Oracle® Retail Supplier Evaluation Cloud Service

Supplier User Guide

Release 24.0.201.0
F93081-01
April 2024

Oracle Retail Supplier Evaluation Cloud Service Supplier User Guide, Release 24.0.201.0

F93081-01

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Preface

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

Audience

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

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

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

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

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Conventions

The following text conventions are used in this document:

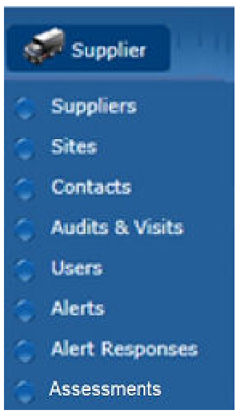
Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1 Introduction

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

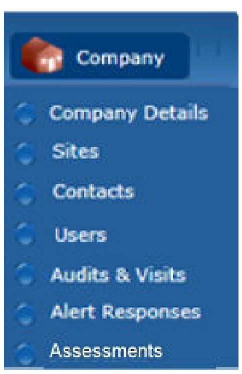
To access a Supplier option, select the option from the Supplier drop-down list.

Figure 1-1 Supplier Drop-Down List



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

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



For information on the choices in the drop-down list, see the chapter shown in Table 1-1. For information on the Users option, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*.

Table 1-1 Description of Supplier Drop-Down Choices

Option	Description	Chapter
Suppliers	Maintenance of the supplier account details.	Supplier Management
Sites	Maintenance of the supplier's individual manufacturing and packing location details.	Site Management
Contacts	Maintenance of the individual contacts at the supplier and site locations.	Contacts Management
Alerts and Alert Responses	Process for the retailer/portal owner to issue alerts and manage alert responses.	Alerts Management
Audits & Visits	Management of the regular auditing program for the supplier base.	Audits & Visits
Assessments	Management of the regular performance assessment program for the supplier base.	Assessment Management

Available Options Based on Type of User

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

- Retailer users

  Retailer users see both Company (for the retailer) and Supplier (their suppliers).

  Under Company:

  - Company Details: Name and address details of the retailer.
  - Users: List of all retailer users.
  - Admin: Administration options if the user has access to any options.

  Under Supplier:

  - Suppliers: List of all supplier records.
  - Sites: List of all site records.
  - Contacts: List of all supplier/site contacts for all suppliers and sites.
  - Users: List of all supplier/site users for all suppliers and sites.
  - Audits & Visits: Work with audits and visits if the user has access to that module.
  - Alerts: Work with alerts if the user has access to that module.
  - Assessments: Work with assessments if the user has access to that module.
- Suppliers users

  Supplier users see Company (for their organization):

  - Company Details: Supplier record.
  - Sites: List of the supplier's sites with which the user is associated.
  - Contacts: List of the supplier's supplier and site contacts. A site user only sees the contacts for the sites with which they are associated.

- Users: List of the supplier's supplier and site users. A site user only sees the users for the sites with which they are associated.
- Audits & Visits: Work with audits and visits if the user has access to that module.
- Alerts: Work with alerts if the user has access to that module.
- Assessments: Work with assessments if the user has access to that module.

Authority Profiles

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

Supplier & Site Administrator

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

Supplier User Editor

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

Supplier Contacts Administrator

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

Getting Started

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

2

Supplier Management

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

Figure 2-1 Suppliers Page

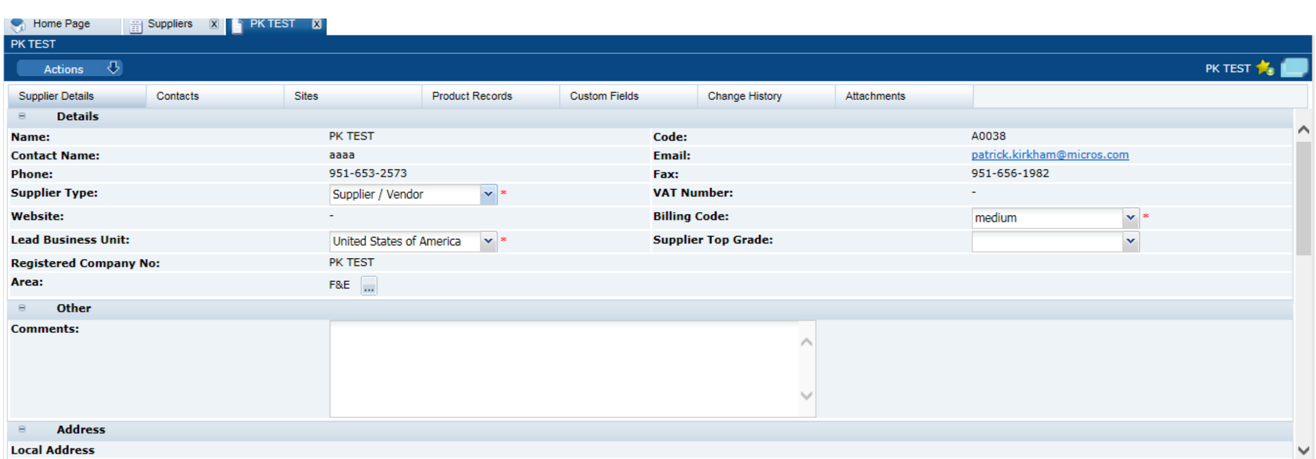
The list shows the suppliers in order by supplier name. For each supplier, the supplier code and country are also shown.

The following actions are available:

- New Supplier: For more information, see Registration.
- New Alert: For more information, see Alerts Management.

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

Figure 2-2 Supplier Details



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

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

Registration

This section covers the steps for registering a new supplier:

- Adding a Supplier
- Viewing Registration Requests
- Accepting the Registration

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

Adding a Supplier

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

Figure 2-3 Create Supplier/Site Page

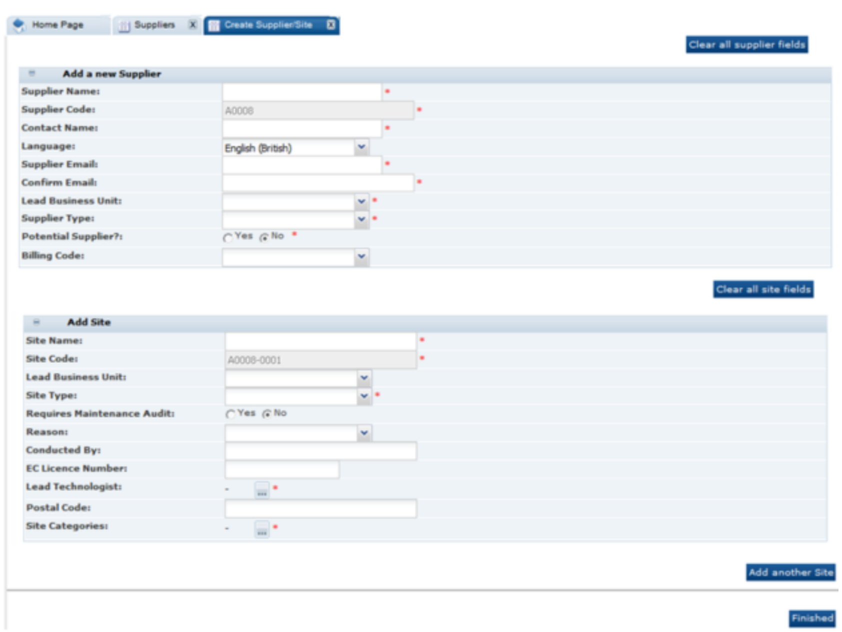


Table 2-1 describes the fields used to add a new supplier.

Table 2-1 Add a New Supplier Fields

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

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

Table 2-2 Add a New Site Fields

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

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

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

To add a new supplier:

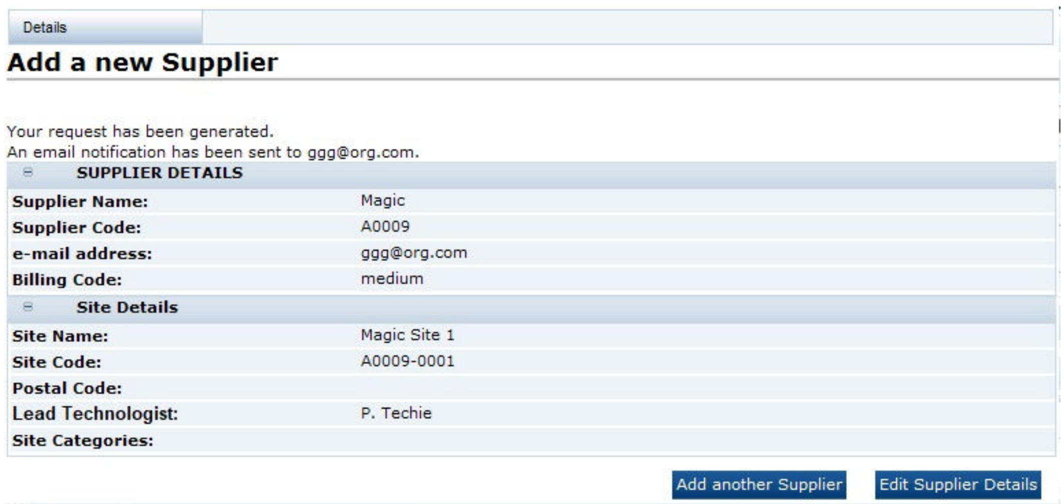
1. Enter the information for the new supplier. For a description of the fields, see Table 2-1.
2. Enter the information for a site for the supplier. For a description of the fields, see Table 2-2.
3. If additional sites are needed, click **Add another site**. An additional section for information for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

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

Figure 2-4 Reason for This Site Request Field

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

Figure 2-5 Add a New Supplier Confirmation Page



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

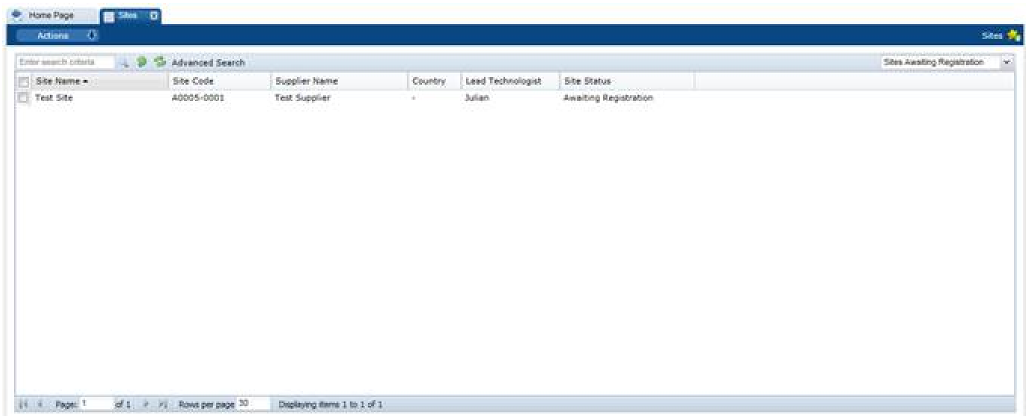
Upon completion of the registration request, the following is done:

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

Viewing Registration Requests

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

Figure 2-6 View Registration Requests



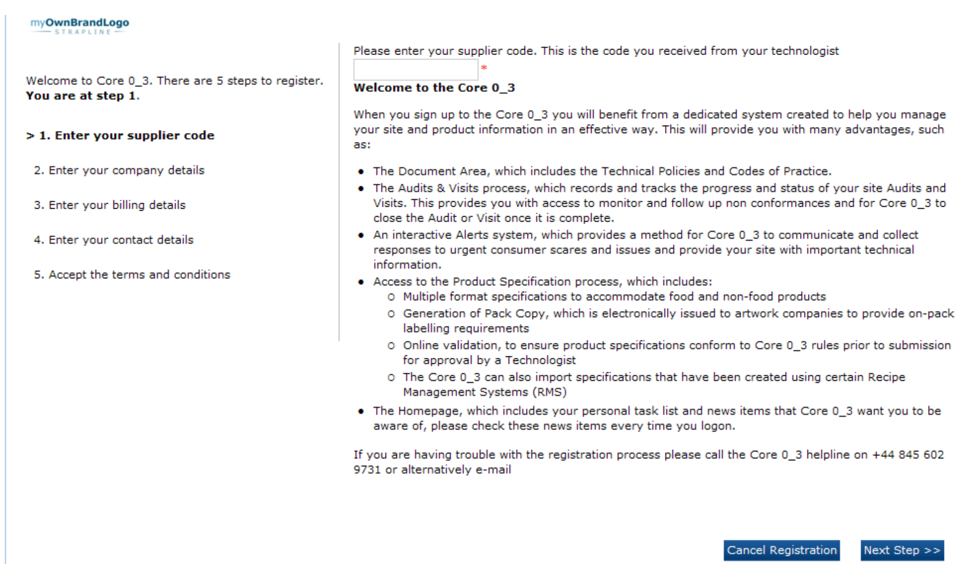
The retailer can send a reminder email message to any suppliers who have yet to complete the registration. To send the reminder, select the Re-send Registration Request action. The email message is not sent if the supplier has already registered.

