

# Oracle® Retail Supplier Evaluation Cloud Service Workspace User Guide



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

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Oracle Retail Supplier Evaluation Cloud Service Workspace User Guide, Release 23.0.101.0

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# Preface

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

## Audience

This document is intended for the users of the Oracle Retail Supplier Evaluation Cloud Service *Workspace* user interface.

## Documentation Accessibility

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## 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*

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*

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<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
<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

This release introduces the new User Interface (UI) design for Supplier Evaluation. It is based on the *Oracle JET* technology and *Redwood* theme, as used by other Oracle Retail applications.

The full transition to the new UI will be in phases, or *modules*. The first module delivers the *Workspace*, which provides the *home* page, from where the user has access to the design and functionality of the new UI, and direct access to the areas of Supplier Evaluation modules that have yet to be converted.

Future modules will convert more of the application to the new UI, in some cases introducing new functionality, and new user experience for achieving existing functionality. The application will operate using concurrent user interfaces until the full transition is complete.

This user guide covers the following features of the Supplier Evaluation *Workspace* module:

- *Workspace* - the *home* page and navigation controls.
- *Assignments* - the user's tasks and urgent items.
- *Announcements* - news items and resources.
- *KPIs* - charts and tables presented as tiles within a dashboard.
- *List Views* - the functionality of the new list view style, and use of filters and searches.
- *Supplier Evaluation Dashboard* - charts, graphs, and metrics presenting Supplier Evaluation data.
- A Design Standard appendix describes the style and functionality of other new UI components.

# 2

## Getting Started

This chapter provides an introduction to accessing and using the Supplier Evaluation Workspace. The following topics are covered:

- [Login](#)
- [Workspace](#)
- [Administration](#)
- [Security](#)
- [Internationalization](#)

### Login

Your Supplier Evaluation Identity Provider profile provides access to the Workspace. When you log in, you are taken to the Workspace.

### Terms and Conditions

If you are new user, you must accept the portal owner's Terms and Conditions, if required by the portal owner. The initial user for a new supplier must also complete the Registration process. The system will guide you through these tasks:

1. The Workspace page is loaded with an overlay message stating whether you must accept the terms and conditions and/or complete the supplier Registration process before proceeding:

**Figure 2-1 Login Overlay**

#### Important

Please complete the following tasks before you continue...

- **Accept the terms and conditions**
- **Complete the supplier onboarding process**

Click the button below to begin these tasks.

When they are completed you can return here to continue your work.

**Click to complete the tasks**

2. If you are required to accept the terms and conditions, clicking the button will present the Terms and Conditions page, with options to accept or reject. If you reject, you are returned to the Login page, and cannot access the application.
3. If you are required to complete the supplier onboarding process, clicking the button will present the Registration wizard for you to complete.

- Once all Terms and Conditions and Registration requirements are complete, the Workspace page opens.

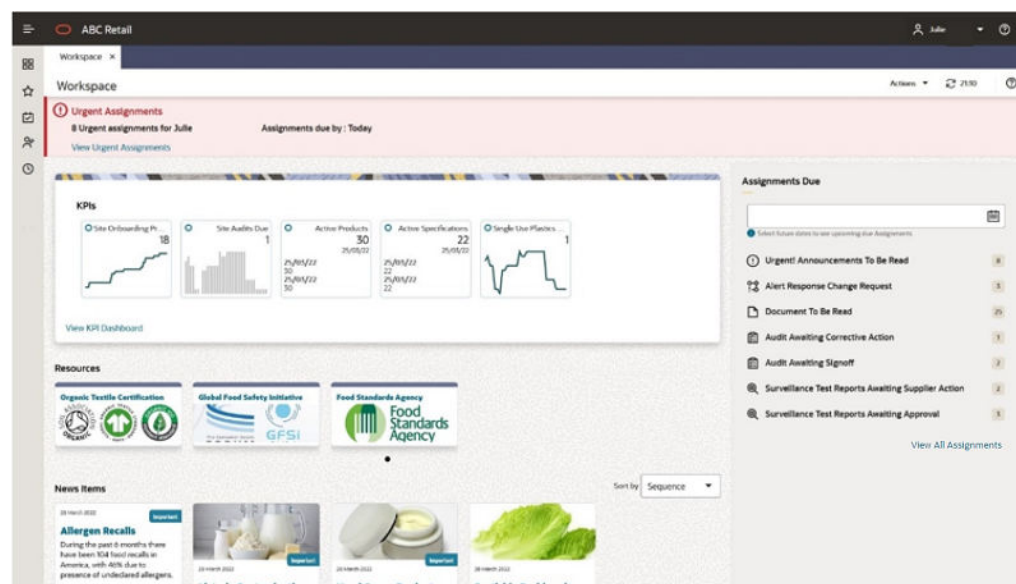
## Logout

To log out of Workspace, use the Logout option in the User menu. This presents a confirmation prompt, before logging you out of your Workspace, Supplier Evaluation, and Identity Provider sessions, and returning you to the Login page.

## Workspace

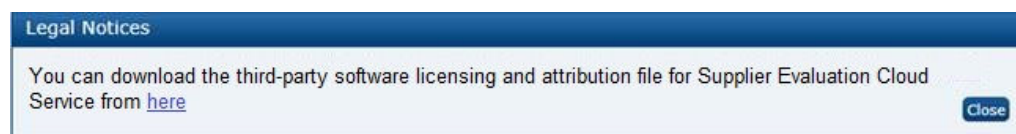
The Workspace page is the hub of your access to all areas of the application. From here you have access to the new Assignments, Announcements, and KPIs features, plus the Supplier Evaluation modules and submodules.

**Figure 2-2** Workspace Page



Clicking the Legal Notices link at the bottom of the page displays a message box containing options to display details of all third-party software components that are used within the system.

**Figure 2-3** Legal Notices



To view the legal notices, click the link. A page appears containing links to the Oracle Retail Licensing Information documents, which describe the third-party software components. An example is shown in [Figure 2-4](#).

Figure 2-4 Legal Notices Example

The screenshot displays the Oracle Retail Global Business Unit Licensing Documentation Library. The page features a blue header with the Oracle logo and the text "Retail Global Business Unit Licensing Documentation Library" and "Documentation". Below the header, there are two main content areas. On the left, a green sidebar titled "Releases" lists various version numbers from 22.x down to 14.1.3. On the right, a blue sidebar titled "Releases" provides a detailed list of licensing guides for each version, including links to PDF and HTML versions. At the bottom right of the page, there are links for "Cookie Preferences" and "Ad Choices".

Releases	Releases
22.x	22.x
21.x	<a href="#">Licensing Guide</a>
20.x	21.x
19.x	<a href="#">Licensing Guide</a> (Rev 3)
18.x	20.x
17.x	<a href="#">Licensing Guide</a> (Rev 3)
16.x	19.x
15.x	<a href="#">Licensing Guide</a> (Rev 23)
14.1x/14.2	18.x
14.1	Licensing Guide (Rev 25) <a href="#">PDF</a> <a href="#">HTML</a>
14.0	17.x
14.1.1	Licensing Guide (Rev 6) <a href="#">PDF</a> <a href="#">HTML</a>
14.1.2.1	16.x
14.1.3	Licensing Guide (Rev 8) <a href="#">PDF</a> <a href="#">HTML</a>
	15.x
	<a href="#">Licensing Guide</a> (Rev 7)
	14.1.x/14.2
	<a href="#">Licensing Guide</a>
	14.1
	<a href="#">Licensing Guide</a>
	14.0
	<a href="#">Licensing Guide</a> (Rev 2)
	14.1.1
	<a href="#">Licensing Guide</a> (Rev 2)
	14.1.2.1
	<a href="#">Licensing Guide</a> (Rev 2)
	14.1.3
	<a href="#">Licensing Guide</a>

Cookie Preferences | Ad Choices

## Navigation

The following options are available for navigating within Workspace and beyond, subject to your assigned access rights/permissions:



The **Menu** icon expands and collapses the left-hand menu area to show the options in a static pane rather than overlaying the main Workspace page.

The menu area contains icons to open the Application, Tasks, Administration, Favorites, and Recent Items menus.



The **Applications** icon provides links to the Oracle Retail applications you have licensed. Initially, it will just contain Supplier Evaluation.



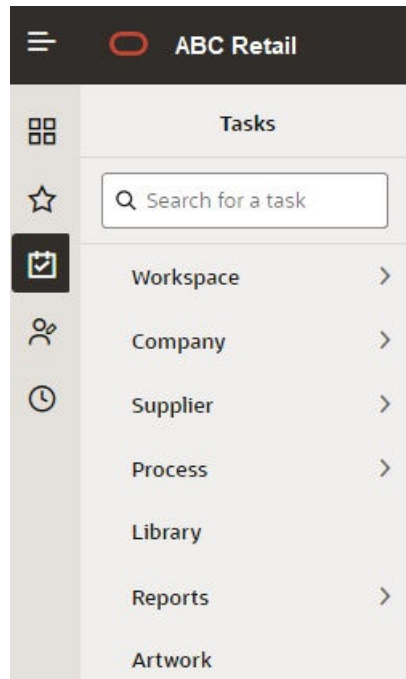
The **Tasks** icon presents the Workspace and Supplier Evaluation options to which you have access.

The Workspace option includes links to the Workspace page, your Assignments, Announcements, and KPIs. The other options correlate to the module and submodule options

you have available to you; these options take you directly to the relevant page in Supplier Evaluation.

The search box allows you to locate specific tasks using a type-ahead filter. Clicking an option that has sub-options, as identified with a right chevron (>), presents the list of sub-options. Use the left chevron (<) to return to the main option.

**Figure 2-5 Tasks Menu**



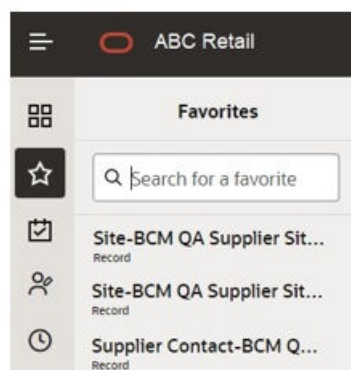
The **Administration** icon presents any Workspace administration options to which you have access. The options are presented per the Tasks menu. If there are no options available to you, the icon is hidden.



The **Favorites** icon presents a list of any bookmarks you have made within the application.

The items are listed in the order you bookmarked them, with the most recent at the bottom. The type of record and its description is shown. If the description is truncated, hovering over will show the full text.

**Figure 2-6 Favorites Menu**



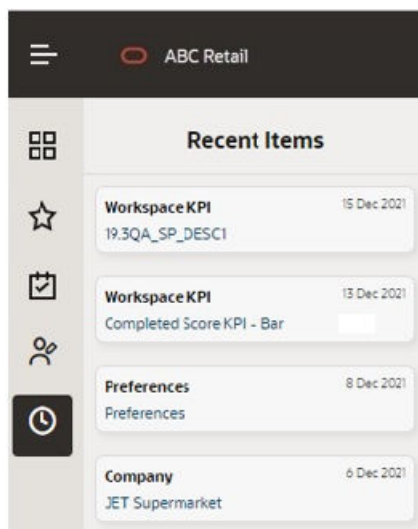


The **Recent Items** icon presents a list of pages you have recently opened within the application.

The items are listed in the order you opened them, with the most recent at the top. The date of when the record was opened is shown, along with the type of record and its description. The box will expand to fit the full description.

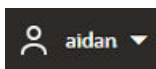
The Preferences option in the User menu allows you to set the number of items to show.

Figure 2-7 Recent Items Menu



The **Application Help** menu contains two options:

- **Application Help** opens the Supplier Evaluation page in the *Oracle Help Center* applicable to the application's release version. The page contains links to resources such as user guides and release readiness guides.
- **About** opens a message box showing the application's release version (build tag), the name of the company, and the name, email address, and locale of the user.

