

Oracle® Retail Supplier Evaluation Cloud Service Workspace User Guide



Release 24.0.201.0

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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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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.

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

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

Conventions

The following text conventions are used in this document:

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

1

Introduction

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. The second module delivers the *Operation List Views*, which replaces and removes the list views from the classic environment.

Note:

When enabling the Workspace, the application link in Retail Home must also be set to use the ORSE Workspace environment. This can be configured by the Retail Home Admin user, by accessing Settings > Application Administration > Application Navigation Setup, and setting the Application Link for the ORSE application.

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, searches, and other features.
- 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.
- A System List Views appendix describes the system-delivered list views.

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.

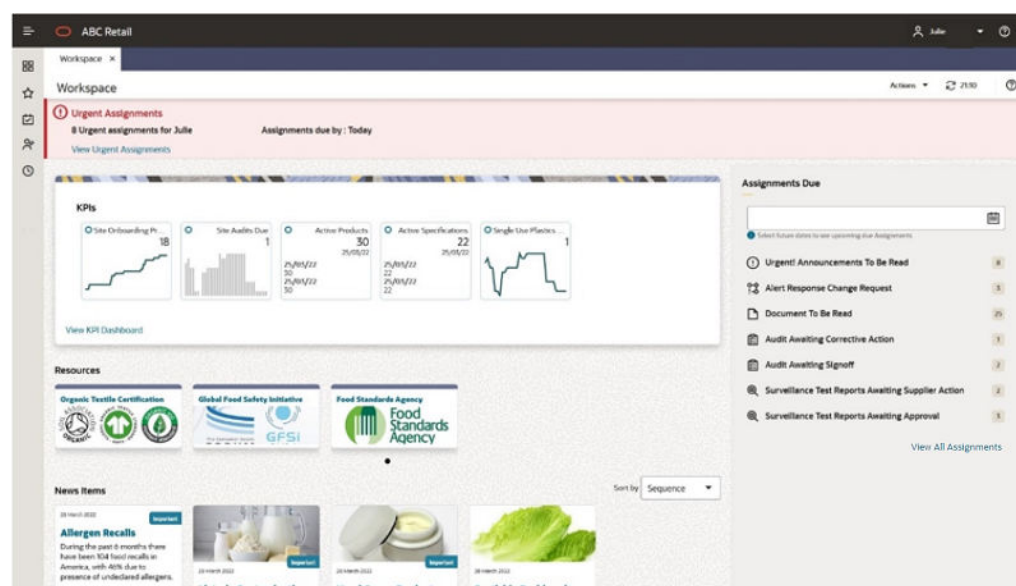
Logout

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

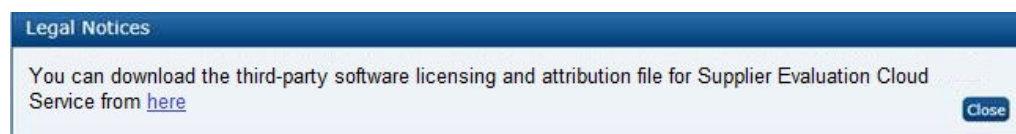
The Workspace page is the hub of your access to all areas of the application. From here you have access to the new Assignments, Announcements, and KPIs features, plus the Supplier Evaluation modules and submodules.

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 header titled "Releases" lists the same version numbers, each followed by a link to a "Licensing Guide" or "Licensing Guide (Rev X)". Some links include "PDF HTML" options. At the bottom right of the page, there are links for "Cookie Preferences" and "Ad Choices".

Navigation

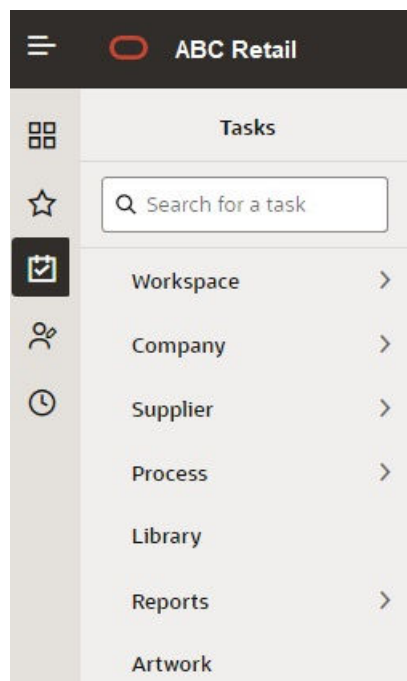
The following options are available for navigating within Workspace and beyond, subject to your assigned access rights/permissions:

| Icon | Description |
|---|---|
|  | 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





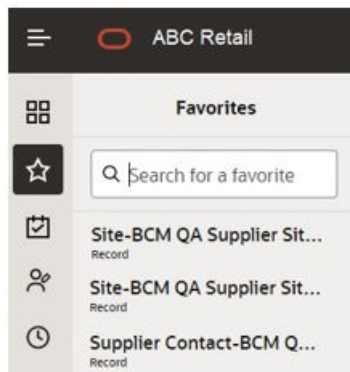
| Icon | Description |
|---|---|
|  | The Administration icon presents any Workspace administration options to which you have access. The options are presented per the Tasks menu. If there are no options available to you, the icon is hidden. |
|  | The Favorites icon presents a list of any bookmarks 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

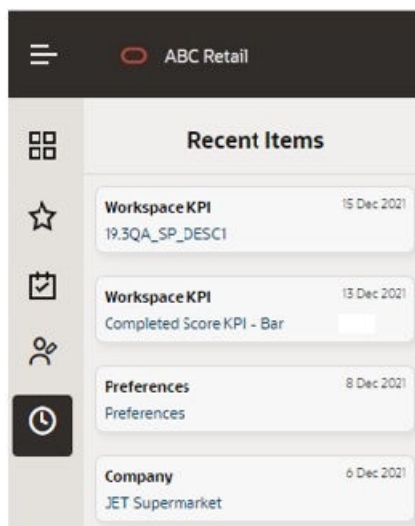
**Icon****Description**

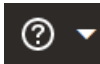
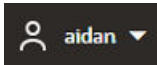

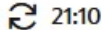
The **Recent Items** icon presents a list of pages you have recently opened within the application.

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



| Icon | Description |
|---|--|
|  | <p>The Application Help menu contains two options:</p> <ul style="list-style-type: none"> • Application Help opens the Supplier Evaluation page in the <i>Oracle Help Center</i> 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. |
|  | <p>The User menu contains four options:</p> <ul style="list-style-type: none"> • 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. |
|  | <p>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.</p> |
|  | <p>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.</p> |

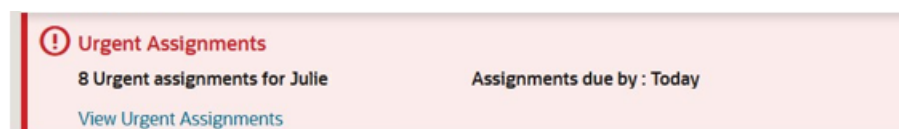
Other elements of the Workspace page include:

- 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.

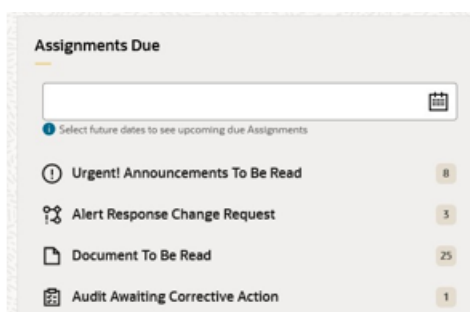
Assignments

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



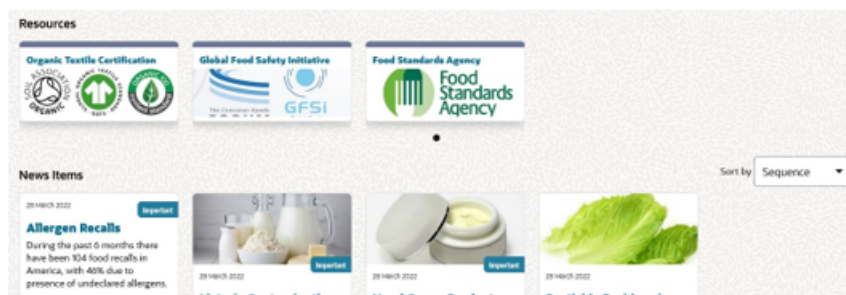
The **Assignments Due** pane shows all your assignments.

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.

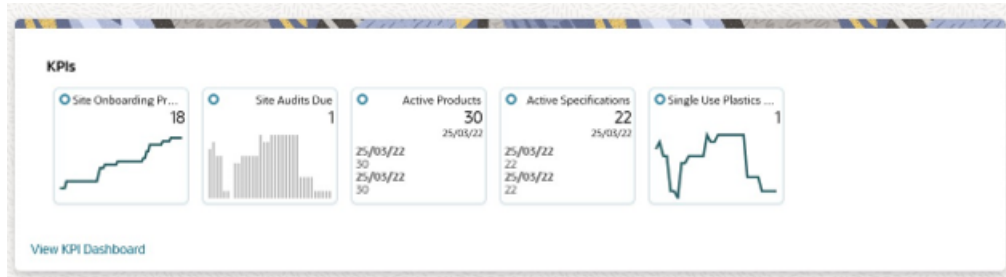
For further details, see the [Announcements](#) chapter.

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. |

| Area | Access Rights |
|---------------------------|---|
| 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.

See the [Appendix: Security UI](#) for details of the administration of the JET UI user access permissions.

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.

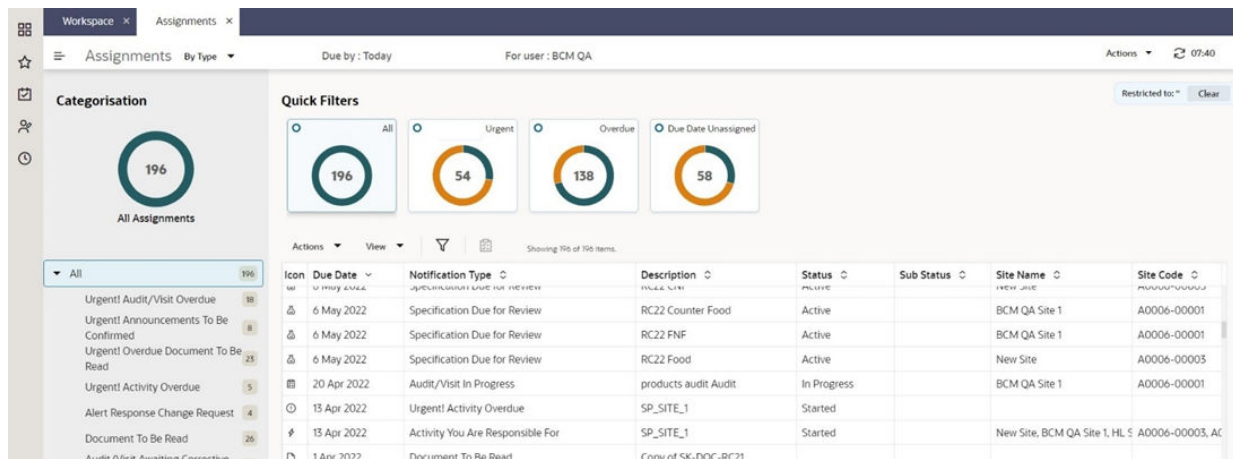
Viewing Assignments

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. |

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

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.

Viewing by Assignment Type

If you select an Assignment Type in the Assignments Due pane, the Assignments list view is filtered to only show your assignments of that type. In this case a message appears above the Quick Filters, indicating that the view contents are restricted to that type. Click the Clear button to refresh the view, to show all your assignments of all types.

Figure 3-2 Viewing by Assignment Type



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](#)

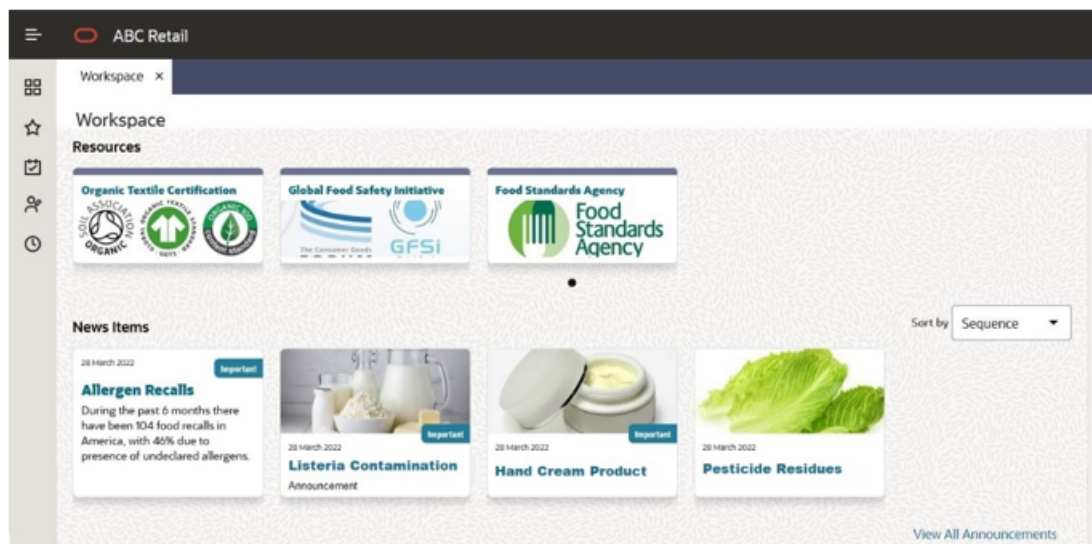
Announcements are the means of publishing communications to the user base, either as News Items, or as Resources for the more static items, such as links to external bodies or training resources.

