Oracle® Retail Supplier Evaluation Cloud Service

User Guide

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Oracle Retail Supplier Evaluation Cloud Service User Guide

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Preface

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

> **Note**
>
> See the *Oracle Retail Supplier Evaluation Cloud Service Workspace User Guide* for the Home page and method of Announcements and managing Assignments.

Audience

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

Documentation Accessibility

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Related Documents

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

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

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

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An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of an document with part number E123456-01.

If a more recent version of the document is available, that version supersedes all previous versions.

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

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.

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1
Introduction

Oracle Retail Supplier Evaluation Cloud Service is a collaborative cloud service for the on-boarding and evaluation of merchandising suppliers, enabling the assessment and governance of ethical, environmental, safety, and quality performance. It manages the selection of suppliers against Environmental, Social, and Governance (ESG), brand standards and governance policies, incorporating supplier self-certification survey and assessment, audit and action management, vendor performance, and incident alert notifications.

Oracle Retail Supplier Evaluation Cloud Service is composed of the following modules:

- Library enables the issue, receipt, and acceptance of policies, guidelines, and key working documents.
- Process supports the development of process briefs, plans, and workflow management.
- Product supports the development and assessment of products.
- Reports provides a reporting tool for reporting across the system, using standard templates and custom reports.
- Supplier enables the identification, selection, and approval of suppliers.

For more information on any of these modules, see the module User Guide. For information on Library, see Library.

> **Note**
>
> Technologist is the default name for that Retailer role across the entire application. Each portal may configure an alternative to suit their business if required.

IDCS or OCI IAM Integration for Authentication

The authentication of user and external system identity for access to Oracle Retail Supplier Evaluation Cloud Service is managed by Oracle Identity Cloud Service (IDCS) or Oracle Cloud Infrastructure Identity and Access Management (OCI IAM). This strategic initiative is a move towards most Oracle Retail Cloud Service applications using IDCS or OCI IAM for authentication, thus paving the way for single sign-on across the product range. In the meantime, Supplier Evaluation will implement IDCS or OCI IAM as a standalone means of identity authentication.

> **Note**
>
> When IDCS or OCI IAM integration is implemented, it becomes the sole means of authentication for users and external systems. In the event of the IDCS or OCI IAM tenant not being available to perform authentication, access to Supplier Evaluation will not be permitted.

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The key features of the IDCS or OCI IAM authentication for the portal are as follows:

- All users log in to the portal using an individual IDCS or OCI IAM profile.
- Each portal instance has dedicated IDCS or OCI IAM tenants, for its production and staging/UAT environments (unless the customer has opted to use a unified tenant for both).
- New users are created in Supplier Evaluation, which automatically triggers creation of an IDCS or OCI IAM profile.
- User roles map to groups in IDCS or OCI IAM to control users' level of access.
- All maintenance of user passwords and email addresses is carried out by the user in IDCS or OCI IAM.
- The user maintains all other account details in Supplier Evaluation.
- An hourly batch job automatically synchronizes changes between Supplier Evaluation and IDCS or OCI IAM.
- External systems accounts also require an OAuth configuration into the IDCS/OCI IAM tenant, in order to access the portal's APIs.

Note

User documentation for IDCS can be found at the *Oracle Identity Cloud Service* page on Oracle Help Center:

https://docs.oracle.com/en/cloud/paas/identity-cloud/

User documentation for OCI IAM can be found at the *Oracle Cloud Infrastructure Identity and Access Management* page on Oracle Help Center::

https://docs.oracle.com/en-us/iaas/Content/Identity/home.htm

Passwords

All Supplier Evaluation password management is handled by IDCS or OCI IAM. The system administrator configures the rules for password format strength and expiry within IDCS or OCI IAM. For example, you may need to enter a password that is at least five characters and includes at least one numeric character. Also, you may be prevented from reusing a previous password. For information on your password requirements, consult your system administrator.

Passwords can be set to expire within a specific number of days after being set. During login, if you are warned that your password is about to expire, you can choose to change your password at that time. If you do not change your password before it expires, you may be locked out from logging into the application. You may also be locked out after a specific number of invalid login attempts. If you are locked out, a system administrator must reset your password.

Language Support

Oracle Retail Supplier Evaluation Cloud Service supports multiple languages. The Login page is displayed in the language derived from the user's browser settings. Once logged in, the pages are displayed in the language selected for the user. For information on selecting the language, see Editing your Profile. The system supports the UTF-8 character set.

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Note

Users operating with their locale (language) set to Argentina (es_AR), Brazil (pt_BR), or Chile (es_CL) will see numbers formatted with a comma as the decimal point separator; all other locales use a period as the separator. All locales use a comma as the thousands separator.

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2
User Information

You can manage your user profile and preferences from the Home page. Changes made to user information take effect immediately.

The following topics are covered in this chapter:

- Changing your Email Address
- Editing your Profile
- Editing your Preferences

Changing your Email Address

Your user details are maintained in your Supplier Evaluation user account, other than your password and email address, which are maintained in your IDCS or OCI IAM profile.

> **Note**
>
> Supplier Evaluation and IDCS or OCI IAM use different formats for storing names: Supplier Evaluation has a single name field; IDCS or OCI IAM has three separate fields. Therefore, there is no synchronization of the name fields.
>
> When your IDCS or OCI IAM profile is created, the First Name field is populated with the full name from Supplier Evaluation; the Middle Name and Last Name fields are set to blank or a dash. You can subsequently change these in IDCS or OCI IAM, without affecting the name in Supplier Evaluation.
>
> The Login Id cannot be changed; it provides the unique link between the Supplier Evaluation user account and the IDCS or OCI IAM user profile.

To change your email address using IDCS, see Changing your Email Address using IDCS.

