Oracle® Retail Supplier Evaluation Cloud Service

Release Readiness Guide

Release 24.0.101.0

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ORACLE®

Oracle Retail Supplier Evaluation Cloud Service Release Readiness Guide, Release 24.0.101.0

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Contents

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.

Documentation Accessibility

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When contacting Customer Support, please provide the following:

- 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)

Oracle Retail product documentation is available on the Oracle Help Center at https://docs.oracle.com/en/industries/retail/index.html.

(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.

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.
  - **Medium:** These UI or process-based features are typically comprised of field, validation, or program changes. Therefore, the potential impact to users is moderate.
  - **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?
Text Editor Replacement	All	Small	Yes	No

Table 1-1   (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
JET UI Security	Admin	Medium	Yes	Yes
Auto Prompt for Audit Submission	Supplier	Small	Yes	No

Text Editor Replacement

The current *CK Editor* rich text editor component used for formatting text in fields, such as News items, is replaced with the *Tiny MCE* text editor.

JET UI Security

A new JET UI based security administration facility replaces the current ECHO UI Permissions spreadsheet upload, for the new JET UI based screens only.

The new model utilizes the existing method of allocating users combinations of Authority Profiles and Roles to determine their level of access to the application's functionality (including navigation, actions, and APIs), and its data. The permissions are defined as sets of policies in XML files rather than a spreadsheet of rules.

The core set of default system-delivered security policies can be overridden by the client, with the system administrator having access to a new maintenance facility in the Admin area.

The overrides are applied by uploading XML files containing the custom rules. The files may represent a single rule as part of a simple *flat* structure, or a group of rules as part of a more complex *hierarchical* structure.

The enhancement includes the following features:

- The security rules are defined as **policies** and **policy sets**, in XML files, grouped by these **policy types:**
  - Tasks - for controlling access to menu options.
  - Filters - for applying filters to data.
  - Fields - for controlling access to list view columns and form fields.
  - Actions - for controlling access to list view and form actions.
  - Redactions - for forming subsets of data, such as to remove associated child data that is not required.
  - Decisions - for controlling whether a UI component is shown or hidden.
- A predefined set of **combining algorithms** determine how the policies are applied and whether the rule is to permit or deny access:
  - PermitPreferred - If any rules in the policy generate a PERMIT result, then PERMIT is the result. If any rules in the policy generate a DENY result and no rule generates a PERMIT result, then DENY is the result. If no rules are matched, then the result is NO_MATCH. Used for Tasks and Actions.

- DenyPreferred - If any rules in the policy generate a DENY result, then DENY is the result. If any rules in the policy generate a PERMIT result and no rule generates a DENY result, then PERMIT is the result. If no rules are matched, then the result is NO_MATCH. Used for Tasks and Actions.

- LastMatch - The last rule to match is chosen as the result. If there are no matches, the result is NO_MATCH. Used for Tasks and Actions.

- CombineAnd - If one rule is matched, the expression from that rule is the result in a singleton list. If multiple rules are matched, then the expressions from those rules are ANDed together as the result in a singleton list. If no matches are generated, then the result is an empty list. Used for Filters.

- CombineOr - If one rule is matched, the expression from that rule is the result in a singleton list. If multiple rules are matched, then the expressions from those rules are ORed together as the result in a singleton list. If no matches are generated, then the result is an empty list. Used for Filters.

- AllMatch - If any rules are matched, then all are returned as the result list. If no rules are matched, then an empty list is the result. Used for Redactions.

- The system-delivered core rules may be overridden or extended by client administrators using the new Security Policies maintenance facility. The Security Policy comprises a set of Policy Override records per Policy Type (so up to 6 sets of Policy Overrides). Each Policy Override record is associated to a single Policy Type and Combining Algorithm, and has a single XML file attachment.
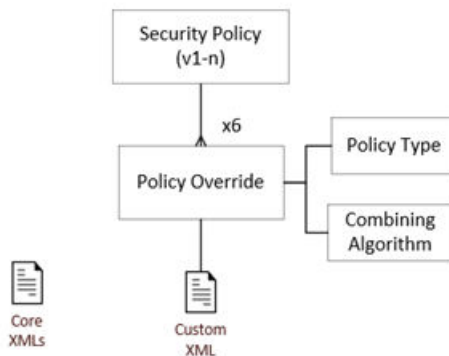
- The **Security Policies list view** contains a single Security Policy record which may have multiple versions, of which just one is active. Alternative sets of new draft rules can be maintained, then activated when ready; prior sets of rules can be reverted to, by reactivating a deactivated set.

  The custom rules are maintained as Policy Override records within the Security Policy. They act as a container for the XML files which contain the rules in code form. The core system policy rules can be downloaded as a set of XML files, for reference when building custom overrides.

- The **Security Policy form** comprises:

- – A set of fields which represent the **Security Policy** record.

- – A set of tabs which represent the fixed set of **Policy Types**: Task, Filter, Field, Action, Redaction, and Decision.