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.

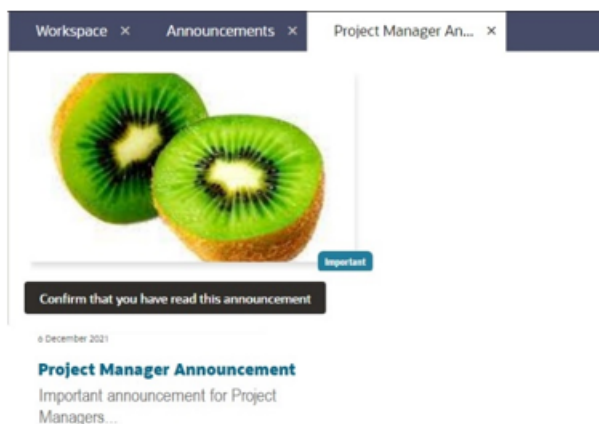
The dashboard just shows three published items; if more are available, use the filmstrip control to scroll through the full list.

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.

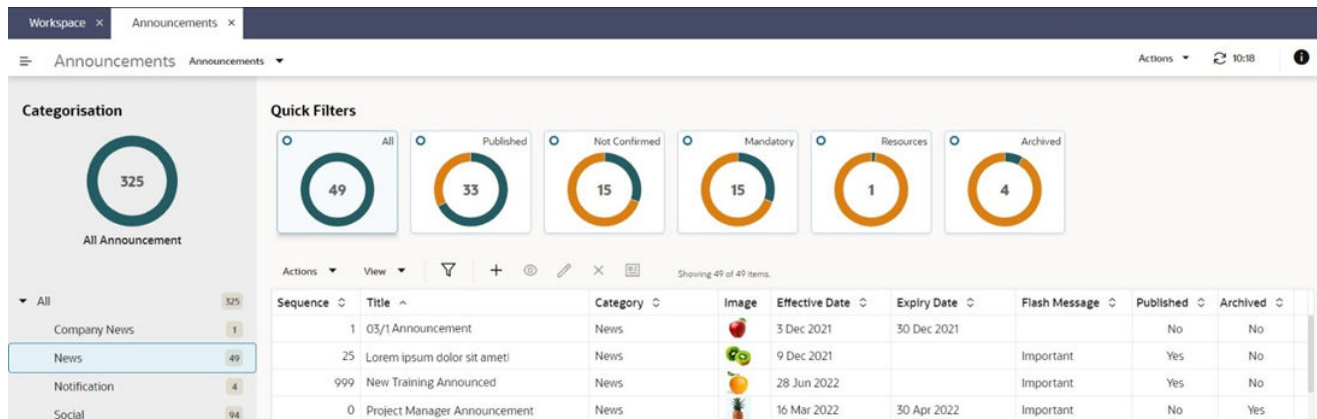
Figure 4-2 Announcement



Announcements Page

Open the Announcements page to view all your announcements by clicking the View All Announcements link beneath the Announcements, 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. The form includes several input fields and checkboxes:

- Code:** 12345
- Sequence:** 1
- High Message:** Important
- Category:** Alerts
- Effective Date:** (calendar icon)
- Resource:** Resource
- Published:** Published
- Archived:** Archived
- Expiry Actions:**
 - Expiry Date:** (calendar icon)
 - Set to Unpublished:**
 - Set to Archived:**
- Logging and Mandatory Details:**
 - Mandatory:**
 - 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

Navigation buttons at the bottom right: Previous, Next, Cancel, 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

Distribution Content Preview

Localisable Information French

Default Language

Title Project Manager Announcement

Body

B I U

TEST Project Manager Announcement

Image

Delete Image

French

Title

Body

B I U

Image

+ 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.

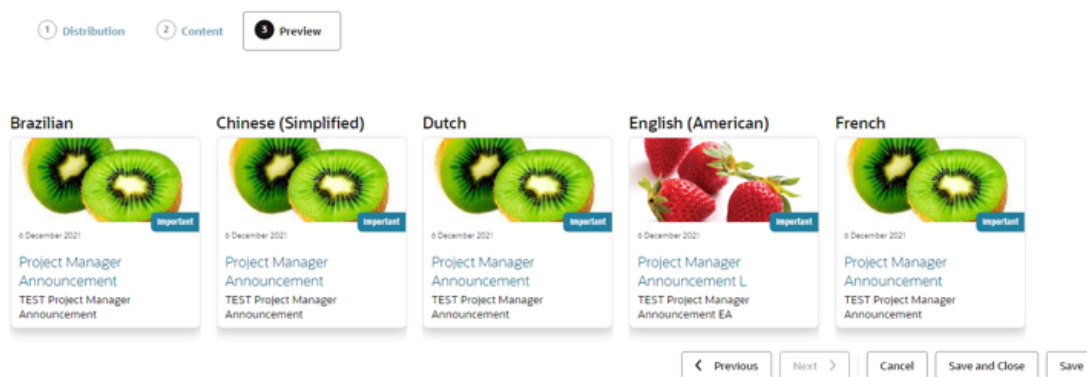
Alternative content can be specified for any of the portal's supported languages. The left-hand pane contains the default language, which is English (British). Select an alternative language from the **Localisable Information** picklist and enter any overrides for that language in the right-hand pane.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

The screenshot shows a slide-out pane titled "Review readership". It contains two tables. The first table, "Internal Users", has columns for User Name, Date Last Viewed, and Date Confirmed Read. The second table, "External Users", has columns for Supplier Name, User Name, Site Name, Site Code, Supplier Code, Date Last Viewed, and Date Confirmed Read. Both tables include action icons for CSV, Excel, and XML exports.




| 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 |

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

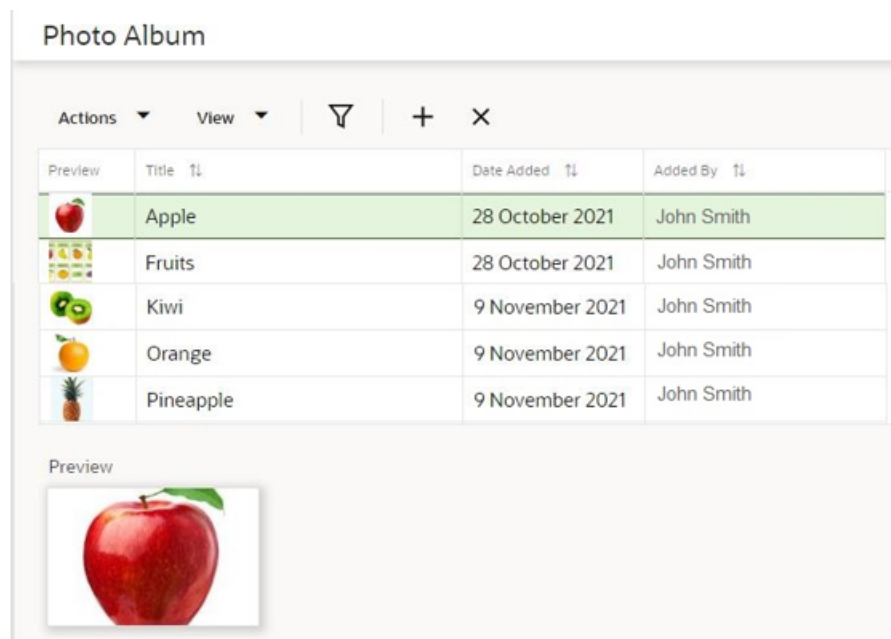
If you have *News Administrator* access rights, you will have access to the Announcement administration options: the Photo Album and Announcement glossaries.

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

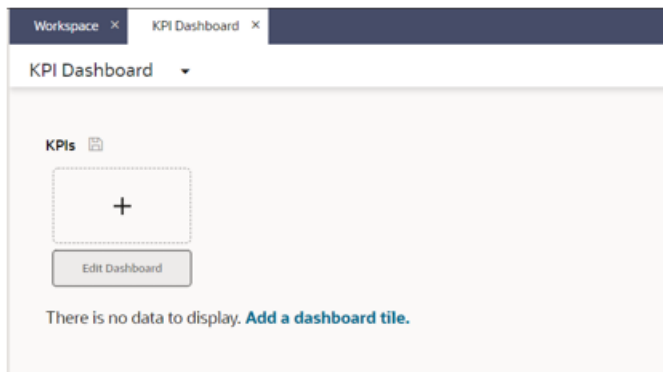
The KPIs available to you are those which you have access to within the Reports module. This requires you to be granted access to the KPI as a recipient, and the KPI must be made available for selection as a Workspace KPI. See the [Managing Workspace KPIs](#) section.

Adding KPIs

To add tiles to your dashboard:

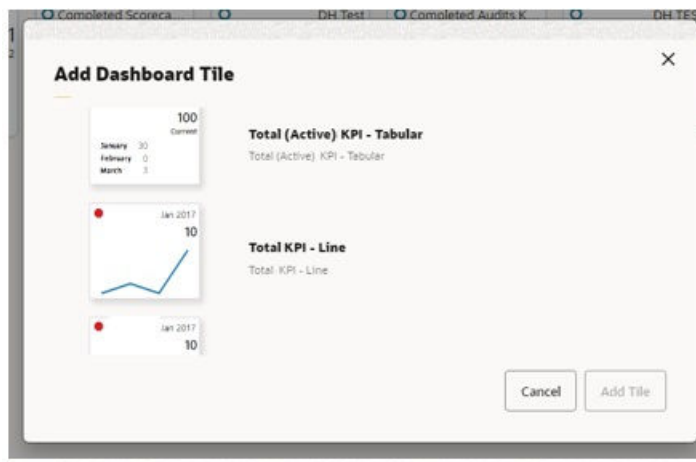
1. Click the View KPI Dashboard link within the dashboard, or select the Workspace/KPI Dashboard option from the Tasks menu.

Figure 5-2 KPI Dashboard Page - Add Dashboard Tile



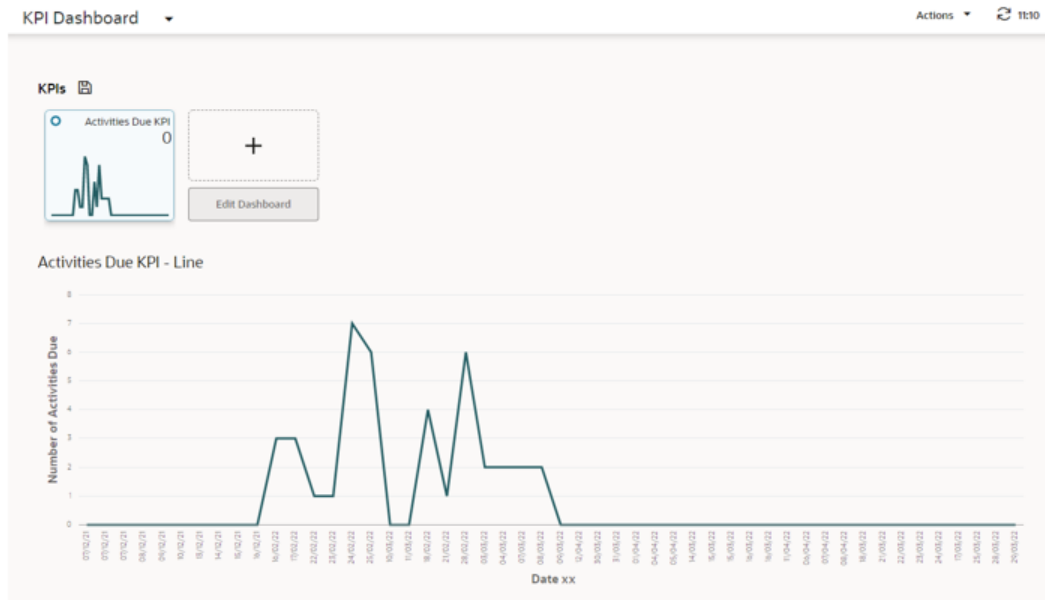
2. From the KPI Dashboard page, click Add a dashboard tile or the + control, and select from the list of available KPIs.


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

| 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 | |
| 15/04/22 | 1 | |

6

List Views

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

- [List View Contents](#)
- [Filter Tiles](#)
- [List View Actions](#)
- [Managing Columns](#)
- [Searches](#)
- [Customization](#)
- [Info Panels](#)
- [Data Import/Export](#)

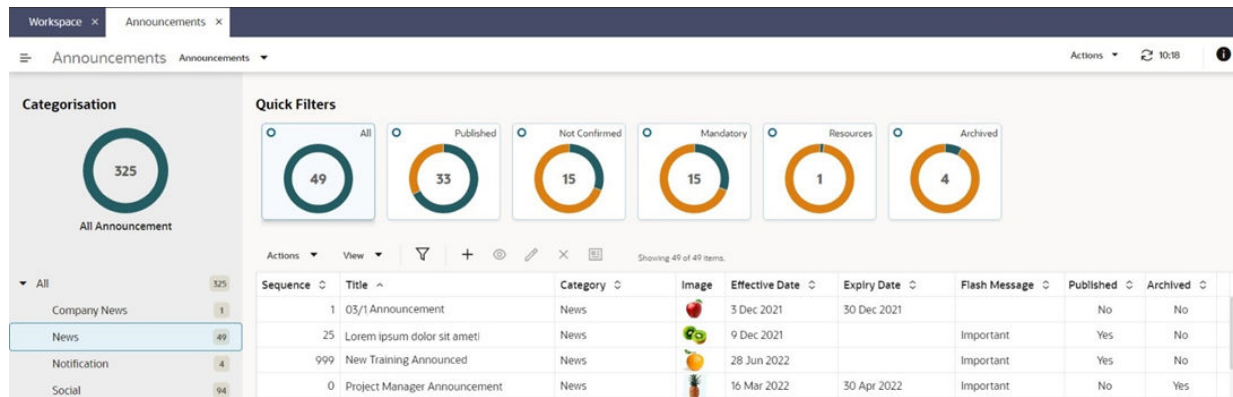
List views present collections of records, from where the records can be opened and actioned, and new records created. The contents can be filtered, sorted, and searched in order to categorize the contents or locate specific records.