To change your email address using OCI IAM, see Changing your Email Address using OCI IAM.

Changing your Email Address using IDCS

To change your email address:

1. Open your IDCS profile.
2. Click the icon showing your initials, in the top right hand corner, to open the IDCS profile menu.
3. Click **My Profile** and select the Email Options tab to open the Emails page.

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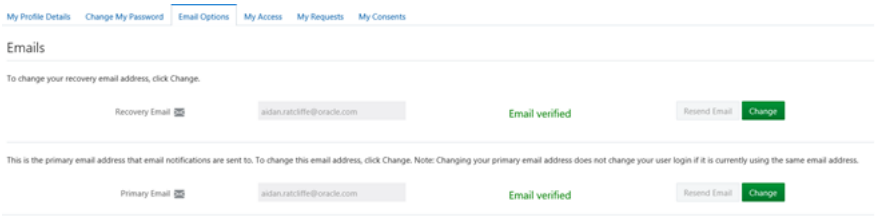
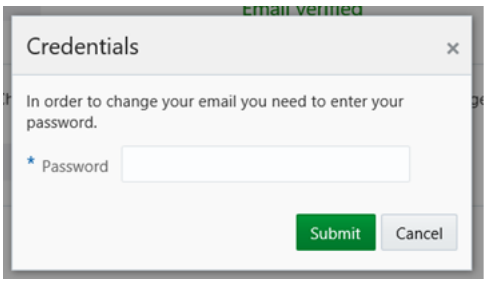
Figure 2-1 IDCS Emails Page



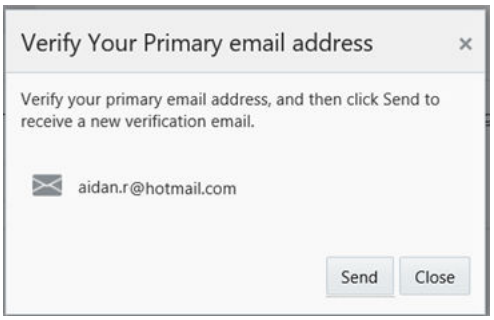
4. The page contains your primary email address and an optional alternative recovery email address. Click **Change** for the primary email address.
5. Enter your password in the Credentials dialog box, and click **Submit**.

Figure 2-2 IDCS Credentials Dialog Box



6. Enter the new email address and click **Save & Verify**.
7. Click **Send** on the Verify Email Address dialog box. You will receive a *Please verify your email address* email.

Figure 2-3 IDCS Verify Email Address Dialog Box



8. Click **Email Verification** in the email, and then click the link on the confirmation to proceed to the IDCS Login page.

If you wish to set an alternative recovery email address in the event of your primary email address being unavailable, repeat the above steps for the recovery email address.

When your make changes to your IDCS profile you may receive a *Your user profile has been updated* email. Click **View Changes To My Profile** in the email to log in to IDCS and view your profile.

Changing your Email Address using OCI IAM

To change your email address:

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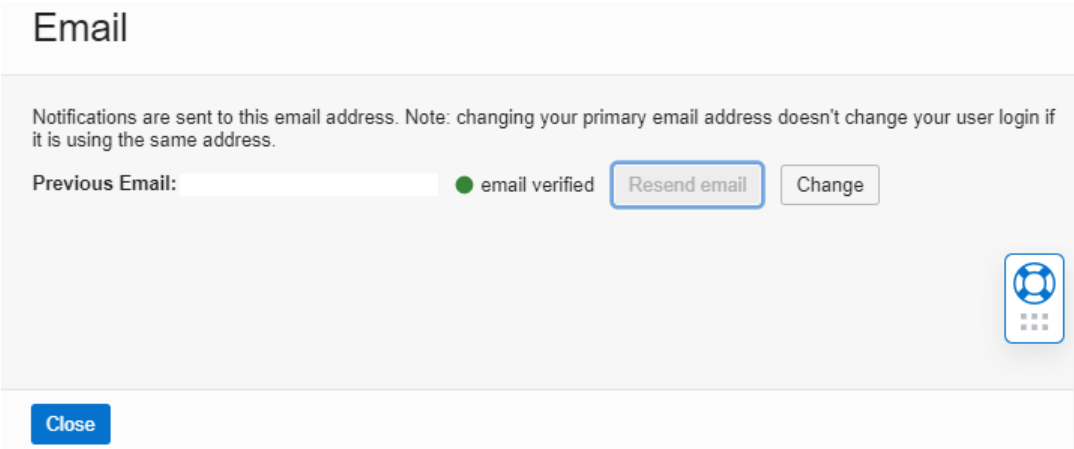
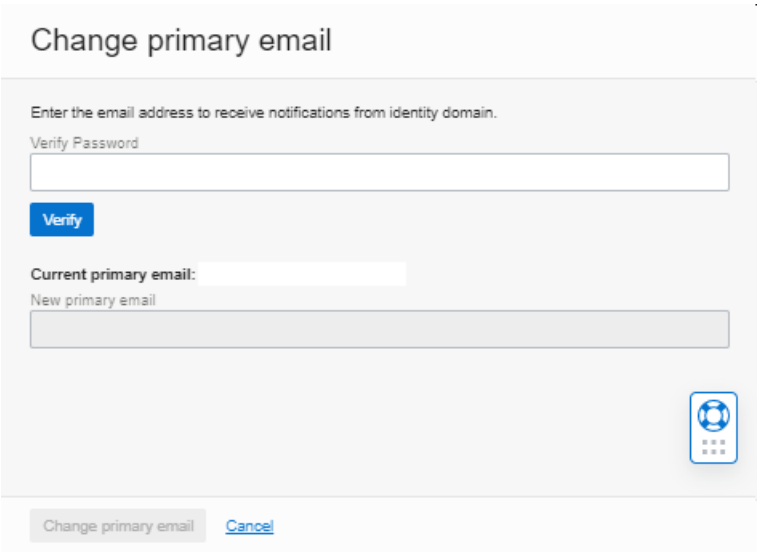
1. Click the Profile icon, in the top right hand corner, to open the OCI IAM profile menu.
2. Click **My Profile**. On the My Profile page, click **Select More Actions** and then select **Edit email** from the menu. The Email page is displayed.