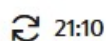


The **User** menu contains four options:

- **User Profile** opens your User record in Supplier Evaluation.
- **Identity Provider Admin** opens your Identity Provider profile.
- **Preferences** opens your Preferences page.
- **Logout** logs you out of your Workspace and Identity Provider sessions.



The **Actions** menu contains actions that are relevant to the current page. The Workspace page and list views will include the option to Refresh the contents. Form pages will include options to Edit the page and so forth.



The **Refresh** icon appears on the Workspace page (including the Favorites and Recent Items contents), and on list view pages.

It refreshes the contents of the page, showing the time when the page was last refreshed.

Other elements of the Workspace page include:

- The **Header** bar shows the name of the application and the Menu icon.

- The **Tabs** bar shows which pages you have open. A maximum of 15 pages may be open concurrently.
- The **Title** bar sub-heading shows the page name and the Actions and Refresh option when they are available.
- The main **Body** of the Workspace page contains your Assignments, Announcements, and KPIs.

## Assignments

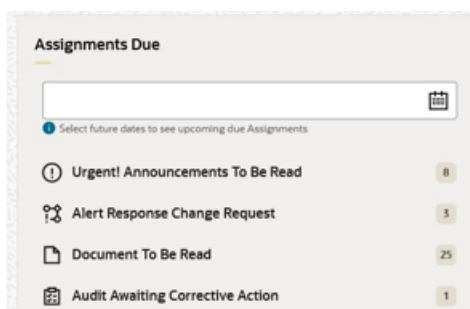
The **Urgent Assignments** banner appears at the top of the page if you have any urgent assignments. The banner will always show if you have urgent items; it cannot be hidden.

**Figure 2-8 Urgent Assignments in Workspace**



The **Assignments Due** pane shows all your assignments.

**Figure 2-9 Assignments Due in Workspace**

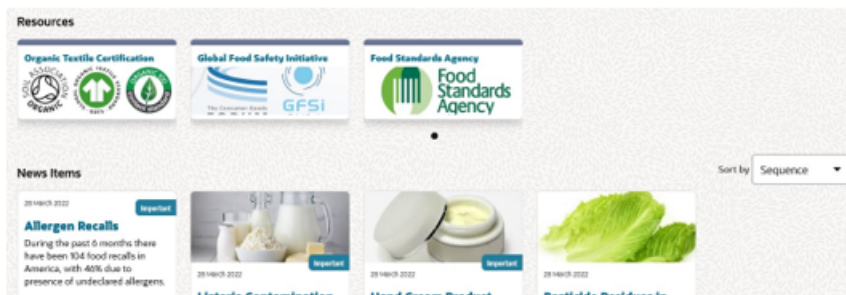


For further details, see the [Assignments](#) chapter.

## Announcements

Announcements provide the ability to categorize them as Resources. Both appear within the Workspace page, grouped separately.

Figure 2-10 Announcements in Workspace



Announcements have features including the categorization, targeting, and readership logging facilities. Resources are intended for more static announcements, such as links to external bodies or training resources.

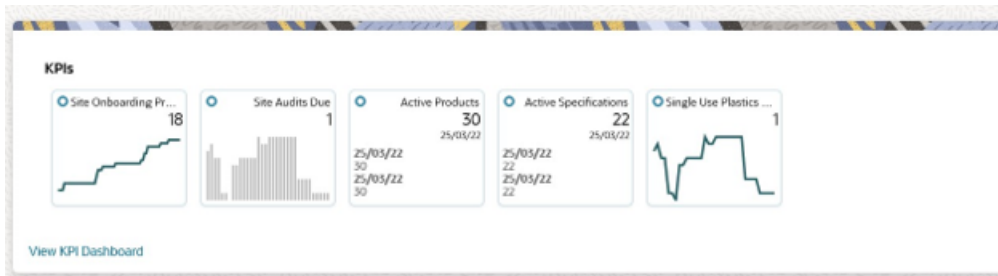
For further details, see the [Announcements](#) chapter.

## KPIs

The KPIs dashboard allows you to configure a set of KPI (Key Performance Indicator) report outputs to show as tiles within your Workspace page.

The tiles show a thumbnail representation of the KPI data; opening the tile shows the full size chart or table.

Figure 2-11 KPIs in Workspace



For further details, see the [KPIs](#) chapter.

## Administration

The Administration icon in Workspace contains any administration options to which you have access.

## Announcements

If you have *News Administrator* access rights, you will have access to the following:

- The **Photo Album** option will appear in the Administration menu. It provides access to the repository of images used in Announcements.



- The **Announcement Category** and **Announcement Flash Messages** glossaries, used in Announcements, are maintained in the Admin area.

For further details, see the [Announcements](#) chapter.

## KPIs

If you have *Advanced Reporting Administrator* or *Advanced Reporting User* access rights, you will have access to the **Manage Workspace KPIs** option in the Reports menu of the Admin area. This area is where users are assigned which KPIs they have available to them within Workspace.

## Security

The Permissions rules include the following, to cater for Workspace specific access rights.

Area	Access Rights
Workspace page	Accessible by all users.
Tasks and Administration options	The options shown are limited to those that the user has access to, based on the configured Permissions rules.
Urgent Assignments banner	All users who have urgent Assignments.
Assignments Due pane	All users, filtered to show their Assignments.
Resources and News Items	All users.
Announcements maintenance	Users with the <i>News Administrator</i> authority profile only.
Review Readership action	Users with the <i>News Administrator</i> authority profile only.
Photo Album	Users with the <i>News Administrator</i> authority profile only.
KPIs Dashboard	Retailer/portal owner users with the <i>Advanced Reporting Administrator</i> , <i>Advanced Reporting User</i> , or <i>Advanced Reporting Reader</i> authority profiles.
Manage Workspace KPIs	Only accessible to retailer/portal owner users, and who have <i>Advanced Reporting Administrator</i> or <i>Advanced Reporting User</i> authority profiles; otherwise, it is hidden.

All rich text data entered in Workspace is cleansed to ensure there are no illegal HTML characters, such as for an SQL injection attack.

## Internationalization

Some of the initial features are as follows:

- Language translations are provided for the JET UI components, such as menu options and buttons, for the languages supported by JET.
- Language translations are provided for the application UI components, such as field labels and error messages, using the System Text facility.
- Language translations can be entered for certain data fields within the Announcements record. For further details, see the [Announcements](#) chapter.

- Workspace determines the user's **language** from their User record, regardless of their Identity Provider profile, and the user's **time zone** from the locale of the device they are using.

## 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.

# 3

## Assignments

This chapter describes how Workspace presents the user their due or urgent tasks, in the form of Assignments. The following topics are covered:

- [Urgent Assignments](#)
- [Assignments Due](#)
- [Viewing Assignments](#)

### Urgent Assignments

The Urgent Items banner is only displayed when there are urgent assignments for the user. The content of the banner includes:

- Count of urgent assignments.
- Name of the user.
- Assignments due by date.
- Link to the Assignments page.

The link, if selected, will open the Assignment list view page in a separate tab, filtered to display the Urgent Assignments. The date entry will be **Today** unless a different date has been selected in the date picker on the Assignments Due pane.

### System Parameters

The parameters on the **Urgent Items** page of the System Control / System Parameters section of the Admin area is used to manage Urgent Assignments except for:

- Max Items to Display
- Active?

### Assignments Due

The Assignments Due pane provides a list of all Assignments grouped by type with a count against each, indicating the number requiring action by the user. A link at the bottom of the pane will, if selected, open the Assignment list view page in a separate tab, to display all Assignments. If no assignments are displayed, this just means the user has no Assignments.

A date picker allows the selection of an alternative Assignments due by date, for those Assignments displayed based on a date. Once a date has been selected, the Assignments Due pane and Urgent Assignments banner will update to reflect the Assignments due by date change.

## User Preferences

The selections on the users **Preference** page is used to determine the statuses which will generate notifications for the associated Assignment Types.

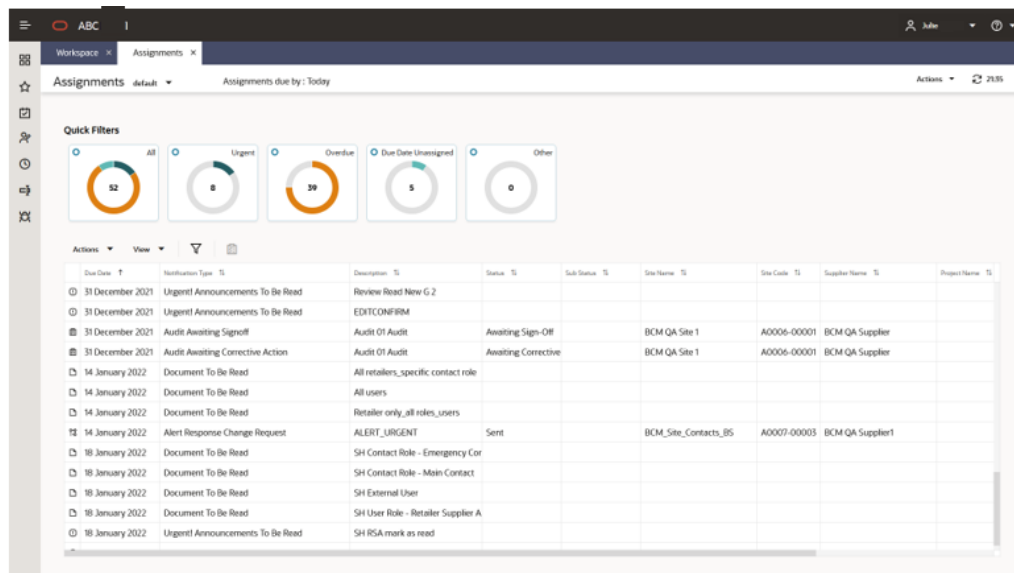
## Viewing Assignments

The Assignments page can be opened using the:

- Task menu **Assignments** option under the **Workspace** option which will display all your assignments.
- **View All Assignments** link on the Assignments Due pane which will display all your assignments.
- Assignment Type record link on the Assignments Due pane to display a pre-filtered list of your assignments for the selected Assignment Type.
- **View Urgent Assignments** link on the Urgent Assignments banner to display a pre-filtered list of your Urgent Assignments.

The assignments displayed will be based on today's date unless there is an entry in the date picker on the Assignments Due pane (Workspace page). The Assignments due by field on the menu bar will display the relevant entry.

**Figure 3-1 Assignments in Workspace**



The page presents a list view containing all the assignments requiring action.

Use the filter tiles, column sorting, and simple and advanced search facilities to categorize the contents and to search for specific assignments.

The following Quick Filter metric tiles are available:

Metric Tile	Description
All	An unfiltered list of assignments for the user based on the Assignments due by date if relevant to the assignment.
Urgent	A filtered list of the user's urgent assignments: <ul style="list-style-type: none"><li>• Overdue Document to be Read</li><li>• Announcement Item Overdue to be Read</li><li>• Missing Mandatory Supplier Contact</li><li>• Missing Mandatory Site Contact</li><li>• Confirm Supplier Details</li><li>• Confirm Site Details</li><li>• Alert Response is Urgent</li><li>• Alert Response Overdue</li><li>• Audit Corrective Action Overdue</li><li>• Audit Overdue</li><li>• Assessment Overdue</li><li>• Activity Overdue</li><li>• External System Password Due</li><li>• External System Password Expires Today</li></ul>
Overdue	A filtered list of the user's assignments where the Due Date is in the past.
Due Date Unassigned	A filtered list of the user's assignments where the Due Date is not relevant to the Assignment notification: <ul style="list-style-type: none"><li>• Document to be Read</li><li>• Missing Mandatory Supplier Contact</li><li>• Missing Mandatory Site Contact</li><li>• Confirm Supplier Details</li><li>• Confirm Site Details</li><li>• Alert Response Change Request</li></ul>

When an assignment record is opened from the list view, depending on the record type, a separate tab will display the relevant record on the JET UI browser page.