The main components of a list view page are:

- A title bar with actions to refresh the contents, create custom views, and open other views.
- A categorized or hierarchical tree, grouping the data by categories or folders.
- The list view grid, with a toolbar for applying actions and configuring the columns.
- Quick Filter tiles for filtering the list contents.
- Simple and Advanced search facilities.
- Clickable column headings for sorting the grid contents.
- Slide-out info panels showing additional data.
- Data import and export features.

See [Appendix: System List Views](#) for details of the system-delivered list views.

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.

Tree Pane

The majority of list views are *categorized*, where a left-hand pane contains a tree which groups the data by a predefined category. An alternative *hierarchical* pattern is used to group the data within parent entities, such as folders containing Library documents.

The tree pane indicates the number of records within each category or folder, with a top-level count of all records. As records may appear within more than one category or folder, the cumulative parent-level and top-level counts may be greater than the actual number of records being presented.

Navigate the tree by expanding and collapsing the nested levels. The levels are sorted alphabetically.

Selecting a level filters the grid to just show the records for that category or folder (or all records if the *All* level is selected). Selection within the tree filters the grid to a subset of records; the grid's *All* filter tile shows a count of the actual number of records

within the selected level; any subsequent filtering of the grid using filter tiles or searches applies to the subset, and has no effect on the tree.

Grid

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

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; blank or null values appear at the bottom of the list, whether sorted ascending or descending. Rich text, picture, and multi-value columns are not usually sortable.

The filter tiles and searches are applied independently. If the list is filtered with a simple or advanced search and then a filter tile is clicked, the list will be refreshed based on the filter tile's criteria, and the search filter is cleared. See [Filter Tiles](#) and [Searches](#).

Note:

Filters and searches are applied to the grid in a hierarchy:

1. Any default *scoping* filter that is coded into the view, such as to exclude deleted records.
2. The *All* category/folder in the tree pane.
3. Any filter chips in the tree pane.
4. The selected category or folder in the tree pane.
5. The *All* Quick Filter tile.
6. Any other filter tiles.
7. Any Query by Example (QBE) quick search or Query Builder advanced search criteria (either can be applied, but not both).

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. Icons may be used in columns which relate to actions or tasks, such as to show a check mark if completed positively/accepted, a cross if completed negatively/rejected, or blank if not completed.

Additional information relating to a row can be viewed by opening a slide-out panel. See [Info Panels](#).

A range of options is available for importing and exporting data through the grid. These include common actions for downloading the view contents to a variety of data formats, and actions that are specific to the type of record, for downloading the full contents of records, and in some cases for uploading data to create new records. See [Data Import/Export](#).

You can apply actions to rows in the grid, subject to factors such as the type of record, its status, and your user permissions. To action a record, single-click the row; to open a record in read mode, double-click the row. See [List View Actions](#).

View Selector

The system is delivered with a set of predefined list views for each type of record (see [Appendix: System List Views](#)), which may be customized by the administrator. You may also create your own custom variants of the views (see [Customization](#)).

The name of the list view is shown in the title bar next to the name of the type of record being presented. Use the selector to switch to an alternative view.

Filter Tiles

A set of Quick Filter tiles show above the grid. These predefined filters represent the record states, or other categorizations; the contents of the metric tiles relate to the number of rows that match the filter along with a graphical representation.

There are three types of filter tile:

- Those which have segments that proportionally represent the number of records in the grid for the values of a particular attribute, such as the record's status. Blank or null values are excluded. Hovering over a segment shows the name of the item and the number of records in the grid with that value. These do not show a metric value.

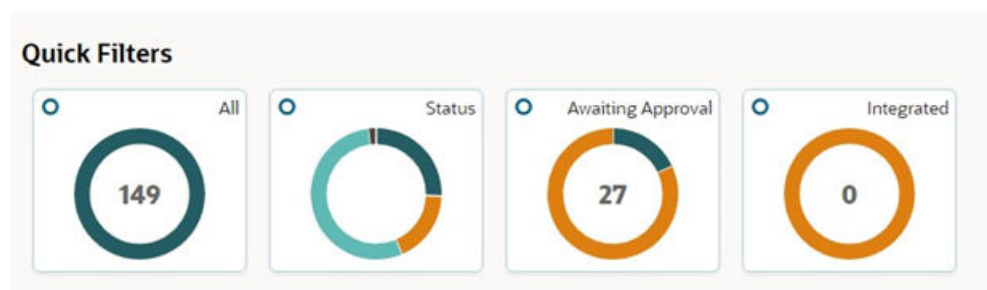
Double-clicking a segment further filters the grid to just the records which have the attribute set to that value. Click the *All* tile to clear the segment filter.

- Those which represent a specific criteria, such as records that are awaiting approval. These just have two segments: one for records that match the criteria, and one for those that do not. Blank or null values are treated as a non-match. Hovering over a segment shows the number of matching records in the grid. The segments are not clickable. These show a metric value of the number of records that meet the criteria

Clicking the tile refreshes the grid to show records that meet the criteria of that filter.

- The *All* tile, which represents the full list of all records in the grid.

Figure 6-2 Filter Tiles



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

Filter Chips

Hierarchical type views may include filter chips which filter the contents of the tree pane, such as to locate records of a particular type or status. The chip indicates the number of records in that grouping. Use the *All* chip to reset the filter.

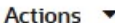


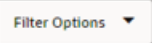



List View Actions

Actions are applied to the contents of the grid by selecting a row (or multiple rows where permitted) and selecting the action from the menu or icon on the toolbar.

Select a single row by clicking it. Where an action can be applied to multiple rows, select further rows by clicking another row while holding down the *Ctrl* key (for multiple individual rows) or the *Shift* key (for a contiguous block of rows). Click a selected row to deselect it, or use the Clear Selections action.

The available actions will depend on the type of record, its status, and your user permissions. Some actions are specific to the type of record, others are standard across views.

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

| Action | Description |
|---|---|
|  | The Actions menu contains actions that are relevant to the list view contents. Typical options are the New, View Record, Edit, Copy, Print, and Delete for maintaining records, and any actions specific to the type of record. |
|  | The View menu contains options: <ul style="list-style-type: none"> • 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 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 options, to create a new record, or view, edit, or delete the selected record. Also, the View Attachments option, which opens a list of the record's file attachments. |
|  | The options to Export the list view as a CSV, Excel, or XML file. |
|  | 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.

Single-clicking a row selects it to be actioned; double-clicking a row opens the record in read mode (where permitted). Columns that contain a hyperlink to an alternative record, or to file attachments, have a link icon and blue text; single-clicking the text opens the target.

Hierarchical type views may include actions within the tree pane which apply to the tree pane contents rather than the grid contents.

Managing Columns

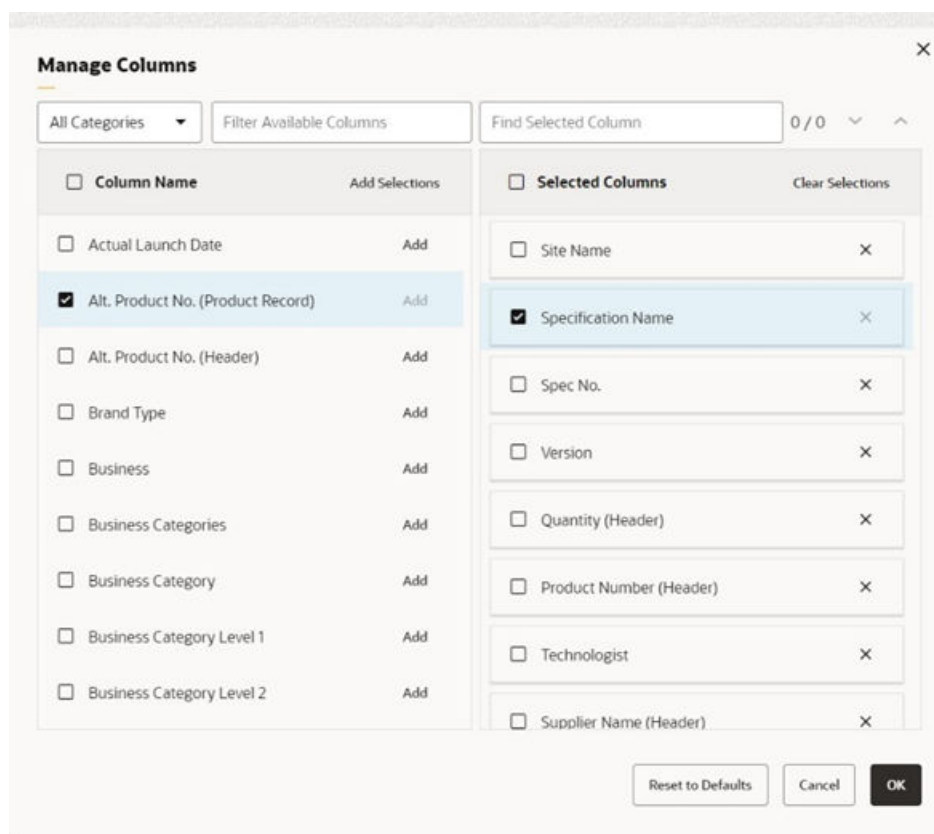
The Manage Columns option within the View menu allows you to customize the list view by adding, removing, and reordering the columns.

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. If the list contains multiple fields with the same name, the group name is appended to the label. Use the checkbox and click Add to select columns. Use the header checkbox to select all columns.

The list of selected columns can be reordered using the checkbox, and dragging and dropping the columns to the required position. Use the checkbox and click Clear Selections to deselect columns, or click the X to remove an individual column from the selection. Use the header checkbox to select all columns. Selected columns can be located using the search box. The number of selections that match the text is shown, and the up/down arrows can be used to focus on the matches.

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

| Filter | news | Filter | Filter | Edit Date ... | Edit Date ... | Filter | Filter |
|----------|-----------|--------------|--------|----------------|---------------|---------------|---------|
| Sequence | Title | News | Image | Effective Date | Expiry Date | Flash Message | Publish |
| 33 | News Item | News | | 2 Nov 2021 | 31 Dec 2021 | | Nc |
| 100 | News Item | Notification | | 7 Apr 2022 | 7 Apr 2022 | Important | Nc |

The input fields act as 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.

Picture and multi-value columns are not usually filterable.

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.

Blank or null values will result in a non-match; it is not possible to search a column for a null value.

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

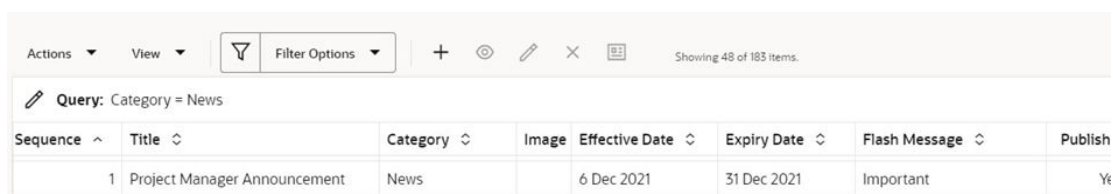
To close the search and revert to the unfiltered list view, click the Query by Example Icon, or select the Clear Filters option in the Filter Options menu.

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 or select Query by Example in the View menu, and then 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



The screenshot shows a search interface with a toolbar at the top containing 'Actions', 'View', 'Filter Options', and various icons. Below the toolbar, a query is defined as 'Query: Category = News'. A table displays the search results with the following columns: Sequence, Title, Category, Image, Effective Date, Expiry Date, Flash Message, and Publish. The first row of data is as follows:

| Sequence | Title | Category | Image | Effective Date | Expiry Date | Flash Message | Publish |
|----------|------------------------------|----------|-------|----------------|-------------|---------------|---------|
| 1 | Project Manager Announcement | News | | 6 Dec 2021 | 31 Dec 2021 | Important | Ye |

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.

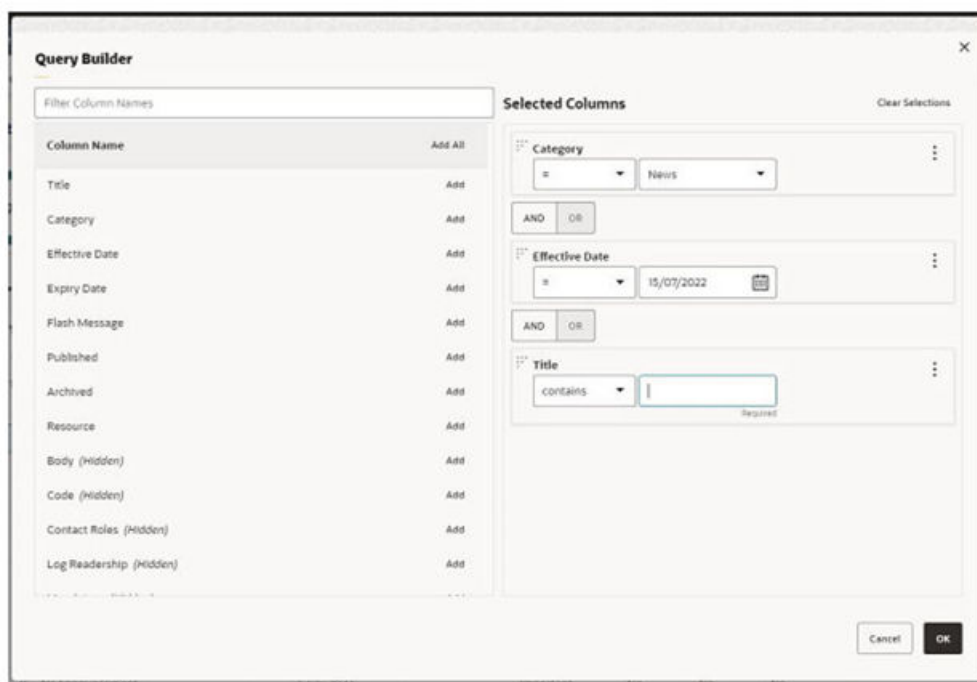
The Query Builder dialog box presents the list view columns in a left-hand pane, and the construction of the search criteria query statement in the right-hand pane.