Figure 2-4 OCI IAM Email Page



3. On the Email page, select **Change**. The Change Primary Email page is displayed.

Figure 2-5 OCI IAM Change Primary Email



4. Enter the password and click **Verify**.
5. Once the password is verified, enter the New primary email address and select **Change primary email**.

When your make changes to your OCI IAM profile, you may receive a *Your user profile has been updated* email. Click **View Changes To My Profile** in the email to log in to OCI IAM and view your profile.

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Editing your Profile

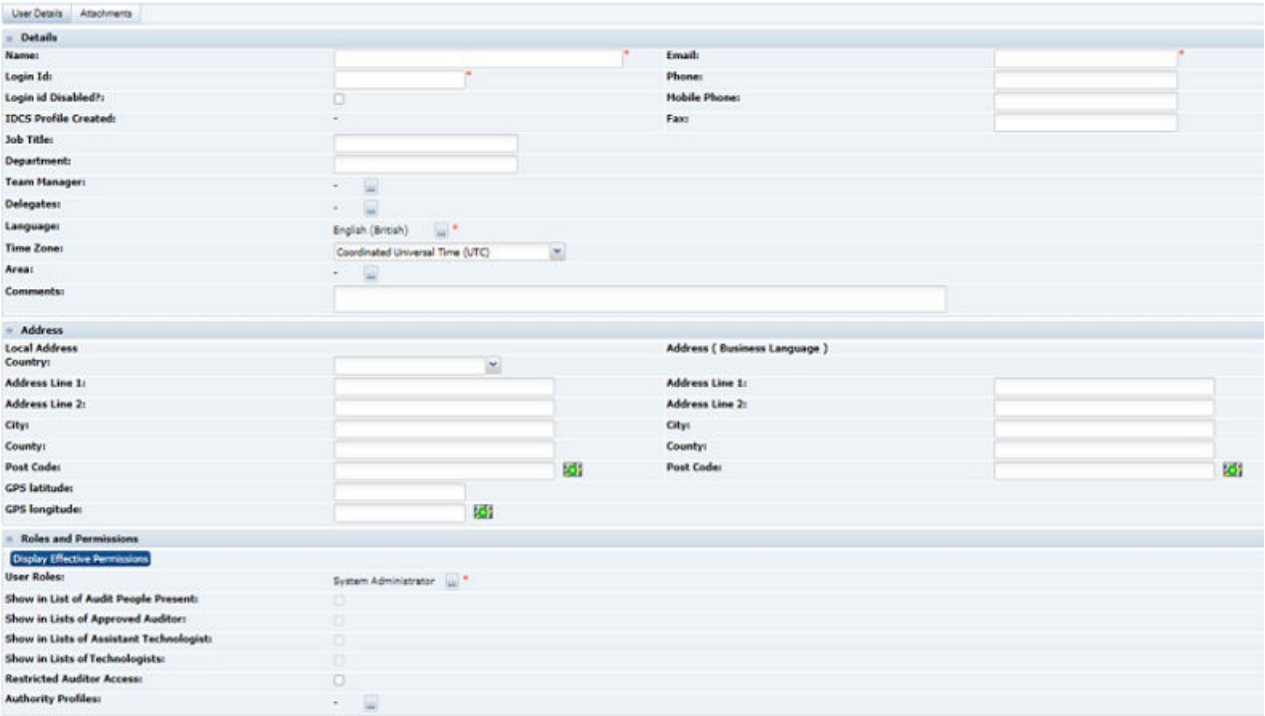
To edit your user profile, select **Edit Profile**. Your user record opens in edit mode. You can edit any of the fields except for the following:

- Login Id
- Logon id Disabled?
- External Authentication
- Roles and Permissions fields

The following actions are available on this page:

- Validate. The values on the page are validated.
- Save. The user record is saved.
- Save & Exit. The changes are saved and the tab is closed.
- Exit. In the Save dialog box, select if you want to save or discard the changes.

Figure 2-6 User Record



Editing your Preferences

To edit your preferences, select **Preferences**. The Preferences tab opens. You can edit all of the details on this page.

The following actions are available on this page:

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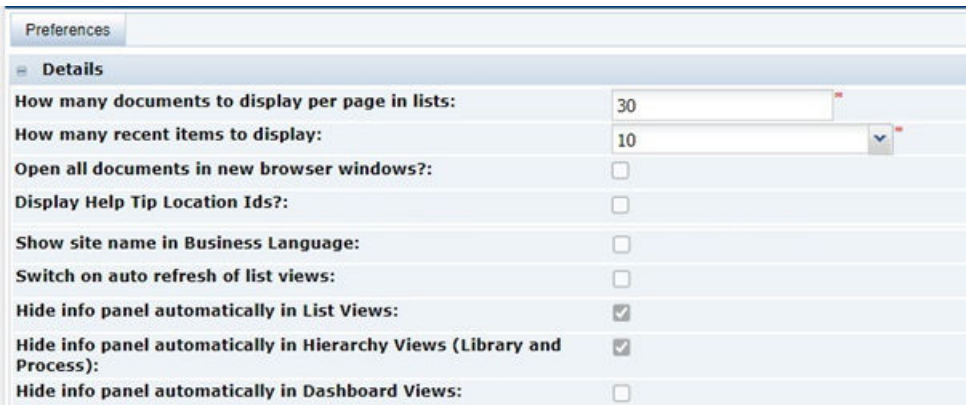
- Validate. The values on the page are validated.
- Save. The user record is saved.
- Save & Exit. The changes are saved and the tab is closed.
- Exit. In the Save dialog box, select if you want to save or discard the changes.
- Restore default settings.