# 4

## Announcements

This chapter describes Announcements, which are presented in Workspace as dashboards of news items and resources. The following topics are covered:

- [News Item Dashboard](#)
- [Resources Dashboard](#)
- [Reading Announcements](#)
- [Publishing an Announcement](#)
- [Reviewing Readership](#)
- [Administration](#)

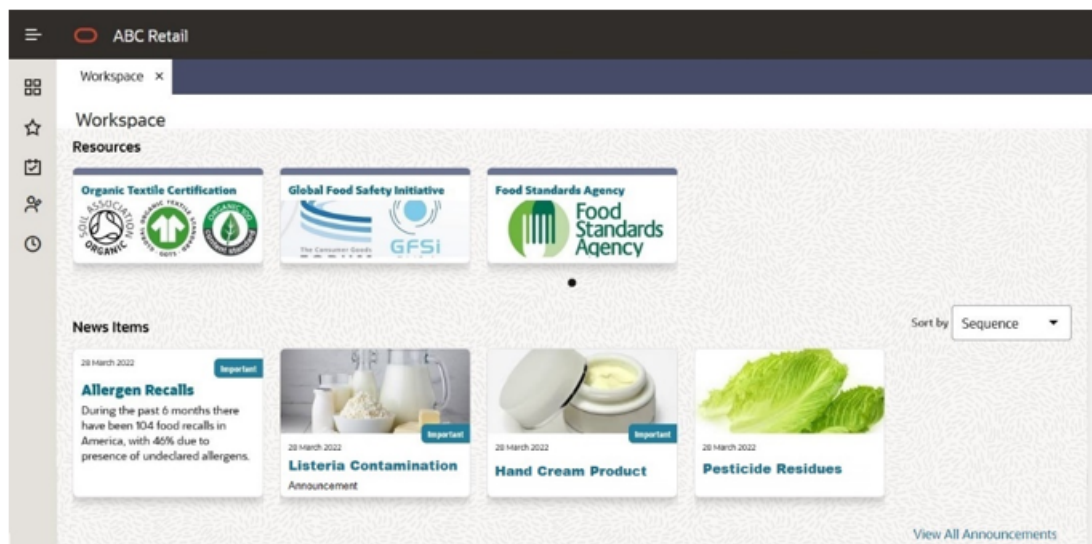
Announcements are the means of publishing communications to the user base, either as News Items, or as Resources for the more static items, such as links to external bodies or training resources.

The key features include:

- Categorization and Prioritization
- Targeting and Readership Logging
- Auto-expiry and Archiving
- Images (from a Photo Album repository) and Rich Text Formatting

The published announcements are presented on the Workspace page within the Resources and New Items dashboards. Clicking a tile opens the full article.

Figure 4-1 Announcements in Workspace



An Announcements page provides a list view of all announcements, with filter and search facilities.

Announcements are published by users with *News Administrator* access rights. These users also have access to the readership logging details, and to the administration of the Announcement glossaries and Photo Album.

## News Items Dashboard

The News Items dashboard shows your news item announcements. Click a tile to view the full article.

The dashboard shows up to published 20 items; if more are available, they can be viewed by clicking the View All Announcements link. The items are listed in their assigned sequence. Use the Sort by option to resequence them either by the newest first, or by title, flash message, or category.

## Resources Dashboard

The Resources dashboard contains any announcements that have been classified as a Resource type. Click a tile to view the full article.

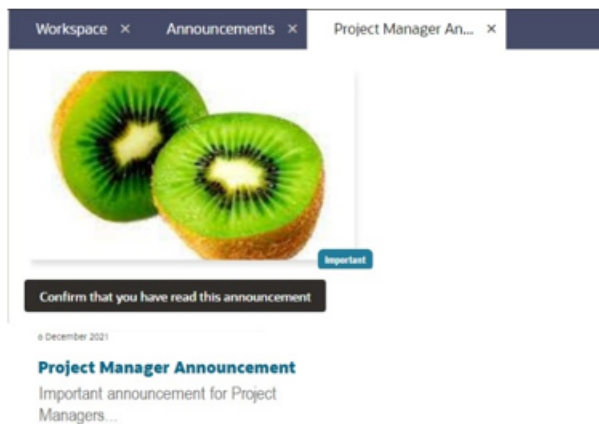
The dashboard just shows three published items; if more are available, use the filmstrip control to scroll through the full list.

## Reading Announcements

The tiles in the Workspace dashboards show a title and the date the item was published. They may also include an image and/or a flash.

Click the tile to open the full article. If you are required to confirm that you have read the announcement, a button appears above the published date.

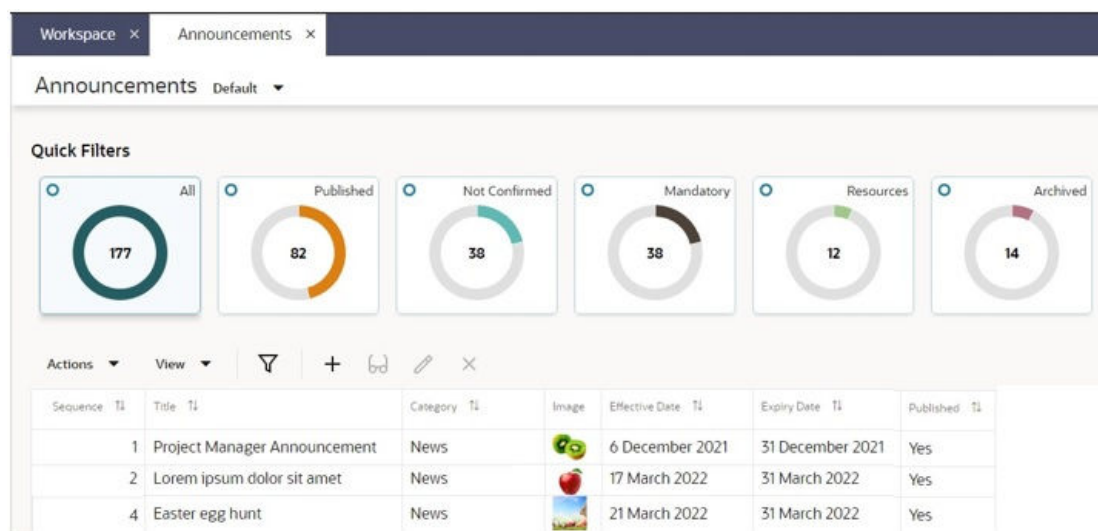
**Figure 4-2 News Item**



## Announcements Page

Open the Announcements page to view all your announcements by clicking the View All Announcements link beneath the News Items, or by selecting the Workspace/Announcements option in the Tasks menu.

**Figure 4-3 Announcements Page**



The page presents a list view containing all the announcements that are relevant to you.

Use the filter tiles, column sorting, and simple and advanced search facilities to categorize the contents and to search for specific announcements.

The following Quick Filter metric tiles are available:

Metric Tile	Description
All	The unfiltered list of published announcements (including archived items). For <i>News Administrator</i> users, this will also include unpublished items.
Published	The published announcements (excluding archived items).
Not Confirmed	Any published mandatory announcements, those which require confirmation that they have been read, which you have yet to confirm (excluding archived items). For <i>News Administrator</i> users, this just shows those that they personally are required to confirm, not a list of those that other users have yet to mark as read.
Mandatory	The published announcements that require you to confirmation they have been read; whether you have confirmed or not (excluding archived items).
Resources	The published resources (excluding archived items).
Archived	The published announcements that have been archived.

If you have *News Administrator* access rights you will also have the ability to create, edit, publish, and archive announcements. For further details, see the [Publishing an Announcement](#) section.



## Confirming as Read

If a published announcement requires confirmation that you have read it, but have yet to do so, when you open the full article a confirmation button appears above the published date.

When you click the button, the date and time of confirmation is logged in the announcement's Review Readership page. The readership log can only be viewed by *News Administrator* users.

After confirming, when you subsequently view the article, the date and time of confirmation will show in place of the button.

Until you have confirmed as read, you will see a reminder in your list of Assignments. This may also show in your list of Urgent Assignments if there is a deadline for confirmation.

## Publishing an Announcement

Announcements are created, edited, published and archived by users with *News Administrator* access rights, from the Announcements page.

The standard maintenance icons and actions in the list view toolbar are used to create, view, edit, and delete Announcements.

An Announcement is maintained across three pages using a wizard style form: 1 Distribution; 2 Content; 3 Preview.

### 1 Distribution

The Distribution page defines the type of announcement, and any auto-expiry, mandatory readership, or logging requirements.

**Figure 4-4** Announcement Distribution Page

The screenshot shows the 'Distribution' page of an announcement wizard. It features a progress indicator at the top with 'Distribution' selected, followed by 'Content' and 'Preview'. The form includes several input fields and checkboxes:

- Code:** 12345
- Sequence:** 1
- High Message:** Important
- Category:** News
- Effective Date:** A date picker field.
- Resource:**  Resource
- Published:**  Published
- Archived:**  Archived
- Expiry Actions:**
  - Expiry Date:** A date picker field.
  - Set to Unpublished:**  Set to Unpublished
  - Set to Archived:**  Set to Archived
- Logging and Mandatory Details:**
  - Mandatory:**  Mandatory
  - Log Readership:**  Log Readership
  - Who Reads:** Process Manager x | Technologist x
  - Who Writes:** Product development manager x | Out of hours contact x
  - Start To Date:** 15/07/2022

At the bottom right, there are navigation buttons: '< Previous', 'Next >', 'Cancel', and 'Save and Close'.

If the announcement is a Resource type, check the **Resource** checkbox, otherwise leave unchecked if it is a News Item.

On creation, enter a unique **Code** for the announcement. Once saved, this becomes read only.

A **Sequence** number can be set to control the order announcements appear within the Workspace dashboard using the *by Sequence* option. Enter a number between 0 and 99999. The dashboard presents the items in ascending order.

Optionally assign a **Category** and **Flash Message** by selecting an entry from the associated glossaries. These values can also be used to filter the Workspace dashboard, using the respective *by Category* and *by Flash Message* options. Category does not appear on the published item, it is for classification purposes only; Flash Message appears on the published item (News Items only) as the flash, for example to tag an item as *Important*.

You must set an **Effective Date** from when the announcement becomes effective. This cannot be in the past. The **Published** and **Archived** checkboxes control when the item is published (once the Effective Date has been reached), and/or if the item is archived.

Use the **Auto Expiry** options to have the announcement automatically unpublished and/or archived once the Expiry Date is reached. See also the [Unpublishing and Archiving](#) section.

Use the Logging and Mandatory Details option if it is to be mandatory for certain users to confirm they have read the item (the **Mandatory** checkbox), and for the readership details to be logged (the **Log Readership** checkbox). A mandatory item will automatically log readership; non-mandatory items may also have readership logging enabled.

If the item is mandatory, select the types of users will be required to confirm they have read the article. For internal (retailer/portal owner) users, select one or more **User Roles**; for external (supplier) users, select one or more **Contact Roles**. Once the announcement is published, when users with these roles open the full article, they will see the button to confirm they have read it. They will also have a reminder in their list of Assignments. If a **Read By Date** is specified, if the user has not confirmed by that date, their Assignment will become *urgent*. The Read By Date cannot be earlier than the Effective Date.

As a *News Administrator* user, you can view the logged readership details in the Review Readership page. For further details, see the [Reviewing Readership](#) section.

Click Next, or the 2 *Content* tab to proceed to the Content page.

## 2 Content

The Content page defines the contents of the announcement.

Figure 4-5 Announcement Content Page

Project Manager Announcement

Actions

Distribution Content Preview

Localisable Information French

Default Language

Title Project Manager Announcement

Body

B I U Link Unlink Undo Redo

TEST Project Manager Announcement

Image

Delete Image

French

Title

Body

B I U Link Unlink Undo Redo

+ Add Image

< Previous Next > Cancel Save and Close Save

Enter the **Title** of the article, any **Body** text, and optionally select an **Image** from the Photo Album.