Accepting the Registration

To accept the registration request:

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

   Figure 2-7 Registration Page



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

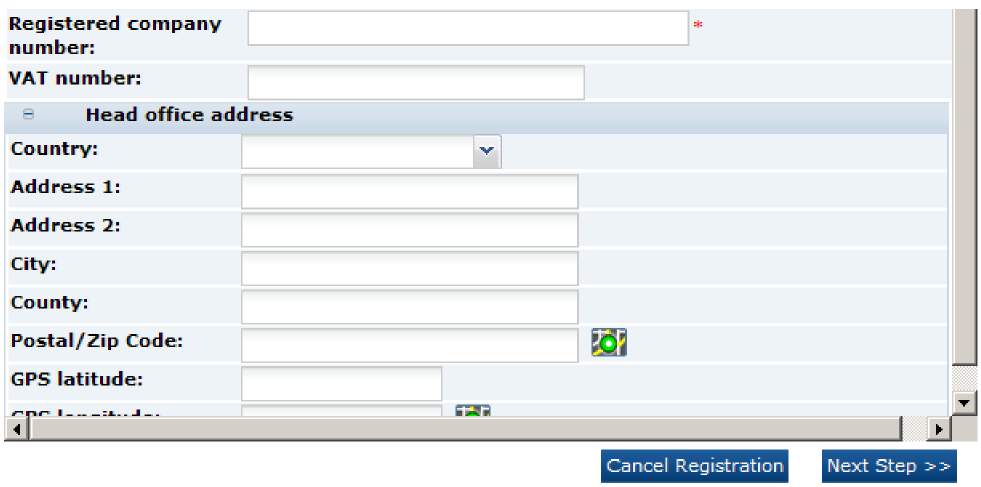
2. Enter the unique supplier code and select **Next Step**.

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

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

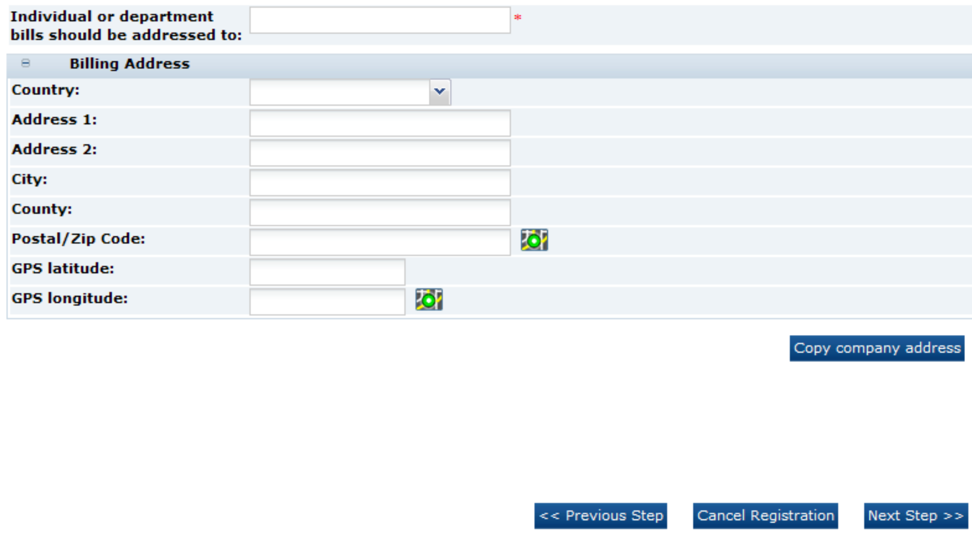
3. Enter the company details. The registered company name is mandatory. Select **Next Step**.

   Figure 2-8 Company Details

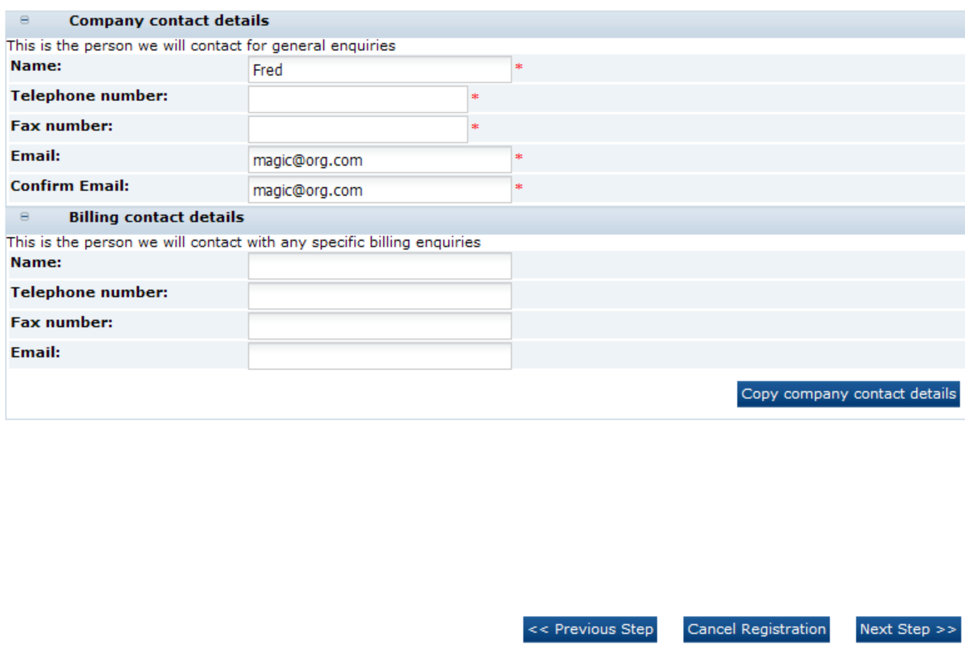
4. Enter the billing details. To copy the corporate address for the company as the billing address, select **Copy company address**. Select **Next Step**.

Figure 2-9 Billing Details



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

Figure 2-10 Company Contact Details

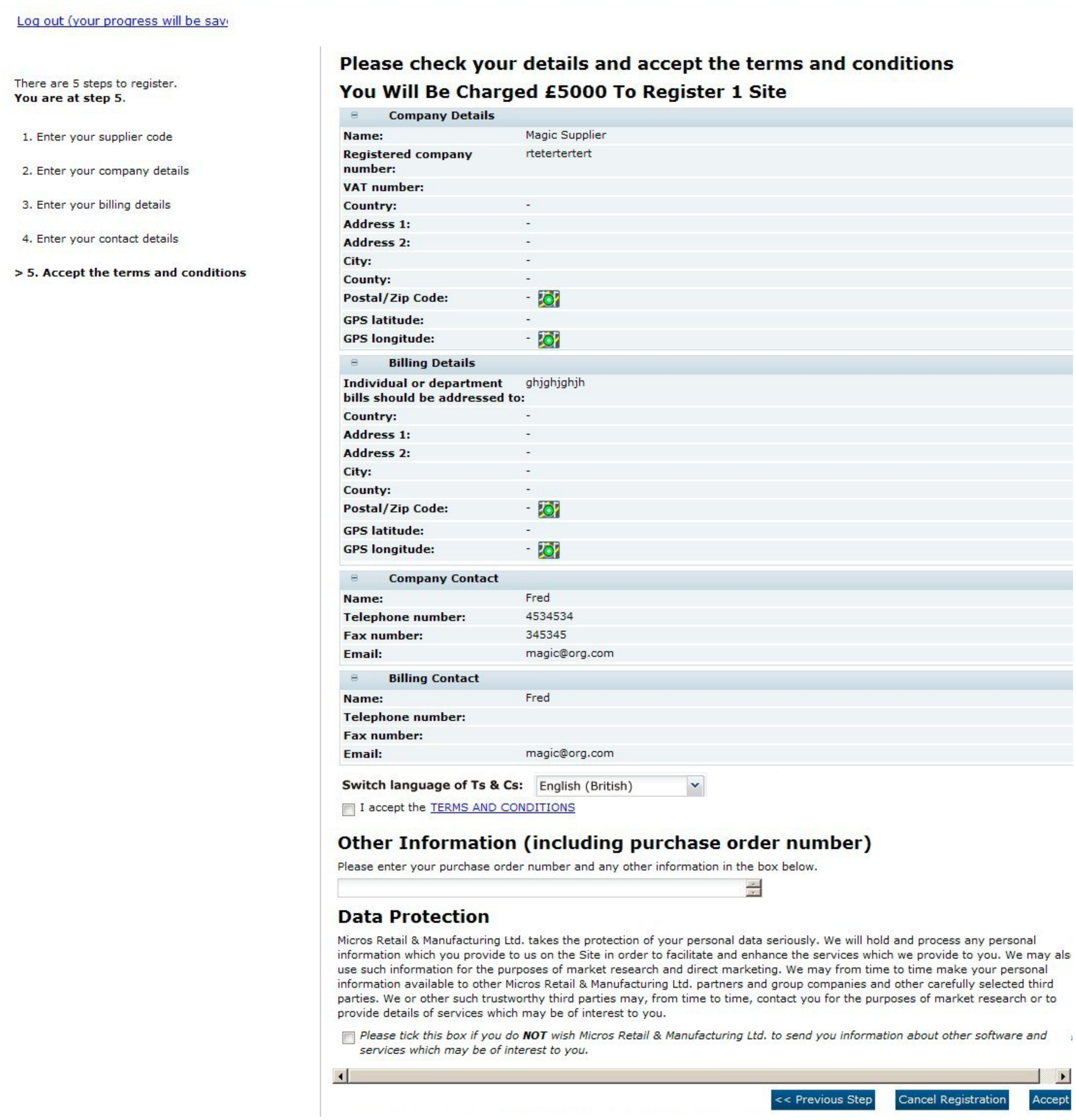


6. Accept the terms and conditions:
   a. If required to accept the terms and conditions, check the box. You may choose to view the terms and conditions in any of the supported languages.
   b. Under Other Information, enter the purchase order number.
   c. Under Data Protection, check to box if you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

d. Select **Accept**.