Figure 2-7 Preferences Page



> **Note**
>
> The Switch on auto refresh of list views option will only appear if the feature is enabled for the portal. If used, it potentially improves performance by eliminating the constant rebuilding of lists.
>
> If it is enabled, check the option if you wish to have the contents of list automatically refreshed each time you open the list during the session.
>
> If unchecked, the contents of list views will be automatically refreshed when you initially open the list during the session, but if you switch to another page and return to the list, the contents will only refresh if you use the Refresh action (or close and reopen the list view).

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3
Change History Logs

When the following occurs for a record, the name of the user and the date and time of the change are logged:

- When a new record is created and saved, either as a the result of a New or Copy action within a wizard or automated task.
- When a field within a record is changed and saved either as a result of a manual edit or update within a wizard or automated task.

When a record is physically deleted, the change history is also deleted. If a record is *soft deleted* by changing the status or moving it to an archive area, the event is recorded as an update transaction if the record it set to record such events.

When displaying a record, the Change History subtab is available. To see the change history for the record, select this subtab.

Figure 3-1 Change History Log for a Record

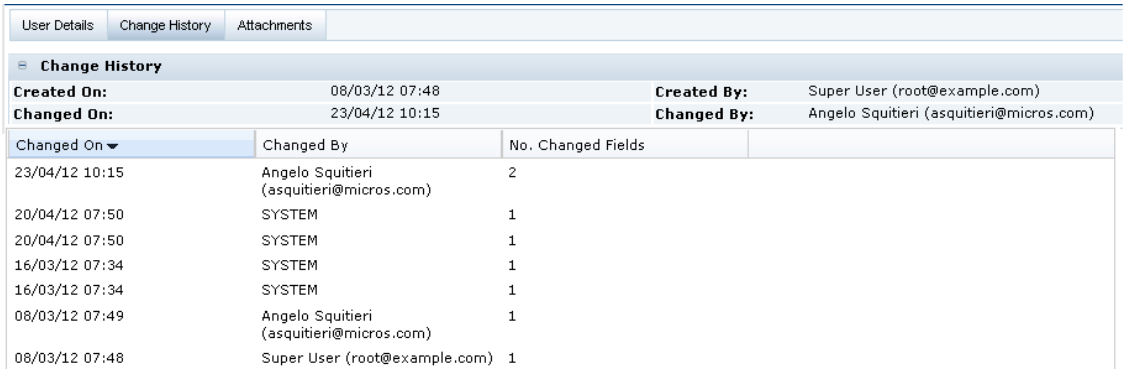

Table 3-1 describes the layout of this view. A field with multiple values is displayed as a comma-separated list.

Table 3-1 Layout of Change History Log

Information	Description
Creation Details	• Date and time the record was created. • User name and email address of the person who created the record or SYSTEM if the record was created by a system process.
Change Details	• Date and time the record was last changed. • User name and email address of the person who last changed the record or SYSTEM if the record was modified by a system process.
Changes	Table that lists all changes in descending order by date and time, that is, the latest change is at the top of the table.

If a row is selected in the list, the details of the change appear.

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Figure 3-2 Change History for a Selected Entry

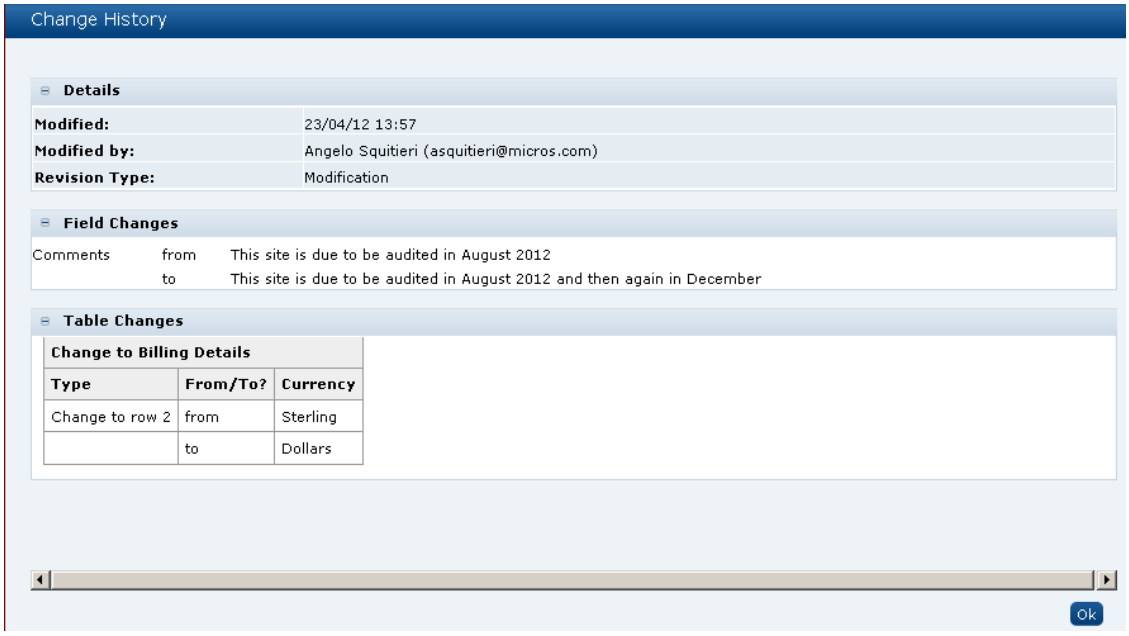

Table 3-2 describes the layout of this view.

