Oracle® Retail Supplier Evaluation Cloud Service

Product User Guide

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Oracle Retail Supplier Evaluation Cloud Service Product User Guide,

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Oracle Retail Supplier Evaluation Cloud Service Product User Guide

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Preface

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

Audience

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

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Related Documents

For more information, see the following documents in the Oracle Retail Supplier Evaluation Cloud Service documentation set:

- *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Implementation Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Release Readiness Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Security Guide*
- *Oracle Retail Supplier Evaluation Cloud Service User Guide*
- *Oracle Retail Supplier Evaluation Cloud Service Workspace User Guide*

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

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

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Oracle Retail product documentation is available on the following web site:

`https://docs.oracle.com/en/industries/retail/index.html`

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

Conventions

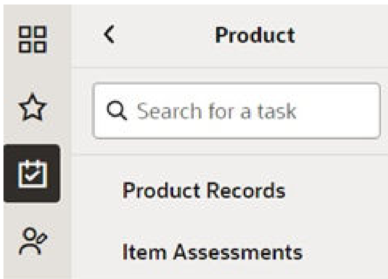
The following text conventions are used in this document:

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

1 Introduction

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

Figure 1-1   Product Drop-Down List



For information on the choices in the drop-down list, see the chapter shown in Table 1-1.

Table 1-1   Description of Product Drop-Down Choices

Option	Description	Chapter
Product Records	Maintenance of the product records.	Product Record
Item Assessments	Maintenance of item assessments.	Item Assesments

Getting Started

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

2 Product Record

The Product Record is a container for all information about a single Product (SKU), for a particular supplier/product combination.

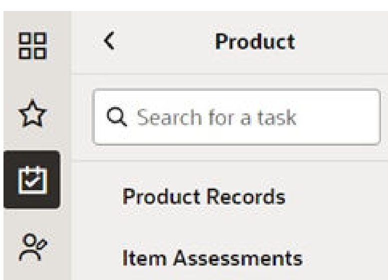
Separate Product Records are created if the same product is supplied by multiple suppliers, either at once or at different stages in the life of the product. There is one Product Record per supplier/product combination.

The Product Record holds the following information:

- Basic identifying information: Name, Quantity, Product Number, Brand, and so on.
- Details of the Supplier and Primary Sites at which the Product is currently manufactured.
- The Retailer contacts who are responsible for the product.
- Any product coding cross-references for identifying the item in other systems.
- Links to Processes and Assessments.
- Attachments, such as, Artwork and Quality Assurance (QA) information.
- Links to other Product Records for the same product from other Suppliers.

To work with Product Records, select Product Records from the Product menu.

Figure 2-1 Product Options List



The Product Records tab opens, showing a list of all the Product Records on the system, grouped by the Retailer Technologist responsible for the Product.

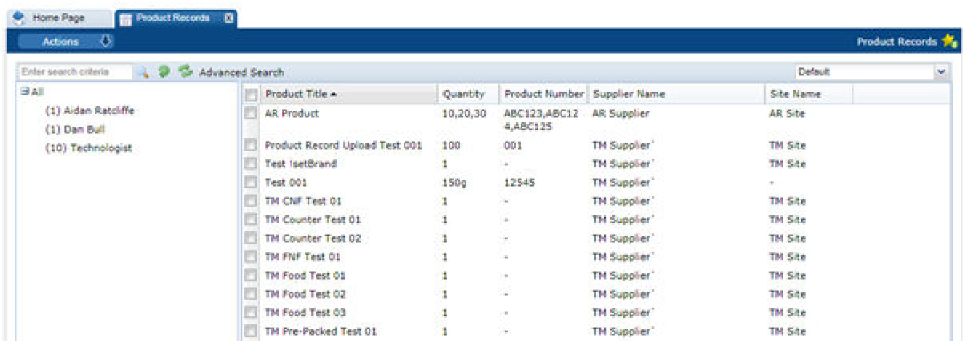
Note:

A supplier user's ability to create and edit the Product Record can be controlled using system parameters and permissions configuration.

Permissions rules can be configured to prevent supplier users from creating new Product Records, and to control whether they may edit individual fields within the record.

For details of the system parameters and how the Permissions spreadsheet can be configured, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*.

Figure 2-2   Product Record Page

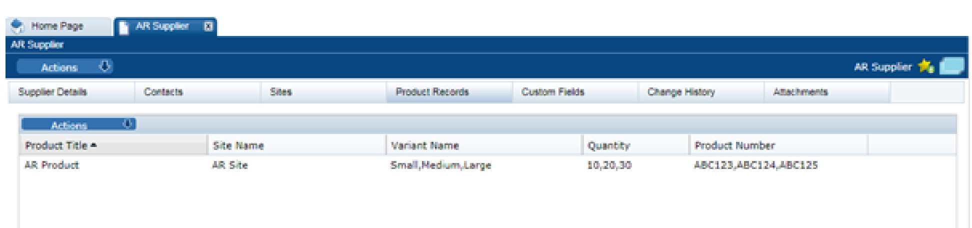


The following columns are shown:

- Product Title
- Quantity
- Product Number
- Supplier Name
- Site Name

Product Records are also listed in the Product Record page within the Supplier Record. The listed records are just the Product Records that apply to that specific Supplier.

Figure 2-3   Product Record within Supplier Record

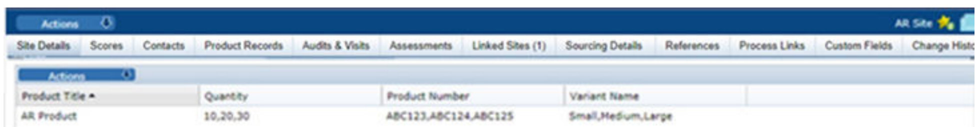


Here, the following columns are shown:

- Product Title
- Site Name
- Variant Name
- Quantity
- Product Number

Product Records are also listed in the Product Record page within the Site Record. The listed records are just the Product Records that apply to that Site.

Figure 2-4 Product Record within Site Record



Here, the following columns are shown:

- Product Title
- Quantity
- Product Number
- Variant Name

To open the Product Record in a new tab, double click the entry in the list.

A new Product Record is created from any of these list views by selecting New Product Record from the Actions menu.

A new Product Record may be created by the Supplier or the Retailer. A new tab opens with a blank Product Record that has several pages listed across the top.