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

Figure 2-11 Accept Terms and Conditions


Log out (your progress will be sav

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

1. Enter your supplier code
2. Enter your company details
3. Enter your billing details
4. Enter your contact details

> 5. Accept the terms and conditions

Please check your details and accept the terms and conditions

You Will Be Charged £5000 To Register 1 Site

Company Details	
Name:	Magic Supplier
Registered company number:	rteterterert
VAT number:	
Country:	-
Address 1:	-
Address 2:	-
City:	-
County:	-
Postal/Zip Code:	-
GPS latitude:	-
GPS longitude:	-

Billing Details	
Individual or department bills should be addressed to:	ghjghjghjh
Country:	-
Address 1:	-
Address 2:	-
City:	-
County:	-
Postal/Zip Code:	-
GPS latitude:	-
GPS longitude:	-

Company Contact	
Name:	Fred
Telephone number:	4534534
Fax number:	345345
Email:	magic@org.com

Billing Contact	
Name:	Fred
Telephone number:	
Fax number:	
Email:	magic@org.com

Switch language of Ts & Cs: English (British)

I accept the TERMS AND CONDITIONS

Other Information (including purchase order number)

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

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

<< Previous Step | Cancel Registration | Accept

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

- The site status is set to Awaiting Approval.

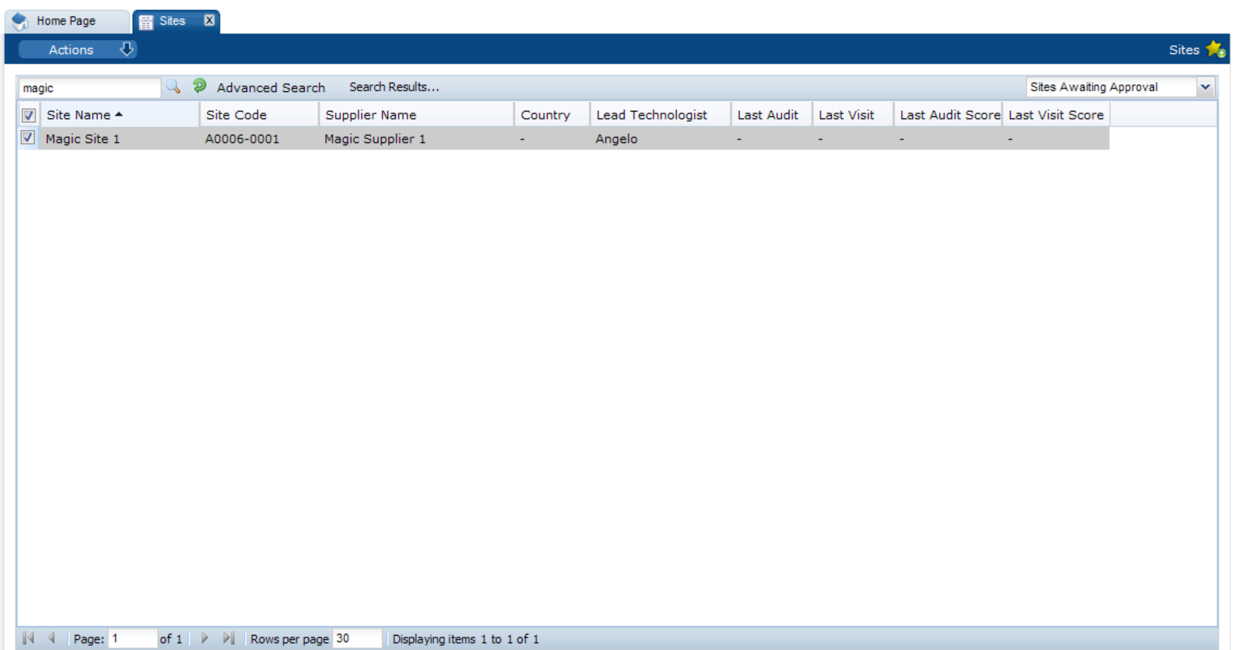
Approving the Registration

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

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

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

Figure 2-12 Sites Awaiting Approval



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

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

Completing the Approval of the Site

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

Figure 2-13   Site Status Change

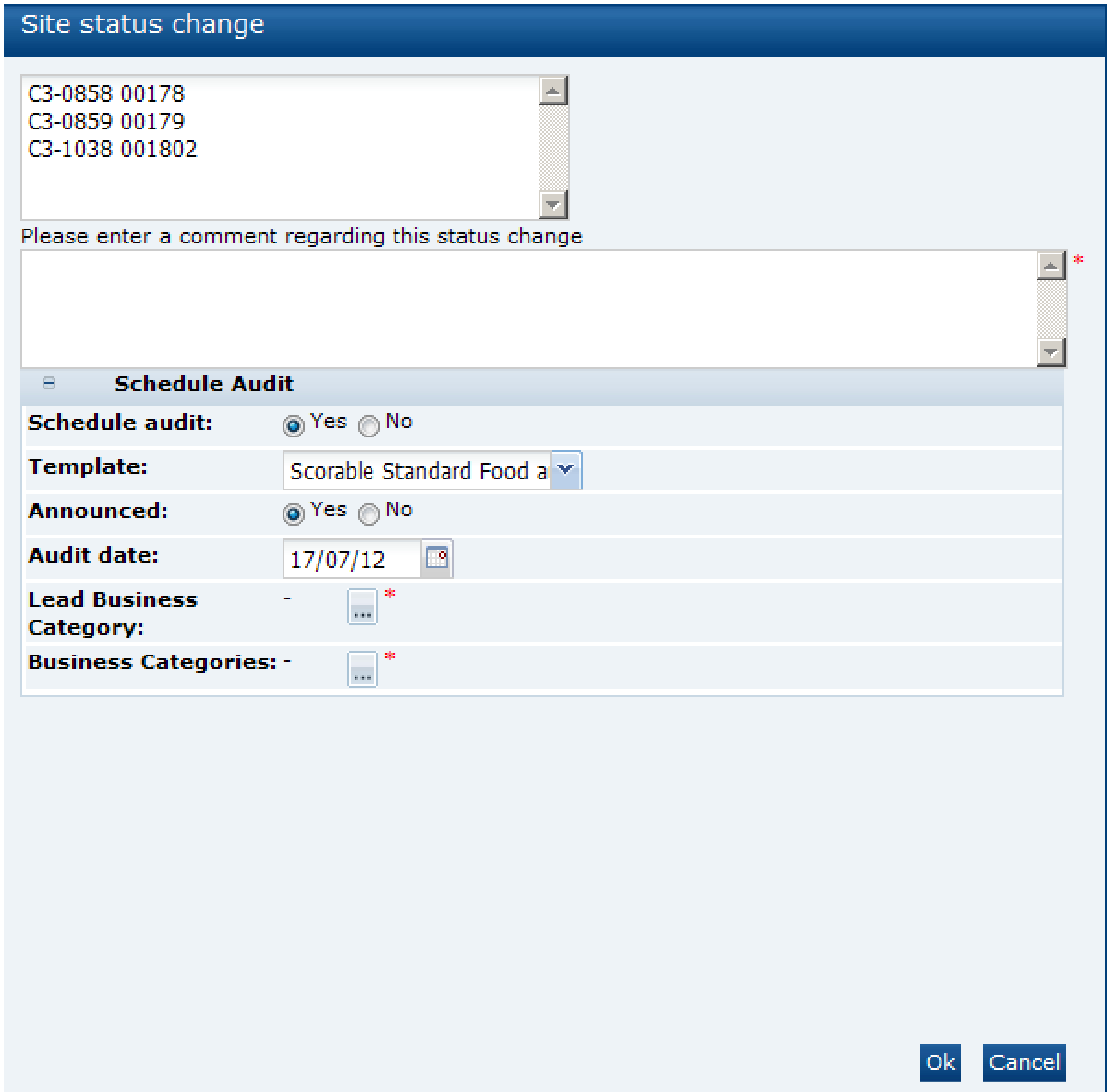


Table 2-3 describes the fields in the Site Status Change dialog box.

Table 2-3   Site Status Change Fields

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

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

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

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

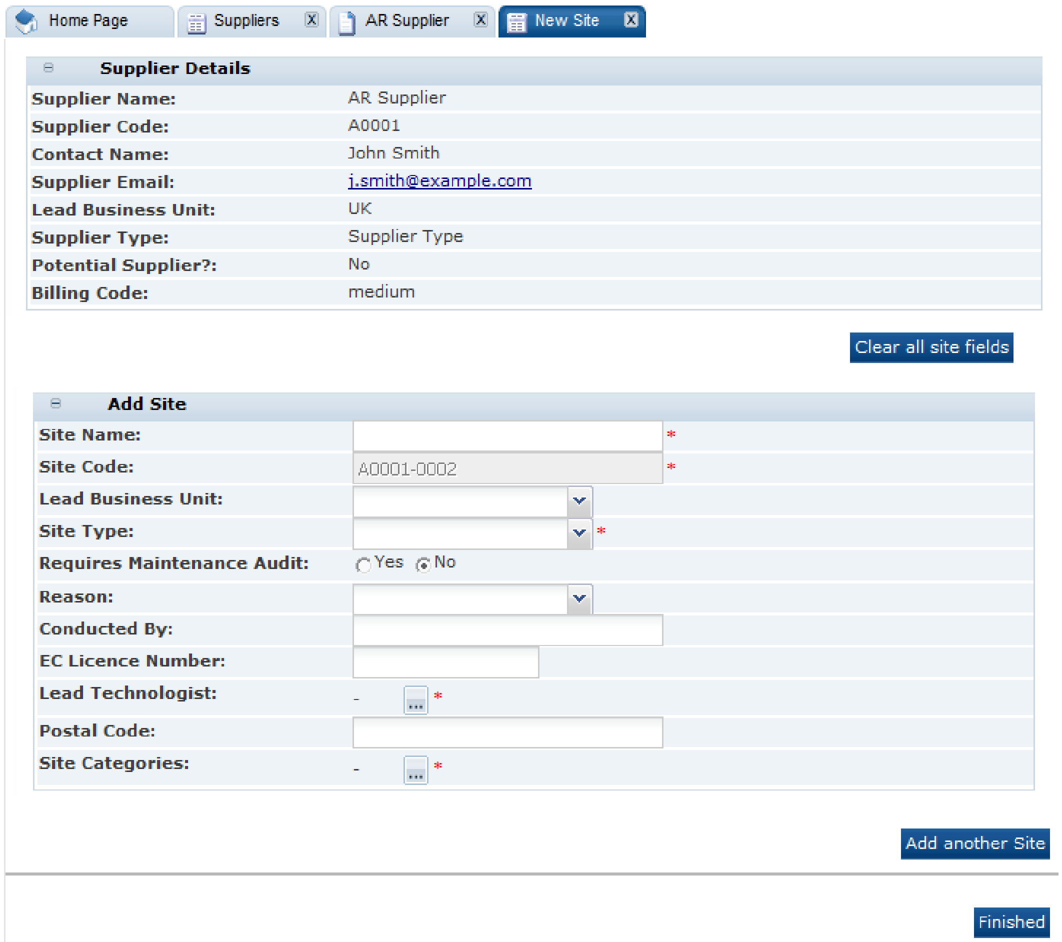
- The selected sites are set to Active.
- The entered comments are appended to the site's comments field.
- The Change History log is updated.
- If the option to schedule an audit was selected, an audit is created for the selected type against the site with the announced/unannounced flag and due date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

Adding Additional Sites

When additional sites are required for a supplier, a Retailer user or a Supplier Administrator user who has Site Creation permission can add the additional sites. To add an additional site:

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

Figure 2-14 New Site Page



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

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

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

Deleting Suppliers and Sites

The deletion of supplier and site accounts is restricted to retailer administrator users with the Power Administrator authority profile only. There are two methods available:

1. The Delete Suppliers and Delete Sites options in the Admin area allow for the deletion of accounts that have been created in error or were created and never used, that is, where there are no references to related records such as Users, Contacts, or Audits, and so on. For more information, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*.
2. The Delete action within the Site record allows for the deletion of individual Site accounts. In this case, the deletion is permitted where there are references to certain types of related records. Deletion of the last remaining Site record also deletes the Supplier record.