The Body text can have rich text formatting applied for bold, italics, underline, and can have hyperlinks inserted.

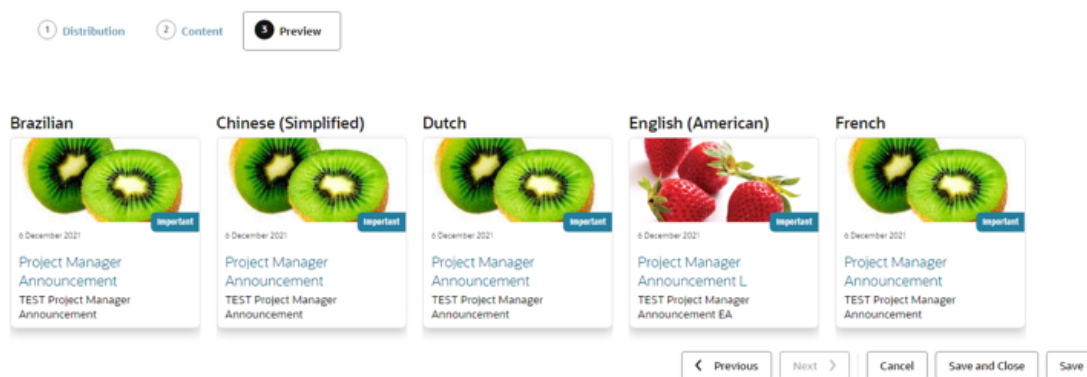
Alternative content can be specified for any of the portal's supported languages. The left-hand pane contains the default language, which is English (British). Select an alternative language from the **Localisable Information** picklist and enter any overrides for that language in the right-hand pane. An alternative image may also be used for each language.

When the announcement is published, any language overrides will be presented for users of that locale; in the absence of language overrides, the default language text or image is used.

Click Next, or the 3 Preview tab to proceed to the Preview page.

### 3 Preview

The Preview page presents the tile as it will be seen in the Workspace dashboard, for each of the portal's supported languages.

**Figure 4-6** Announcement Preview Page

Click a tile to view how the full size article will appear to the user.

Click Save and Close to save the Announcement and return to the Announcements page.

## Unpublishing and Archiving

Further details on the unpublishing and archiving of Announcements is included here.

An announcement becomes **published** and therefore shown as a tile on the Workspace if:

1. The Published checkbox is checked.
2. The Effective Date has been reached.
3. The Expiry Date (if any) has not been reached.
4. The Archived checkbox is unchecked.

An announcement is **unpublished** by unchecking the Published checkbox. This can be done by manually editing, or the Auto Expiry options can be used to have it automatically unpublished when the Expiry Date is reached.

An announcement is **archived** by checking the Archived checkbox. This can be done by manually editing, or the Auto Expiry options can be used to have it automatically archived when the specified Expiry Date is reached.

Both published and unpublished announcements may be archived. A published archived announcement will not show as a tile in the Workspace dashboard, but will be included in the Announcements list view. An un-published archived announcement will only be visible to *News Administrator* users, within the Announcements list view.

Unpublishing, archiving, or deleting an announcement removes any associated Assignments.

The Auto Expiry processing is handled by a nightly batch job.

## Reviewing Readership

Announcements that have been set to log readership record details of when users view the announcement or click the button to confirm they have read it. The logging details are available for viewing by *News Administrator* users only, within a Review Readership page.

To view the readership log details of an announcement as a *News Administrator* user, click the row in the Announcements list view to select the announcement, and then select the Review Readership option in the Actions menu.

**Figure 4-7 Review Readership Page**

**Review readership**

**Internal Users**

User Name	Date Last Viewed	Date Confirmed Read
Jane Smith	22 June 2022	22 June 2022
John Smith	8 July 2022	8 July 2022

**External Users**




Supplier Name	User Name	Site Name	Site Code	Supplier Code	Date Last Viewed	Date Confirmed Read
ABC Supplies	Jack Smith	Nottingham	A0002-0001	A0002	22 June 2022	22 June 2022

Close

The Review Readership page opens as a slide-out pane. It contains two tables, listing the users who have read and/or confirmed they have read the announcement.

The Internal Users table lists retailer/portal owner users who were targeted using the User Roles selection. The External Users table lists supplier users who were targeted using the Contact Roles selection.

**Date Last Viewed** shows when the user most recently opened the article to view it. **Date Confirmed Read** shows when the user confirmed that they had read the announcement.

Use the    file icons to download the contents of the table in CSV, Excel, or XML format files respectively, or use the corresponding options in the Actions menu.

Click Close to close the Review Readership page and return to the Announcements page.

 **Note:**

If readership logging is enabled and subsequently disabled, the readership log data that has already been recorded for the Announcement is retained; it is not cleared.

## Administration

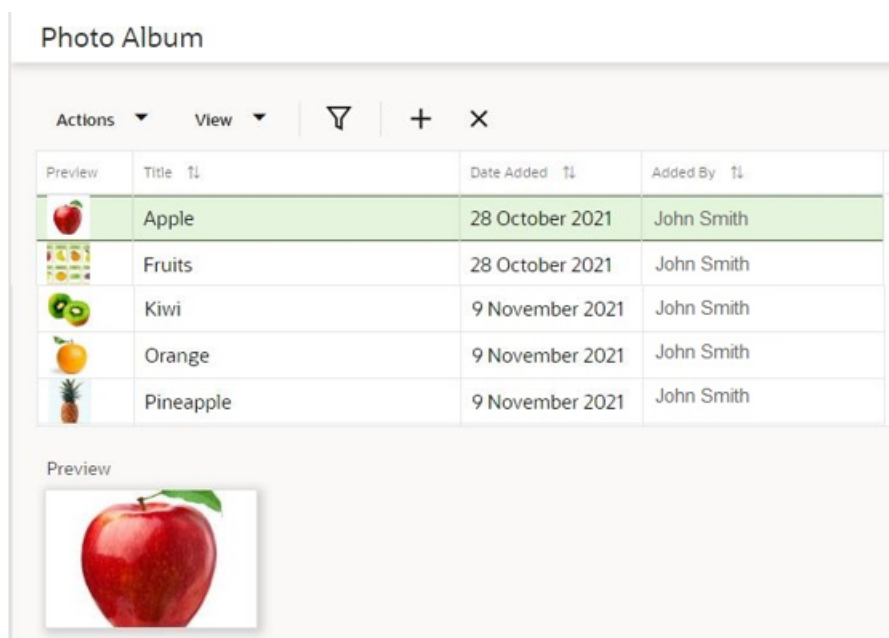
If you have *News Administrator* access rights, you will have access to the Announcement administration options: the Photo Album and Announcement glossaries.

### Photo Album

The Photo Album is a repository of image files. For an image to be used in an Announcement, it must first be uploaded to the Photo Album.

Open the Photo Album using the option in the Administration tasks list.

**Figure 4-8 Photo Album**



Use the standard list view actions or icons to add and remove images.

To add a new image, enter a **Title** and attach an image either by dragging and dropping to the **Drop files here** box, or click **Pick File...** to open your OS file explorer selector. Validation checks that the image size does not exceed a predefined limit. This is initially set as 10MB.

A thumbnail image is shown in the list view; click a row to see a larger scaled **Preview** image beneath the list view.

If an image is removed from the Photo Album, any references to it in Announcements will substitute with a *File not found* placeholder.

Images may also be added to the Photo Album while editing an Announcement.

## Announcement Glossaries

The Announcement Flash Message and Announcement Category fields on the Announcement record have associated glossaries, which are maintained in the News section of the Admin area.

The **Announcement Flash Messages** glossary holds the values that are to be shown as flashes on the News Item tiles and full articles, for example *Important*, *Normal*, and *High*.

The **Announcement Categories** glossary allows the *News Administrator* user to categorize announcements. The values are not shown on the tiles or full article.

# 5 KPIs

This chapter describes the KPIs dashboard in Workspace, and how it is configured to show tiles. The following topics are covered:

- [KPIs Dashboard](#)
- [Configuring the Dashboard](#)
- [Viewing KPIs](#)

The KPIs dashboard is available to internal (retailer/portal owner) users, who have *Advanced Reporting Administrator*, *Advanced Reporting User*, or *Advanced Reporting Reader* access rights. The contents of the dashboard are configured by the user. Clicking a tile opens the full KPI chart or table.

## KPIs Dashboard

As an *Advanced Reporting* user, you will see the KPIs dashboard within the Workspace page.

**Figure 5-1 KPIs in Workspace**



You must configure which KPIs you wish to appear in the dashboard, from those that are available to you. For further details, see the [Configuring the Dashboard](#) section.

Once you have added KPIs to your dashboard, they are shown as a set of tiles. Use the > and < controls to scroll through the list if there are more to show.

The KPI data is based on KPI reports that are generated in Supplier Evaluation. The tile shows the KPI metric, and either a thumbnail representation of a chart, or the latest three values of a table.

Clicking the tile opens the KPI Dashboard page containing the full chart or table.



## Configuring the Dashboard

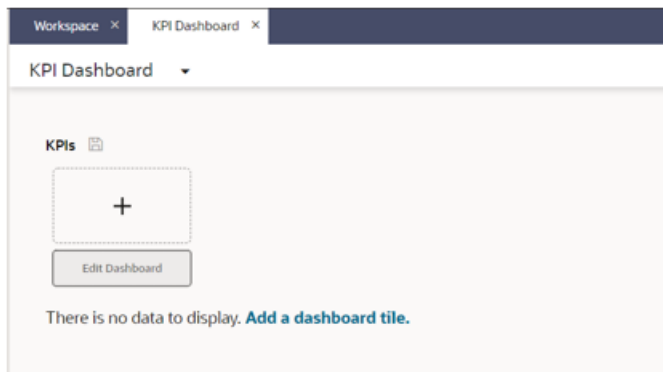
The KPIs available to you are those which you have access to within the Reports module. This requires you to be granted access to the KPI as a recipient, and the KPI must be made available for selection as a Workspace KPI. See the [Managing Workspace KPIs](#) section.

### Adding KPIs

To add tiles to your dashboard:

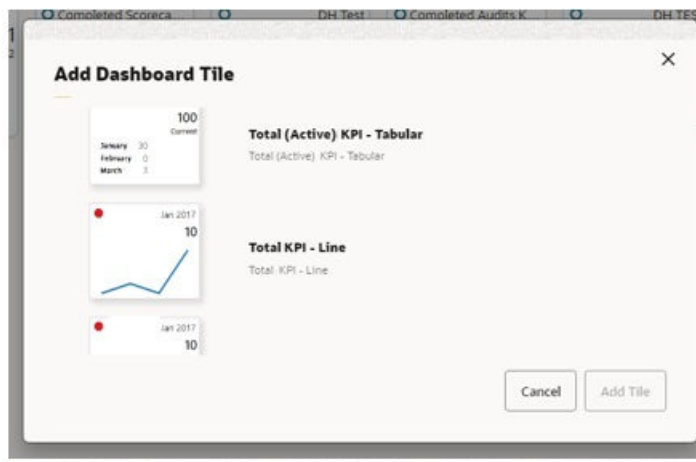
1. Click the View KPI Dashboard link within the dashboard, or select the Workspace/KPI Dashboard option from the Tasks menu.