Table 3-2 Layout of Change History for a Selected Entry

Information	Description
Details	• Modified: Date and time the record was created. • Modified by: User name and email address of the person who created the record or SYSTEM if the record was created by a system process. • Revision Type: Modification is always displayed.
Field Changes	List of fields that were changed. For each change, the field label and before and after values are shown.
Table Changes	This section is only included when the changes include modifications to a table that is part of the record. For more information, see Table.

Table

Changes to values within tables are logged in the same way as individual fields and are presented in the Change History view as a table. A separate log is shown for each table that was updated during the transaction. The name of the changed table and changes by row number are shown. If the table was changed due to the Add or Delete table actions, the values of all columns are shown. For modifications, only the values for changed columns are shown. An example of a modification is shown in Figure 3-2.

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Figure 3-3 Change History Log for a Table

Table Changes

Change to Billing Details

Type	From/To?	Business Unit	Currency	Further Information	Invoicing Ref	Invoicing System	Sequence
Added row 3		Republic Of Ireland			423 342342	Oracle	2

Change to References

Type	From/To?	Country	Expiry Date	Certificate No.	Certifier	Type	Sequence	Status
Added row 1				121`		Organic Certification		PENDING
Removed row 1			2012-03-07	KJ-1231	Third party	Organic Certification		CERTIFIED

Status

Certain record types, such as sites, alerts, or audits, require a specific log of changes to the status of the record to be recorded. For these record changes, a Status Change History log is included.

Figure 3-4 Change History Log for Status

Product Record Details | Linked Product Records | Specifications | Pack Copy Files | Project Links | Change History | Attachments

Status Change History

Status Before	Status After	Changed On	Changed By	Comments
Archived	Active	23/04/12 14:56	Angelo Squitieri	-
Active	Archived	23/04/12 14:56	Angelo Squitieri	No longer required
Draft	Active	23/04/12 14:56	Angelo Squitieri	-

Change History

Created On:	23/04/12 14:55	Created By:	Angelo Squitieri (asquitieri@micros.com)
Changed On:	23/04/12 14:56	Changed By:	Angelo Squitieri (asquitieri@micros.com)

Changed On	Changed By	No. Changed Fields
23/04/12 14:56	Angelo Squitieri (asquitieri@micros.com)	1

The entries are listed in descending order by transaction date and time. The most recent change is listed at the top. Table 3-3 describes the layout of this log.

Table 3-3 Layout of Change History Log for Status

Column	Description
Status Before	The status before the change was made.
Status After	The status after the transaction was made.
Changed On	Date and time the change was made.
Changed By	Name of the user who made the change.
Comments	Any comments entered by the user.

Attachment Manager

All changes made through a record's Attachment Manager, that is, file attachments or URL links are added, changed, or deleted, are reflected in the change history log.

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Figure 3-5 Change History Log for an Attachments Record

Changed On	Changed By	No. Changed Fields
04/25/12 09:31 AM	Angelo Squitieri (asquitieri@micros.com)	0
04/25/12 09:31 AM	Angelo Squitieri (asquitieri@micros.com)	0
04/25/12 09:31 AM	Angelo Squitieri (asquitieri@micros.com)	0

Table 3-4 describes the columns in this log.

Table 3-4 Layout of Change History Log for Attachment Record

Column	Descritption
Changed On	Date and time the change was made.
Changed By	Name of the user who made the change.
No. Changed Fields	Number of fields in the section that were changed.

Figure 3-6 Change History for a Selected Row for an Attachment

Table Changes

Change to Attachments

Type	From/To?	Attached By	Attached On	Description	File Name or URL
Added row 1		Angelo Squitieri	04/25/12 08:25 AM	Word doc example	Word Doc Example.docx

Table 3-5 describes the columns in this log.

Table 3-5 Layout of Change to Attachments Section

Column	Description
Type	Indicates if an addition or deletion was made for the attachment.
From/To?	If a row was modified, the before and after values are shown.
Attached By	Name of the user who attached the file.
Attached On	Date and time the file was attached.
Description	Description of the attachment.
File Name or URL	Name of the file or the URL to the file.

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4
Library

To access Library, select Library on the main navigation bar. The list of published documents that can be accessed by the user is shown. Figure 4-1 shows an example of this page.

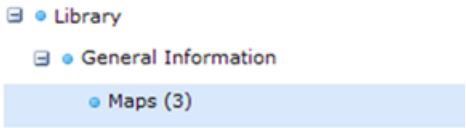
Figure 4-1 Library Tab

Document Folder Pane

The contents of the document library are presented as a structured hierarchy where documents are organized within a tree of libraries that contain any number of folders and sub-folders.

A user only sees the folders and sub-folders that contain documents to which the user has access. Clicking a folder or sub-folder name displays the list of all documents in the folder or sub-folder and all its sub-folders.

When a user puts focus on the lowest level folder, the number of documents is shown in brackets:



Archive shows the folder and sub-folder structure of archived documents. It is only available to users with the Library Administrator authority profile.

Permissions

Permissions control whether a user has access to the document library. Generally, all users are granted access. Access to individual documents can be granted or refused on a user basis. The Library Reader authority profile provides reader access to the library.

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Locating a Document

To display all the documents within and beneath a folder, click the folder name in the Document Folder pane area. Only those documents to which the user has access are shown.