   Deleting Site and Supplier records using this method will automatically remove the associated Contacts, Users, and references in Alerts, Documents, and Announcements/News Items. Deletion is not permitted if the account has other types of records associated to it (Audits/Visits, Assessments, or links to Processes).

   The records are soft deleted and are excluded from list views and data extracts. Filters must be applied to exclude them from reports and data retrieved by the APIs:

   - To exclude the soft deleted records from reports, it is necessary to add the Deleted column as a filter to the relevant Report Data Source, Report Design, and Report Schedule records.
   - The API XML contains a deleted element (set to true if deleted). To exclude soft deleted records, it is necessary to use a *softDelete=false* parameter when calling the API. For example:

     ```
     /creations-core/services/rest/site?softDelete=false
     ```

   The Delete action is available when the Site record is in edit mode. It first checks for any records that will prevent deletion and presents a message listing any that have been found, otherwise a confirmation prompt to continue. A batch job is submitted to handle the deletion processing, as follows:

   - A further check is made for any references that will prevent deletion. If any are found, the details are logged against the batch job and it is ended.
   - Contacts associated to the site which are not associated to another site or the supplier are deleted.
   - Any Site User or All Sites User type Users that are associated to the site that are not associated to another site are deleted.
   - Any Alert Responses related to the site are deleted.
   - Any references to the site in the Reader Log and Accept Log of any Library Documents are removed.
   - Any references to the site in the Reader Log and Accept Log of any Announcements/News Items are removed.
   - Any references to the site are removed from the Favorites, Recent Items, and Assignments/Tasks lists.

- The site is deleted.
- If deleting the supplier's only site, the same steps are applied to the Supplier record, before deleting that record.

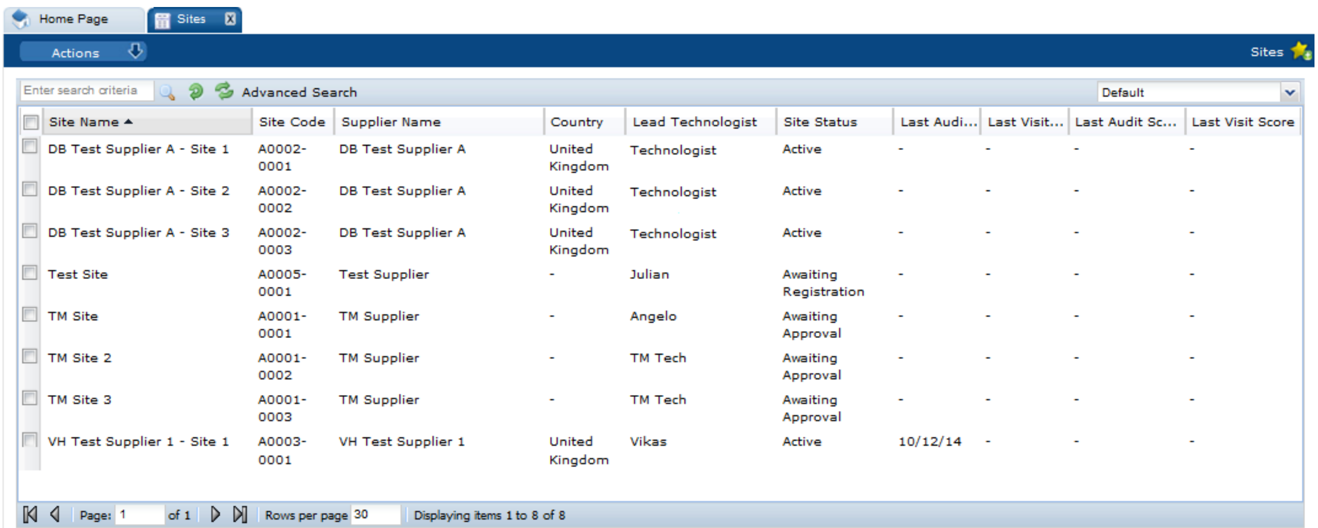
The deletion processing will do all or none, in that if any one part of the deletion cannot be completed for a Site, the processing will roll-back so that none of the deletion is done for the Site. If any records cannot be deleted due to record locks, the process will automatically retry per the standard batch job record lock handling, with details of the locked record logged against the batch job.

> **Note:**
>
> If integrating with Merchandising and if a site is soft deleted, it may continue to show Supplier Evaluation scores in the Merch dashboard, but will no longer have updates sent. A business process should be established for deleting or deactivating the corresponding accounts in Merchandising, as appropriate.

3 Site Management

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

Figure 3-1 Sites Page

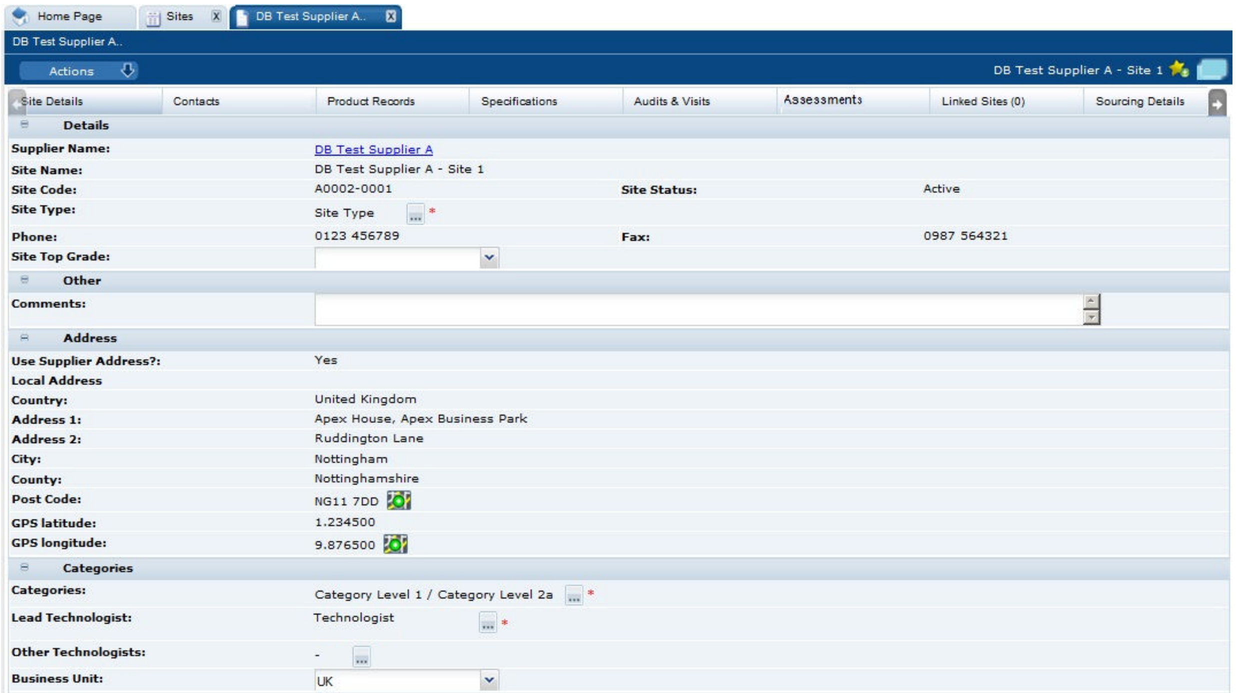


The following actions are available:

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

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

Figure 3-2 Site Details Page



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

- Site Details
- Scoring Details: Scores for each Supplier Evaluation Type and the list of events that contributed to the score.
- Contacts: List of contacts for the site.
- Audits & Visits: List of audits and visits and the status.
- Assessments: List of assessments and status.
- Linked Sites: The number of linked sites is shown in parentheses on the subtab.
- Sourcing Details: Billing and production details.
- References: List of certificates and the status.

  The system can be configured to automatically notify the relevant users when individual references become due for renewal or exceed their expiry date.
- Process Links: If Process is purchased and implemented, list of processes and status.
- Custom Fields
- Change History
- Attachments: List of documents attached to the site.

The following actions are available:

- New Audit: For information on creating a new audit, see Audits & Visits.
- New Visit: For information on creating a new visit, see Audits & Visits.

- New Assessment: For information on creating a new assessment, see Assessment Management.

4

Contacts Management

This chapter covers managing contacts:

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

This chapter covers the following topics:

- Creating a Contact
- Editing a Contact
- Deleting a Contact

Creating a Contact

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

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

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

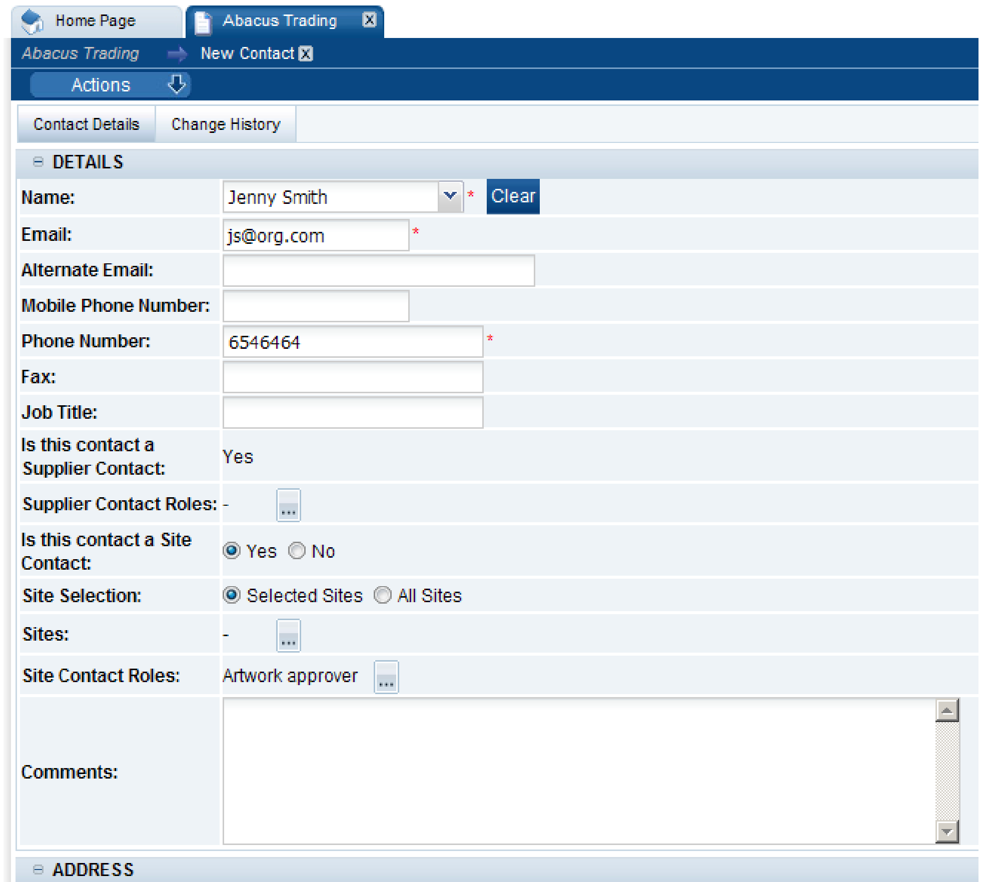


Table 4-1 describes the fields in this page.