Figure 2-5 New Product Record page

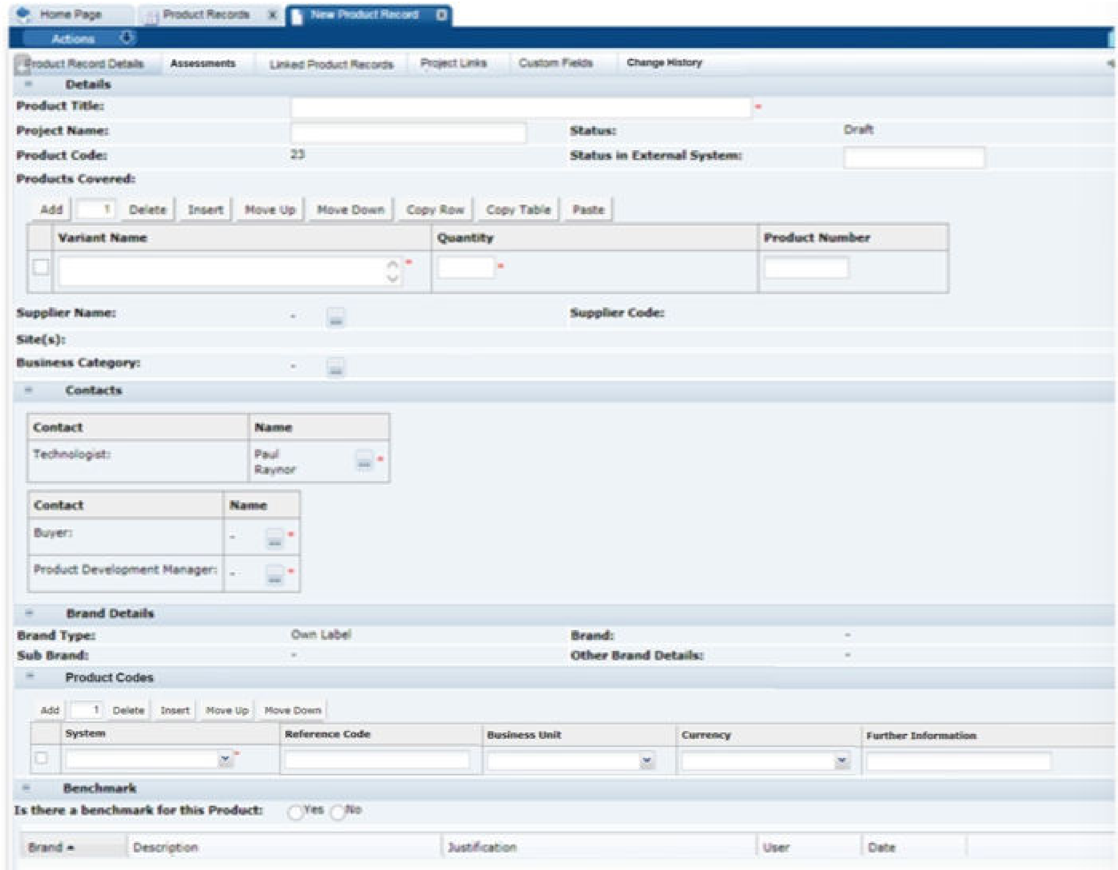


Table 2-1 describes the fields in a product record.

Table 2-1 Product Record Fields

Field	Description
Product Title	The Product Title is to be sufficiently precise to enable the Product to be identified by both the Supplier and other Retailer users, and to distinguish it from other similarly-named products. This is not necessarily the on-pack Product Name.
Process Name	Non-mandatory, but can be used to provide the Development process name, for additional ease of identification.
Status	This is the status of the record. May be any of the following: • Draft: Newly created Product Record. The Supplier has not yet been allocated. • Active: Automatically set once the Supplier has been allocated and the record saved. The Product Record is now available to the Supplier. • Archived: Set for Products which are no longer being produced.
Product Code	Number automatically given by the system.
Status in External System	May be used to cross reference the product in a Retailer's other product management system, if any.

Table 2-1 (Cont.) Product Record Fields

Field	Description
Products Covered	• Variant Name A Product Record may cover a number of variants, such as, different sizes of the same product. This field is used to describe the variant. • Quantity The quantity of the item being sold, such as, 200g or 6 pack. • Product Number A unique number usually used by the business. • Alt. Product Number An optional alternative identifier for the product. • Division An optional additional categorization for the product. The portal may be configured to include the Alt. Product Number and Division fields. The alternative product number can be used to hold the product's identifier such as a GTIN code; Division is selected from a glossary of categorizations. If the Alt. Product No. and Division fields are used, the portal may be further configured to use the fields to control the updating of the Retailer Product Number. This would typically be used where the Retailer Product Number holds the product's identifier from an external system, such as an Article Number.
Supplier Name/Supplier Code	The company or agent that supplies this Product to the Retailer. Only one Supplier may be selected per Product Record. Multi-supplier Products have separate Product Records per product/supplier combination. The Supplier Code is automatically populated when the Supplier is selected.
Sites	The Site where the product is manufactured and packed. If a product is made at multiple sites, all the sites may be selected and listed here.
Business Category	This is the commercial category in which the product is sold.
Contacts	The Retailer contacts who are responsible for this product.
Brand Details	The brand type, brand, and sub brands, and any other brand details.
Product Codes	This table can be used to build a list of the product’s references in other systems. It is enabled by a system parameter. If adding a reference, the following details should be completed: • System: Select the name of the external system. • Business Unit: Optionally select a Business Unit. • Reference Code: Optionally select a Reference Code. • Currency: Optionally select a Currency. • Further Information: Enter any supporting information.

Table 2-1 (Cont.) Product Record Fields

Field	Description
Benchmark	Enables a history of the benchmark competitive products to be recorded. The following details should be completed: Is there a Benchmark for this product?: Yes or No Brand: Select the Brand Name. Description: Indicates the name of the Competitive product and any other descriptive details. Justification: Enter the reason why this Brand or product is chosen as the benchmark. (Must also be completed if there is no benchmark; enter the reason why there is no benchmark.) Alternative benchmark products and details may be added if the benchmark changes by clicking **Add Benchmark**. The details may be completed by the Retailer user only, unless the Supplier Can Edit Benchmark system parameter has been set to also allow the Supplier user to complete the Benchmark Details.

Linked Product Records

This page of the Product Record is only seen by the Retailer users. It shows a list of other Product Records where the Product Number within the Products Covered Table is the same as in this record. These Product Records may be opened in another tab by double clicking on a particular entry.

Assessments

This page shows a list of the Item Assessments linked to the Product Record. The list shows the type of assessment, its due date, details of its due date, and any score. The Assessments can be opened from the list by double clicking on a particular row. See the Item Assessments section for further details.

Process Links

This page shows a list where the product has been linked to a Process. For more details, see the *Oracle Retail Supplier Evaluation Cloud Service Process User Guide*.

The page shows the following:

- Process Title
- Activity Name
- Process Status
- Date Link Created

Custom Fields

The system provides a facility for a Retailer to set up a number of customized fields within the Product Record. They appear on this page. If no customized fields are set up, this page is not shown.

Change History

This shows the change history for the Product Record, including the dates of any status changes.