The list of available columns can be filtered with the type-ahead text search. If the list contains multiple fields with the same name, the group name is appended to the label. 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. Use the Remove menu option to deselect a column, or Clear Selections 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 below.

Figure 6-6 Query Builder Dialog Box



The screenshot shows the 'Query Builder' dialog box. On the left, there is a list of columns with a search filter 'Filter Column Names'. The columns listed are: Title, Category, Effective Date, Expiry Date, Flash Message, Published, Archived, Resource, Body (Hidden), Code (Hidden), Contact Roles (Hidden), and Log Readership (Hidden). Each column has an 'Add' button. On the right, the 'Selected Columns' section shows the constructed query: 'Category = News', 'Effective Date = 15/07/2022', and 'Title contains []'. The 'Title' clause is marked as 'Required'. The dialog box has 'Cancel' and 'OK' buttons at the bottom right.

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.

Blank or null values will result in a match depending on the data type and operator used. The following describes per data type, which operators may result in blank/null values being returned as a match:

- For **Text** and **Glossary** fields, *Blank* will return rows that have no value. *!=*, *Does Not Contain*, *Does Not Start With*, and *Does Not End With* will return rows that have no value along with those that do not match the specified value.
- For **Rich Text** fields, *Does Not Contain* will return rows that have no value along with those that do not match the specified value.
- For **Number**, **Date** and **Boolean** fields, *Blank* will return rows that have no value. *!=* will return rows that have no value along with those that do not match the specified value.

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 (>=)*
- *Blank and Not Blank*

Text (text, telephone number, email, hyperlink, and comment fields) include:

- *Contains* and *Does Not Contain* for partial text matching (also for rich text fields).
- *Starts With/Does Not Start With* and *Ends With/Does Not End With* for partial text matching.

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 = High) 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. It has a title bar with 'Selected Columns' and 'Clear Selections'. The main area contains four filter rows. Each row has a column name, an operator, a value, and a 'Remove' icon. The first row is 'Category' with operator '=', value 'News', and a 'Remove' icon. Below it are 'AND' and 'OR' buttons. The second row is 'Flash Message' with operator '=', value 'Flash Message', and a 'Remove' icon. Below it are 'AND' and 'OR' buttons. The third row is 'Flash Message' with operator '=', value 'Flash Message', and a 'Remove' icon. Below it are 'AND' and 'OR' buttons. The fourth row is 'Effective Date' with operator '=', value '15/07/2022', and a 'Remove' icon. Below it are '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.

- 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 some cases, the timestamp will also be available as separate date and time columns.

- 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.

Customization

The system is delivered with a set of predefined list views for each type of record (see [Appendix: System List Views](#)).

The system-delivered views may be customized by the administrator. Individual users can create personal custom variants of the views.

A migration facility is available for automatically creating personal views based on equivalent personal views in the classic UI.

Customizing System Views

Users with Configuration Editor access rights have the ability to customize the system-delivered list views.

The aspects of a system view that can be customized are:

- The initial set of columns shown when the view opens.
- The column order and widths.
- The default sort sequence.
- Any Query Builder advanced search criteria. Filtering by filter tiles, QBE quick search, or categorization is not saved.

See [Managing Columns](#) and [Searches](#) for details on making changes to columns and applying advanced searches.

The page-level Actions menu contains the following options for customizing system views:

- Save View - overwrites with the current state. A confirmation prompt warns that you are updating a system view.
- Discard changes to view - resets to the state it was when last saved.

The changes made to the view are visible to all users, the next time they open that system list view.

System views cannot be deleted or created; if the administrator creates a new list view, it is a personal view, visible only to themselves.



Note:

Where a system view has alternative variances for Retailer and Supplier users, the view is named accordingly.

Creating Personal Views

All users have the ability to create personal views, as customizations of the system-delivered views.

The aspects of a personal view that can be customized are:

- The initial set of columns shown when the view opens.

- The column order and widths.
- The default sort sequence.
- Any Query Builder advanced search criteria. Filtering by filter tiles, QBE quick search, or categorization is not saved.

See [Managing Columns](#) and [Searches](#) for details on making changes to columns and applying advanced searches.

The page-level Actions menu contains the following options for customizing system views:

- Save View As... - creates a new personal view. Enter a name that differentiates it from other system and personal views.
- Save View - overwrites with the current state.
- Discard changes to view - resets to the state it was when last saved.
- Delete View - deletes the view.

Personal views are only visible to the user who creates them.

List View Migration

Where users have created personal custom list views in the classic UI, a facility is available to automatically migrate them to equivalent personal views, containing the same columns and filters. The view name is preserved and tagged as having been migrated.

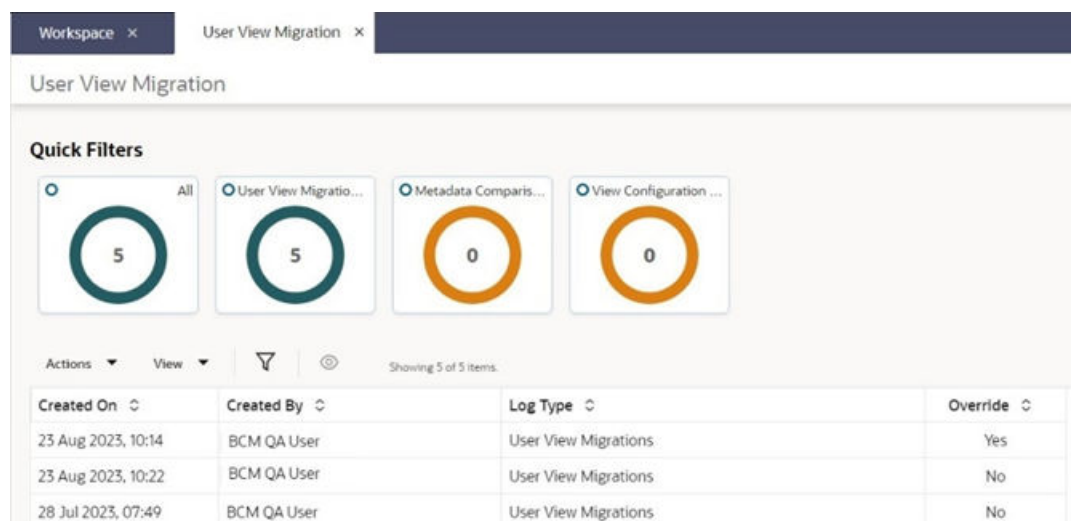
Customizations to system-delivered list views cannot be migrated.

The migration process is initiated by the administrator as a post release task. It may be run more than once, with options to perform pre-migration validation checks.

Migration Log

The migration process is managed through a User View Migration option within the Administration menu. It is available to users with Oracle Authorized Administrator or Configuration Editor access rights.

A list view presents a log of any previously completed migrations.

Figure 6-8 User View Migrations Log

Opening a log entry shows details of that run, such as the date and time of completion, and the user who initiated it.

The Log Type indicates the type of log (see below for details of the different run types); Override indicates if the option to overwrite existing views was selected.

The Log page contains details of the run as comma-delimited text, intended to be opened as CSV format, with columns:

1. User
2. View Name
3. Entity
4. Is this an update?
5. Migrated columns in display sequence
6. Columns not migrated
7. Filter

The first row of the log identifies the run type.

Migration Actions

The Actions menu contains the following options for running the migration process:

- Compare View Configuration with Presenters - a pre-migration validation run which compares the JET UI and Classic UI list views. It produces a log, but does not perform any migration processing.
- Compare View Configuration Metadata with Presenters - a pre-migration validation run which compares the JET UI and Classic UI list view columns. It produces a log, but does not perform any migration processing.
- Migrate User Views - submits the migration processing.

Migration Processing

When submitted, the migration job processing is as follows:

- If the migration has previously been run, a confirmation prompt is presented. By default, only views that have not previously been migrated are included in the run. Selecting the Overwrite option will migrate all views, overwriting those previously migrated.
- The name of the migrated list view is that from the classic UI with the tag (Migrated) appended. The tag is a translatable system text literal. If a translation does not exist for the user's language, the base language is used.
- The processing attempts to match the columns, their sequence, and any advanced search criteria.
The classic list views allow duplicate columns; the migration will only migrate one instance of the column.
- Any exceptions such as non-matching views, columns, or search criteria are skipped and recorded in the log.

Info Panels

Most list views include an information panel, which slides out from the right, showing additional data relating to the row selected in the grid.

Figure 6-9 Info Panel

The screenshot shows the Oracle interface for 'Assessments Score by SE Type'. It features a table with columns: Site Name, Site Code, Supplier Name, Supplier Evaluation Type, Assessment Type, and Due Date. The table contains three rows of data. To the right, the 'Site details' panel is open, displaying the 'Overall SE Score' and a table of scores for different categories: Environmental (Score Not Achieved, 1), Ethical (Five Star, 56), Procedure (Two Star, 6), and Quality & Safety (Score Not Achieved, 1). Below this, it shows 'Completed Assessments' with 'No data to display.'

| Site Name | Site Code | Supplier Name | Supplier Evaluation Type | Assessment Type | Due Date |
|-----------------------------------|------------|---------------------|--------------------------|---|------------|
| Branded Products - Grocery / Food | A0044-0001 | All Branded Product | Procedure | Governance Assessment (All Categories) | 3 Feb 2023 |
| Branded Products - Grocery / Food | A0044-0001 | All Branded Product | Environmental | Environmental Assessment (Food & Agriculture) | 3 Feb 2023 |
| Branded Products - Grocery / Food | A0044-0001 | All Branded Product | Ethical | Ethical Assessment (Food & Agriculture) | 3 Feb 2023 |

To view the info panel, select a single row in the grid and click the **i** icon in the title bar.

Selecting a different single row in the grid will refresh the panel contents accordingly.

Use the **X** to close the panel or use the **i** icon to toggle between open and closed.

Some views may be designed to open the info panel by default.

The contents of the panel are read only and may be presented across multiple tabs. The heading may include key information such as the record's description, code, or status.

If a page contains multiple fields with the same name, the group name is appended to the label.

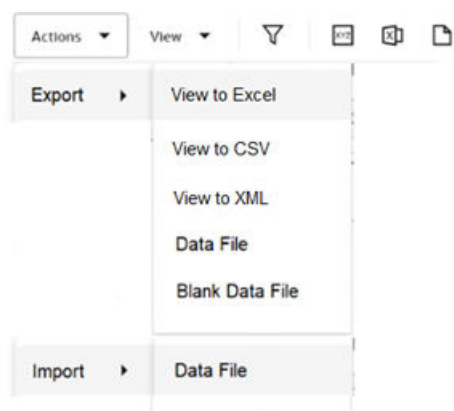
Data Import/Export

Facilities are available for exporting data from list views, and in some cases for importing data. Some options are common across all views, others are specific to certain types of record. The types of options are:

- Export View - common options for exporting the list view contents to a data file.
- Export Data File - for extracting the full contents of certain types of record to a data file.
- Import Data File - for the creation of certain types of records by means of importing a data file.

When a list view has the facilities available, they are grouped in the toolbar Actions menu, within the Export and Import options. They may also appear as icons on the toolbar.

Figure 6-10 Import/Export Actions



Export View

Most list views include the options to export the contents of the grid to a data file. Three options are available:

- Export/View as Excel file
- Export/View as CSV file
- Export/View as XML file

To export the contents to an Excel, CSV, or XML file, select the appropriate option. The file is created immediately and presented in your browser's download prompt.

The data file contains the rows and columns that are present in the view. If the view is filtered or has columns customized, the file contents will reflect it accordingly. Only the grid contents are exported; the contents of the tree pane and info panel are not included.

For the Excel and CSV files, the rows and columns correspond to those of the grid. Column headings and column sequence are per the grid.

For the XML file, the structure has a single `ResultSet` parent element containing a `Row` element for each row of data. The `Row` element contains elements that correspond to the grid

columns (in the same sequence), with the tag names being the column headings, concatenated with spaces trimmed. For example:

```
<ResultSet>
  <Row>
    <ColumnName1>...</ColumnName1>
    <ColumnName2>...</ColumnName2>
    <ColumnName3>...</ColumnName3>
  </Row>
  <Row>
    <ColumnName1>...</ColumnName1>
    <ColumnName2>...</ColumnName2>
    <ColumnName3>...</ColumnName3>
  </Row>
</ResultSet>
```

The file name is based on the type of record, prefixed with View-of-. For example, the file name for an Alerts view would be View-of-Alert.xls, View-of-Alert.csv, or View-of-Alert.xml.

Note:

- If a cell contains commas, they are preserved in the output.
- Numbers are output as they appear in the grid.
- Timestamp fields are output with the full date and time.
- Boolean values are output as true or false.
- Images and icons are output as the name of the image.
- Virtual, calculated, and hidden columns are excluded.
- A maximum of 2000 rows may be exported. If the view exceeds 2000 rows, the file is truncated, and a notification is issued.

Export Data File

Certain list views include the option to export the full record contents to a data file. This is currently available for:

- Suppliers and Sites

The extracts of Process Briefs and Assessments are based on a similar export process.