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

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

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

Field	Description
Is this contact a Supplier Contact	• When creating a contact from the Supplier record, this field is set to Yes. • When creating a contact from the Site record, this field is set to No.
Supplier Contact Roles	Select the supplier-level roles for this contact from the list of available roles. This field is only available when creating a contact from the Supplier record. Mandatory field.
Is this contact a Site Contact	• When creating a contact from the Supplier record, this field is set to No. • When creating a contact from the Site record, this field is set to Yes.
Site Selection	• When set to Selected Sites, the sites must be chosen in the Selected Sites field. • When set to All Sites, this contact is used for all sites for this supplier, including any sites added later.
Selected Sites	Select the sites to be assigned to the contact. This field is only displayed when Site Selection field is set to Selected Sites. Mandatory field.
Site Contact Roles	Select the site-level roles for this contact from the list of available roles. This field is only available when creating a contact from the Site record. Mandatory field.
Comments	Enter any comments.
Address	If a name is selected from the list of users, the address is automatically filled in: • When creating a contact from the Supplier record, this field is set to the supplier address. • When creating a contact from the Site record, this field is set to the site address.

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

Editing a Contact

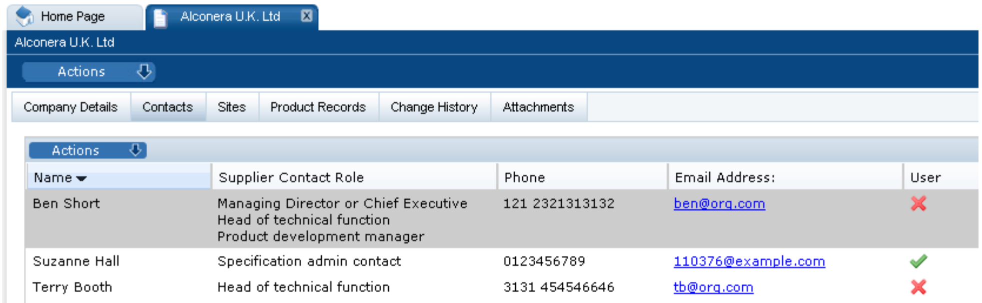
Supplier users can edit supplier contacts and site contacts. Site users can only edit site contacts.

Editing a Supplier Contact

To edit a supplier contact:

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

Figure 4-2 Supplier Contacts Page



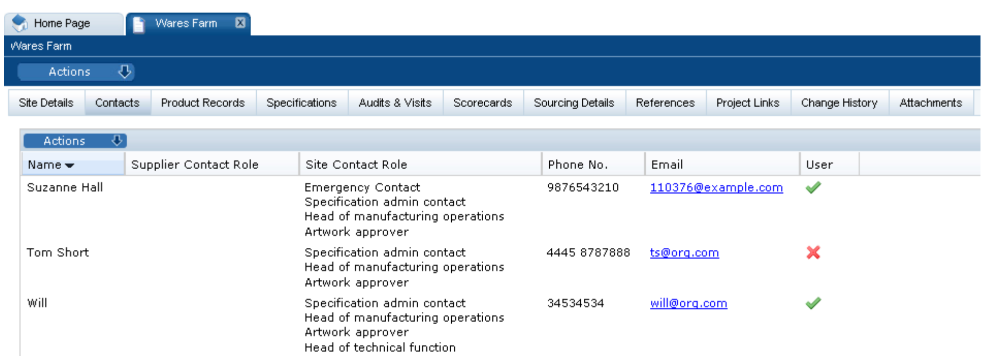
2. Select the relevant contact.
3. Select the Edit action. The Contact Details appear.
4. Make any needed updates and select the Save action.

Editing a Site Contact

To edit a site contact:

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

Figure 4-3 Site Contacts Page



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

Deleting a Contact

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

Deleting a Supplier Contact

To delete a supplier contact:

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

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

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

Deleting a Site Contact

To delete a site contact:

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

5

Alerts Management

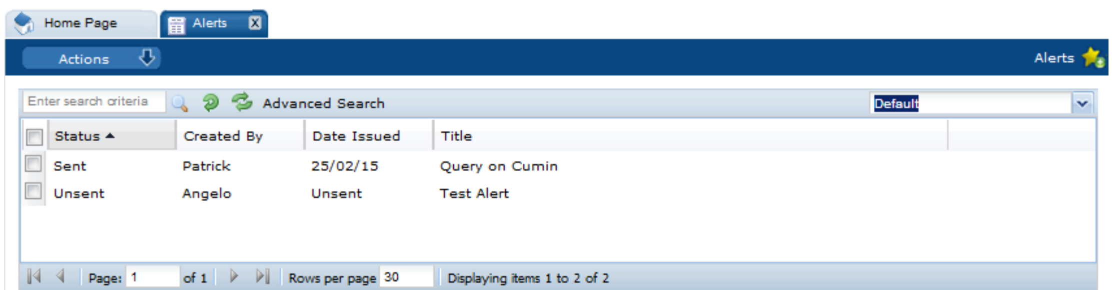
Alerts are a means of communication between the retailer and its supplier base for the management of urgent issues, such as food scares, and capture of feedback using a customized form, for example, whether the supplier uses a particular ingredient or process in the manufacture of its products. Alerts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

This chapter covers managing and responding to alerts.

Managing Alerts

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

Figure 5-1 Alerts Page



For each alert, the following information appears:

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

Create a New Alert

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

Figure 5-2 New Alert Page

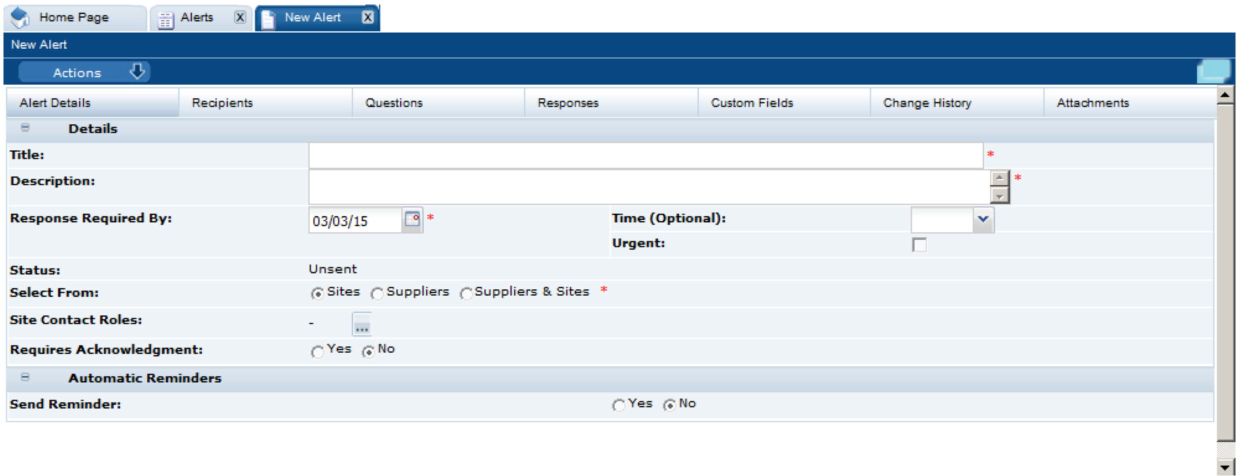


Table 5-1 describes the fields on this page.

Table 5-1 New Alert Tab

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

The following subtabs are available:

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

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

The following actions are available:

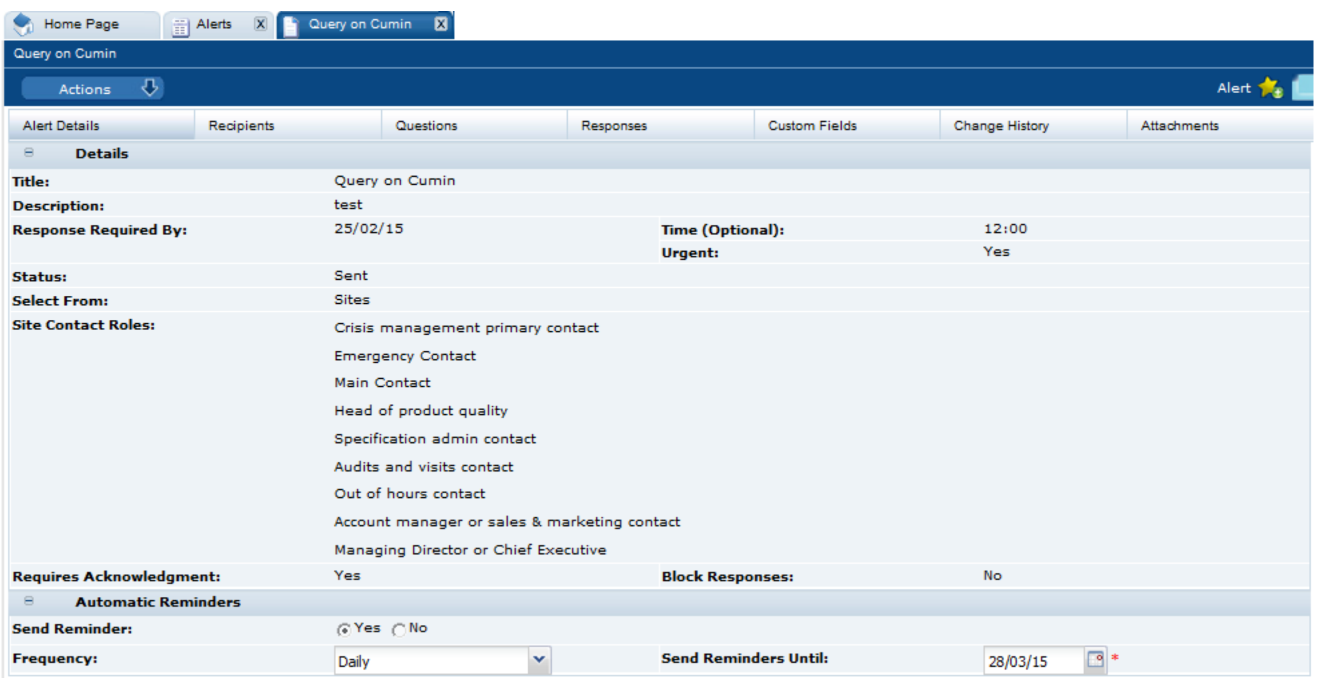
- Create Mailing List
- Load Mailing List
- Import Recipients
- Save and Send