- – A **Combining Algorithm** selector containing the option available for the policy type.

- – A data grid which contains the **Policy Override** records for the selected policy type tab.

- – The actions for maintaining the Policy Override records and exporting the XML file.

- – The **Policy Override** record is a container for the override policy rules XML file. It contains:

  - * The **Policy Type** based on the which tab has been selected.

  - * The **Sequence** the rules are to be applied.

  - * A **Reason** or purpose of the override.

  - * The **Policy File** upload/download of a single XML file.

See also Post Release Tasks, and refer to the Security UI appendix in the *Oracle Retail Supplier Evaluation Management Cloud Service Workspace User Guide* for further details of administering the JET UI user access permissions.

Auto Prompt for Audit Submission

If the supplier forgets to submit an Audit after completing all open issues, the status is not progressed for the retailer to finalize completion of the Audit.

To avoid such delays, validation is added to the Audit to check if all Issues are *Completed*, and if so, to prompt the user with an option to set the status to *Awaiting Approval*, meaning the retailer can then progress the Audit.

The enhancement includes the following features:

- **System Parameters:** *Prompt Supplier to Set to Awaiting Sign Off* – enables the prompt for the supplier to set an Audit or Visit to Awaiting Sign Off status. Default is not enabled.

- **Audit Validation**: If the system parameter is enabled, validation will be applied when a supplier user (not a retailer user) saves and exits each Issue in an Audit that is currently at In Progress, Awaiting Corrective Action, or Awaiting Amendment status.

  The validation will check if all the audit's Issues have the Completed Date entered. If so, a message will notify the user that all issues are now complete so the audit should be set to Awaiting Sign Off, with an option to change the status accordingly.

  See also Post Release Tasks.

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.

JET UI Security

If the new Workspace UI is enabled, areas presented in the JET UI have their access controlled by the new Security Policies subsystem. Any custom overrides to the core access rules, including any that have previously been applied using the ECHO Permissions spreadsheet, must be applied using the new method.

See the *Oracle Retail Supplier Evaluation Cloud Service Workspace User Guide* for details on administering the JET UI user access permissions.

Auto Prompt for Audit Submission

To enable use of the Auto Prompt for Audit Submission feature, set the *Prompt Supplier to Set to Awaiting Sign Off* system parameter in the Audits tab.

Required Spreadsheet Updates

The Text Editor replacement requires an update to the Branding stylesheet.

1. Log in as an Oracle Authorized Administrator User and go to Company > Admin > System Control. Select the Branding menu item to open the Brand page. On the Branding Themes tab, click the orbc-theme.css link to download the file.

2. Open the downloaded file in a text editor, and search for the following:

```
.html-label ul {
```

This should locate a CSS style matching this:

```
.html-label ul {
    list-style: disc inside none !important;
}
```

This should be updated to match the following:

```
.html-label ul {
    list-style-position: inside;
}
```

3. Next, search for the following:

```
.html-label ol {
```

This should locate a CSS style matching this:

```
.html-label ol {
    list-style: decimal inside none !important;
}
```

This should be updated to match the following:

```
.html-label ol {
    list-style-position: inside;
}
```

4. Once the changes are made and saved to your local copy of orbc-theme.css, this needs to be uploaded back to the Branding page.

5. In the Branding page, choose the Action > Edit to enable edit mode for the page.

6. Click the *Choose File* button next to the Core Theme which should have orbc-theme.css listed.

7. Select the orbc-theme.css file that was amended above and click Open. This should upload the file to the Branding record.

8. Select Action > Save & Exit.

9. Refresh the browser using F5. The required style sheet should now be in effect.

Database Update Scripts

There are no Database Upgrade Scripts included within this release.

Enabling Identity Management Notifications

As an IDCS or OCI IAM Administrator, verify that Notifications are enabled in the corresponding Stage / Production tenant.

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.

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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.

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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	Summary
General: Assignments	35923012	**Assignment Suppression** The ability to be able to suppress the Assignments from being retrieved from the server is now included. The Urgent Assignments and the Assignments Due panel will still display on the Workspace, but the Assignments will not be loaded. The Assignment List view will also remain available, but the Assignments will not be loaded from the server. By default, the Assignments will continue to be available. For these to be suppressed, a Support Ticket (SR) will need to logged requesting this to be done and the appropriate environment identified such as Stage or Production.
General: News	35899336	**Resource and News Items cannot be created** In the JET UI, when a user with a non-default language attempts to create a News Item or Resource, the Body field is not displayed to allow the user to enter data. A fix has been implemented so the Body field is displayed and can be edited.
General: System Text	35785973	**Window not closing when importing System Text** A fix has been made to rectify an issue when importing System Text in the Admin area, where the window failed to close.