**Figure 5-2 KPI Dashboard Page - Add Dashboard Tile**



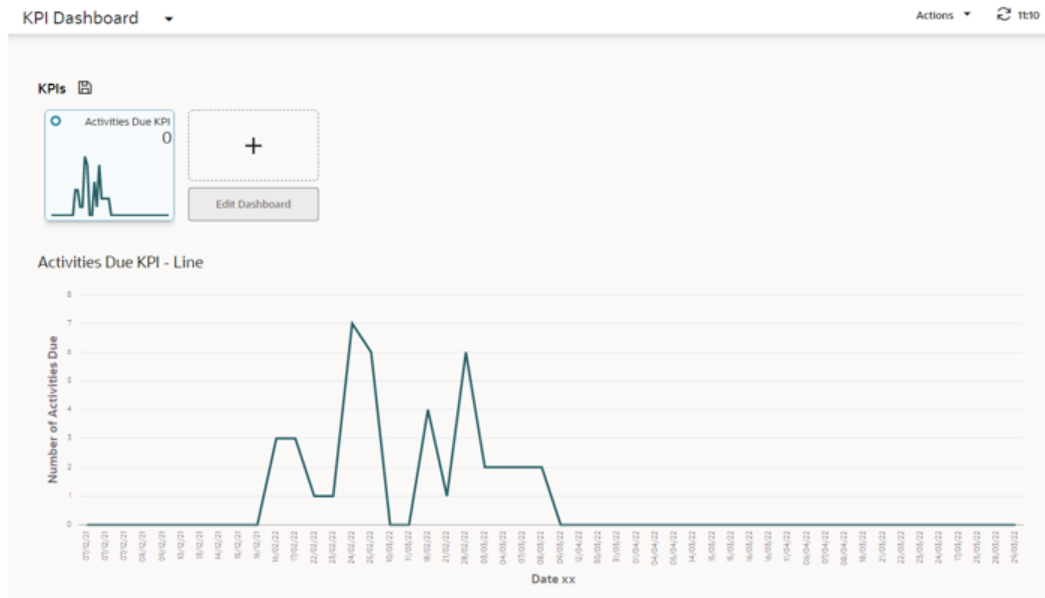
2. From the KPI Dashboard page, click Add a dashboard tile or the + control, and select from the list of available KPIs.


**Figure 5-3 Add Dashboard Tile Dialog Box**



3. Click Add Tile. The KPI Dashboard page is refreshed to show the selected KPI has been added as a tile, plus the full chart or table.

Figure 5-4 KPI Dashboard Page - KPI Added



4. Repeat to add other KPIs. You can select up to 12 tiles to show in the dashboard.
5. Click the  Save icon to permanently apply the selections to your dashboard.
6. Return to the Workspace page and refresh the page. The KPIs Dashboard will now show your selected KPI tiles.

## Editing the Dashboard

Once your dashboard is populated, you can reconfigure it to add, remove, or reorder your tiles.


To edit your dashboard, open the KPI Dashboard page by clicking a tile or the View KPI Dashboard link within the dashboard, or by selecting the Workspace/KPI Dashboard option from the Tasks menu.

Figure 5-5 KPI Dashboard Page - Edit KPIs



To add a tile, locate the + control in the right-most tile, and complete per the [Adding KPIs](#) section.

To remove or move a tile, click the Edit Dashboard button, then click the X control on the tile to remove it, or click the ... control and drag and drop the tile to move it. As an alternative to dragging and dropping, you can right-click the ... control and use the Cut and Paste Before/Paste After options.

When you have made the changes, click Done Editing and then click the  Save icon to permanently apply the selections to your dashboard. Return to the Workspace page and refresh the page to see the changes.

## Managing Workspace KPIs

For a KPI to be selectable to add to your dashboard, you must be assigned as a recipient of the KPI report when it is scheduled to run.

The KPI report must also be configured to be available for selection in the Workspace KPIs dashboard. This can be done by users with *Advanced Reporting Administrator* or *Advanced Reporting User* access rights, using the Manage Workspace KPIs option within the Reports module menu.

To make a KPI report output available for selection in the Workspace KPIs dashboard, create a record for it within the Manage Workspace KPIs area.

Figure 5-6 Manage Workspace KPIs

Select the **KPI Schedule** that relates to the KPI, and enter a **Name** to identify it as a Workspace KPI. A **Description** and **Sequence** number can optionally be used to provide more information, and set its order, when presented in the Add Dashboard selector.

Then select the **Display Type** for the required type of KPI output (Tabular, Bar Chart or Line Chart), and provide the **X Axis** and **Y Axis** labels.

### Report Schedule Reversioning

The Workspace KPI record forms the link between the Workspace KPI tile and the KPI Report Schedule, thus providing users who have been named on the Report Schedule with access to that KPI for use in their KPIs dashboard.

When a KPI Report Schedule is selected in the Workspace KPI record, the link is formed to that Schedule, not to a specific version of it. Therefore, if the Schedule is reversioned, there is no need to relink the Workspace KPI record.

As a new version of the Schedule may exclude a user who previously had access, and who has the KPI selected in their dashboard, the KPIs dashboard always references the latest version of each KPI tile's Schedule record, to determine if the user is named on that version. If they are not, the tile is not displayed or selectable, even if they had access to it previously.

If there is not an active version of a Schedule, any associated tiles will not be displayed or selectable within the KPIs dashboard.

## Viewing KPIs

To view a KPI chart or table, open the KPI Dashboard page by clicking a tile or the View KPI Dashboard link within the dashboard, or by selecting the Workspace/KPI Dashboard option from the Tasks menu. The full chart or table is presented beneath your dashboard tiles. Clicking another tile will refresh the page to show the chart or table for that KPI.

Chart KPIs are presented as bar chart or line chart, with the KPI value as the y-axis and the x-axis being the time interval.

**Figure 5-7 Chart KPI**



Tabular KPIs are presented as a scrollable list, with a sort option on the y-axis KPI value column only.

Figure 5-8 Chart KPI

Completed Audits KPI

Time	KPI Value	T1
18/03/22	1	
17/03/22	1	
08/04/22	4	
07/04/22	4	
06/04/22	2	
11/04/22	4	
16/03/22	1	
15/03/22	1	

# 6

## List Views

This chapter provides an overview of the List View framework used in Workspace. The following topics are covered:

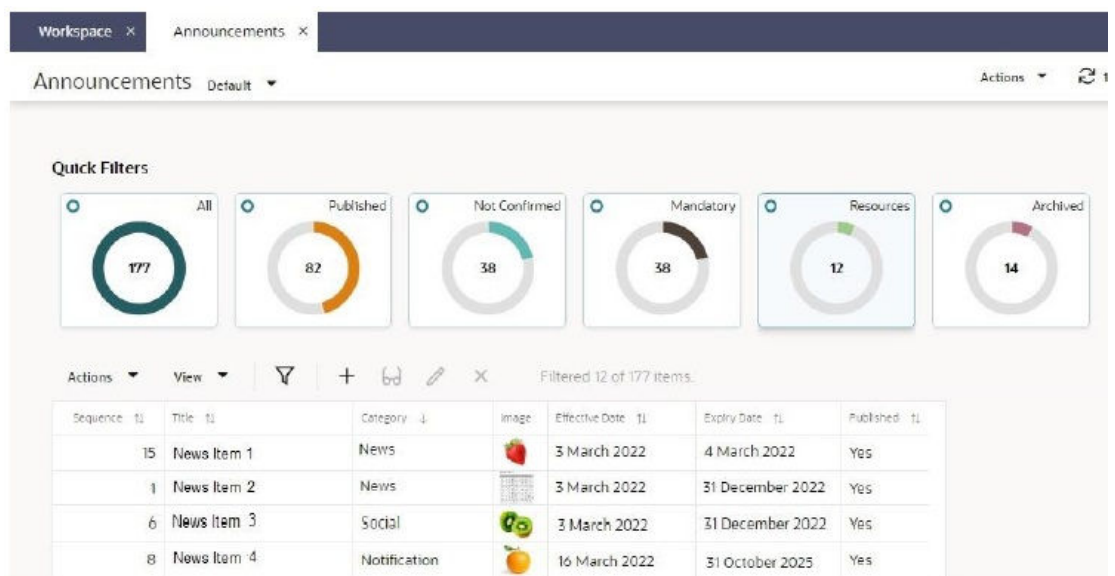
- [List View Contents](#)
- [Filter Tiles](#)
- [List View Actions](#)
- [Managing Columns](#)
- [Searches](#)

List views present collections of records, from where the records can be opened and actioned, and new records created. The contents can be filtered, sorted, and searched in order to categorize the contents or locate specific records.

The main components of a list view page are:

- A Title bar with actions to refresh the contents, and open other related list views.
- The list view contents, with a toolbar for applying actions and configuring the columns.
- Filter tiles for filtering the list contents.
- Simple and Advanced search facilities.

**Figure 6-1 List View**



## List View Contents

The list view is a grid of rows and columns, where the rows represent individual records of a common type, and the columns represent the fields within the records.

To action a record, single-click the row; to open a record in read mode, double-click the row.

Columns can be resized by dragging the borders of the column heading; alternatively, right-click the row and use the Resize options.

Click a column heading to sort the list view contents in ascending order by that column; click again to sort in descending order. Alternatively, right-click the column and use the Sort Column options. Sorting is usually case -insensitive.

The filter tiles and searches are applied independently. If the list is filtered with a simple or advanced search, then a filter tile is clicked, the list will be refreshed based on the filter tile's criteria, and the search filter is cleared.

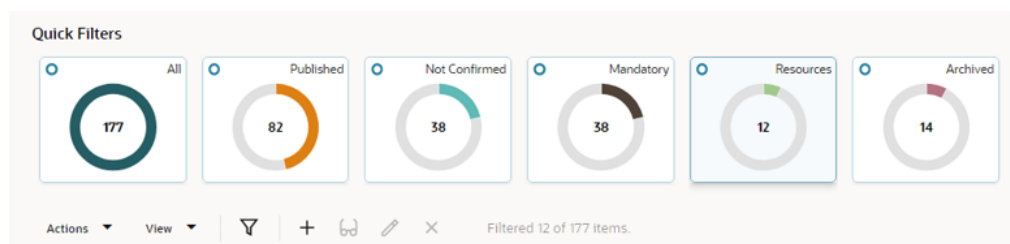
Columns for rich text fields truncate the content to fit the column width. Columns for Boolean fields show the true/false values as Yes/No accordingly.

## Filter Tiles

A set of Quick Filter metric tiles show above the list contents. These predefined filters represent the record states, or other categorizations.

The tiles show the number of rows in the list view that match the filter, along with a graphical representation of its proportion of the full list view contents. The *All* tile represents the full list of all records.

**Figure 6-2** Filter Tiles



Clicking a tile refreshes the list view to show records that meet the criteria of that filter.

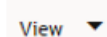
The number of records returned by the filter and the overall total number of records is shown within the toolbar.

## List View Actions

The toolbar provides a standard set of actions that can be performed on the list view.

The screenshot shows a dropdown menu labeled "Actions" with a downward arrow.

The **Actions** menu contains actions that are relevant to the list view contents. Typical options are the New, View, Edit, and Delete for maintaining records, and any actions specific to the type of record.

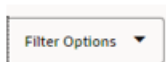
The screenshot shows a dropdown menu labeled "View" with a downward arrow.

The **View** menu contains options:

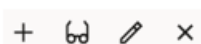
- **Mange Columns** - for customizing the list view. See the [Managing Columns](#) section.
- **Query by Example** - for searching the list view contents. See the [Searches](#) section.



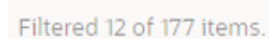
The **Query by Example** icon enables the searching options. It places the list view in Query by Example mode and shows the Filter Options menu. See the [Searches](#) section.

The screenshot shows a dropdown menu labeled "Filter Options" with a downward arrow.

The Filter Options menu appears when the Query by Example icon is clicked, providing additional search options. See the [Searches](#) section.



The **New, View, Edit,** and **Delete** icons are used to create a new record, or view, edit, or delete the selected record.

The screenshot shows a status bar that says "Filtered 12 of 177 items."

If a filter tile or search is applied, the **number of records** returned by the filter is shown, along with the overall total number of records.

#### **Note:**

Actions will be hidden or appear greyed out if they are inactive or not permitted.

In some cases, the Delete action will not be available from the list view, instead the record must be opened in edit mode and the form's Delete action used.

## Managing Columns

The Manage Columns option within the View menu allows you to customize the list view by adding, removing, and reordering the columns.