Figure 4-2 Folder Content Display

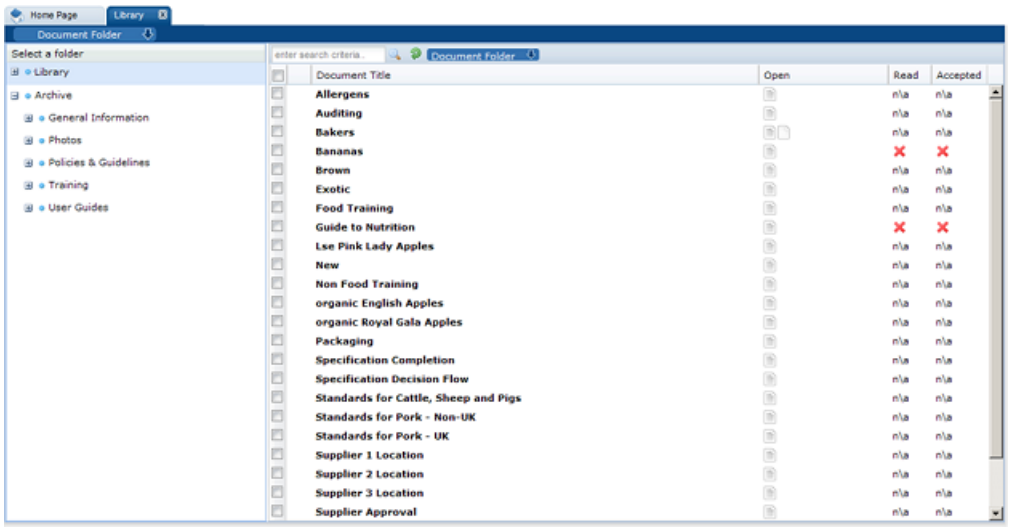

Table 4-1 describes the columns displayed for the selected folder.

Table 4-1 Columns Displayed for a Selected Folder

Column	Icons	Description
First	Shows the status of the document.	
		This document is only visible to internal users, that is, the retailer's users. The document title in the next column is shown in red.
		This document is mandatory. This icon is only shown for supplier users.
		This document has not been published and is therefore only visible to users with the Library Administrator authority profile.
Document Title	The list of document titles is sorted by the icon in the first column. Clicking a document title opens the summary document as a new tab.	
Open	Indicates the type of attachments to the document, if any. If there are more than three attachments, an ellipsis is appended to the icon for the third attachment.	
		Microsoft Excel spreadsheet
		Microsoft Word document
		Portable Document Format (PDF) file

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Table 4-1 (Cont.) Columns Displayed for a Selected Folder

Column	Icons	Description
		Text Document
Read	Indicates if this document has been read by the user.	
		User has not read the document.
	n\a	Indicates the document has Log Readership set to NO.
		User has marked the document as read.
Accepted	Indicates the acceptance of the document by the user.	
		User has not accepted the document.
	n\a	Indicates the document has Log Readership set to NO.
		User has accepted the document.

The following actions are available in this pane:

- Mark as read
- Mark as accepted

Reading a Document

To read a document:

1. Click a document folder. The list of available documents in the folder appears. See Figure 4-2.
2. To read a document, click the document title. A new tab opens for the document.
3. If there are any attachments available, an icon is shown in the Open column. Click the icon to open the attachment.
4. If you are required to mark the document as read when you complete reading it, select the Mark as Read action. If you are required to mark the document as accepted when you complete reading it, select the Mark as Accepted action.

Marking a Document

The Library Administrator can require that a user confirm that a document has been read and approved.

Marking a Document as Read

The read confirmation action is only applicable for mandatory' documents It can only be selected if the user has at some point opened the document or one of its attachments.

To mark a document as read, do one of the following:

- Select the document in the left-hand pane and select the Mark as Read action from the Actions menu in the right-hand pane.

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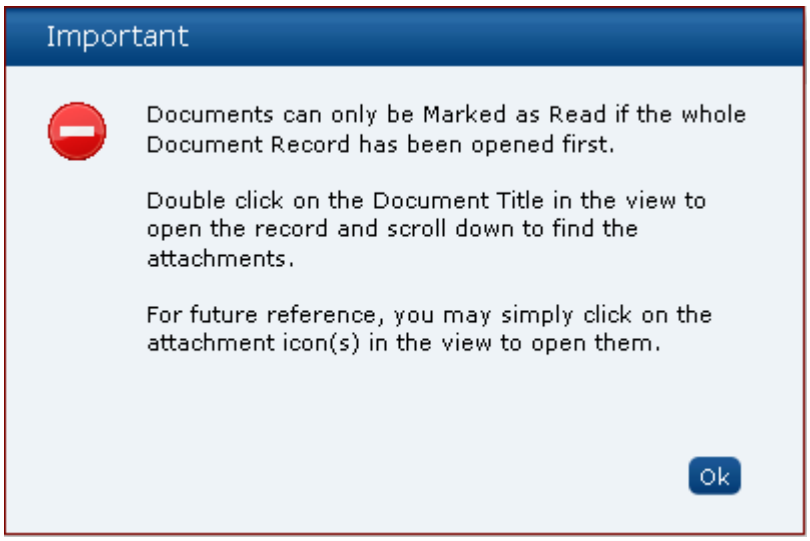
- Select the document in the left-hand column. Right-click and select the Mark as Read action.
- Open the Summary document and select the Mark as Read action.