Attachments

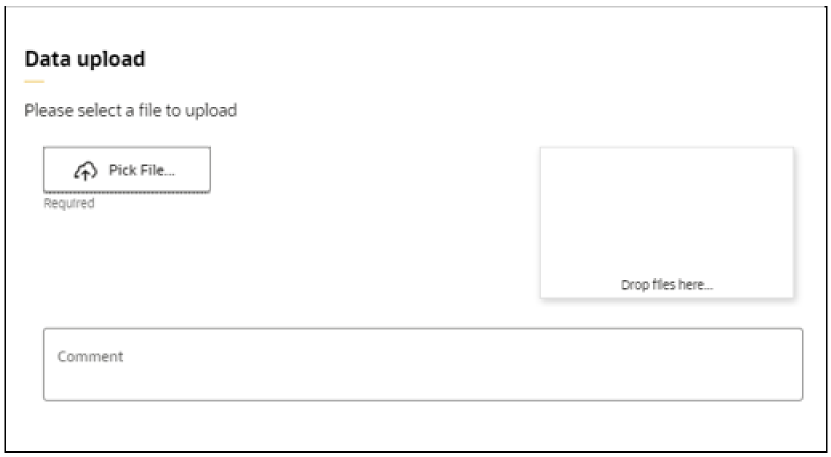
As with most records within the system, there is a page to attach any relevant documents to the Product record, such as Process charts, Nutrition analysis, Artwork files, and so on.

Importing Products Codes

The Product Codes table can also be populated by uploading a data file. This option is only available from the new JET UI Product Record list views.

To import product codes:

1. Select the **Import/Product Reference Codes** action from a Product Record list view. The Data upload slide-out pane appears.



2. To locate the data file (.xlsx or .csv file) to import, click **Pick File...**
The file layout comprises the following columns:

Column	Contents	Notes
A	Product Code	Mandatory for the import to succeed and must match the code of a Product Record.
B	Product Title	Can be included for reference purposes but is ignored by the import.
C	System	Populates this column in the Product Codes table. Is mandatory for the import to succeed and must match a valid Code in the Product Integration Systems glossary.
D	Reference Code	Populates this column in the Product Codes table. Is mandatory for the import to succeed. Represents the MFCS item number.
E	Business Unit	Populates this column in the Product Codes table. Is optional but must match a valid Code in the Business Units glossary if populated.

Column	Contents	Notes
F	Currency	Populates this column in the Product Codes table. Is optional but must match a valid Code in the Currencies glossary if populated.
G	Further Information	Populates this column in the Product Codes table. Is optional.

> **Note:**
>
> Multiple rows can be present per Product Record, in order to populate multiple rows in the table.
>
> The import simply appends rows to the table; it does not update or clear any existing values in the table. An exception is where a combination of System and Reference Code already exists in the table; in order to prevent duplicate MFCS item numbers being added to the table, in this case the row is overwritten.

3. Set whether the file contains column headings as the first row, and optionally enter a Comment.
4. Click **Ok** to proceed. The Import Product Reference Codes batch job is submitted to process the file. You will receive an email notification when the import is complete, with details of any exceptions.

3

Item Assessments

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

Templates are available for creating assessments. For information on the templates, see the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide*.

Assessments can be created from within the Product Record or from the Assessments Request wizard.

To work with assessments, select the Assessments option from the Product drop-down list.

The Item Assessments tab opens. The following information is displayed for each assessment:

- Due Date
- Year
- Period
- Supplier Name
- Supplier Code
- Site Name
- Site Code
- Assessment Type
- Product Title
- Status
- Product Code
- Product Number
- Person Responsible
- Evaluation Type
- Completed On
- Assessment Score
- Further Comments

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

Figure 3-1 Assessment Details Page

The following table describes the fields on this page.

Field	Description
Site Details	
Supplier Name	Name of the supplier.
Supplier Code	Code assigned to the supplier.
Site Name	Name of the site.
Site Code	Code assigned to the site.
Assessment Details	
Assessment Type	Name of the template used to create the assessment.
Code	The assessment’s unique reference id.
Status	Status of the assessment: • Future • In progress • Awaiting approval • Awaiting amendment • Complete
Assessment Level	Identifies as being an assessment for an Item (product).
Evaluation Type	If the assessment is aligned with a specific evaluation type.
Product Title	The name of the product the assessment relates to.
Product Code	The unique reference id of the related Product Record.
Product Number	The product’s retailer reference number.
Draft Product Title	If the assessment is not yet linked to a Product Record it will have a draft product title.
Due Date	Date the assessment is due to be completed.
Year	Year that corresponds to the due date based on the system calendar.
Period	Period that corresponds to the due date based on the system calendar.
Week	Week that corresponds to the due date based on the system calendar.

Field	Description
Quarter Start Date	Quarter start date that corresponds to the due date based on the system calendar.
Quarter End Date	Quarter end date that corresponds to the due date based on the system calendar.
Extra Assessment	Set if this assessment was scheduled based on a frequency override.
Frequency	Frequency for scheduling this assessment.
Person Responsible	Name of the technologist responsible for the assessment.
Business Category	Business categories applicable to this assessment.
Auto generation of this assessment	If the Status field is Future, select whether to automatically reschedule this assessment when it is completed or becomes due.
Completed by	Name of the user who submitted or completed the assessment.
Completed on	Date the assessment was submitted or completed.
Assessment Request	
Request Reason	A table of request reason folder that the assessment appears within, as a result of being created using the Assessments Request wizard.
Due Date	Date the assessment is due to be completed for the request reason folder.
Selection Status	The current status of the request reason folder.
Accredited Assessment Integration	
Integration Type	If the assessment is eligible for integration with a third party for sourcing of data, the integration type will be Supplier Owned or Retailer Owned - depending in whether the supplier or retailer manages its progress with the third party.
Accredited Body	If the assessment is integrated, the name of the nominated third party.
Sub Status	If the assessment is integrated, the current status of the integration. The workflow stages are Issued, Pending, Retrieved, Responded.

