desktop)

Microsoft has deprecated Internet Explorer 11 in Windows 10 and recommends using Edge as the default browser. Refer to the [Oracle Software Web Browser Support Policy](#) for additional information.

3

Noteworthy Resolved Issues

This following table highlights specific key fixes that are included in this release. In some cases, only a percentage of the overall fixed defects are listed.

Affected Component	Defect Number	Description
General: Announcements	NA	Announcement Contents tab system text A fix has been made to correct the wording of the <i>Please select a country to customise the information for this language</i> text on the Contents tab of the Announcement record.
General: Announcements	NA	Announcement Distribution tab system text A fix has been made to correct the system text of the <i>Another Announcement exists with this Code</i> validation message shown beneath the Code field on the Distribution tab of the Announcement record.
General: Assignments	NA	Assignments List performance A performance improvement has been made to the Assignments page, specifically for the loading of the Assignments that relate to Assessments.
General: Assignments	NA	Unable to open Assignment details A fix has been made to rectify an issue that occurred when clicking on an entry in the Assignments list view. The issue resulted in the associated record failing to open. This has been corrected.
General: Library Documents	NA	Accepting Library Documents A fix has been made to rectify an issue where a user with no access to Library documents had a task in their Assignments list to accept a document.
Supplier: Audits & Visits	34492671	Error when editing a Site A fix has been made to rectify an error that occurred when editing a Site. The error occurred for users who log on using a language that is different to the default (en_GB) – for example en_US. If a Business Category description did not have a language translation for the user's language, the system was erroring rather than using the default language description.