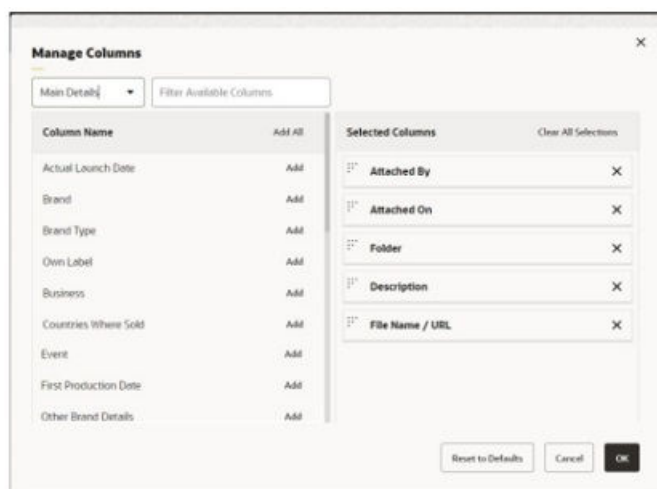
The Manage Columns dialog box presents the available columns in a left-hand pane, and the selected columns in the right-hand pane.

The list of available columns can be filtered by the field subsection grouping, or with the type-ahead text search. Click Add to select a column, or Add All to select all columns.

The list of selected columns can be reordered by clicking the handle icon and dragging and dropping to the required position. Click the X to deselect a column, or Clear All Selection to deselect all.



Figure 6-3 Manage Columns



Click OK to return to the refreshed list view. At least one column must be selected.

The Reset to Defaults button resets the column selections to the core default set.

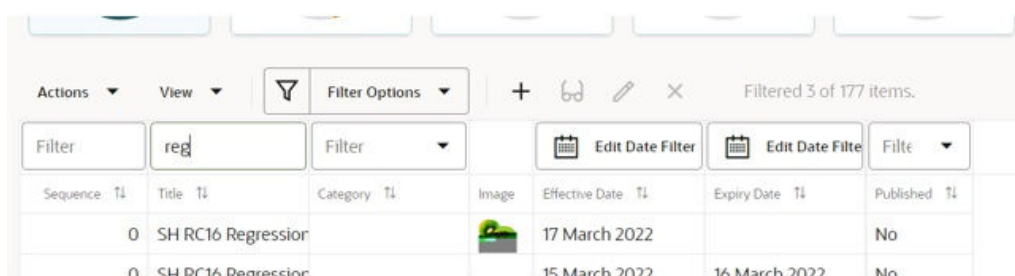
## Searches

The contents of list views can be searched using the simple and advanced search options. The simple search allows you to apply filters to the list view's columns; the advanced search allows you to build query statements for applying more complex search criteria.

### Simple Search

To perform a simple (or *Query by Example*) search, click the Query by Example icon, or select the Query by Example option in the View menu. This places the list view in Query by Example mode, presenting a set of input fields beneath the column headings, and the Filter Options menu.

Figure 6-4 Query by Example Mode



The input fields act as type-ahead filters. Enter values in one or more of the columns' input fields to filter the contents of the list view accordingly. The Enter key or field exit refreshes the list view.

If values are entered in multiple columns, the filtering is applied with either AND or OR logic according to whether you select the Column Match “OR” or Column Match “AND” option in the Filter Options menu.

Columns that relate to a glossary have the search value selected from a picklist. Date columns use a date picker.



#### Note:

Text input is case insensitive.

A column that relates to a rich text field may return hits on text that is not visible, such as the HTML markup code used for text formatting.

The number of records returned by the filter, and the overall total number of records is shown within the toolbar.

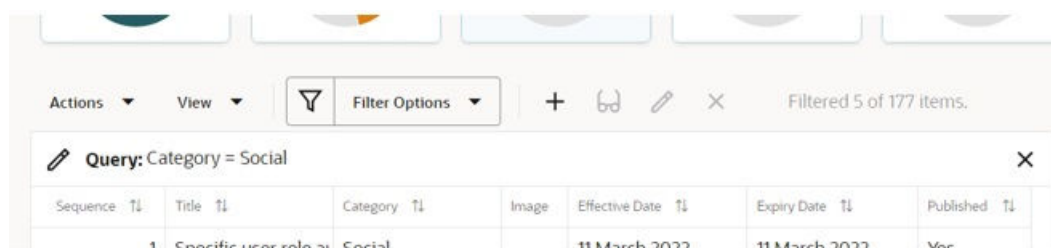
To close the search and revert to the unfiltered list view, click the Query by Example Icon, or select the Clear Filters option in the Filter Options menu.

When Query by Example is selected, any other filters are cleared. Searches and filters cannot be applied simultaneously. Clicking a filter tile or entering Query Builder mode clears the simple search filter.

## Advanced Search

To perform an advanced (or *Query Builder*) search, click the Query by Example icon, and select the Query Builder option in the Filter Options menu. This places the list view in Query Builder mode, presenting a query bar above the column headings.

**Figure 6-5 Query Builder Mode**



Click the Query Builder icon on the search bar, or select Edit Query Builder in the Filter Options menu to open the Query Builder dialog box.

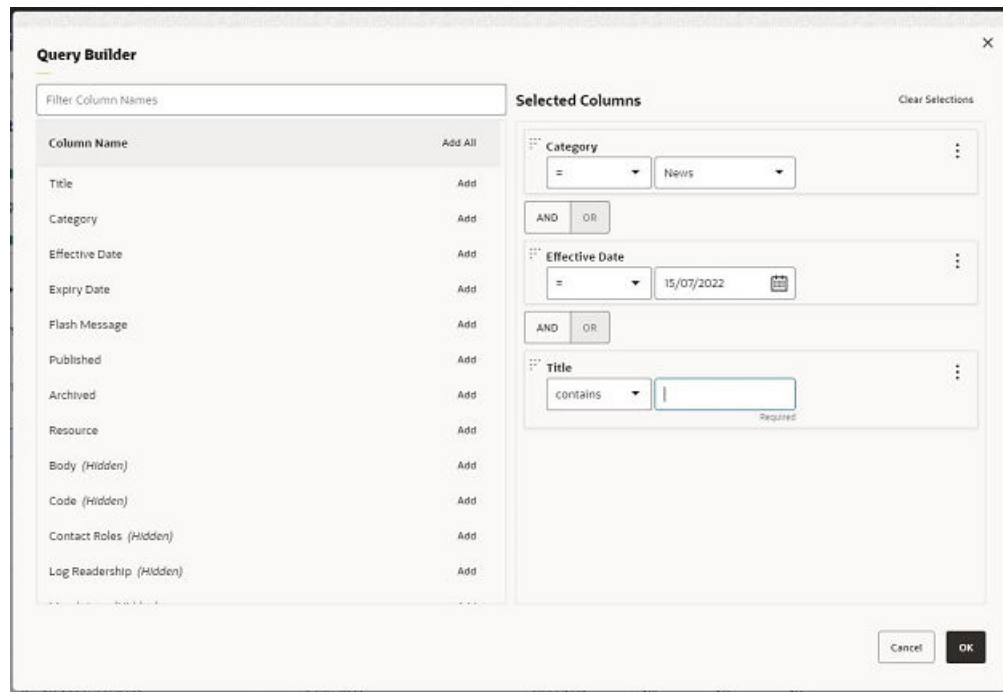
The Query Builder dialog box presents the list view columns in a left-hand pane, and the construction of the search criteria query statement in the right-hand pane.

The list of available columns can be filtered with the type-ahead text search. Click Add to select a column, or Add All to select all columns.

The selected columns can be reordered by clicking the handle icon and dragging and dropping to the required position. Click the X to deselect a column, or Clear All Selection to deselect all.

The query statement is constructed as individual clauses for the selected columns, by specifying operators and data values. For further details, see the Building Query Statements section.

**Figure 6-6 Query Builder Dialog Box**



Click OK to apply the query search. This closes the dialog box and refreshes the list view to filter the contents accordingly.

The query statement is shown in the list view query bar, and the number of records returned by the filter, and overall total number of records is shown within the toolbar.

To close the search and revert to the unfiltered list view, click the Query by Example Icon or the X on the query bar, or select the Clear Filters option in the Filter Options menu.

When Query Builder is selected, any other filters are cleared. Searches and filters cannot be applied simultaneously. Clicking a filter tile or entering Query by Example mode clears the advanced search filter.

 **Note:**

Text input is case insensitive.

A column that relates to a rich text field may return hits on text that is not visible, such as the HTML markup code used for text formatting.

## Building Query Statements

The query statement is constructed by specifying the search criteria for each selected column, and grouping clauses, as follows:

1. Select the **column** from the list of available columns by clicking Add.
2. Select the **operator**. The options vary depending on the column field's data type.

The common options are:

- *Less than or equal to* (<=) and *Less than* (<)
- *Equal to* (=) and *Not equal to* (!=)
- *Greater than* (>) and *Greater than or equal to* (>=)

Text and rich text fields also include a *contains* option for partial text matching.

Date fields also include a *between* option for specifying a range of dates.

Boolean (true/false or yes/no) fields, and those that relate to a glossary just have the *Equal to* (=) and *Not equal to* (!=) options.

3. Enter the **data value**.

For text, rich text, and numeric fields, enter the search value.

For fields that relate to a glossary, select from the picklist or use the type-ahead filter.

For date fields, use the date picker or enter the date. See also **Date Filters** below.

For Boolean fields, select or enter yes (true) or no (false).

4. If more than one column is selected, click AND or OR to set the **Boolean logic** for how each is compared to the next column.

As a simple example, searching for *Category = 'News' AND Flash Message = 'High'* would return records that have a Category of 'News' and a Flash Message of 'High'; searching for *Category = 'News' OR Flash Message = 'High'* would return records that have a Category of 'News' or a Flash Message of 'High'.

A column may be selected multiple times, for example to build a clause such as *Flash Message = 'High' OR Flash Message = 'Important'*.

5. For more complex statements, use **grouping**. The Create Group, Edit Group, and Remove From Group menu options allow you to build a nested structure by grouping clauses together.

Groups are formed by clicking the handle icon and dragging and dropping a column onto another column within the right-hand pane. Multiple levels of group nesting is permitted; each group is indicated with a left-hand border.

Set the Boolean logic operator for the columns within the group, and for how the group is compared to the next column or group.

As a simple example, grouping would be used to search for records with a Category of 'News' and a Flash Message of 'High' or 'Important', where the expiry date is less than 08/04/2022, as:

*Category = News AND (Flash Message = High OR Flash Message = Important) AND Expiry Date < 8 Apr 2022*

To make changes to the grouping structure, select the Edit Group option for the group and reset the Boolean logic operators relative to the selected group. The group icon

indicates the selected group. Select the checkbox of a clause to have the logic reset, then click OK.

**Figure 6-7 Edit Group**

The screenshot shows the 'Selected Columns' dialog box. At the top right, there is a 'Clear Selections' link. The main area contains a list of selected columns, each with a dropdown menu for the operator and a checkbox to reset the logic. The first row is 'Category' with the operator '=' and the value 'News'. Below it are two 'Flash Message' rows, each with empty dropdown menus. The last row is 'Effective Date' with the operator '=', the value '15/07/2022', and a calendar icon. Between each row is a group of 'AND' and 'OR' buttons. At the bottom, there is a 'Set All in Group to' section with 'AND' and 'OR' buttons, and 'Cancel' and 'OK' buttons. There are also 'Cancel' and 'OK' buttons at the very bottom of the dialog.

- Use the Move Up, Move Down, and Remove menu options to adjust the selected rows and groups within the right-hand pane.

### Date Filters

- Some date fields are stored in the database as a timestamp, comprising the date and the time to the millisecond. In some cases, just a date may be visible within the application, however the time portion is also present. This must be taken into account when applying filters to such fields.