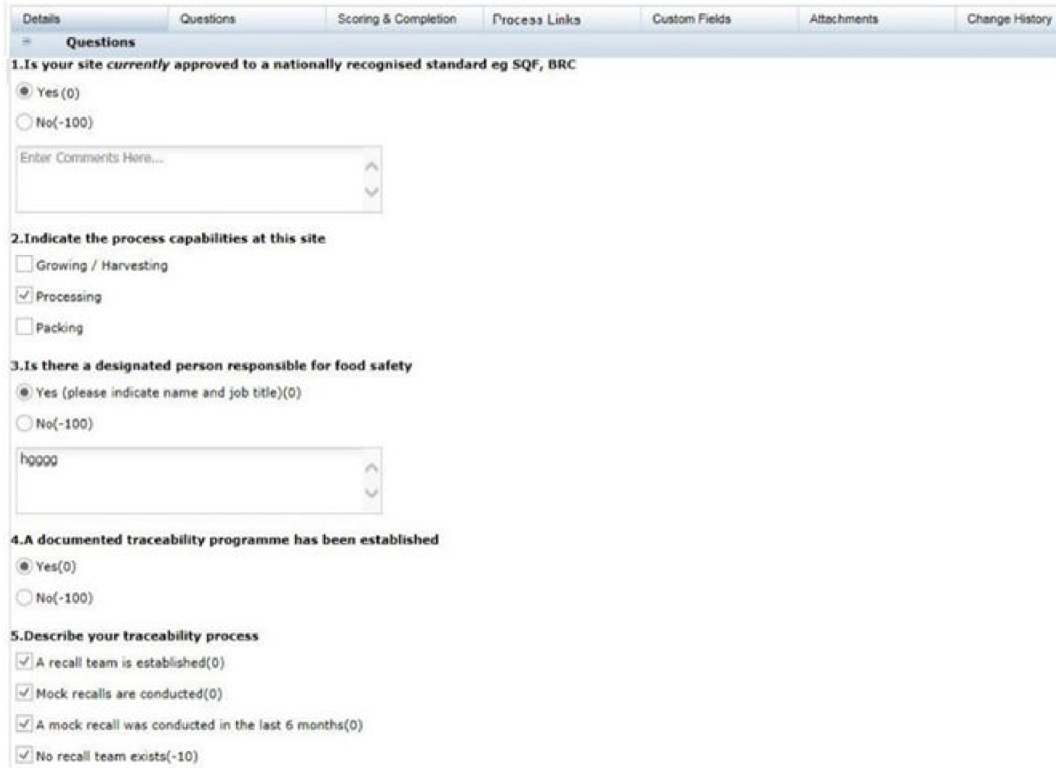
The following tabs are available:

- Details
- Questions
- Scoring & Completion
- Process Links
- Custom Fields
- Attachments
- Change History

Questions Tab

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

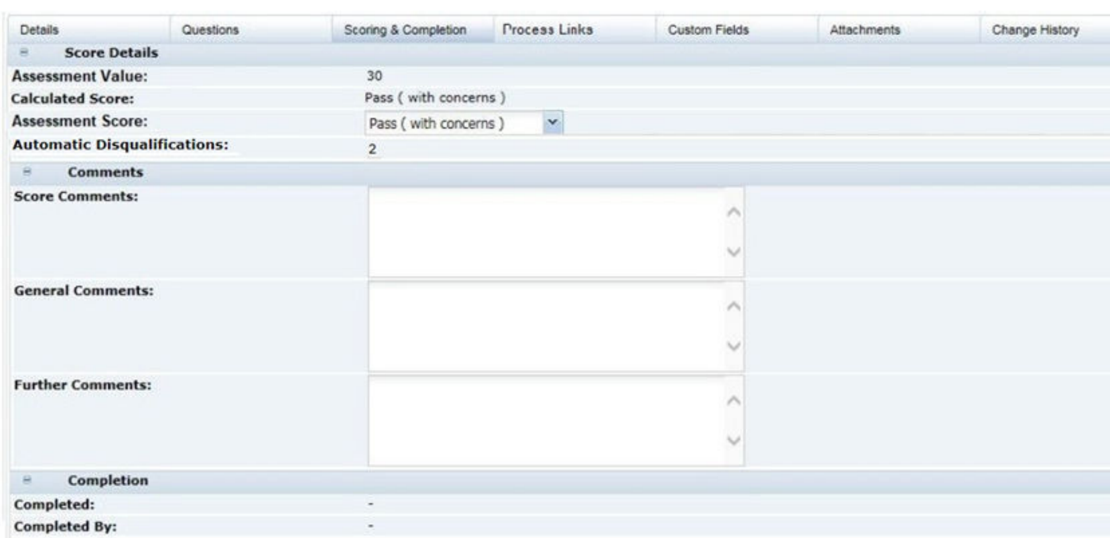
Figure 3-2 Assessment Questions Page



Scoring & Completion Tab

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

Figure 3-3 Scoring & Completion Page



Process Links Tab

This page shows a list where the product has been linked to a Process. For more details, see the *Oracle Retail Supplier Evaluation Cloud Service Process User Guide*.

The page shows the following:

- Process Title
- Activity Name
- Process Status
- Date Link Created

Custom Fields Tab

The system provides a facility for a Retailer to set up a number of customized fields within the Product Record. They appear on this page. If no customized fields are set up, this page is not shown.

Change History Tab

This shows the change history for the Product Record, including the dates of any status changes.

Attachments Tab

As with most records within the system, there is a page to attach any relevant documents to the Product record, such as Process charts, Nutrition analysis, Artwork files, and so on.

Creating an Assessment

New assessments can be created within the Product Record or using the Assessment Request wizard.

Creating an Assessment from the Product Record

1. Open an active Product Record.
2. Select the New Assessment action. The Create Assessment dialog box appears.
3. From the drop-down lists, select a template. Set the due date and click **Ok**. The details of the new assessment, based on the template, appear.
4. Update the fields for the assessment and save the assessment.

Assessments Request Wizard

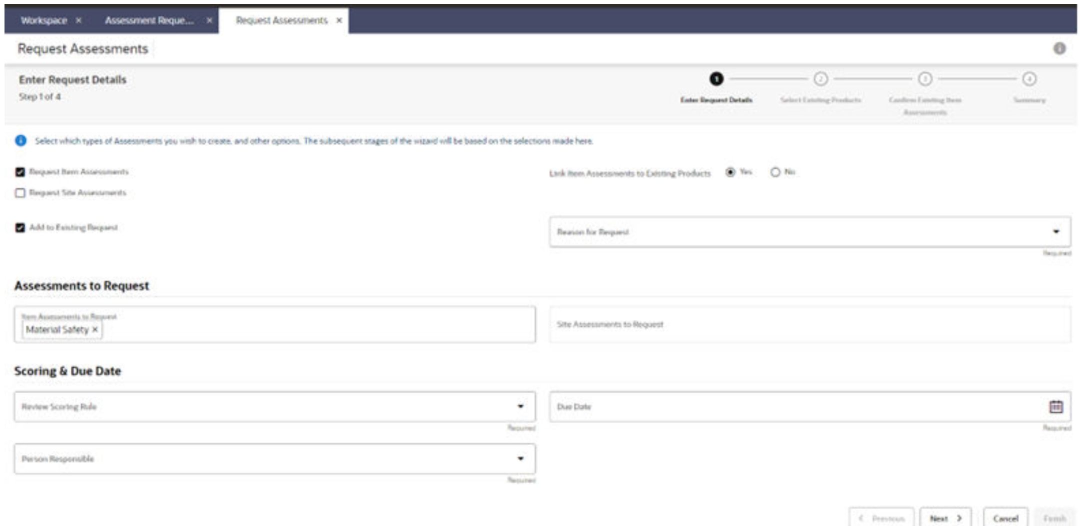
The Assessments Request wizard can be used to create multiple assessments through a single action. This is typically of use to create multiple instances of an assessment for comparing products from different suppliers as part of the supplier selection process. To aid that process, the assessments are assigned a *request reason* which groups them together in the Request & Compare list view where they can be reviewed and given a selection status.