The options are available to users with Advanced Reporting Administrator access rights. The export is submitted to run as a batch job. It generates a CSV data file within a folder in the Report Outputs area.

The data file contains the records that are present in the grid. The view can be filtered to export just a subset of records. The columns of the data file are specific to the type of record.

To run the export:

1. If required, filter the grid using Query Builder to create a subset of records to export.
2. Select the Export/Data File option from the list view Actions menu.
3. Optionally select an alternative **Language**, to be used for the output of translatable values.
4. Select a folder to **Save Output To**, where the data file will be located. New folders can be created in the Report Outputs area, within the Data Extracts group.
5. Click OK and confirm the submission, or click Cancel to exit.
You will receive a notification email on the start and completion of the export.
6. Locate the generated file within the specified folder in the Data Extracts group of the Report Outputs area. The report name is the same as the file name.

The file name is based on the type of extract with the batch job number appended, for example, SupplierExtract_99999.csv or SiteExtract_99999.csv.

 **Note:**

- The view must be filtered using the Query Builder advanced search; the QBE quick search and filter tiles are not effective.
- The data file is a fixed, predefined layout.
- The column headings show the system text key plus the system text field label.
- If the data file exceeds the maximum permitted size of a file attachment (set by the *File Attachment Size Limit (MB)* system parameter), it is truncated accordingly.

Import Data File

Certain list views include the option to create records by importing a spreadsheet file. This is currently available for:

- Users (Retailer users only, not Supplier users)
- Suppliers (and Sites)
- Processes (not Activities)

The options are available to users with Upload Administrator access rights. The import is submitted to run as a batch job which processes the uploaded data file.

The imports use predefined data file layouts. Blank files can be download, to be populated as a spreadsheet.

To run the import:

1. Download the appropriate blank data file and use as a template. See **Export Blank Data File** below.
2. Populate the data file and save it as either CSV, XLSX, or XLS format.
Multiple files may be uploaded simultaneously by compressing them as a ZIP file.
3. Select the Import/Data File option from the list view Actions menu.
4. Click **Pick File...** to select the data file.

5. Optionally enter any **Comments** to be recorded against the batch job.
6. If applicable, set **Send New User Email** to yes or no, according to whether new users are notified when a User account has been created as part of the import (this is relevant for the import of Users and Suppliers/Sites).
7. Click OK and confirm the submission, or click Cancel to exit. Alternatively, click Submit Go to Manage Batch Jobs to submit the import and open the Batch Jobs area to view the progress of the job.

Validation will prevent submission if a file of the format CSV, XLSX, XLS, or ZIP has not been uploaded.

The file contents are pre-validated. If any exceptions are encountered which prevent the file being processed, you will receive a notification email, with an error message indicating the issues found. See **Pre-Validation Checks** below.

The batch job processes the contents of the uploaded files, creating new records accordingly. The file is added to the Attachments page of the batch job. Any exceptions encountered will be listed in the batch job log.

You will receive a notification email on the start and completion of the import.

Figure 6-11 Data Upload Prompt

The screenshot shows a dialog box titled "Data upload". Below the title is a horizontal line. The main text reads "Please select a file to upload". Underneath, there is a section labeled "Upload location" containing two buttons: "Pick File..." with a circular arrow icon and "Drop files here...". Below this is a large text input field with the placeholder text "Comment". At the bottom left, there is a checkbox labeled "Send new user email". At the bottom right, there are three buttons: "Submit Go to Manage Batch Jobs", "Cancel", and "OK".

 **Note:**

- The import is for the creation of records only, not updates.
- Multiple files, containing any number of records can be imported.
- The data file is a fixed, predefined layout.
- Any valid file name can be used.
- The file extension must be .csv, .xlsx, .xls or .zip.
- The processing, and name of the batch job is specific to the type of import.
- A maximum of 100 error messages will be logged.

Pre-Validation Checks

The pre-validation processing will include the following checks, according to the type of record being imported:

| Validation Check | Error Message Where: {0} = File, {1} = Column, {2} = Row, {3} = The invalid data. |
|---|--|
| A mandatory field is missing. | {0} {1}{2} a value must be entered - {3} |
| The key to a related record does not exist in the system. | {0} {1}{2} the code entered is not recognised - {3} |
| A control character has been detected. | {0} {1}{2} contains one or more control characters and cannot be imported - {3} |
| A date provided is not in the correct format. | {0} {1}{2} The date entered is not valid - {3} |
| A date-time provided is not in the correct format. | {0} {1}{2} the date-time entered is not valid - {3} |
| A numeric data item is not an integer. | {0} {1}{2} the value entered is not a valid integer - {3} |
| A column value is the same as another column. | {0} {1}{2} the column values must be unique, the following value has already been used - {3} |
| A ZIP file does not contain a valid CSV, XLS, XLSX file to process. | No import file was found to import |

Export Blank Data File

Where records can be created by importing a spreadsheet file, the Import/Data File options have a corresponding Export/Blank Data File option to download a blank file, for use as a template for populating the data to be uploaded.

The options are available to users with Configuration Editor access rights.

A spreadsheet file is created and populated with the column headings relating to the data import for that type of record. The file name indicates the type of record. The file is then compressed as a ZIP file of the same name.

The file is created immediately and presented in your browser's download prompt.

 **Note:**

- The data file is a fixed, predefined layout.
- The column headings show the system text field label, with an asterisk to indicate a mandatory 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:

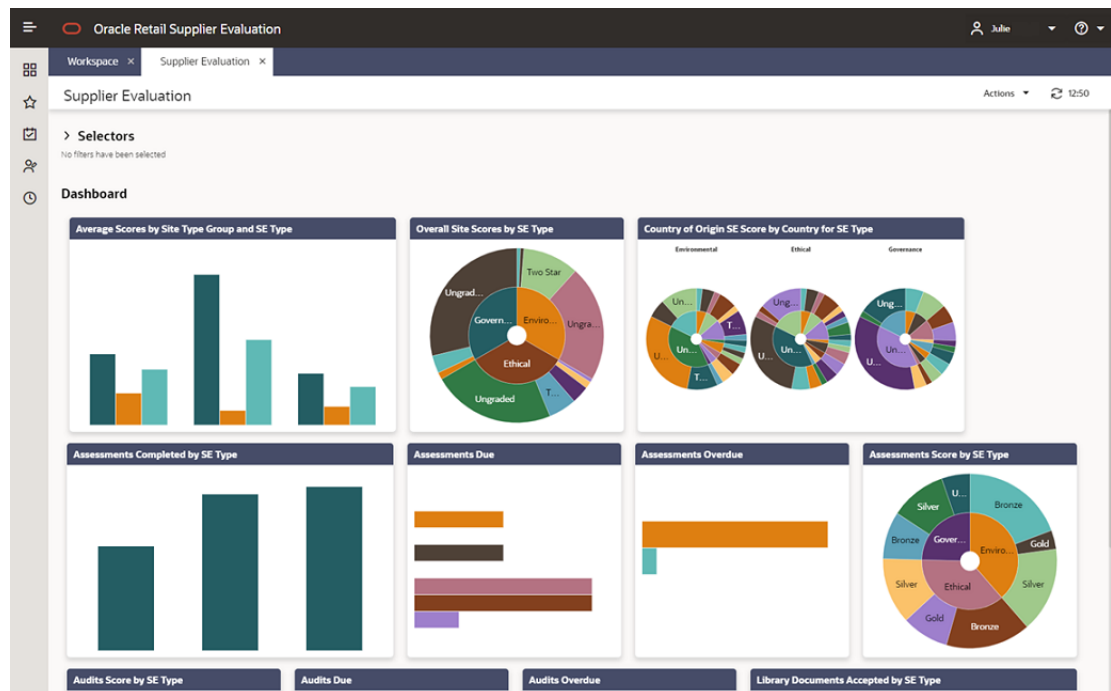
- [Supplier Evaluation Dashboard Layout](#)
- [Supplier Evaluation Dashboard Tiles](#)

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.

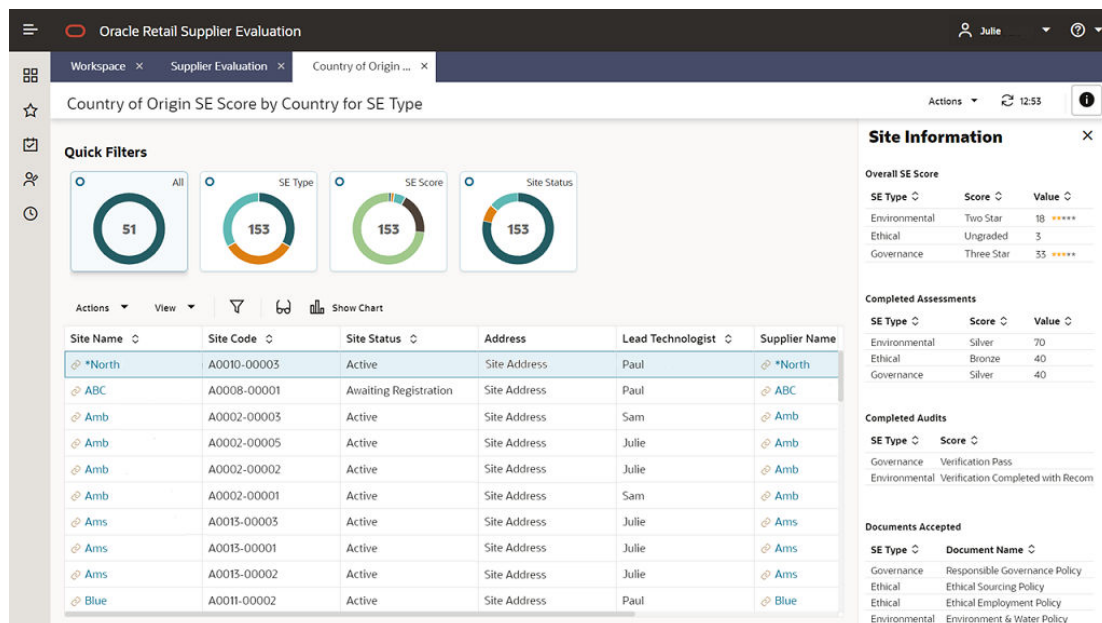
The data has implicit filters to manage the following:

- 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.

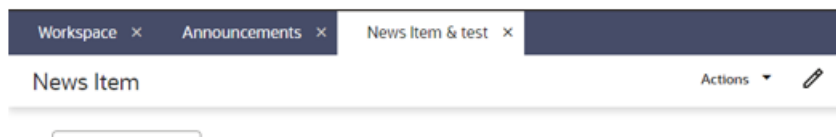
The common components and design standards of forms include the following.

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.

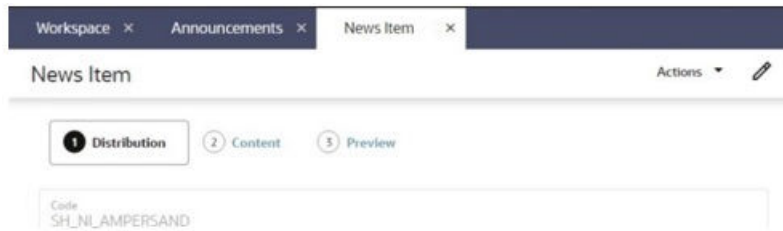
The Actions menu contains context-sensitive options available to perform on the record based on its state and the user's permissions, such as to put the form in edit mode, and to progress the record through its workflow stages. Some options also appear as icons, next to the Actions menu.

Figure A-1 Title Bar



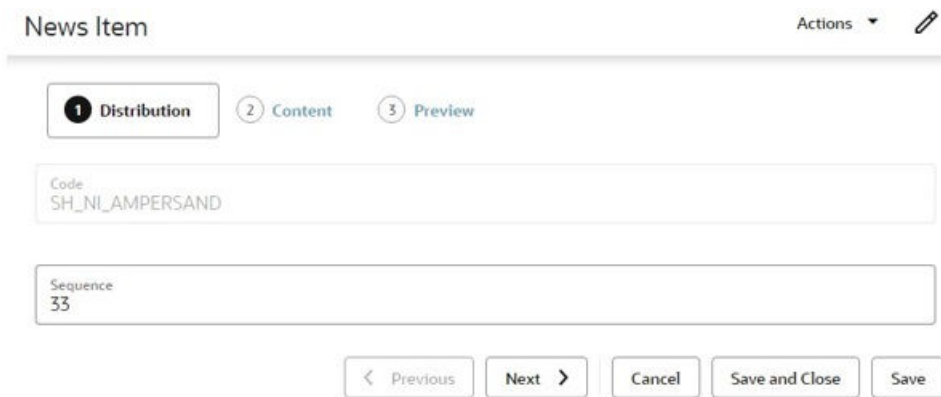
Tabbed Pages

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

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

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 |

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 | Sequence |
| Flash Message | Category |
| Effective Date | |
| <input type="checkbox"/> Resource | <input type="checkbox"/> Published |
| | <input type="checkbox"/> Archived |

Expiry Actions

Expiry Date

| | |
|---|--|
| <input type="checkbox"/> Set to Unpublished | <input type="checkbox"/> Set to Archived |
|---|--|

Logging and Mandatory Details

| | |
|---|--|
| <input checked="" type="checkbox"/> Mandatory | <input checked="" type="checkbox"/> Log Readership |
| User Roles | Contact Roles |

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.

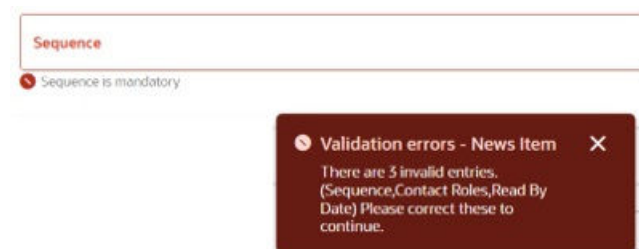
Rich text fields include options to apply bold, italics, and underline formatting, to insert a hyperlink, and to undo or redo edits.