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

View or Edit an Existing Alert

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

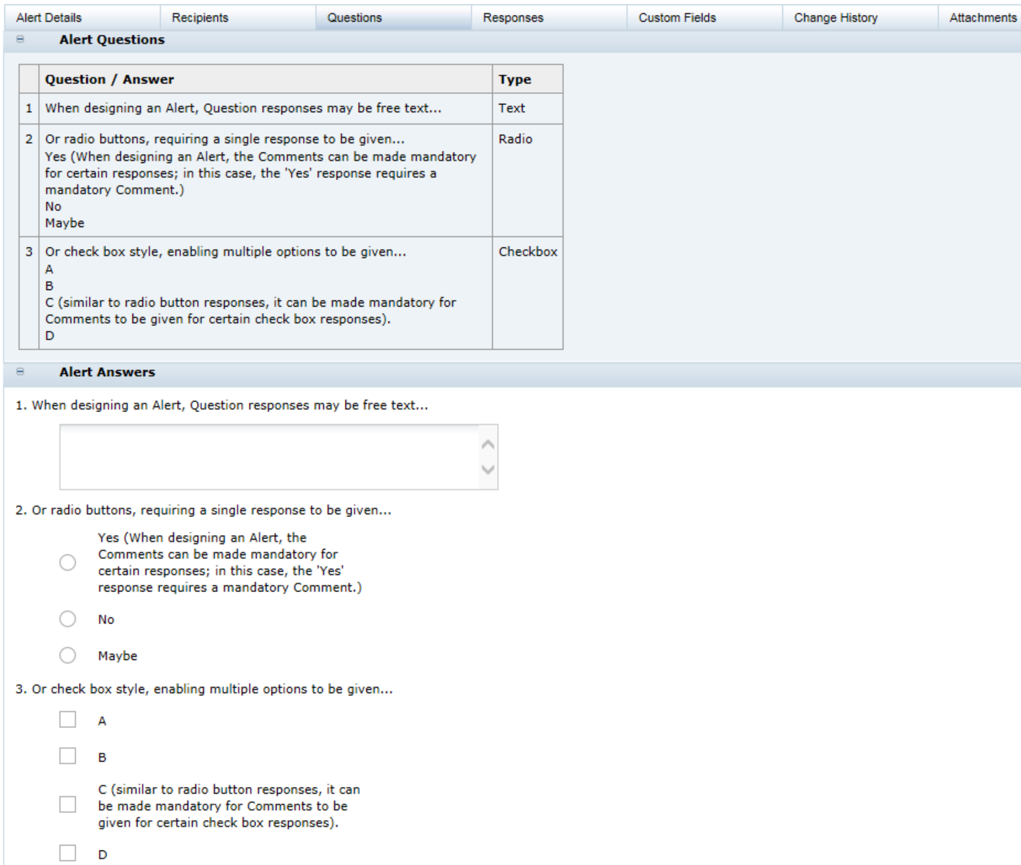
Figure 5-3 Alert Details Page



For information on these fields and subtabs, see Create a New Alert.

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

Figure 5-4 Alert Questions Page



Responding to Alerts

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

Figure 5-5 Alert Responses Page

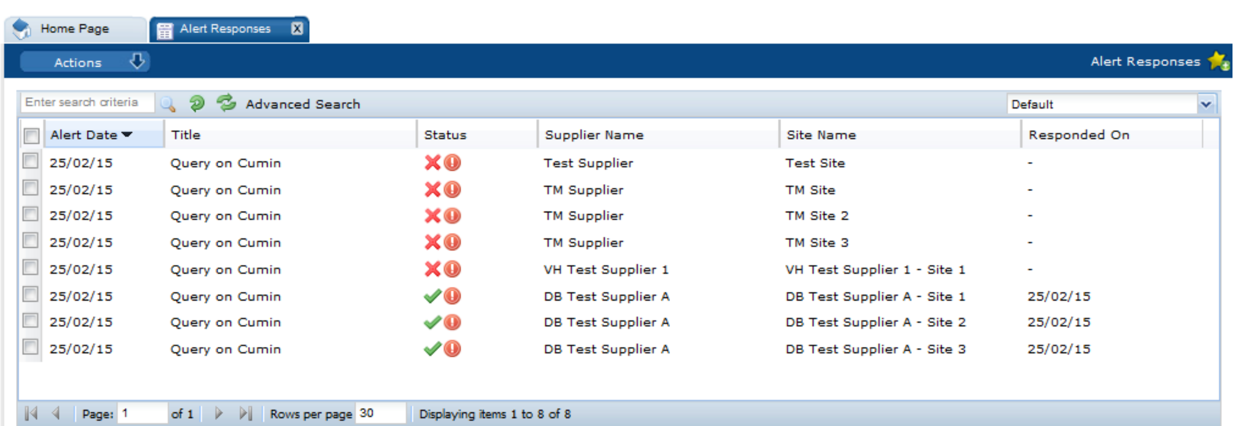


Table 5-2 describes the columns in this page.

Table 5-2 Alert Responses

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

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

Figure 5-6 Alert Response Details Page

6
Audits & Visits

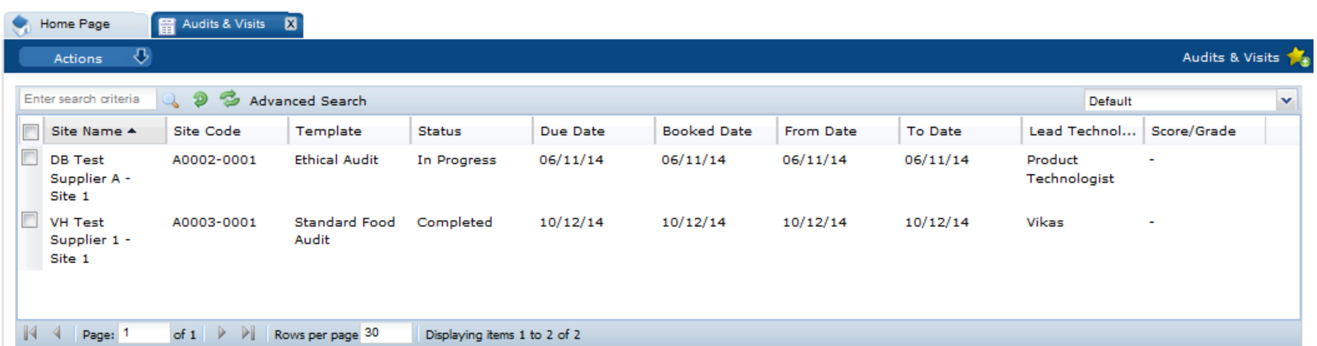
Audits and visits are created against suppliers' sites and are managed between the retailer and supplier users. Issues of non-conformance may be created to manage any necessary follow-up corrective actions. Once created, a predefined workflow process is used to manage the audit/visit and any non-conformances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

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

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

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

Figure 6-1 Audit & Visits Page



The following columns are shown:

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

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

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

Figure 6-2   Audit Details Page

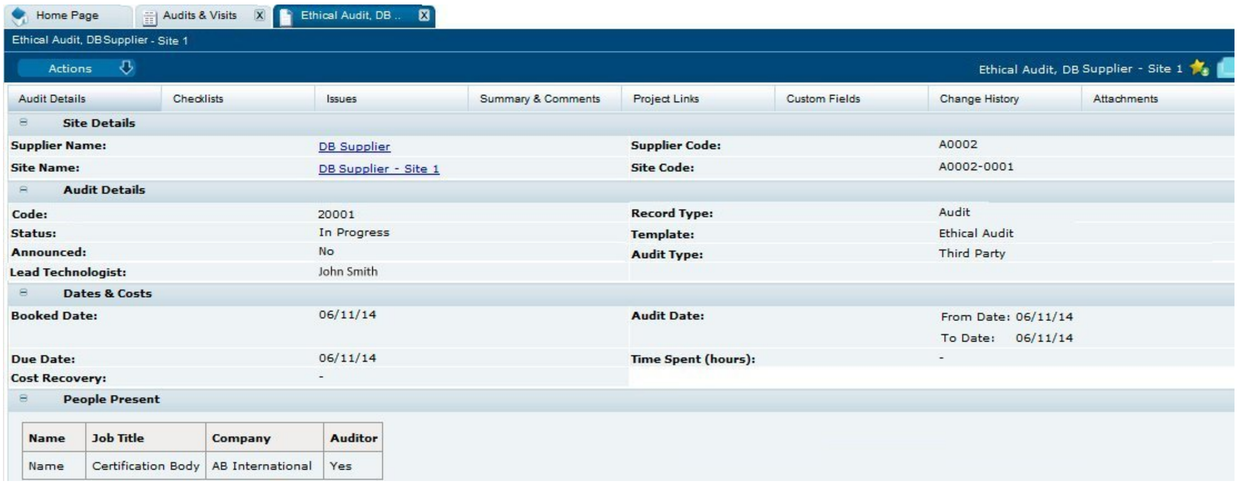


Table 6-1 describes the fields in this view.

Table 6-1   Audit Details

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

Table 6-1 (Cont.) Audit Details

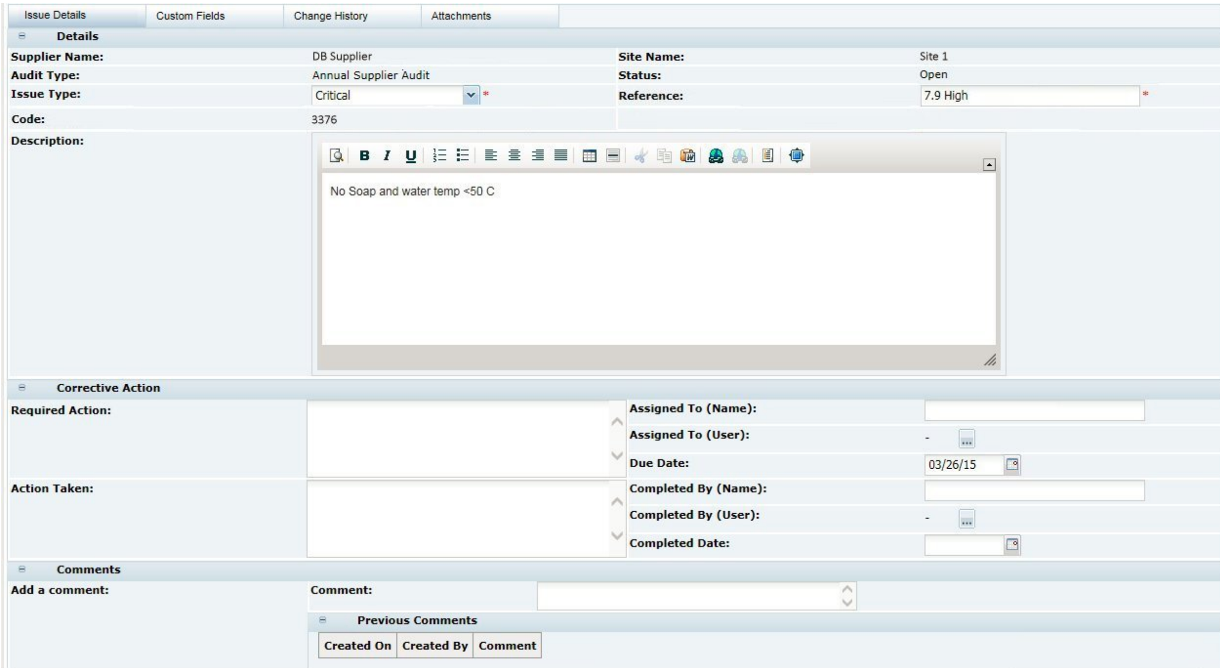
Field	Description
Time Spent (hours)	Time the retailer spent working on the audit/visit.
Cost Recovery	Indicates whether the cost (all or part) of the audit/visit is recharged to the supplier. If Yes is selected, the Cost Recover Comments field appears. The amount to be recharged can be entered here.
People Present	For each person present at the audit, the following information is listed: • Name of the person • Job title • Company name • Indicator if this person is an auditor

The following subtabs are available:

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

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

Figure 6-3 Audit/Visit Issues Page



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

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

Audit Updates Wizard

Auditors can be assigned or deleted from multiple internal Audit records, using the Update Auditors option, from the Audits and Visits Action menu.