This option is only available to retailer users with the Assessment Requester authority profile (it is not available to supplier users).

The wizard allows multiple Item Assessments and Site Assessments to be created simultaneously, through a series of steps:

1. Open the Assessments list view and Select the Request Assessments action. The wizard opens at step 1 (Enter Request Details).

Figure 3-4 Enter Request Details



2. Select whether creating Item and/or Site Assessments, and the types of assessments to be created.

   If creating Item Assessments, choose if the assessments are to be linked to existing Product Records.

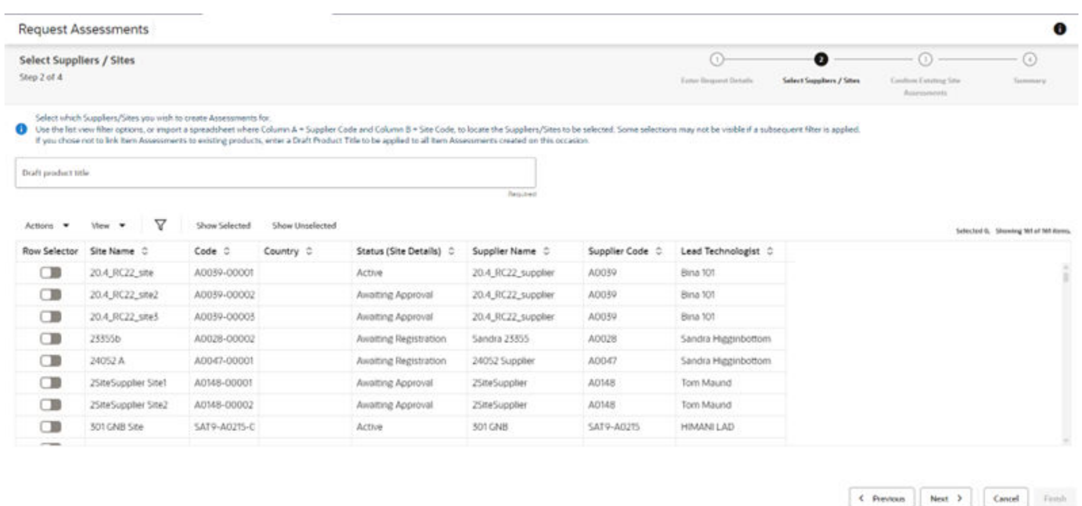
   Enter a unique Reason for Request to group the assessment together, otherwise choose to add them to an existing group.

   Assign the person to be responsible for the assessments and the due date to be applied.

   If scoring is to be used for comparison and selection purposes, select the Review Scoring rule.

3. Click **Next** to progress to the next step. If Site Assessments are being created, or if Item Assessments are being created which are not being linked to Product Records, this step will show a list of supplier sites.

Figure 3-5 Select Suppliers/Sites

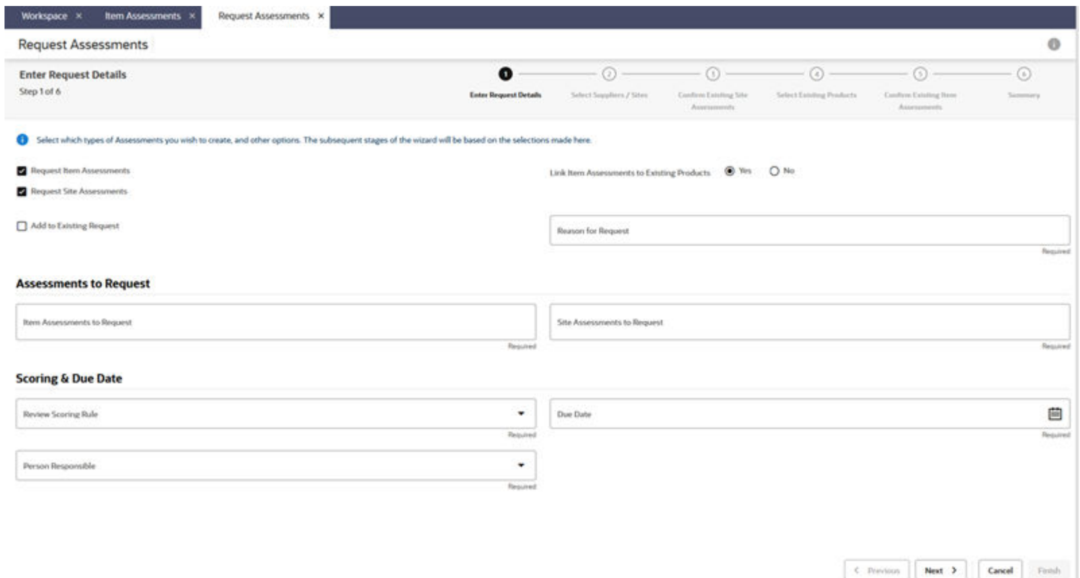


Select the sites to have assessments created for them.

If creating Item Assessments which are not linked to a Product Record, enter a Draft Product Title.

4. Click **Next** to progress to the next step. If Site Assessments are being created, and any of the sites selected in the previous step already have assessments of the type being created, they are listed here.

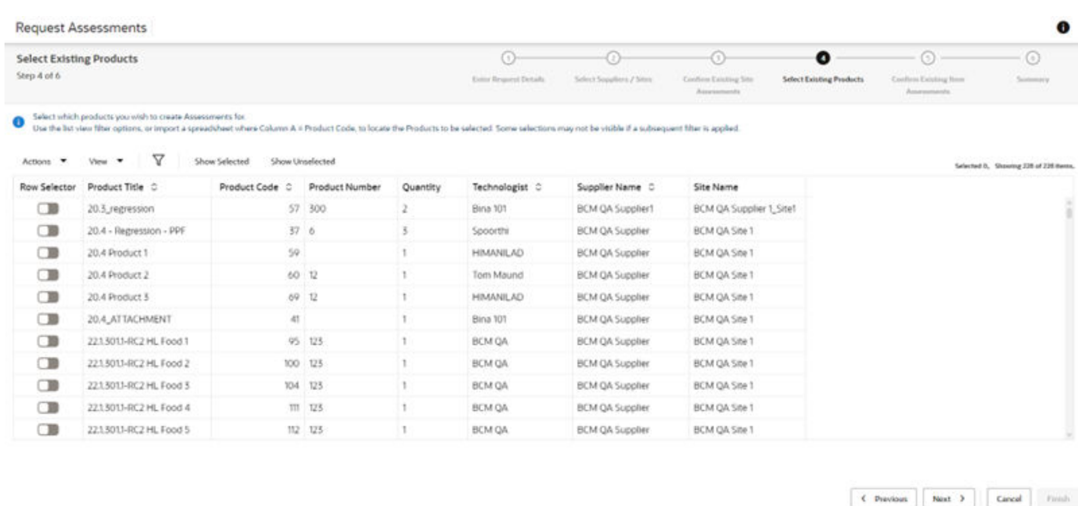
Figure 3-6 Confirm Existing Site Assessments



Select any existing assessments to be used. In this case new assessments will not be created for this combination of assessment type and site; otherwise new assessments will be created.