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

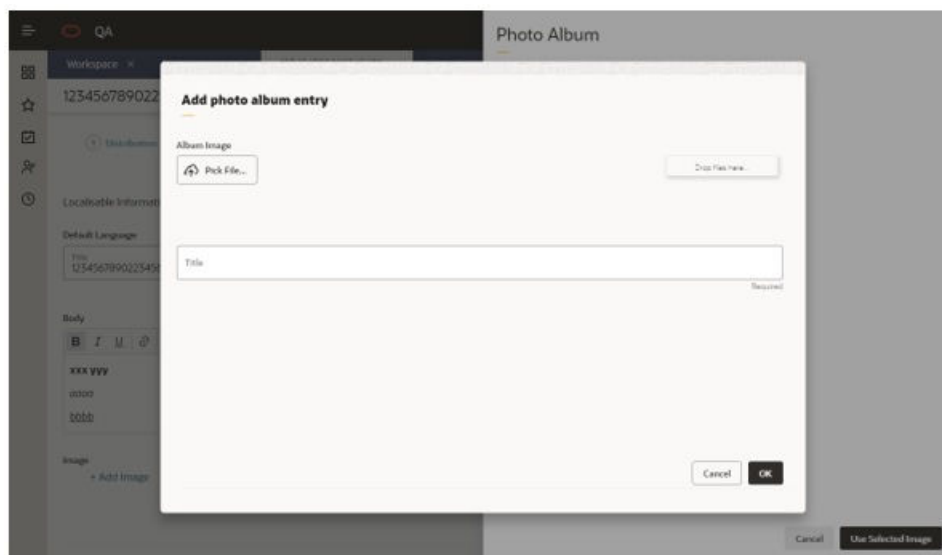
Records that the user has open for editing are exclusively locked for five minute intervals. If the user terminates their session by closing the page, the lock is automatically removed once the five minutes has elapsed. This frees up records where editing has been abandoned due to the session terminating 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

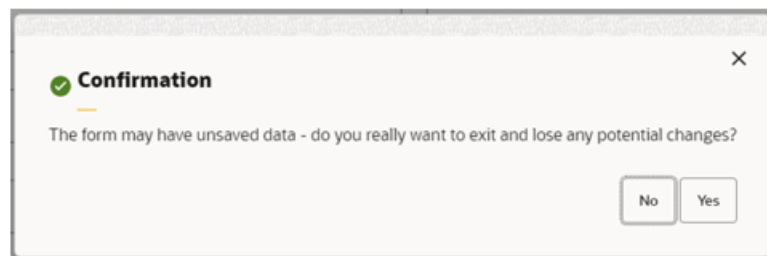
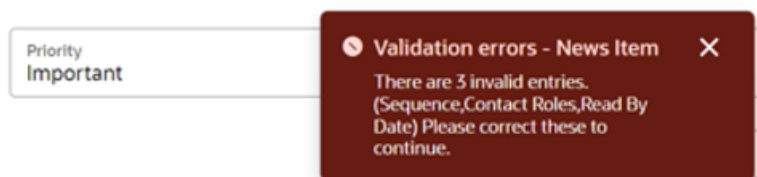


Figure A-9 Warning Message Box



Figure A-10 Error Message Box

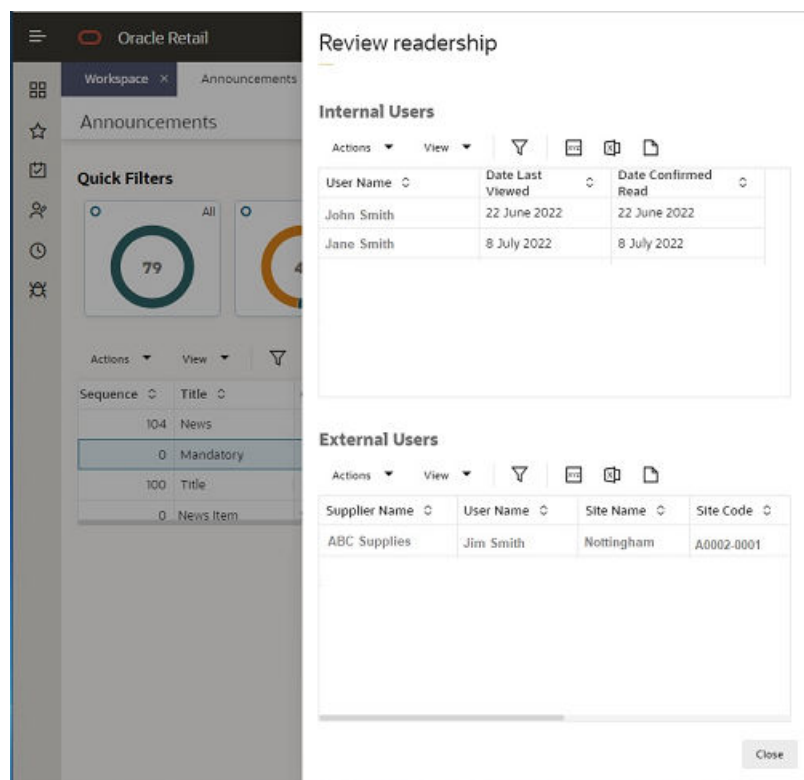


Overlays

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



B

Appendix: System List Views

This appendix provides a summary of the system-delivered list views, grouped by module:

- [Company/Supplier](#)
- [Library](#)
- [Process](#)
- [Reports](#)
- [Workspace](#)

The tables provide the following details:

- List View - the name of the view.
- Default View - indicates which default view for each area.
- Retailer View - indicates available to Retailer users.
- Supplier View - indicates available to Supplier users.
- Summary - an overview of the contents and purpose of the view.

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

Company/Supplier

| List View | Default View | Retailer View | Supplier View | Summary |
|---------------|--------------|---------------|---------------|--|
| Users | | | | |
| Users by Role | Yes | Yes | No | <p>A list of retailer users categorized by User Role.</p> <p>Provides retailer users with a means of locating users by their job role. A user may have multiple roles.</p> <p>The filter tile indicates where users have yet to complete the registration process.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of User records by users with the necessary permissions. Includes the facility for creating new users by importing a data file.</p> <p>The info panel contains basic information from the User record.</p> |

| List View | Default View | Retailer View | Supplier View | Summary |
|----------------------|--------------|---------------|---------------|--|
| Users by Area | No | Yes | No | <p>A list of retailer users categorized by Area.</p> <p>Of use where EAC (Enhanced Access Control) permissions are used to assign retailer users to specific suppliers, it provides retailer users with a means of locating users by EAC area. A user may be assigned to multiple areas.</p> <p>The filter tile indicates where users have yet to complete the registration process.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of User records by users with the necessary permissions. Includes the facility for creating new users by importing a data file.</p> <p>The info panel contains basic information from the User record.</p> |
| Users by Role | Yes | No | Yes | <p>A list of supplier users categorized by User Role.</p> <p>Provides supplier users with a means of locating users within their organization (subject to which sites they are associated to), by their job role. A user may have multiple roles.</p> <p>The filter tile indicates where users have yet to complete the registration process.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of User records by users with the necessary permissions.</p> <p>The info panel contains basic information from the User record.</p> |
| Suppliers | | | | |
| Suppliers by Country | Yes | Yes | No | <p>A list of suppliers categorized by the country of their head office address.</p> <p>Provides a means of locating suppliers by geographical area.</p> <p>The integrated filter tile is of use when integrated with the Merchandising system, to show the supplier accounts that are successfully integrated. Other filter tiles allow suppliers to be located by status or supplier type.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Supplier records by users with the necessary permissions. Includes the facility for creating new suppliers by importing a data file. Also includes the facility for exporting the full Supplier record contents to a data file.</p> <p>The info panel contains basic information from the Supplier record.</p> |

| List View | Default View | Retailer View | Supplier View | Summary |
|----------------------------|--------------|---------------|---------------|--|
| Suppliers by Area | No | Yes | No | <p>A list of suppliers categorized by Area.</p> <p>Of use where EAC (Enhanced Access Control) permissions are used to assign retailer users to specific suppliers, it provides a means of locating suppliers by EAC area. A supplier may be assigned to multiple areas.</p> <p>The integrated filter tile is of use when integrated with the Merchandising system, to show the supplier accounts that are successfully integrated. Other filter tiles allow suppliers to be located by status or supplier type.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Supplier records by users with the necessary permissions. Includes the facility for creating new suppliers by importing a data file. Also includes the facility for exporting the full Supplier record contents to a data file.</p> <p>The info panel contains basic information from the Supplier record.</p> |
| Sites | | | | |
| Sites by Country | Yes | Yes | Yes | <p>A list of supplier sites categorized by the country of their location address.</p> <p>Provides a means of locating sites by geographical area.</p> <p>The integrated filter tile is of use when integrating with the Merchandising system, to show the site accounts that are successfully integrated. Other filter tiles allow suppliers to be located by status, and specifically where they are awaiting approval.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Site records by users with the necessary permissions. Includes the facility for changing the status of one or more sites, such as for account approval by technologists. Also includes the facility for exporting the full Site record contents to data file.</p> <p>The info panel contains basic information from the Site record.</p> |
| Sites by Lead Technologist | No | Yes | Yes | <p>A list of supplier sites categorized by Lead Technologist.</p> <p>Provides a means of locating sites by their designated lead technologist.</p> <p>The integrated filter tile is of use when integrating with the Merchandising system, to show the site accounts that are successfully integrated. Other filter tiles allow suppliers to be located by status, and specifically where they are awaiting approval.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Site records by users with the necessary permissions. Includes the facility for changing the status of one or more sites, such as for account approval by technologists. Also includes the facility for exporting the full Site record contents to a data file.</p> <p>The info panel contains basic information from the Site record.</p> |

| List View | Default View | Retailer View | Supplier View | Summary |
|------------------------------|--------------|---------------|---------------|---|
| Sites by Other Technologists | No | Yes | Yes | <p>A list of supplier sites categorized by Technologist.</p> <p>Provides a means of locating sites by their allocated technologists, lead or otherwise. A site may be associated to multiple technologists.</p> <p>The integrated filter tile is of use when integrating with the Merchandising system, to show the site accounts that are successfully integrated. Other filter tiles allow suppliers to be located by status, and specifically where they are awaiting approval.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Site records by users with the necessary permissions. Includes the facility for changing the status of one or more sites, such as for account approval by technologists. Also includes the facility for exporting the full Site record contents to a data file.</p> <p>The info panel contains basic information from the Site record.</p> |
| Sites by Supplier | No | Yes | Yes | <p>A list of supplier sites categorized by supplier.</p> <p>Provides a means of locating sites by their parent supplier accounts.</p> <p>The integrated filter tile is of use when integrating with the Merchandising system, to show the site accounts that are successfully integrated. Other filter tiles allow suppliers to be located by status, and specifically where they are awaiting approval.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Site records by users with the necessary permissions. Includes the facility for changing the status of one or more sites, such as for account approval by technologists. Also includes the facility for exporting the full Site record contents to a data file.</p> <p>The info panel contains basic information from the Site record.</p> |
| Supplier Users | | | | |
| Users by Role | Yes | Yes | No | <p>A list of supplier users categorized by User Role.</p> <p>Provides retailer users with a means of locating all supplier users (subject to any EAC area restrictions), by their job role. A user may have multiple roles.</p> <p>The filter tile indicates where users have yet to complete the registration process.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of User records by users with the necessary permissions.</p> <p>The info panel contains basic information from the User record.</p> |
| Contacts | | | | |

| List View | Default View | Retailer View | Supplier View | Summary |
|---------------------------------|--------------|---------------|---------------|---|
| Contacts | Yes | Yes | Yes | <p>A list of supplier contacts.</p> <p>Retailer users see the contacts for all suppliers (subject to any EAC area restrictions). Supplier users only see contacts within their organization (subject to which sites they are associated to).</p> <p>The filter tiles can be used to just show contacts for the Supplier account or just contacts for the Site account.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Contact records by users with the necessary permissions.</p> <p>The info panel contains basic information from the Contact record.</p> |
| Audits & Visits | | | | |
| Audits & Visits by Type | Yes | Yes | Yes | <p>A list of audits and visits categorized by Type (audit or visit).</p> <p>The filter tiles can be used to show those that are scheduled or not scheduled.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Audit/Visit records by users with the necessary permissions. Includes an option to assign auditors.</p> <p>The info panel contains basic information from the Audit/Visit record.</p> |
| Audits & Visits Action Required | No | Yes | Yes | <p>A list of audits and visits categorized by Supplier.</p> <p>Provides a means of locating audits and visits that require action, by supplier.</p> <p>The filter tiles can be used to show those that are overdue, or are at a status of awaiting amendment, corrective action or sign-off.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Audit/Visit records by users with the necessary permissions. Includes an option to assign auditors.</p> <p>The info panel contains basic information from the Audit/Visit record.</p> |
| Audits & Visits by Due Date | No | Yes | Yes | <p>A list of audits and visits categorized by Due Date, grouped by Year/Month.</p> <p>Provides a means of locating audits and visits by the date they are due to be completed.</p> <p>The filter tiles can be used to show those that are scheduled or not scheduled.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Audit/Visit records by users with the necessary permissions. Includes an option to assign auditors.</p> <p>The info panel contains basic information from the Audit/Visit record.</p> |