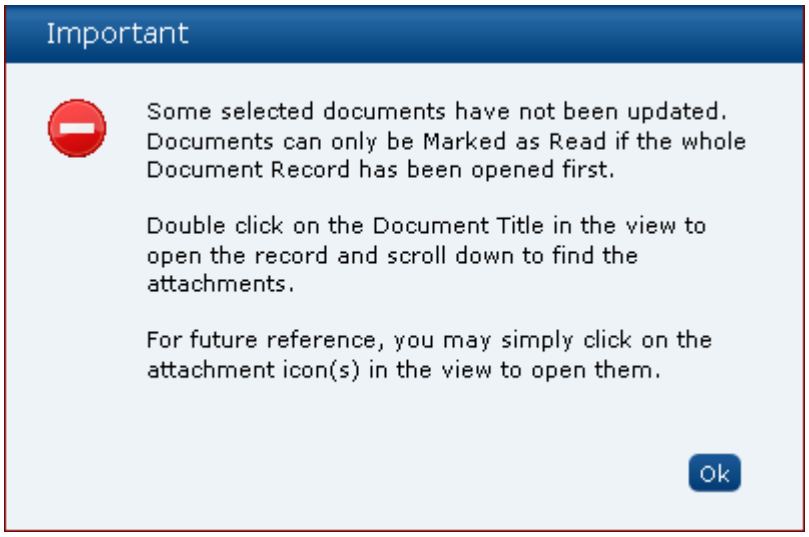
If the Mark as Read action is selected, but the document has not been opened the following error dialog box appears.

Figure 4-3 Mark as Read Error Dialog for Document Not Opened



If the Mark as Read action is selected, but the document has not been opened within a multiple selection of documents, the following error dialog box appears. Some documents are marked as read, but the rest of the documents are not marked.

Figure 4-4 Mark as Read Error Dialog for Not All Documents Marked



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Marking a Document as Accepted

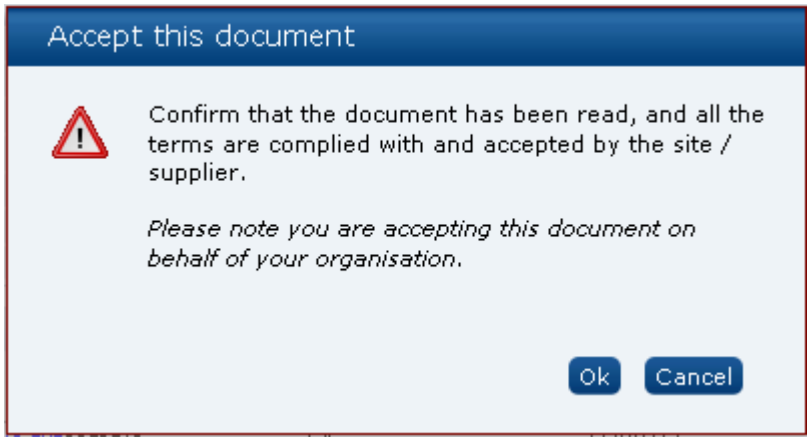
The accept confirmation action is only applicable for mandatory documents It can only be selected if the user has at some point opened the document or one of its attachments.

To mark a document as accepted, do one of the following:

- Select the document in the left-hand column and select the Mark as Accepted action from the Actions menu in the right-hand pane.
- Select the document in the left-hand column. Right-click and select the Mark as Accepted action.
- Open the Summary document and select the Mark as Accepted action.

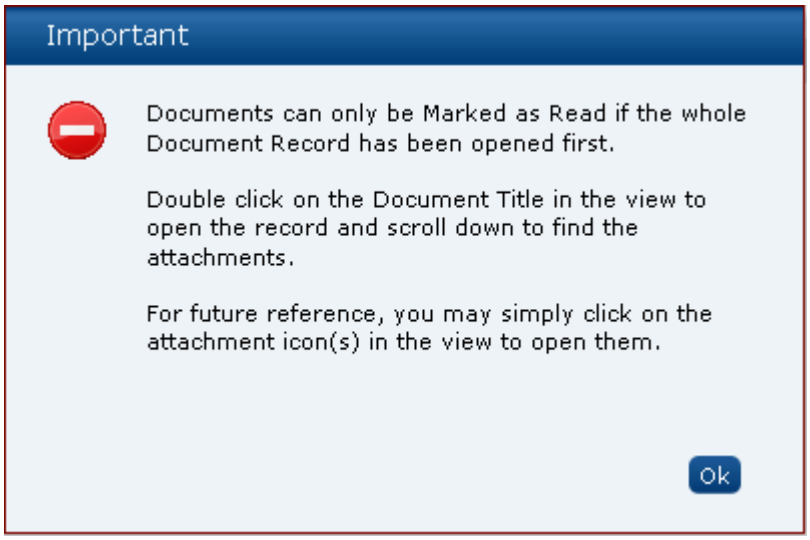
A dialog box appears to enable the user to confirm the acceptance. Select **Ok**.

Figure 4-5 Accept this Document Dialog Box



If the Mark as Accept action is selected, but the document has not been opened the following error dialog box appears.

Figure 4-6 Mark as Accept Error Dialog for Document Not Opened



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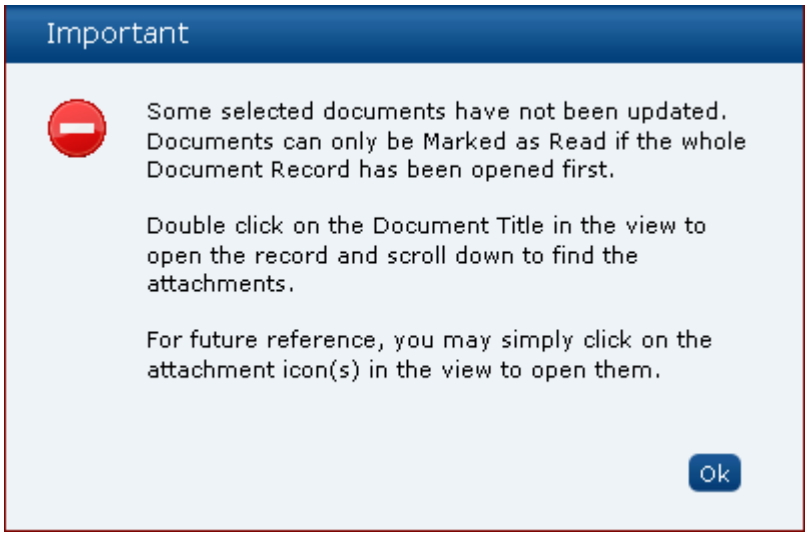
If the Mark as Accept action is selected, but the document has not been opened within a multiple selection of documents, the following error dialog box appears. Some documents are marked as accepted, but the rest of the documents are not marked.