5. Click **Next** to progress to the next step. If Item Assessments are being created, and are being linked to existing Product Records, they are listed here.

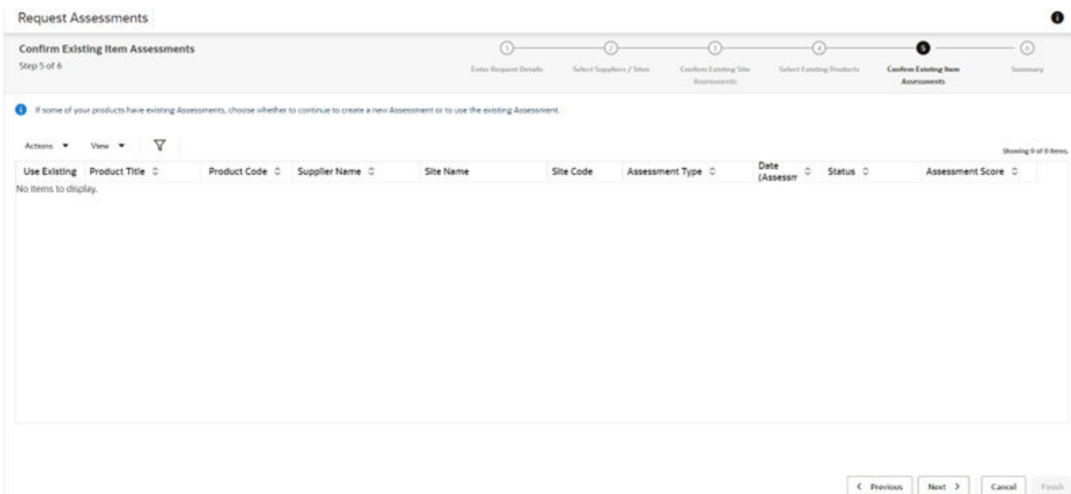
Figure 3-7 Select Existing Products



Select the products to have assessments created for them.

6. Click **Next** to progress to the next step. If Item Assessments are being created, and any of the products selected in the previous step already have assessments of the type being created, they are listed here.

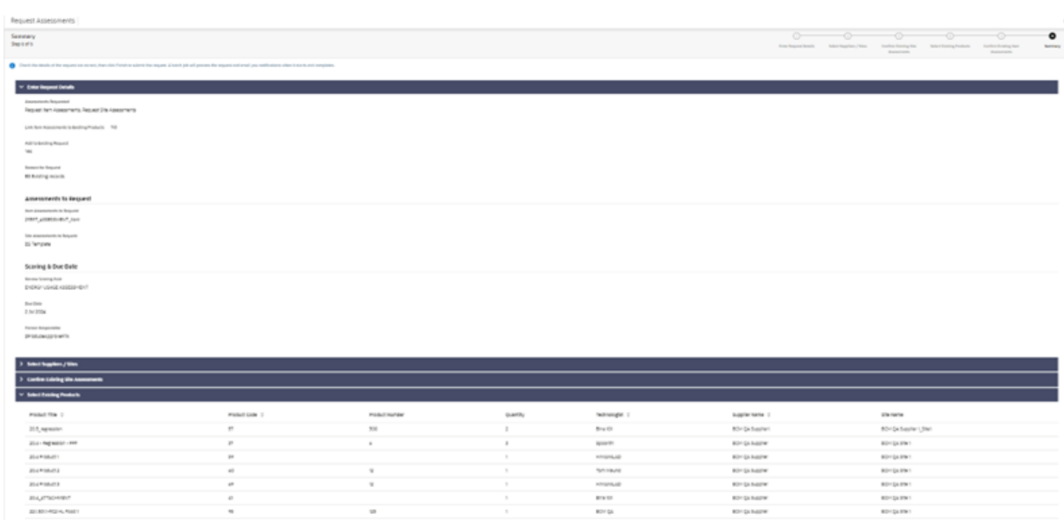
Figure 3-8 Confirm Existing Item Assessments



Select any existing assessments to be used. In this case, new assessments will not be created for this combination of assessment type and product; otherwise new assessments will be created.

7. Click Next to progress to the next step. This presents a summary of the selections that have been made in the preceding steps.

Figure 3-9 Summary



Click **Finish** to confirm the selections. A batch job is submitted to create the assessments. You will receive an email notification when it is complete.

Deleting an Assessment

Assessments can be deleted individually, or multiple assessments may be deleted with a single action from the list view.

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

Linking to a Product Record

If an Item Assessment has been created using the Assessments Request wizard and was not linked to a Product Record at the time, it can subsequently be linked to a Product Record.

1. Open the assessment in edit mode.
2. Click the **Select Product** button next to the Product Title. A list of active Product Records for the assessment's supplier sites will be displayed.
3. Select a Product Record and click **Ok**. The assessment is linked to the selected product, validated and saved.

> **Note:**
>
> An Item Assessment may be progressed to completion without being linked to a Product Record.

Copying Assessment Responses

It is possible to populate the responses to an assessment's questions with the responses given to another assessment of the same type.

The action is available to both retailer and supplier users, in assessments which are at Future or In Progress status.

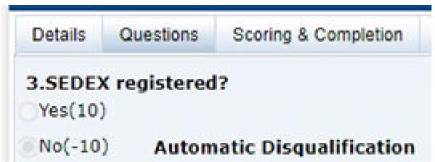
1. Open the assessment in edit mode.
2. Select the Select Assessment action. A list of assessments of the same type as the one being edited, for the sites that the user has access to, is presented.
3. Select the assessment to be copied and click **Ok**. The assessment is validated, and a list of any non-matching questions is presented.
4. Click **Ok** to confirm the copy. The responses are populated with those of matching questions in the selected assessment (any existing responses are overwritten). The assessment is again validated and saved. If its status was Future, it is set to In Progress.

Disqualifying an Assessment

Certain assessment questions may be configured to be flagged as a *disqualification* if they are answered with a specific response. The question types that have a predefined choice of answer can be configured in this way, such as radio buttons, checkboxes, and picklists. See the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide* for details on how the questions are configured for disqualification.