| List View | Default View | Retailer View | Supplier View | Summary |
|---------------------------------|--------------|---------------|---------------|--|
| Audits & Visits Scheduled | No | Yes | Yes | <p>A list of audits and visits categorized by Supplier.</p> <p>Provides a means of locating audits and visits that are scheduled, by supplier.</p> <p>The filter tiles can be used to show either audits or visits.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Audit/Visit records by users with the necessary permissions. Includes an option to assign auditors.</p> <p>The info panel contains basic information from the Audit/Visit record.</p> |
| Assessments | | | | |
| Assessments by Status | Yes | Yes | Yes | <p>A list of assessments categorized by Site, grouped by Status.</p> <p>Provides a means of locating assessments at a specific status, by supplier site.</p> <p>The filter tile can be used to show those that are overdue.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Assessment records by users with the necessary permissions.</p> <p>The info panel contains basic information from the Assessment record.</p> |
| Assessments by Period | No | Yes | No | <p>A list of assessments categorized by Due Date Period, grouped by Year.</p> <p>Provides a means of locating assessments by the period and year of their due date.</p> <p>The filter tiles can be used to show those with a specific score, or just those that have been completed.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Assessment records by users with the necessary permissions. Includes an option to mass generate future assessments, and the facility for exporting the full Assessment record contents to a data file.</p> <p>The info panel contains basic information from the Assessment record.</p> |
| Completed Assessments by Period | No | No | Yes | <p>A list of completed assessments categorized by Due Date Period, grouped by Year.</p> <p>Provides supplier users with a means of locating completed assessments by the period and year of their due date.</p> <p>The filter tile can be used to show those with a specific score.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Assessment records by users with the necessary permissions.</p> <p>The info panel contains basic information from the Assessment record.</p> |

| List View | Default View | Retailer View | Supplier View | Summary |
|-------------------------|--------------|---------------|---------------|--|
| Assessments by Type | No | Yes | No | <p>A list of assessments categorized by Technologist, grouped by Type.</p> <p>Provides a means of locating assessments by type (the name of the associated template), and by the technologist allocated to the site.</p> <p>The filter tile can be used to only show those that have been completed.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Assessment records by users with the necessary permissions. Includes an option to mass generate future assessments, and the facility for exporting the full Assessment record contents to a data file.</p> <p>The info panel contains basic information from the Assessment record.</p> |
| Assessments by Supplier | No | Yes | No | <p>A list of assessments categorized by Site, grouped by Supplier.</p> <p>Provides a means of locating assessments by supplier and site.</p> <p>The filter tile can be used to show those at a specific status.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Assessment records by users with the necessary permissions. Includes an option to mass generate future assessments, and the facility for exporting the full Assessment record contents to a data file.</p> <p>The info panel contains basic information from the Assessment record.</p> |
| Alerts | | | | |
| Alerts by Status | Yes | Yes | No | <p>A list of alerts categorized by Status.</p> <p>The filter tiles can be used to show those that are urgent, have their responses blocked, or require acknowledgment.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Alert records by users with the necessary permissions.</p> <p>The info panel contains basic information from the Alert record.</p> |
| Alerts by Author | No | Yes | No | <p>A list of alerts categorized by Author.</p> <p>Provides a means of locating alerts by the user who created them.</p> <p>The filter tiles can be used to show those at a specific status, and those that are urgent, have their responses blocked, or require acknowledgment.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Alert records by users with the necessary permissions.</p> <p>The info panel contains basic information from the Alert record.</p> |
| Alert Responses | | | | |

| List View | Default View | Retailer View | Supplier View | Summary |
|--------------------------|--------------|---------------|---------------|---|
| Alert Responses | Yes | Yes | Yes | <p>A list of alert responses categorized by Date.</p> <p>Provides a means of locating alert responses by their response date.</p> <p>The filter tiles can be used to show those at a specific status or are urgent.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Alert Response records by users with the necessary permissions.</p> <p>The info panel contains basic information from the Alert Response record.</p> |
| Archived Alert Responses | No | Yes | Yes | <p>A list of archived alert responses categorized by Date.</p> <p>Provides a means of locating alert responses that have been archived, by response date.</p> <p>The filter tiles can be used to show those that were urgent or just those that were responded to.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Alert Response records by users with the necessary permissions.</p> <p>The info panel contains basic information from the Alert Response record.</p> |

Library

| List View | Default View | Retailer View | Supplier View | Summary |
|--------------------------------------|--------------|---------------|---------------|--|
| Document Library | | | | |
| Documents (Administrator Default) | Yes | Yes | No | <p>The retailer administrator's view of documents grouped within Folders. A document may appear in more than one folder.</p> <p>The filter chips can be used to locate those at a specific status. The filter tiles can be used to locate those that you have yet to read or accept, those that are mandatory, and whether visible to external (supplier) and/or internal (retailer) users.</p> <p>The folder actions include options to create, edit, and delete folders.</p> <p>The document actions include the standard set of options for the maintenance of Documents. Also includes options to assign the documents to folders, archive documents, and to view the readership and acceptance logs.</p> <p>The info panel contains basic information from the Document and its parent Folder, in separate tabs.</p> |

| List View | Default View | Retailer View | Supplier View | Summary |
|--------------------------------------|--------------|---------------|---------------|--|
| Documents (Retailer User Default) | Yes | Yes | No | <p>The retailer user's view of documents grouped within Folders. A document may appear in more than one folder.</p> <p>The filter chips can be used to locate those at a specific status. The filter tiles can be used to locate those that you have yet to read or accept, and those that are mandatory.</p> <p>The actions include options to mark the document as read or accepted, where required, and to view the readership and acceptance logs.</p> <p>The info panel contains basic information from the Document and its parent Folder, in separate tabs.</p> |
| Documents (Supplier User Default) | Yes | No | Yes | <p>The supplier user's view of documents grouped within Folders. A document may appear in more than one folder.</p> <p>The filter chips can be used to locate those at a specific status. The filter tiles can be used to locate those that you have yet to read or accept, and those that are mandatory.</p> <p>The actions include options to mark the document as read or accepted, where required.</p> <p>The info panel contains basic information from the Document and its parent Folder, in separate tabs.</p> |

Process

| List View | Default View | Retailer View | Supplier View | Summary |
|-----------------------------------|--------------|---------------|---------------|--|
| Processes | | | | |
| Processes | Yes | Yes | Yes | <p>A list of processes categorized by Status.</p> <p>The filter tiles can be used to show those at a specific status, those that are overdue, or those that you are responsible for, owner of, or associated to.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Process records by users with the necessary permissions. Includes the facility for changing the status and scheduling one or more processes. Also includes the facility for running the Brief Extract data export, and for creating new processes by importing a data file.</p> <p>The info panel contains basic information from the Process record.</p> |
| Processes & Activities | | | | |

| List View | Default View | Retailer View | Supplier View | Summary |
|---------------------------------------|--------------|---------------|---------------|--|
| Processes & Activities | Yes | Yes | Yes | <p>A list of activities grouped by their parent Process. Provides a means of accessing activities and their processes, excluding those that are complete or cancelled.</p> <p>The filter tiles can be used to show just end processes, those at a specific status, or those that you are responsible for, owner of, or associated to.</p> <p>The process actions include options to view, create, copy, and delete processes. The New Parent Process option creates a new parent process; the Add Sub Process option creates a new child process within the selected parent.</p> <p>The activity actions include the standard set of options for the maintenance of Activities. Includes the facility for changing the status. Also includes the facility for running the Brief Extract data export.</p> <p>The info panel contains basic information from the Activity and its parent Process, in separate tabs.</p> |
| All Processes & Activities | | | | |
| All Processes & Activities | Yes | Yes | No | <p>A list of all activities grouped by their parent Process. Provides retailer Process Administrator and Process Manager users with a means of accessing all activities and their processes, including those that are complete or canceled.</p> <p>The filter tiles can be used to show just end processes, those at a specific status, or those that you are responsible for, owner of, or associated to.</p> <p>The process actions include options to view, create, copy, and delete processes. The New Parent Process option creates a new parent process; the Add Sub Process option creates a new child process within the selected parent.</p> <p>The activity actions include the standard set of options for the maintenance of Activities. Includes the facility for changing the status. Also includes the facility for running the Brief Extract data export.</p> <p>The info panel contains basic information from the Activity and its parent Process, in separate tabs.</p> |

Reports

| List View | Default View | Retailer View | Supplier View | Summary |
|-------------------------|--------------|---------------|---------------|--|
| Report Schedules | | | | |
| Report Schedules | Yes | Yes | No | <p>A list of scheduled reports grouped by Status.</p> <p>The filter tiles can be used to show those you have created or are associated to.</p> <p>The actions include the standard set of options for the maintenance of Report Schedules.</p> |

| List View | Default View | Retailer View | Supplier View | Summary |
|------------------------------|--------------|---------------|---------------|--|
| Report Outputs | | | | |
| Report Outputs | Yes | Yes | No | <p>A list of generated report outputs grouped by Folder.</p> <p>The filter tiles can be used to show those of a specific schedule type.</p> <p>The folder actions include options for creating, editing, and deleting folders.</p> <p>The top-level Report Results, Data Extracts, and Brief Extracts folders are a fixed set.</p> |
| KPI Results | | | | |
| KPI Results | Yes | Yes | No | <p>A list of generated KPI outputs grouped by Folder.</p> <p>The folder actions include the option to delete folders.</p> <p>The top-level KPI Results folders is fixed.</p> |
| Manage Workspace KPIs | | | | |
| Manage Workspace KPIs | Yes | Yes | No | <p>A list of workspace KPIs, available to the reports administrator.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Workspace KPI records.</p> |

Workspace

| List View | Default View | Retailer View | Supplier View | Summary |
|----------------------|--------------|---------------|---------------|---|
| Announcements | | | | |
| Announcements | Yes | Yes | Yes | <p>A list of announcements categorized by Category.</p> <p>Provides a means of locating news items and resources by announcement category.</p> <p>The filter tiles can be used to show those that are resources, are published, mandatory, archived, or those that you have yet to confirm as read.</p> <p>The standard set of actions are available for managing the view, and for the maintenance of Announcement records by users with the necessary permissions. Includes options to confirm you have read an announcement, and to view the readership log (where permitted).</p> <p>The info panel contains basic information from the Announcement record.</p> |
| Assignments | | | | |
| Assignments by Type | Yes | Yes | Yes | <p>A list of assignments categorized by Type.</p> <p>Provides a means of viewing all your assignments by notification type.</p> <p>The filter tiles can be used to show those that are urgent, overdue, or do not have a due date.</p> |

C

Appendix: Security UI

This appendix provides details of the administration of the JET UI user access permissions.

The 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 user's 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.

Security Model Overview

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.

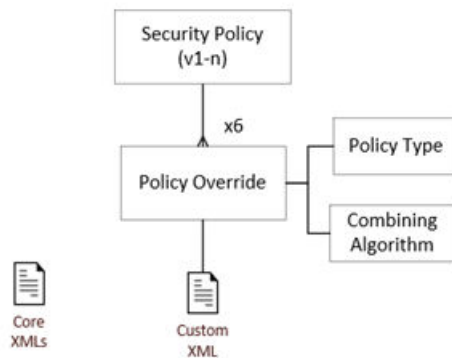
A predefined set of **combining algorithms** determine how the policies are applied and whether the rule is to permit or deny access:

- 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 Security Policy comprises a set of Policy Override records per Policy Type (so up to six 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.



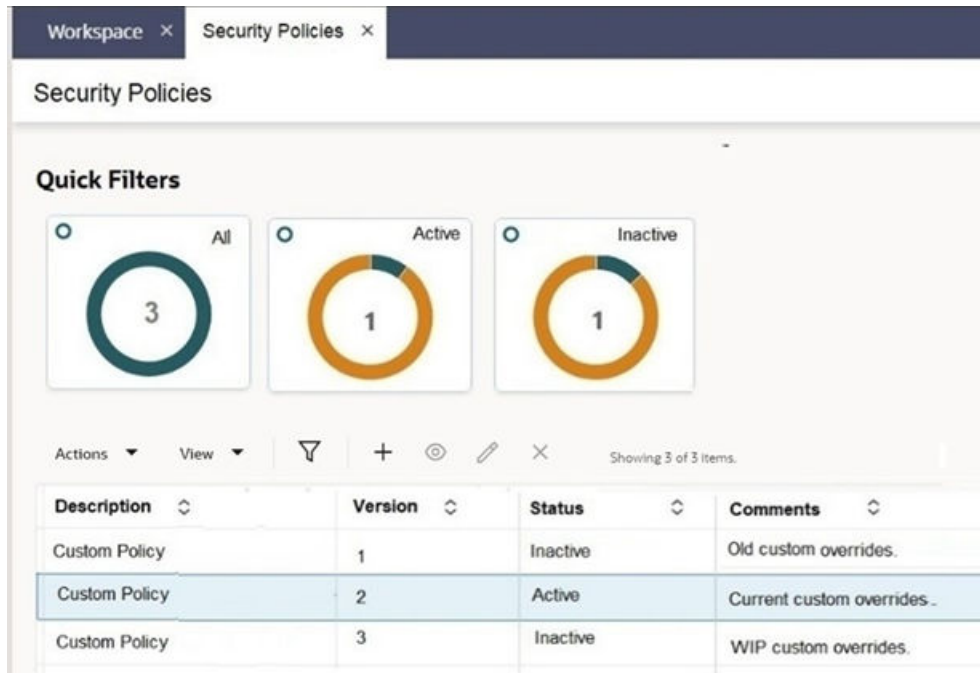
Security Policies Administration

The system-delivered core rules may be overridden or extended by client administrators using the new Security Policies maintenance facility.

By default, the option is available to users with the ORACLE AUTHORIZED ADMINISTRATOR authority profile. This is one of the rules that can be overridden/ supplemented in the security policy overrides, so access may therefore be granted to other authority profiles if required. It opens the Security Policies list view.