Affected Component	Defect Number	Summary
General: Users	35773062	**New Users Data Generator** A fix has been made to the data generator process which creates the initial User accounts when provisioning a new environment. The process was unable to handle a space in the user's login id. This has been corrected.
General: Users	35945675, 35908627, 35657474, 35427176	**Error when user logs on to application** When a user without a time zone set logs on to the application, an error is generated. An update has been made so the application will not error if the user does not have a time zone set.
Process: Activities	36061348	**All Process & Activities List View** It was possible for a user to be able to see an Activity they were not authorized to see on the list view, but would not be able to open or work on the activity. The issue occurred for Area users who should not have seen the Activity if it was not for one of the Areas they are associated to.
Process: Activities	36061726	**Processes & Activities - Overdue Filter Tile** The Overdue filter tile count was not filtering out all of the appropriate records and therefore displaying a number larger than was expected.
Process: Activities	36123315	**Status Filter in All Processes & Activities View** A fix has been made to the Status quick filter tile in the All Processes & Activities list view. The issue resulted in no data being present in the tile.
Process: Activities	NA	**Activity record status cannot be updated to Not Started** In the JET UI, it was not possible to update the status of an Activity record from Started to Not Started, as an error was generated. An update to the application now enables an Activity record's status to be changed to Not Started.

Affected Component	Defect Number	Summary
Process: Activities	NA	**Quick filter displays incorrect values** The Responsible quick filters in the JET UI Process list views were not displaying the correct values. The Responsible quick filter criteria has been updated across the Process list views in the JET UI to ensure they display the correct values.
Process: Activities	NA	**Process list view generates an error** Selecting a Process record in the All Processes & Activities list view generates an error as the system attempts to fetch data for the Information Panel. A fix has been applied so the system can successfully retrieve the data for the Information Panel.
Process: Brief Extract	NA	**Brief Extract displays column incorrectly** When the Brief Extract is run from the All Processes & Activities list view in the JET UI, the Completed By column is called Name in the extract. The Brief Extract has been updated to use the correct column name in the extract.
Process: Processes	35166764	**Process amendments not copied** When a Process record is copied, the Activity Name and Critical Path fields were copied from the original template rather than the existing record. A fix ensures that the existing record entries are copied to a new Process record, which ensures any field changes are also propagated to the new record as expected.
Reports: KPI Outputs	35634947	**KPI Report Copy Issue** An issue has been addressed when copying an existing KPI Report Schedule and then navigating to the Filter tab. An unrecoverable error was being displayed.

Affected Component	Defect Number	Summary
Reports: Report Outputs	33668826	**Email link to Report Outputs** Users with Advanced Reporting User access rights can now access the report output using the link in the notification email. Previously, they were taken to the application home page rather than to the record itself.
Supplier: Assessments	35821642, 35846172	**Assessment Extracts are not generated** Assessment Extracts were not generated, and the Batch Job log showed an error. The Assessment Extracts were timing out and failing. The extract process has been updated to improve performance which stops the process timing out.
Supplier: Assessments	NA	**Assessment Template generates error** Opening any existing Assessment Template generates an error. A fix has been implemented to resolve the underlying cause of the error.
Supplier: Audits	35764727	**Audit Non-Conformance record displaying incorrect data** When traversing Audit Non-Conformance records using the Save and Edit Next or Save and Edit Previous actions, the (Rich Text) Description fields were not displaying the correct data. An update ensures the (Rich Text) Description fields of the record being traversed to, are now displayed correctly.
Supplier: Audits	35788153	**Audits - Further Comments** An issue has been fixed with Audits where the Further Comments were editable by a Supplier Audit Editor when an Audit had reached a status of Completed, Abandoned, Failed, or Not Progressed. At these statuses, the Further Comments should only be editable by a retailer user with Audit Editor or Audit Administrator authority profile.

Affected Component	Defect Number	Summary
Supplier: Audits	35954029, 35955695, 35980274	**Notifications sent for completed Audits** Audit Due and Overdue email notifications are sent for Audits with a status of Completed. An update has been applied to resolve an error in the logic for sending Audit email notifications so email notifications are not sent for Completed Audits.
Supplier: Contacts	35751619, 33617336, 35918495	**Cannot update Supplier Site contact list** When attempting to add a new contact to a site, with an expired reference and Site Reference Notifications enabled, the application would error. This would happen if the new contact had a user role that was listed under the Notify Supplier/Site contacts by Email in the system parameters. A fix has been applied so the application will not error when adding a new site contact in this scenario.

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Deprecated Features

As part of the continuous delivery model for cloud services, features and technical components of a solution may be removed or replaced to enhance the security, performance, and overall quality of the cloud service. When this occurs, the deprecation of a feature or component will be announced in advance, allowing customers sufficient time to anticipate the change and transition to any enhanced replacement feature/component. After the deprecation is announced, the deprecated feature or component will remain in the solution until the planned removal date and will not be enhanced or made compatible with other new features.

For the full schedule of planned deprecations for this product, see the Deprecation Advisory accessed from the following MOS Documentation Library: Oracle Retail Supplier Evaluation Cloud Service Documentation Library at Doc ID 2877111.1.