When an assessment contains disqualification questions, they are visible to the retailer user in the following ways (the disqualification details are not visible to supplier users):

- The text *Automatic Disqualification* is shown against the answer, for example:

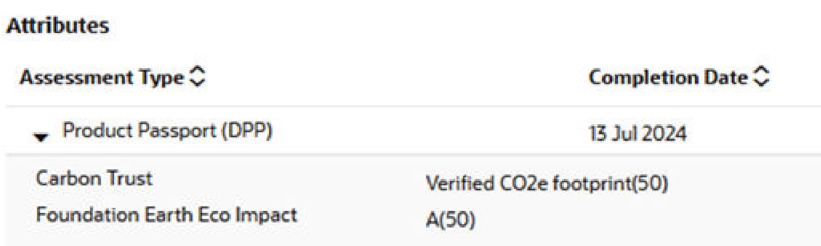


- A count of the number of responses given to Automatic Disqualification answers is shown on the Scoring & Completion page. See Figure 3-3 .

Summary Attributes

Assessment questions may be configured as *summary attributes,* meaning that the responses to the questions can be displayed in the info panel of the Assessment and associated Product Record or Site.

Each summary attribute has a label to identify what information the attribute represents. Within the info panel the summary attributes are grouped by their assessment as a list of pairs of labels and the values given as responses to the *summary attribute* questions.



4
Item Evaluation Integration and Scoring

Summary data for Item Evaluation Scoring is available in the Product Record. This data is used for the information displayed in the Product Summary panel in the Item Evaluation Dashboard.

The system can be configured to calculate Item Evaluation scores for individual products/ items. Scoring rules can be configured for the different aspects of evaluation (such as Ethical, Environmental, and Governance), with the scores being calculated based on the product/item's Assessments.

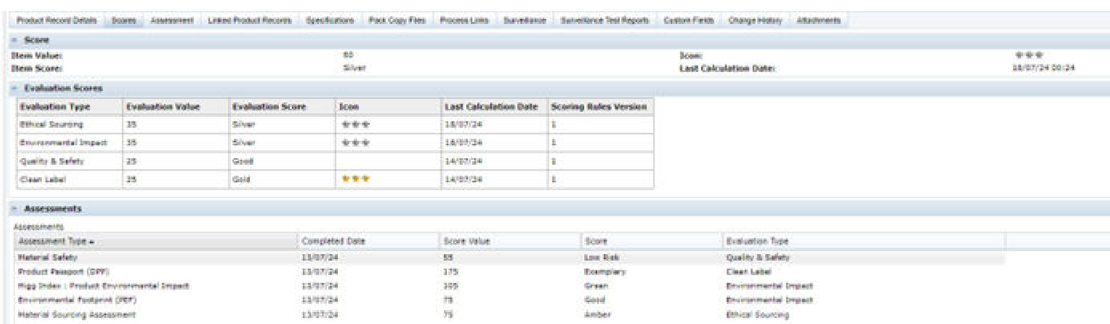
Supplier Evaluation will support integration with the Oracle Retail Merchandising system, *outbound* for the sharing of the item evaluation data that results from Assessments being completed in Supplier Evaluation, and associated scores being calculated.

> **Note:**
>
> The framework for item evaluation data integration with MFCS exists in preparation for the actual integration process being introduced in a future release.

Item Summary Scores in Product Record

The Scores tab in the Product Record shows the product's overall entity score and the evaluation scores for each Evaluation Type, plus a list of the Assessments that contributed to the scores.

Figure 4-1 Item Summary Scores Page



The following table describes the fields in the Scores page.

Table 4-1 Item Summary Scores Fields

Field	Description
Item Value	Last calculated *entity* score for the product based on its collective *evaluation* scores.
Item Score	Text description representing the Item Value.
Icon	Graphic representing the *entity* score. If the score is configured to show a graphic, the graphic from the Photo Album is shown here.
Last Calculation Date	Date when the *entity* score was last calculated.
Evaluation Scores	
Evaluation Type	Type of evaluation that is scored, such as Ethical or Environmental.
Evaluation Value	Last calculated *evaluation* score based on the scores of related assessments.
Evaluation Score	Text description representing the Evaluation Value.
Icon	Graphic representing the EvaluationScore. If the score is configured to show a graphic, the graphic from the Photo Album is shown here.
Last Calculation Date	Date when the *evaluation* score was last calculated.
Scoring Rules Version	Version of the Evaluation Scoring Rules glossary used to calculate the scores.
Assessments	
Assessment Type	A table of the assessments that contribute to the *evaluation* scores. This is the name of the assessment's template.
Completed Date	The date the assessment was completed.
Score Value	The numeric score the assessment achieved based on the number of points assigned to each question.
Score	The descriptive representation of the assessment Score Value.
Evaluation Type	Type of evaluation that the assessment relates to, such as Ethical or Environmental.

The page is only visible if the scoring has been enabled with the Item Scoring Enabled system parameter, and then only to retailer users with the Retailer Score Viewer authority profile.

Score Calculation Process

On completion of an Assessment for a Product Record which is assigned an Evaluation Type with configured Evaluation scoring rules, calculation of the Product Record's scores (and links to show which records contribute to the scores) is triggered, to be run in the next overnight schedule.

When the score calculation job runs, if the parent Product Record is locked, a *fail with retry* process is submitted, to retry every five minutes. This comprises two jobs: *Update Scoring Contributions Job* and *Update Scoring Scores Job*, which handle the linking of the associated contributing records and the calculation of the scores respectively.

When the parent lock is released, the *Update Scoring Contributions Job* will form the link between the parent Product Record and contributing records, and the *Update Scoring Scores Job* will submit a new trigger for the scores to be calculated in the next overnight schedule (rather than actually updating the scores).

It is therefore possible to see the contributing records assigned to the Product Record before its scores have been calculated.