Audits & Visits Workflow

Audit & Visit Statuses and What They Mean

All statuses are changed manually, except for the change from Scheduled to In Progress, which is set automatically once the Audit From and To Dates have been entered.

Table 6-2 Audit & Visit Statuses

Status	Meaning	Actions Available
SCHEDULED	Initial status when an Audit or Visit is created and the Audit/Visit has not yet taken place. Supplier users have visibility and access if *announced* OR if this type of Audit/Visit can be created by the supplier, otherwise it is only accessible to Retailer at this status. Additionally, if an *announced* Audit/Visit is created by the Retailer and the type is *Internal*, the Supplier user can only see the entry in the view, they cannot open the record at this status.	**Save** Once the Audit From and To Dates are entered, saving the Audit/Visit will update the status to In Progress. **Set to Not Progressed** **Delete** (Retailer only)
IN PROGRESS	Indicates that the Audit/Visit has now taken place. This status is set automatically once the Audit From and To Dates have been entered and the record has been saved. The Audit/Visit and any Issues are editable. Issues can be created. Supplier users only have visibility if the Audit/Visit is *announced*. Supplier users may only edit/add Issues if this type of Audit/Visit can be created by Suppliers.	**Set to Awaiting Corrective Action** **Set to Awaiting Sign-off** (Retailer only) **Set to Approved** (Retailer only) **Set to Failed** (Retailer only) **Set to Abandoned** (Retailer only) **Delete** (Retailer Audit Administrator only)
AWAITING CORRECTIVE ACTION	Indicates that Corrective Actions are required to be completed. The Audit/Visit is locked and no further Issues may be created. The Issue *Details* are locked to all users. The Issue *Corrective Actions* are editable to Supplier users (not to Retailer at this status).	**Set to Awaiting Sign off** (Supplier only) **Set to Abandoned** (Retailer only) **Delete** (Retailer Audit Administrator only)
AWAITING SIGN-OFF	Indicates that Corrective Actions have now been completed and must be reviewed by Retailer. The Audit/Visit is locked and no further Issues may be created. The Issues' *Details* and *Corrective Actions* are locked to all users. RETAILER may edit the Issue status and Comment fields.	**Set to Approved** (Retailer only) **Set to Awaiting Amendment** (Retailer only) **Set to In Progress** (Retailer only) **Set to Abandoned** (Retailer only) **Delete** (Retailer Audit Administrator only)
AWAITING AMENDMENT	Indicates that Corrective Actions have been reviewed by the Retailer, but further actions or information must be completed by the Supplier. The Audit/Visit is locked and no further Issues may be created.	**Set to Awaiting Sign off** (Supplier only) **Set to Abandoned** (Retailer only)

Table 6-2 (Cont.) Audit & Visit Statuses

Status	Meaning	Actions Available
	The Issue *Details* are locked to all users. The Issue *Corrective Actions* are editable to Supplier users (not to Retailer users at this status).	**Delete** (Retailer Audit Administrator only)
FAILED	Indicates that the Audit/Visit has been completed and, even after completion of any Corrective Actions (where present), the Audit/Visit is deemed to have failed. It is possible to set the Audit/Visit to Completed but to assign a Score of *Failed*, so it is likely that the Failed Audit/Visit status would only be used in the case of a severe failure. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer.	None
APPROVED	Indicates that any Corrective Actions have now been completed and approved and all activity for the Audit/ Visit is now complete. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer. The next future audit record will be created if this type of Audit/Visit has auto-scheduling enabled.	None
NOT PROGRESSED	Used to indicate that the Audit/Visit may have been scheduled but circumstances mean that it did not go ahead. If the Audit/Visit was created erroneously, it may be deleted by an Audit Administrator, otherwise it may be left on the system as evidence that the Audit/Visit was never carried out. The Comments field can be used to record this. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer.	**Delete** (Retailer Audit Administrator only)
ABANDONED	Used to indicate that the Audit/Visit may have proceeded to some extent, but circumstances mean that it could not be completed. This may be due to practical circumstances or the fact that the initial assessment was so unsatisfactory as to warrant the abandonment of this Audit/Visit and an alternative to be scheduled for future. The Audit/Visit is locked to all users, except for the field for Comments Following Audit/Visit, which is editable to the Retailer.	**Set to In Progress** (Retailer Audit Administrator only)

Issue Statuses and What They Mean

Table 6-3 Issue Statuses

Status	Meaning	Actions Available
OPEN	Initial status when an Issue is created. Both Supplier and Retailer can edit the Issue.	**Save** Once the Completed By, Completed Date, and Corrective Action fields are entered, saving the Issue will update the status to Awaiting Approval.
AWAITING APPROVAL	Supplier user can edit the Issue if the type of audit can be created by Suppliers, otherwise only the Retailer may edit.	**Accept** (Retailer only, unless Suppliers may create this type of Audit/Visit) **Reject** (Retailer only, unless Suppliers may create this type of Audit/Visit)
REJECTED	Supplier users can edit the Issue if the type of audit can be created by Suppliers, otherwise only the Retailer may edit.	**Accept** (Retailer only, unless Suppliers may create this type of Audit/Visit)
ACCEPTED	Supplier users can edit the Issue if the type of audit can be created by Suppliers, otherwise only the Retailer may edit.	**Reject** (Retailer only, unless Suppliers may create this type of Audit/Visit)
COMPLETED	Final state when the Audit/Visit has been set to Completed. Cannot be edited.	None

Audit & Visit Dates and What They Mean

Due Date

The Due Date represents the date by which the Audit/Visit must have been carried out, otherwise it could be deemed to be overdue.

For the types of Audit which achieve certification, it would represent the date on which the existing certificate would expire.

The Due Date must be entered in order to create and save a new Audit or Visit.

The Due Date may be entered as either a past or future date.

The Audit/Visit will appear in the Lead Technologist's Urgent Items list if the Due Date passes before the Audit/Visit is completed.

Booked Date

The Booked Date represents the date on which the Audit/Visit will be carried out. This does not need to be entered straightaway, but can be entered at any time to indicate that arrangements have been made by the relevant parties for the Audit or Visit to take place.

This is the date you will put in your calendar.

The Booked Date would normally be on or before the Due Date, though the system does not restrict this as practical circumstances may prevent this from being possible.

The Booked Date may be entered as either a past or future date.

Audit or Visit From/To Date

The Audit or Visit From / To Dates represent the actual dates when the Audit/Visit took place. Both the From and To Dates must be entered, to indicate whether the activity took place over a number of days, but both dates may be the same if all activity happened on a single day.

The From and To Dates may not be set in the future as they should only be entered once the Audit/Visit has actually been carried out.

Once the From and To Dates have been entered (and the record is saved), the status will automatically be updated to **In Progress**, which correctly represents the activity at this time.

Issue Dates and What They Mean

Due Date

The Due Date should be filled in to represent the date by which each corrective action is required to be completed. The Due Date will usually be arrived at in agreement between the Supplier and the Retailer Lead Technologist.

If any Issues have not been marked as completed by their Due Date, the Audit/Visit will appear in the Site's Audit & Visits Contacts' Urgent Items list and also the Urgent Items lists of any other Site users named as having the Issue assigned to them.

Completed Date

The Completed Date should be filled in by the Supplier to confirm that the corrective action has now been put in place and no further work is required.

The Completed Date may not be set in the future as they should only be entered once the corrective action has actually been carried out.

Once the Completed Date has been entered and the Issue record is saved, the status of the Issue will automatically be updated to **Completed.**

7
Assessment Management

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

Templates are available for creating assessments. For information on the templates, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*. Assessments can be created from within the Site record or from the list of Sites.

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

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

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

Figure 7-1 Assessment Details Page

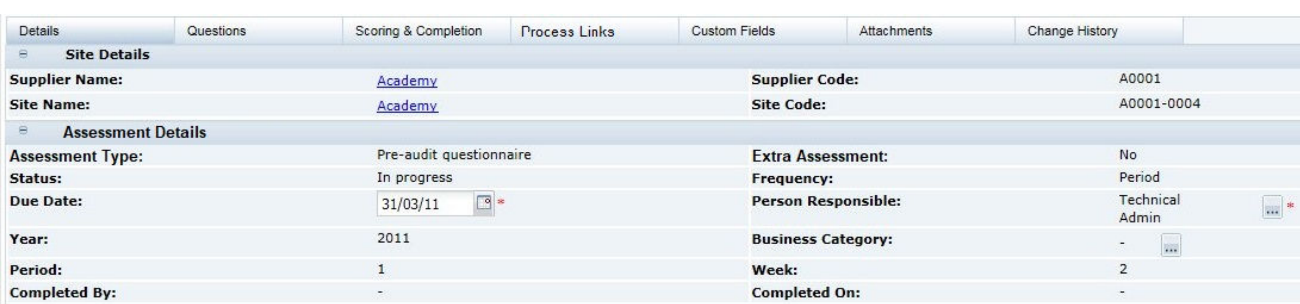


Table 7-1 describes the fields on this page:

Table 7-1 Assessment Fields

Field	Description
Site Details	
Supplier Name	Name of the supplier.
Supplier Code	Code assigned to the supplier.
Site Name	Name of the site.
Site Code	Code assigned to the site.
Assortment Details	
Assessment Type	Name of the template used to create the assessment.
Status	Status of the assessment: • Future • In progress • Awaiting approval • Awaiting amendment • Complete
Due Date	Date the assessment is due to be completed.
Year	Year that corresponds to the due date based on the system calendar.
Period	Period that corresponds to the due date based on the system calendar.
Week	Week that corresponds to the due date based on the system calendar.
Quarter Start Date	Quarter start date that corresponds to the due date based on the system calendar.
Quarter End Date	Quarter end date that corresponds to the due date based on the system calendar.
Extra Assessment	Set if this assessment was scheduled based on a frequency override.
Frequency	Frequency for scheduling this assessment.
Person Responsible	Name of the technologist responsible for the assessment.
Business Category	Business categories applicable to this assessment.
Auto generation of this assessment	If the Status field is Future, select whether to automatically reschedule this assessment when it is completed or becomes due.
Submitted by	Name of the user who submitted or completed the assessment.
Submitted on	Date the assessment was submitted or completed.