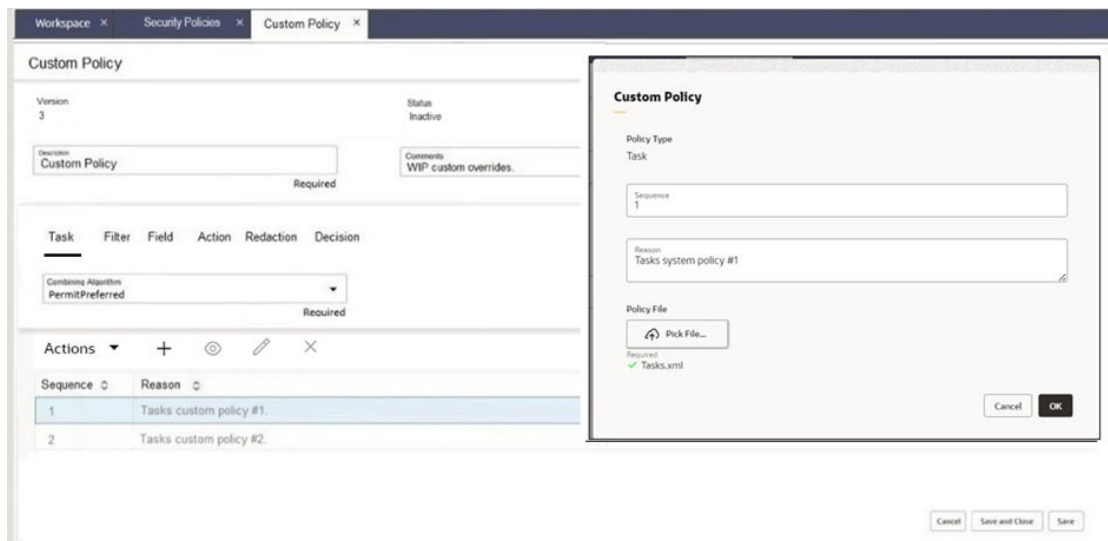
Security Policies List View

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.



Security Policy Form

The Security Policy form comprises:



- A set of fields which represent the **Security Policy** record. Description and Comments are mandatory, non-translatable fields, defaulting to Custom Policy.
- A set of tabs which represent the fixed set of **Policy Types**: Task, Filter, Field, Action, Redaction, and Decision (an enumerated list of translatable system text literals).
- A **Combining Algorithm** mandatory selector containing the options available for the policy type.

The selections are taken from an enumerated list of translatable system text literals, which has a Boolean flag to indicate which are to be included in the picklist. The predefined set of options per Policy Type is as follows:

| Policy Type | Combining Algorithms |
|-----------------|---|
| Action Task | DenyPreferred LastMatch PermitPreferred |
| Field Presenter | LastMatch |
| Filter | CombineAnd CombineOr LastMatch |
| Redaction | AllMatch LastMatch |
| Decision | LastMatch |

- A **data grid** which contains the **Policy Override** records for the selected policy type tab. The rows are sorted in ascending Sequence order, representing the order in which they will be applied as rules.

The maintenance behavior includes the following:

- When creating a new Security Policy record, it must be saved before a Policy Override can be created.
- The Export/XML File option downloads the row's XML file.
- The **Policy Override** record is a container for the override policy rules XML file. The pane contains:
 - The **Policy Type** based on the which tab has been selected.
 - The **Sequence** the rules are to be applied. A mandatory integer (must be greater than zero). In order to allow for overrides to be inserted into an already populated record, the recommendation is to use sequence intervals such as 10, 20, 30 . . . , or 100, 200, 300 . . .
 - A **Reason** or purpose of the override. A mandatory non-translatable text field.
 - The **Policy File** upload/download of a single XML file.

The file may represent either a single rule as part of a *flat* structure, or a group of rules as part of a *hierarchical* structure. See [Additional Information](#) for further details.

Clicking OK validates that the mandatory fields are populated and that an XML file has been selected, the XML is well-formed, and the Policy Type within it matches that of the Policy Override record, before saving the Policy Override record.

Additional Information

For areas that are presented in the JET UI, user access is controlled by the new Security Policies subsystem. Any custom overrides to the core access rule, including any that have previously been applied using the ECHO Permissions spreadsheet, must be applied using the new method.

This section provides additional information on configuring custom Security Policy overrides.

Typical Override Usage

Some examples of custom Permissions overrides that are typically applied by clients are listed here.

Audits & Visits

- Remove permissions rules, to prevent Restricted Auditor users from being able to complete Audits.
- Add permissions, to:
 - Make the Audit Due Date field and Audit Issue Due Date read-only to supplier users.
 - Enable supplier users to complete and unlock Checklists.

Suppliers and Sites

- Add permissions, to:
 - Hide the Details/Other field sets in Supplier and Site records from supplier users.
 - Hide the Change History and Custom Fields tabs in Supplier and Site records from supplier users.
 - Hide the Sites and Linked Sites tabs on the Supplier and Site records from Restricted Auditor users.
 - Make the Custom Fields tab in Site records read-only to supplier users.
 - Make the Name and Address fields in Supplier and Site records read-only to supplier users.

Policy File Examples

This section provides some examples of the core System Policy XML files and custom override XML files.

Core System Policy Files

The core system policy rules are dynamically applied to the system in a way that they are automatically updated as part of a release upgrade whenever the release includes a permissions update.

The current set of core system policy rules can be downloaded as a set of XML files within a ZIP file (*System_Policy.zip*), for reference when building custom overrides.

The root folder of the compressed file contains:

- The XSD schema (*ui-policies.xsd*) which provides the full description of the structure of the policy rules XML files.
- A set of Policy Set XML files (for example *Tasks-PolicySet.xml*) which define the policy rules XML files used for each of the policy types: Tasks, Filters, Presenters (Fields), Actions, Redactions, and Decisions.
- Folders which group together the policy rules XML files by logical area or application module (for example the *supplier* folder may contain the *supplier-filters-policy.xml* and *supplier-tasks-policy.xml* files).

In addition to folders for the application modules (admin, company, library, project, reports, and supplier), the following folders are included:

- area - rules relating to Enhanced Access Control (EAC) permissions.
- enum - rules relating to enumerated picklist values (such as User Types or News Item Priorities).
- glossary - rules relating to individual glossaries (such as Countries or Contact Roles).
- home - rules relating to the Home page contents (such as Announcements and Workspace KPIs).
- manage-columns – rules relating to the presentation of columns in list views based on user type.
- scoring – rules relating to Supplier Evaluation, dashboards, and scoring.

Some simple examples of XML policy rules for the Admin area are as follows:

admin / admin-tasks-policy.xml

Permit Configuration Editor, Oracle Authorized Administrator, and Scorecard Administrator users access to the configuration of Assessments/Scorecards.

```
<Task ruleId="scorecardAdmin">
  <TaskId>Scorecard Questions</TaskId>
  <TaskId>Scorecard Templates</TaskId>
  <TaskId>Scorecard Status</TaskId>
  <Result>PERMIT</Result>
  <ActiveAuthorityProfile>
    <Profile>CONFIGURATION EDITOR</Profile>
    <Profile>ORACLE AUTHORIZED ADMINISTRATOR</Profile>
    <Profile>SCORECARD ADMINISTRATOR</Profile>
  </ActiveAuthorityProfile>
</Task>
```

Permit Oracle Authorized Administrator users access to the configuration of Security Policies.

```
<Task ruleId="securityPolicies">
  <TaskId>securityPolicies</TaskId>
  <Result>PERMIT</Result>
  <ActiveAuthorityProfile>
    <Profile>ORACLE AUTHORIZED ADMINISTRATOR</Profile>
  </ActiveAuthorityProfile>
</Task>
```

Permit News Administrator, Oracle Authorized Administrator, Configuration Editor, and Integration Administrator users access to the configuration of the Photo Album.

```
<Task ruleId="albumAdmin">
  <TaskId>albumAdmin</TaskId>
  <Result>PERMIT</Result>
  <ActiveAuthorityProfile>
    <Profile>NEWS ADMINISTRATOR</Profile>
    <Profile>ORACLE AUTHORIZED ADMINISTRATOR</Profile>
    <Profile>CONFIGURATION EDITOR</Profile>
    <Profile>INTEGRATION ADMINISTRATOR</Profile>
  </ActiveAuthorityProfile>
</Task>
```


Permit Oracle Authorized Administrator and Configuration Editor users access to the custom list view migration facility.

```
<Task ruleId="userViewMigrationLog">
  <TaskId>userViewMigrationLog</TaskId>
  <Result>PERMIT</Result>
  <ActiveAuthorityProfile>
    <Profile>ORACLE AUTHORIZED ADMINISTRATOR</Profile>
    <Profile>CONFIGURATION EDITOR</Profile>
  </ActiveAuthorityProfile>
</Task>
```

admin / admin-actions-policy.xml

Permit Oracle Authorized Administrator users read, create, update, and delete access to Policy Overrides.

```
<Action ruleId="PolicyOverridePolicy">
  <Channel>PolicyOverridePolicy</Channel>
  <Action>createPolicyOverridePolicy</Action>
  <Action>read</Action>
  <Action>create</Action>
  <Action>update</Action>
  <Action>delete</Action>
  <ActiveAuthorityProfile>
    <Profile>ORACLE AUTHORIZED ADMINISTRATOR</Profile>
  </ActiveAuthorityProfile>
  <Result>PERMIT</Result>
</Action>
```

Override System Policy Files

Custom permissions are applied by uploading rules that override the core system policy rules (as described in [Security Policies Administration](#)).

Override rules may be defined in either individual XML files per rule and/or groups of rules within a file (per policy type).

Some simple examples of typical XML override rules are as follows:

admin-tasks-override-photo.xml

Deny News Administrator users access to the configuration of the Photo Album. Policy Type is Task, Combining Algorithm is DenyPreferred.

```
<Policy type="Task" combiningAlgorithm="DENY_PREFERRED"
  xmlns="http://retail.oracle.com/brand-compliance/ui-policy"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://retail.oracle.com/brand-compliance/ui-policy ../ui-
policies.xsd">
  <Task ruleId="albumAdmin">
    <TaskId>albumAdmin</TaskId>
    <Result>DENY</Result>
    <ActiveAuthorityProfile>
      <Profile>NEWS ADMINISTRATOR</Profile>
    </ActiveAuthorityProfile>
  </Task>
</Policy>
```

admin-tasks-override-migration.xml

Also permit News Administrator users access to the custom list view migration facility. Policy Type is Task, Combining Algorithm is PermitPreferred.

```
<Policy type="Task" combiningAlgorithm="PERMIT_PREFERRED"
  xmlns="http://retail.oracle.com/brand-compliance/ui-policy"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://retail.oracle.com/brand-compliance/ui-
policy ../ui-policies.xsd">
  <!-- User View Migration Admin -->
  <Task ruleId="userViewMigrationLog">
    <TaskId>userViewMigrationLog</TaskId>
    <Result>PERMIT</Result>
    <ActiveAuthorityProfile>
      <Profile>NEWS ADMINISTRATOR</Profile>
    </ActiveAuthorityProfile>
  </Task>
</Policy>
```

XML File Structure

File Naming

The core system policy rules have a naming convention for the XML files, for example: supplier-tasks-policy.xml.

The custom override XML files do not need to follow a naming convention, however the client may choose to utilize their own naming convention.

File Structure

The XSD schema provides the full description of what can be placed into the Policy Override XMLs and may be leveraged by some XML editors for auto-completion and validation. The latest XSD can be found within the core System Policies ZIP file (*System_Policy.zip*), which can be downloaded from the list view.

The following is an example of a portion of the XSD:

```
<xs:element name="ActiveAuthorityProfile" type="activeAuthorityProfileType">
  <xs:annotation>
    <xs:documentation>
      Matches on request users active authority profiles
    </xs:documentation>
  </xs:annotation>
</xs:element>

<xs:element name="UserMode" type="userModeType">
  <xs:annotation>
    <xs:documentation>
      Matches on request users mode - NORMAL or RESTRICTED
    </xs:documentation>
  </xs:annotation>
</xs:element>

<xs:element name="ArtworkEnabled" type="markerElementType">
  <xs:annotation>
    <xs:documentation>
      Matches on whether artwork is enabled in the system
    </xs:documentation>
  </xs:annotation>
</xs:element>
```

```
<xs:element name="UserTypes" type="userTypesType">
  <xs:annotation>
    <xs:documentation>
      Matches on request users type - RETAILER, SUPPLIER, SITE or ALLSITE
    </xs:documentation>
  </xs:annotation>
</xs:element>

<xs:complexType name="activeAuthorityProfileType">
  <xs:annotation>
    <xs:documentation>
      The authority profile codes to match on
    </xs:documentation>
  </xs:annotation>
  <xs:sequence>
    <xs:element name="Profile" type="xs:string" maxOccurs="unbounded"/>
  </xs:sequence>
</xs:complexType>

<xs:simpleType name="markerElementType">
  <xs:annotation>
    <xs:documentation>
      Matchers that do not take options or settings use this type
    </xs:documentation>
  </xs:annotation>
  <xs:restriction base="xs:string">
    <xs:maxLength value="0"/>
  </xs:restriction>
</xs:simpleType>

<xs:complexType name="userTypesType">
  <xs:annotation>
    <xs:documentation>
      The user types to match on
    </xs:documentation>
  </xs:annotation>
  <xs:sequence>
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      <xs:simpleType>
        <xs:restriction base="xs:string">
          <xs:enumeration value="RETAILER" />
          <xs:enumeration value="SUPPLIER" />
          <xs:enumeration value="SITE" />
          <xs:enumeration value="ALLSITE" />
        </xs:restriction>
      </xs:simpleType>
    </xs:element>
  </xs:sequence>
</xs:complexType>
```