For example, for a field containing a timestamp of 11-12-2022 18:00, applying a search filter for date 11-12-2022 will look for an exact match on 11-12-2022 00:00, as it defaults the time as 00:00. The method of searching timestamp fields for a particular date, is to apply a range filter, for example where greater than 10-12-2022 and less than 12-12-2022.

- In a set of records being filtered, dates that are null will be included in the results of *less than* and *less than or equal to* operations and excluded from the results of *equal to*, *greater than* and *greater than or equal to* operations. This is because null

dates are considered to be the lowest value in a range and therefore are always *less than* any filter value.

# 7

## Supplier Evaluation Dashboard

This chapter describes the Supplier Evaluation Dashboard in Workspace. The Dashboard displays a preconfigured set of tiles displaying key Supplier Evaluation data. The following topics are covered:

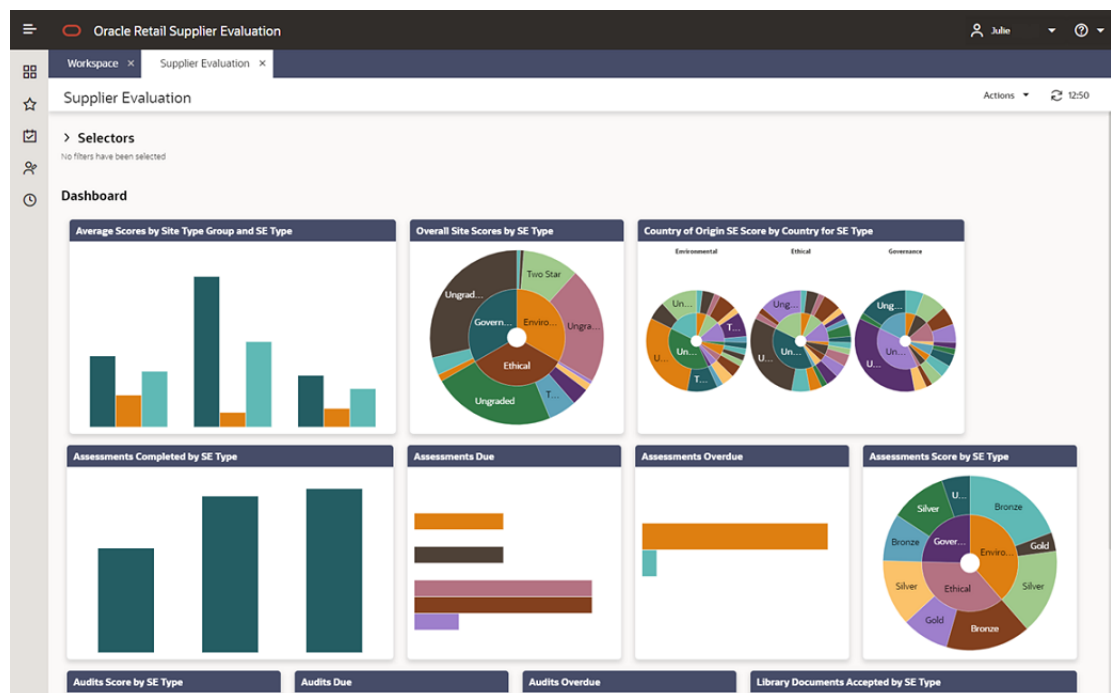
- [Supplier Evaluation Dashboard Layout](#)
- [Supplier Evaluation Dashboard Tiles](#)

The Dashboard is available to Retailer/Supplier/Site users with the Dashboard Access Authority Profile. This Authority Profile is available automatically with the System Administrator User Role.

To access the Supplier Evaluation Dashboard, select the Supplier option from the Tasks menu. Then, select the Supplier Evaluation option. The Supplier Evaluation Dashboard opens in a new tab.

## Supplier Evaluation Dashboard Layout

Figure 7-1 Supplier Evaluation Dashboard



### Selectors

These controls are used to filter the data content that is displayed. The filters are based on the Supplier and Site records.

The selections apply to all Supplier Evaluation Dashboard content, unless explicitly stated otherwise.

When scrolling, the Selectors remain at the top of the page.

When collapsed, the Dashboard area expands to maximize the viewing area. A summary line of the selectors is displayed with the number of options selected for each control.

The Save button refreshes the content of the screen and applies the selections/filters to the Dashboard content. The selection of selectors will be saved/persisted for the current user's future sessions.

The following are available to filter the data in the dashboard tiles:

- Supplier Evaluation Type
- Supplier Type
- Supplier Top Grade
- Site Type
- Site Status
- Site Lead Technologist
- Site Top Grade
- Business Category
- Country
- Area

### Dashboard

The content is predefined. It consists of tiles populated with Charts, Graphs, and Metrics dependent on the data being represented.

The data has implicit filters to manage the following:

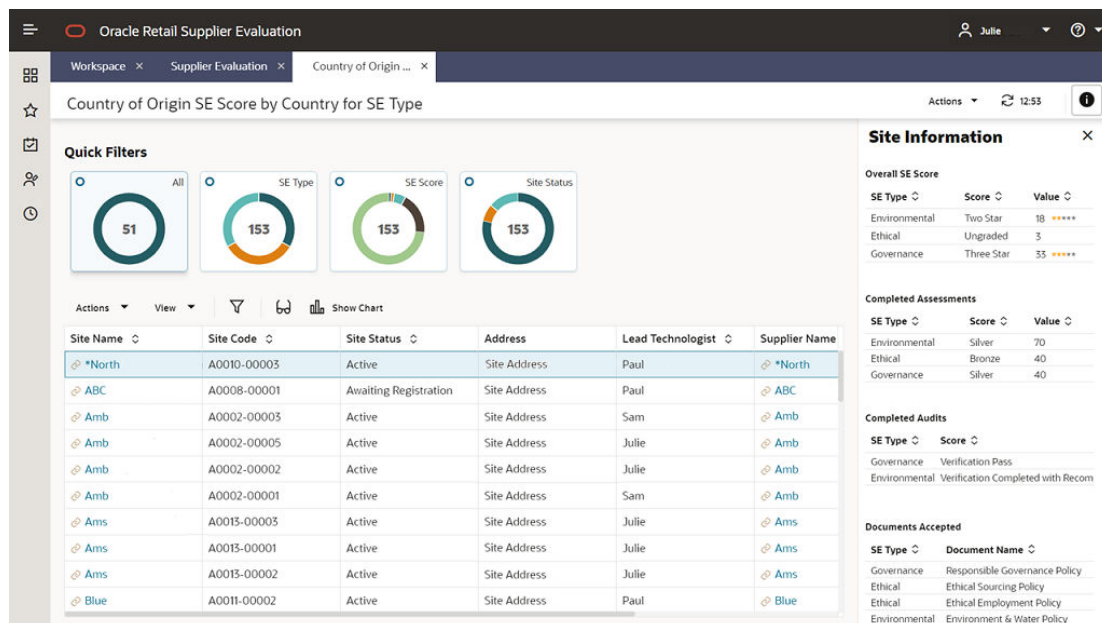
- Area Access - This is dependent upon the system parameter *Restrict Access By Area* being set to Yes. The Area Access is related to a user's access to groups of Suppliers and the associated Sites. When configured, a user may have a reduced view of the data dependent upon their Area setting in their User record.
- Role Based Access - A user's access is dependent on the role assigned to the user. For example, if a user does not have access to Audit, the Audit charts will be hidden.
- Supplier Access - Supplier users only have visibility to their Suppliers and Sites.

### List View Page

Selecting the **Drilldown to details** menu option for a Dashboard tile, opens a new tab to display data for the tile. This tab includes a row of quick filters at the top, a list view of the data, and a Site Summary panel that displays the data for the site selected in the list. The user can toggle between the list view and a graph view. For an example, see [Figure 7-2](#).



Figure 7-2 Example of a List View



## Supplier Evaluation Dashboard Tiles

The following tiles are available on the dashboard. For an example of the type of graph used for the tiles, see [Figure 7-1](#).



### Note:

If the user hovers over a label on a graph, details of that label are displayed.

### Assessments Score by SE Type

The chart displays a count of the Assessment Scores for the latest valid Assessments, for each Assessment Type. The Assessment Score counts are grouped for each Supplier Evaluation Type.

Valid Assessments are those with a status of Complete and assigned a Supplier Evaluation Type. Latest is based on the Due Date if more than one exists for each Assessment type.

A Sunburst graph is used to display this data.

### Assessments Due

The chart displays a count of Assessments that are due for all sites, with breakdown by when each is due: Today, This Week, This Month (calendar), and the next five calendar months.

An Assessment is considered to be due if the status is not Complete and the Due Date has been reached or would be reached within the given time frame.

The chart only includes records assigned a Supplier Evaluation Type.

A Horizontal Bar graph is used to display this data.

### **Assessments Overdue**

The chart displays a count of Assessments that are overdue, for all sites, with a breakdown by the length of time that each Assessment is overdue.

Assessments appear in the chart based on the overdue notification flag for the Assessment record, which also considers any grace period set. The length of time overdue is based solely on the time since the Assessment's Due Date.

The chart only includes records assigned a Supplier Evaluation Type.

A Horizontal Bar graph is used to display this data.

### **Assessments Completed by SE Type**

The chart shows a count of completed Assessments by calendar month for each Supplier Evaluation Type.

An Assessment being completed is based on the Assessment status being set to Complete. The Assessment's Completed On date determines the calendar month by which the Assessments are grouped.

A Vertical Bar graph is used to display this data.

### **Audits Score by SE Type**

The chart displays a count of the Audit Scores for the latest valid Audits, for each Audit Type. The Audit Score counts are presented for each Supplier Evaluation Type.

Valid Audits are those with a status of Completed and assigned a Supplier Evaluation Type. Latest is based on the Due Date if more than one exists for each Audit type.

A Sunburst graph is used to display this data.

### **Audits Due**

The chart displays a count of Audits that are due for all sites, with breakdown by when each is due: Today, This Week, This Month (calendar) and the next five calendar months.

An Audit is considered to be due if the status is not equal to Not Progressed, Abandoned, Failed, or Completed and the Due Date has been reached or will be reached within the given time frame.

The chart only includes records assigned a Supplier Evaluation Type.

A Horizontal Bar graph is used to display this data.

### **Audits Overdue**

The chart displays a count of Audits that are overdue, for all sites, with a breakdown by the length of time that each Audit is overdue.

Audits appear in the chart based on the overdue notification flag for the Audit record, which also considers any grace period set. The length of time overdue is based solely on the time since the Audit's Due Date.

The chart only includes records assigned a Supplier Evaluation Type.

A Horizontal Bar graph is used to display this data.

#### **Library Documents Accepted by SE Type**

The chart displays a count of the number of sites that have accepted documents. The documents are grouped by Supplier Evaluation Type as documents are Supplier Evaluation Type specific.

Any segments/bars that use the same color in the chart infers no meaning; it is just coincidental.

A Horizontal Stacked Bar graph is used to display this data.

#### **Country of Origin - SE Score by Country for SE Type**

The chart displays a count of the number of sites that have achieved a given Site Supplier Evaluation Score, grouped by Site Country for the chart Supplier Evaluation Type.

A site's Supplier Evaluation Score is based on scores associated with Assessment, Audit, and Document accepted records and the site status.

A Sunburst graph is used to display this data.

#### **Overall Site Scores by SE Type**

The chart displays a count of the number of sites that have achieved a given Supplier Evaluation Score, grouped by Supplier Evaluation Type.

A site's Supplier Evaluation Score is based on scores associated with Assessment, Audit, and Document accepted records and the site status.

A Sunburst graph is used to display this data.

#### **Average Scores by Site Type Group and SE Type**

The chart displays the average scores for each Supplier Evaluation Type. This data is grouped by the type of sites (Site Type Grouping).

The chart data is based on the data used to populate the Company Supplier Evaluation page.

The data in this chart is not subject to any selections made in the input filters.

A Vertical Bar graph is used to display this data.