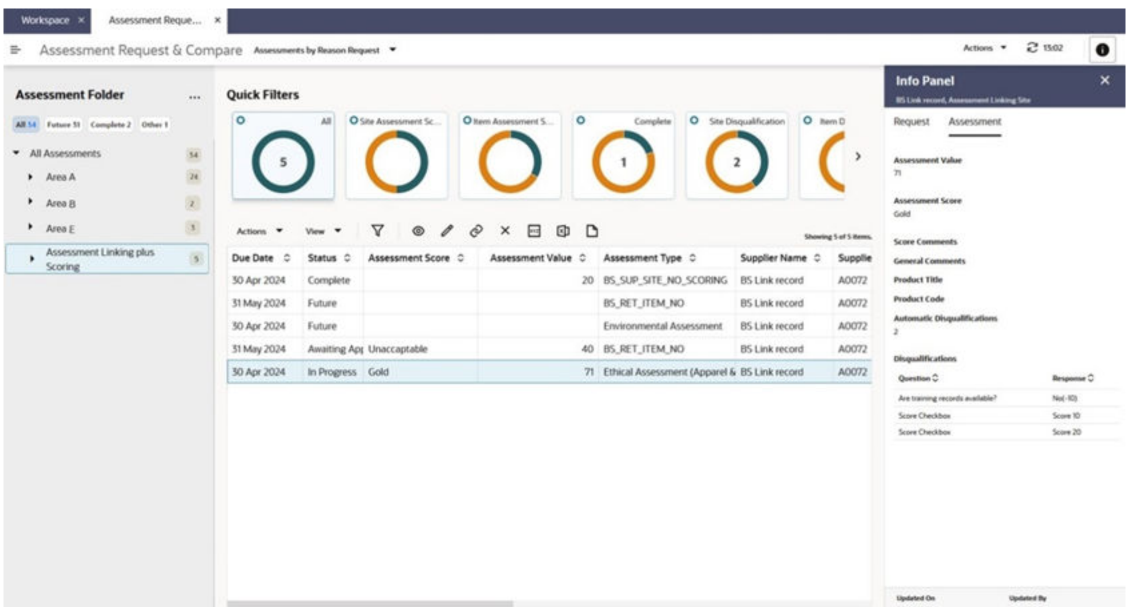
Request & Compare List View

In addition to the dashboard, an Assessment Request & Compare list view provides a means of reviewing and comparing the scores of Assessments that have been created for a common reason - such as *request for information* assessments of multiple suppliers or items as part of a selection program. To access the Assessment Request & Compare list view, select the Assessment Request & Compare option from the Tasks menu.

The list view shows Item and Site Assessments that have been created using the Assessments Request wizard, grouped within the request reason and supplier/site folder hierarchy. The Review scores of the supplier/site level sub folders can be viewed within the list view Info Panel.

Review scores are calculated for the supplier/site level folders when assessments are progresses to or from Completed status. The scoring rules are configured in a similar way to *evaluation* scores, where points are assigned to the scores achieved by the different types of assessments; based on the status and score of the assessments within a supplier/site folder, the folder will be scored accordingly – an aid in the process of comparing and selecting a supplier or product. See the *Oracle Retail Supplier Evaluation Cloud Service Administration Guide* for details on how the scoring rules are configured.

Figure 4-2 Assessment Request & Compare List View



The list view is available to retailer users only, those with the Assessment Administrator, Assessment Editor, Assessment Reader, or Assessments Requester authority profiles. It is accessed from the Assessment Review & Compare option in the Tasks menu.

The key features of the list view are as follows:

- Folders Tree

  The view shows assessments that have been created by the wizard and have therefore been grouped within a Request Reason folder. The top level of the tree is the Request

Reason folder. Within each folder is one or more sub level folders which represent the supplier sites that have assessments within the Request Reason folder.

Filter chips can be used to filter the view contents by assessment status.

The Folders tree has actions available to expand and contract the tree, and a Set Selection Status action which can be used to assign a status to a Supplier/Site folder – an aid in the process of comparing and selecting a supplier or product.

- Assessments Grid

  Selecting a Request Reason folder within the tree shows all the assessments associated with that folder in the grid.

  Selecting a Supplier/Site level folder within the tree shows the selected sites associated with the reason folder in the grid.

  The following columns relate to the Request Reason folder. The values are those given when the folder was created by the Assessments Request wizard:

  – Request Reason
  – Request Date
  – Due Date
  – Scoring Rule
  – Item Assessments Requested - a list of the template names
  – Site Assessments Requested - a list of the template names

  The following columns relate to the Supplier/Site sub folder. The values are those generated when the assessments were created by the Assessments Request wizard:

  – Review Value - the calculated numeric score based on the site's assessments for this Request Reason.
  – Review Score - the calculated descriptive score based on the site's assessments for this Request Reason.
  – Review Score Last Calculated - when the score was last calculated.
  – Scoring Rule Version - the version of the scoring rule used when the score was last calculated.
  – Selection Status - the selection status the user has assigned the site for this Request Reason.

- Filter Tiles

  The available filter tiles include:

  – Site Assessment Scores- the segments show a count of Site Assessments with each Assessment Score.
  – Item Assessment Scores - the segments show a count of Item Assessments with each Assessment Score.
  – Complete - just Assessments at Completed status.
  – Site Disqualification - the Site Assessments which have one or more automatic disqualifications.
  – Item Disqualification - the Item Assessments which have one or more automatic disqualifications.
  – Review Score - the segments show a count of Supplier/Sites with each Review Score.

  - Selection Status - the segments show a count of Supplier/Sites with each Selection Status. When a Supplier/Site folder is selected there will only be one Selection Status.

- Info Panel

  The Assessment page shows key information about the selected Assessment; the Request page shows information from its parent folder, including the Selection Status, Review Score, and Value.

Integration with Accredited Bodies

The system can be configured to allow for the integration of Assessments with third parties. This is of use where the retailer or supplier is using a third party such as a Life Cycle Assessment (LCA) partner to source specialist data, for example sustainability, environmental, and ethical analysis information about a supplier or its products.

For a third party to integrate with the Supplier Evaluation system, the retailer portal owner must register them as an Accredited Body and create an External System account, granting them assess to the relevant APIs.

An Assessment Template can be configured to be the type of assessment which will be used to capture data from a third party, in which case one or more Accredited Bodies are assigned. When an Assessment of that type is created, one of the permitted Accredited Bodies is selected. That third party is then able to retrieve the assessment using the Scorecard API to supply their data by populating the answers to its questions. They then submit the assessment responses using the same API.

Once an assessment is returned it is reviewed, approved, and completed in the same way as regular assessments. The data provided by the third party is thus available for viewing within the assessment and for use in reports. Summary Attributes may be configured to give labels to individual responses which are then presented in Info Panels.

The integration may be *supplier owned*, where the supplier works with the third party and may be responsible for the final completion of the assessment, or *retailer owned*, where the retailer typically works with the third party without involving the supplier.

When registering a third party as an Accredited Body, it is possible to configure a link to the third party's proprietary system, in which case an option will appear in the top level Accredited Bodies navigation Tasks menu.

See the LCA Third Party Integration appendix in the *Oracle Retail Supplier Evaluation Cloud Service Implementation Guide* for further details on the integration.

Item Evaluation Data Integration

The system can be configured for outbound integration with the Merchandising system. The data relating to Assessments and their calculated scores is automatically fed to Merchandising, where dashboards enhance the item data with the latest Item Evaluation information.

> **Note:**
>
> The framework for item evaluation data integration with MFCS exists in preparation for the actual integration process being introduced in a future release.

When Item Assessments are configured to capture item evaluation data, and calculate item evaluation scores, details of the assessment responses and resulting scores are automatically fed back to Merchandising. This occurs for items that have been assigned a corresponding MFCS item number in the Product Codes table of the ORSE Product Record.

Different types of messages are sent to Merchandising as a result of the assessments being completed and scores being calculated in Supplier Evaluation:

- Assessment is created, becomes due or overdue
- Assessment is no longer due or overdue
- Assessment is completed or uncompleted/deleted

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