The following subtabs are available:

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

Create a New Assessment

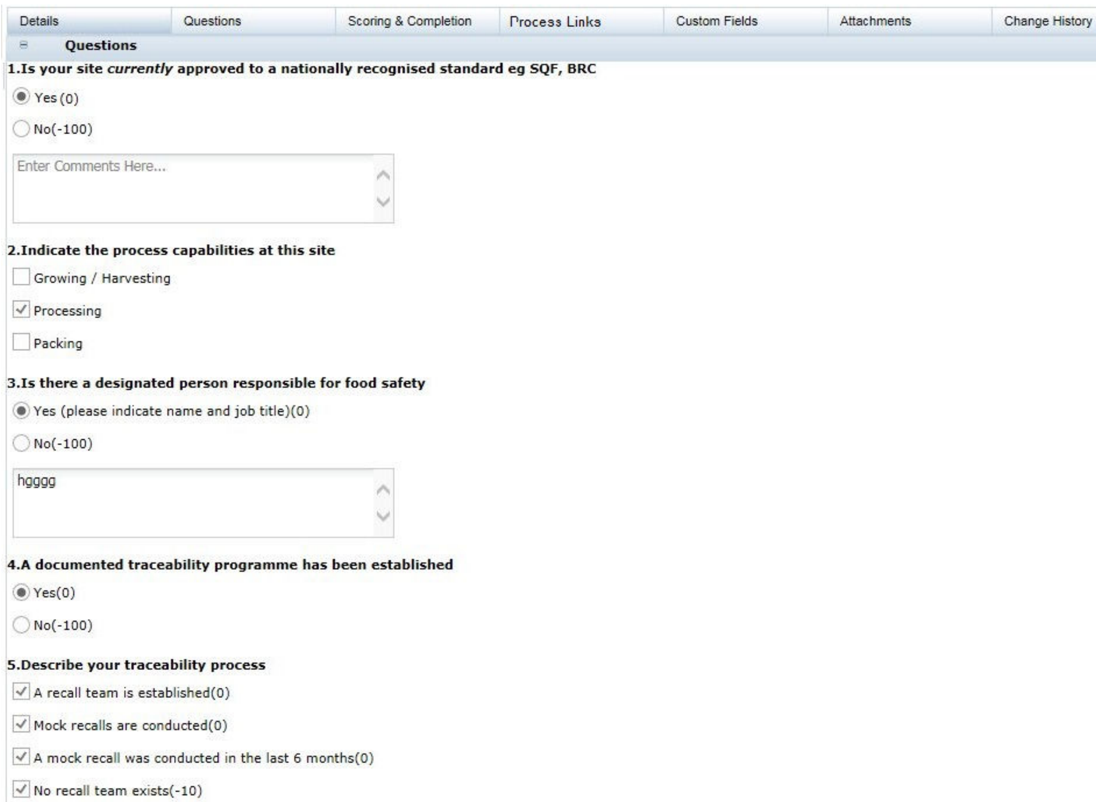
To create a new assessment:

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

Questions Subtab

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

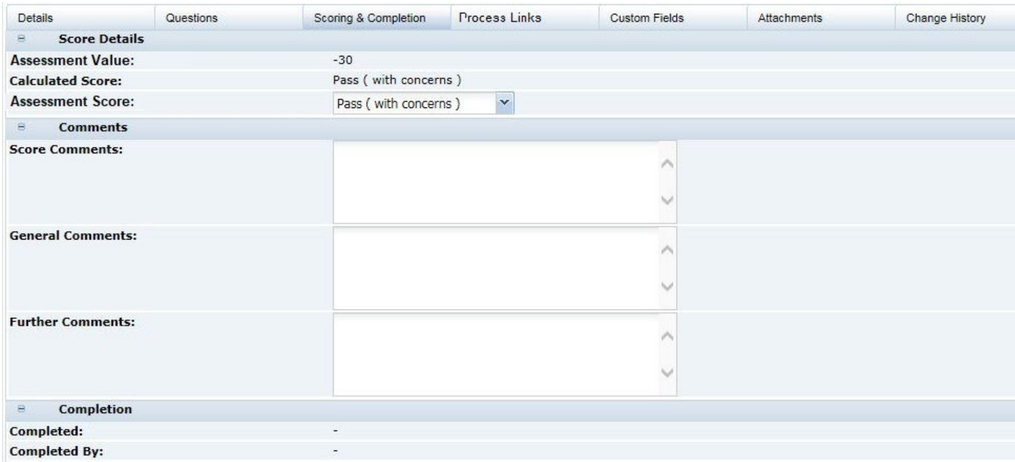
Figure 7-2 Assessment Questions Page



Scoring & Completion Subtab

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

Figure 7-3 Scoring & Completion Page



Deleting an Assessment

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

8 Supplier Evaluation Integration and Scoring

Summary data for Supplier Evaluation Scoring is available in the Site and Company records. This data is used for the information displayed in the Site Summary panel in the Supplier Evaluation Dashboard.

The system can be configured to calculate Supplier Evaluation scores for individual Sites. Scoring rules can be configured for the different aspects of evaluation (such as Ethical, Environmental, and Governance), with the scores being calculated based on the Site's acceptance of specific types of Library Documents, their completion of Audits/Visits and Assessments, and the status of the Site account.

Supplier Evaluation supports integration with the Oracle Merchandising system, both *inbound* for the synchronization of supplier site accounts, and *outbound* for the sharing of the supplier evaluation data that results from certain events taking place in Supplier Evaluation, and associated scores being calculated.

Integration with Merchandising

The system can be configured to integrate Supplier and Site accounts with Merchandising. If enabled, when a new supplier site is approved for use in Merchandising, it is automatically created in Supplier Evaluation. The Supplier account is created with the first Site account, as is the initial supplier User account (for that user to complete the Registration process). A nominated Technologist will receive notification of new sites, for them to approve or assign to another Technologist.

The Merchandising supplier and site codes are held in the References table as the common reference between Supplier Evaluation and Merchandising. The status of the Merchandising site account is also shown in the References table.

Subsequent updates of name and address information in Merchandising are automatically synchronized with the Supplier Evaluation account, where it is read only. The Site Name in the Business Language field is populated with the Merchandising site name when the account is created, but thereafter it is not synchronized, it is manually edited. The integration may be configured to automatically delist the Supplier Evaluation account if it is deactivated in Merchandising.

For information on the glossaries and system parameters used for the integration with Merchandising, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*.

Site Summary in Site Record

The Site Summary tab in the Site record shows the Site's scores for each Supplier Evaluation Type and list of the events that contributed to the score for the latest Documents, Assessments, and Audits & Visits.

Figure 8-1 Site Summary Page

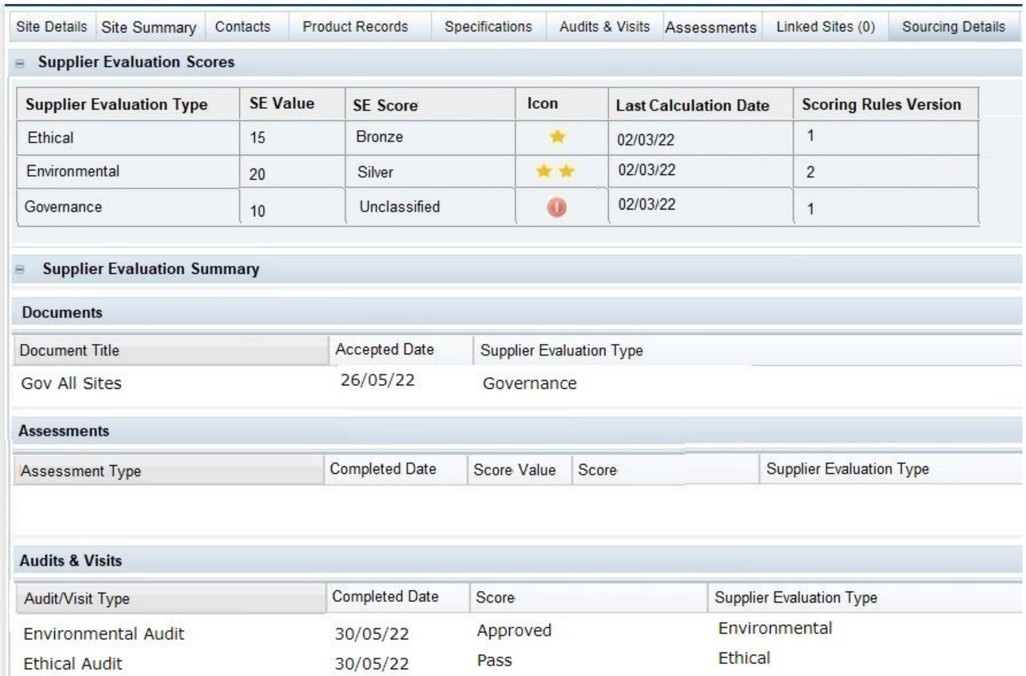


Table 8-1 describes the fields in the Site Summary Page.

Table 8-1 Site Summary Fields

Field	Description
Supplier Evaluation Scores	
Supplier Evaluation Type	Type of assessment that is scored.
SE Value	Last calculated score.
SE Score	Text description representing the SE Value.
Icon	Graphic representing the SE Score. If the score is configured to show a graphic, the graphic from the Photo Album is shown here.
Last Calculation Date	Date when the score was last calculated.
Scoring Rules Version	Version of the Supplier Evaluation Scoring Rules glossary used to calculate the scores.

The Supplier Evaluation Summary section of the Site Summary page contains the following information:

- Documents:
  - Document Title
  - Accepted Date
  - Supplier Evaluation Type
- Assessments:

    - Assessment Type
    - Completed Date
    - Score Value
    - Score
    - Supplier Evaluation Type
- Audits & Visits:
    - Audit/Visit Type
    - Completed Date
    - Score
    - Supplier Evaluation Type

Permissions

The page is only visible if the SE Scoring Enabled system parameter is set to Enabled.

If enabled, users with access to the Site record will have visibility of the page by default, however it will be possible for clients to configure their Permissions access rights per authority profile, to show or hide the page and its individual field sets, tables, and list views.

If the user's access rights do not permit them to access the individual records in the Documents, Assessments, or Audits & Visits lists, the row cannot be selected to launch the record.

Supplier Evaluation Summary in Company Record

The Supplier Evaluation Summary tab in the Company record shows the scores for each Site Type Grouping and Supplier Evaluation Type.

Figure 8-2 Supplier Evaluation Summary Page

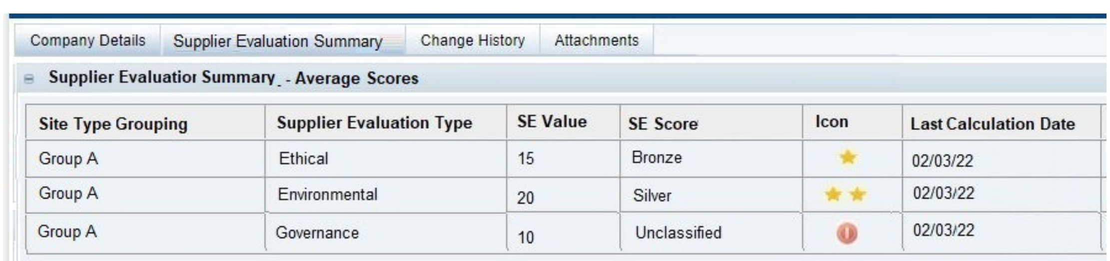


Table 8-2 describes the fields in the Supplier Evaluation Summary Page.

Table 8-2 Supplier Evaluation Summary Page Fields

Field	Description
Supplier Evaluation Summary - Average Scores	
Site Type Grouping	Grouping of sites for the data in this row.

Table 8-2 (Cont.) Supplier Evaluation Summary Page Fields

Field	Description
Supplier Evaluation Type	Type of evaluation type that is scored.
SE Value	Last calculated score.
SE Score	Text description representing the SE Value.
Icon	Graphic representing the SE Score. If the score is configured to show a graphic, the graphic from the Photo Album is shown here.
Last Calculation Date	Date when the score was last calculated.

The scores are calculated automatically as part of the Supplier Evaluation scoring routine, giving the average SE scores per Supplier Evaluation Type for each Site Type grouping.

Permissions

The page is only visible if the SE Scoring Enabled system parameter is set to Enabled.

If enabled, the page is only available to retailer/portal owner users, and only those with the Retailer Score Viewer authority profile.

Supplier Evaluation Data Integration

The system can be configured for outbound integration with the Merchandising system. The data relating to certain events and calculated scores is automatically fed to Merchandising, where dashboards enhance the supplier data with the latest Supplier Evaluation information.

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

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

- Document is accepted, or is subsequently archived, unpublished, or republished
- Assessment is created, becomes due or overdue
- Assessment is no longer due or overdue
- Assessment is completed or uncompleted/deleted
- Audit is created, becomes due or overdue
- Audit is no longer due or overdue
- Assessment is completed or abandoned/not progressed
- Site status changes

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