# A

## Appendix: Design Standards

This appendix outlines some of the JET and Redwood design standards that are implemented in Supplier Evaluation as the new UI. The following topics are covered:

- [Forms](#)
- [Dialog Boxes](#)

See also the [Workspace](#) section for details of the Workspace page and navigation, and the [List Views](#) section for details of the style and features of list views.

The new UI design standards are based on the Oracle *JET* technology and *Redwood* theme. Oracle JET (JavaScript Extension Toolkit) is a development framework for the development of mobile and web applications. The *Redwood* theme is the new Oracle standard for application look and feel. It is being implemented company-wide to unify the user interface of all Oracle product offerings.

### Forms

Forms present the contents of a record's fields, grouped together in subsections, within a page, or across multiple pages. The same layout is used whether in read or edit mode.

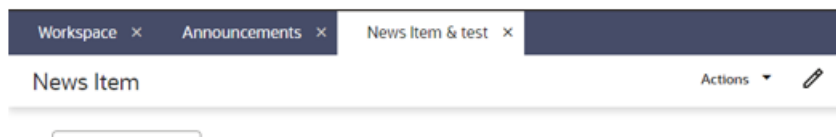
The common components and design standards of forms include the following.

### Title Bar

Per the Workspace page and list view pages, forms have a Title bar sub-heading. It shows the name of the record and an Actions menu.

The Actions menu contains context-sensitive options available to perform on the record based on its state and the user's permissions, such as to put the form in edit mode, and to progress the record through its workflow stages. Some options also appear as icons, next to the Actions menu.

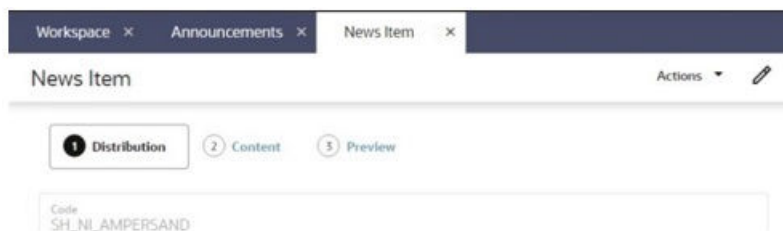
**Figure A-1 Title Bar**



### Tabbed Pages

Forms may present the contents as a tabbed page, either in a *tabbed* or *wizard* style. The wizard style is used where there is a logical order to the data entry, in which case the tabs are numbered, and the form buttons include Next and Previous navigation options.

Figure A-2 Wizard Form Tabs

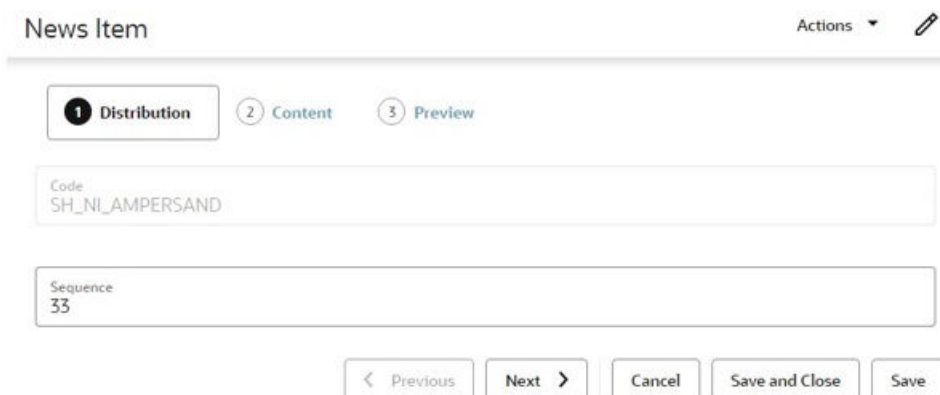


The screenshot shows a browser window with three tabs: 'Workspace', 'Announcements', and 'News Item'. The 'News Item' tab is active. Below the tabs, the page title is 'News Item' and there is an 'Actions' dropdown menu with an edit icon. The main content area features three numbered steps: '1 Distribution' (highlighted), '2 Content', and '3 Preview'. Below the steps is a text input field labeled 'Code' containing the value 'SH\_NI\_AMPERSAND'.

## Form Buttons

A set of context-sensitive buttons appear at the bottom of the page for the basic form actions, such as Save, Save and Close, and Cancel. Wizard forms also include Previous and Next options. Inactive buttons are greyed out.

Figure A-3 Form Buttons



The screenshot shows the same 'News Item' form as in Figure A-2. The 'Code' field contains 'SH\_NI\_AMPERSAND'. Below it is a 'Sequence' field containing the value '33'. At the bottom of the form, there are five buttons: '< Previous' (disabled), 'Next >' (disabled), 'Cancel' (active), 'Save and Close' (active), and 'Save' (disabled).

When creating a record, until it has been saved, just the *Save and Close* button is available (not *Save*); after the initial save, the user must reopen the record to perform further edits.

When a page is in edit mode and the *Cancel* button is clicked (or the page's *Workspace* tab is closed), a confirmation prompt is presented, warning that any unsaved changes will be lost.

## Fields

### Read Mode

In read or print mode, fields are typically presented in one or two columns, with the values beneath the field labels.

**Figure A-4 Form Read Mode**

News Item Actions

1 Distribution 2 Content 3 Preview

Code: 1 Sequence: 0

Flash Message: Important Category: Social

Effective Date: 1 July 2022

Resource: No Published: No Archived: No

**Expiry Actions**

Expiry Date:

Set to Unpublished: No Set to Archived: No

**Logging and Mandatory Details**

Mandatory: Yes Log Readership: Yes

User Roles: Process Manager, Technologist Contact Roles: Out of hours contact, Product development manager

< Previous Next > Close

**Edit Mode**

In edit mode, the field labels appear within the field input area.

**Figure A-5 Form in Edit Mode**

News Item Actions

1 Distribution 2 Content 3 Preview

Code: 1 Sequence: 0

Flash Message: Important Category: Social

Effective Date: 01/07/2022

Resource  Published  Archived

**Expiry Actions**

Expiry Date:

Set to Unpublished  Set to Archived

**Logging and Mandatory Details**

Mandatory  Log Readership

User Roles: Process Manager, Technologist Contact Roles: Out of hours contact, Product development manager

< Previous Next > Cancel Save and Close Save

Read only fields are greyed out.

**Pick lists** are populated by clicking the input area to open the list of available values, or using the type-ahead text filter. If multiple selections are permitted, the selected values are shown in the input area; they are deselected by clicking the X control.

**Date** fields present a date picker; the selected date is shown in the format according to the user's locale. Dates may also be keyed in.

**Numeric** integer fields may have controls to increment and decrement the number.

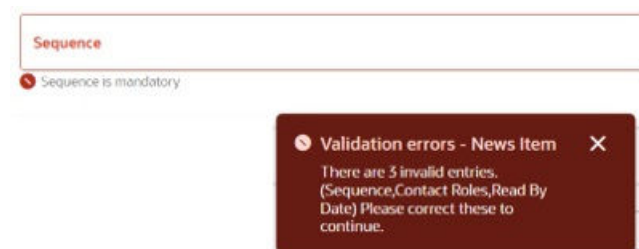
**Rich text** fields include options to apply bold, italics, and underline formatting, to insert a hyperlink, and to undo or redo edits.

**Mandatory** fields are indicated by the text Required beneath the field. Guidance text may appear beneath the field to indicate the expected content.

### Validation

Validation is applied when the record is saved. Errors, such as missing mandatory fields, are indicated within the form.

**Figure A-6 Validation Error**



### Field Alignment

The different types of fields are aligned as follows.

Field Type	Alignment
Number/integer/count	Far
Multi checkbox	Near
Boolean/switch/yes-no	Center
Text/rich text/phone/email/hyperlink/image and so on	Near
Dates and times	Near
Other (blob/complex)	Center

### Images and Files

Depending on the usage, images may be shown as full size, reduced scale, or a thumbnail.

If an image or file cannot be found, a placeholder icon indicating the file type extension is shown instead.

## Record Locking

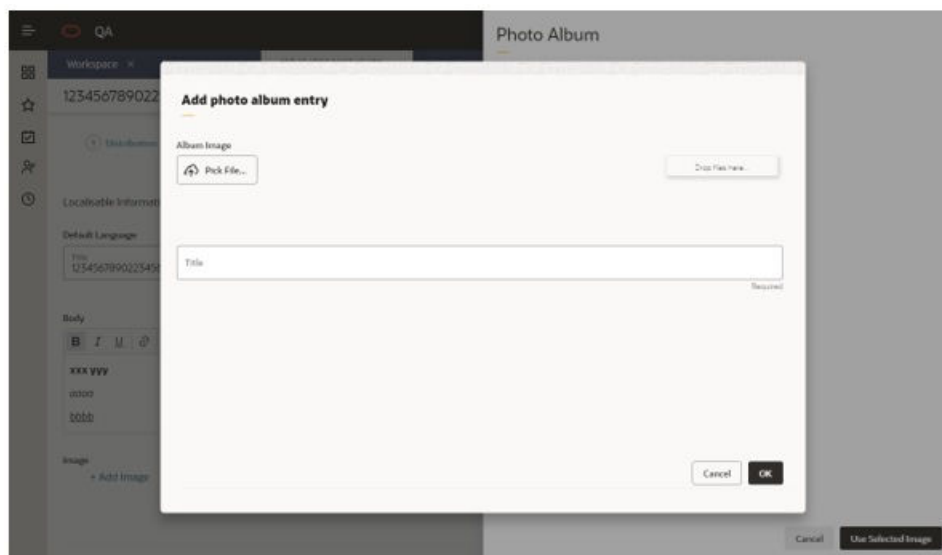
Records that the user has open for editing are exclusively locked for five minute intervals. If the user terminates their session by closing the page, the lock is automatically removed once the five minutes has elapsed. This frees up records where editing has been abandoned due to the session terminating before the record is saved or exited (any changes made during that edit session would have been discarded).

In some cases, the user may have the chance of saving the record before the locks are released and data is lost, in which case a warning message is presented, prompting the user to save their work.

## Dialog Boxes

Dialog boxes are presented using a similar style to form pages.

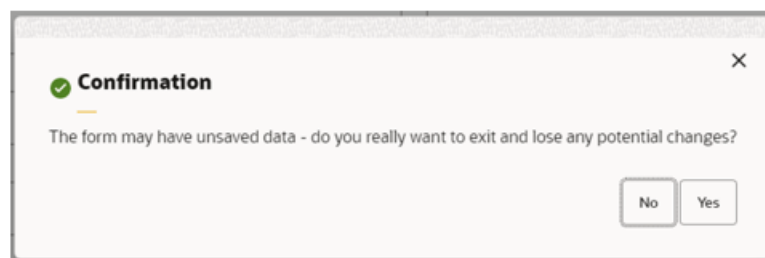
**Figure A-7** Dialog Box



## Message Boxes

Message boxes are used to present confirmation prompts and warning or error messages.

**Figure A-8** Confirmation Message Box

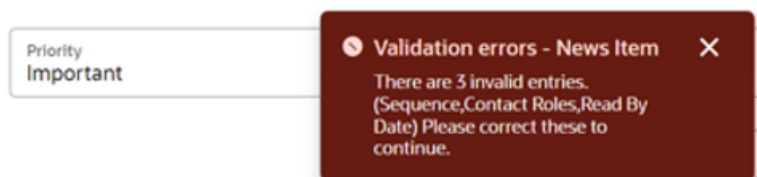




**Figure A-9 Warning Message Box**



**Figure A-10 Error Message Box**



## Overlays

Some actions present a form as a slide-out overlay, allowing it to be viewed or completed without having to navigate away from the original page.

Overlays are presented using a similar style to form pages, with a Close button (plus any other that are appropriate to the action). Simple overlays may use the X as an alternative method of closing.

**Figure A-11 Overlay Form**