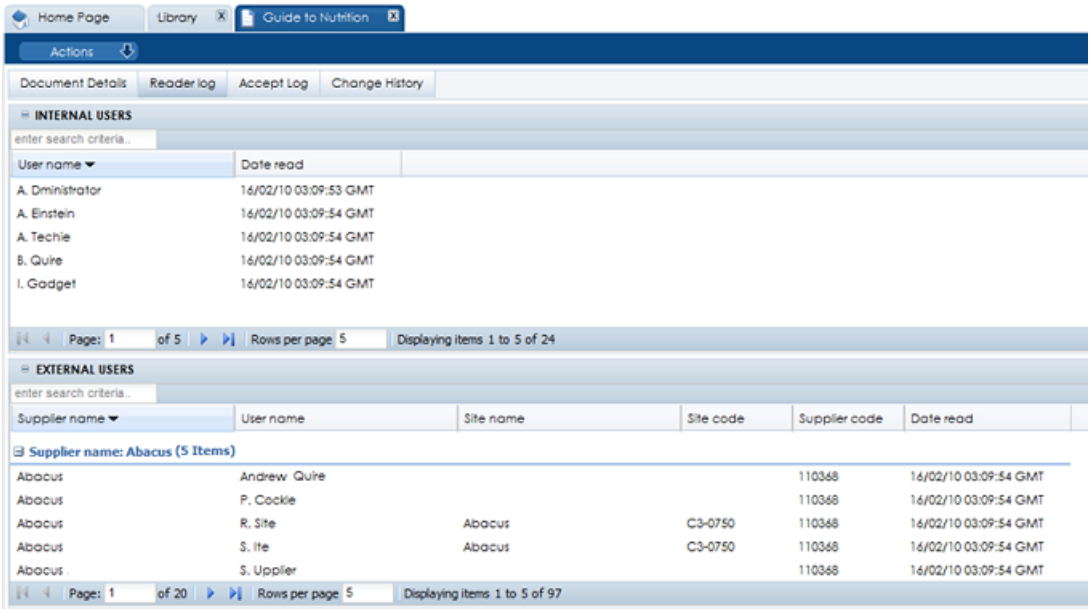
Figure 4-7 Mark as Accept Error Dialog for Not All Documents Marked



Viewing the Reader Log

The Reader Log page enables users to see who has read the document.

Figure 4-8 Reader Log Page



The list of internal users is sorted by the user name in ascending order. The list of external users is sorted by the supplier name and then user name, both in ascending order.

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Supplier users have visibility to mandatory documents so they can see who else within their organization has read the document (restricted to only being able to see information relating to their organization). They are not able to see the Internal Users field set.

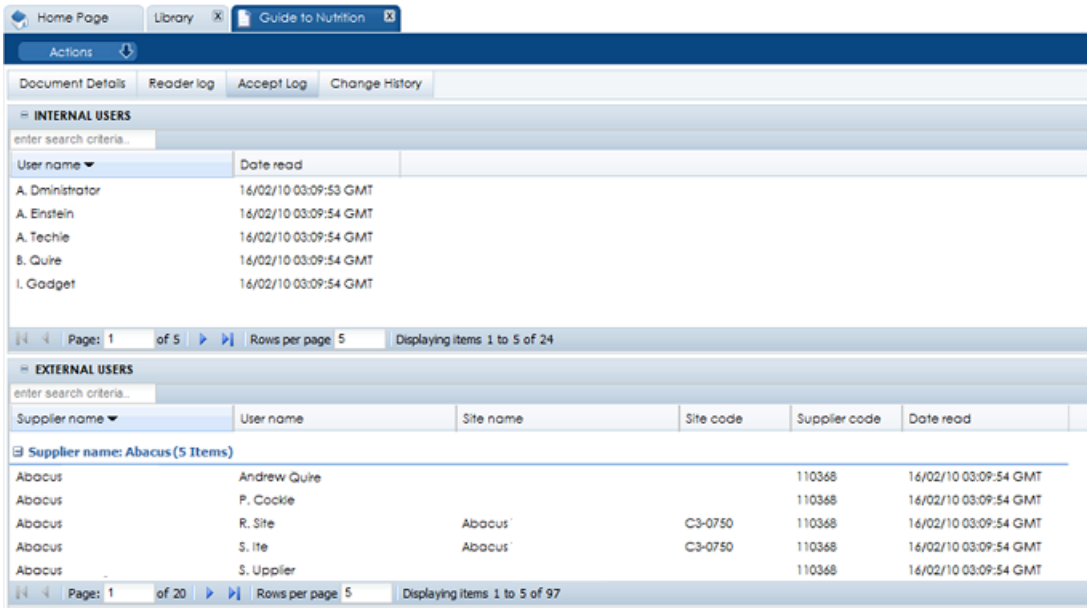
Users are able to perform a Quick Search on the full contents of the log and export the log to Microsoft Excel.

> **Note**
>
> The Site code and Site Name columns are populated if the user is assigned to one or more individual sites. If the user is an All Sites user or is a Supplier user, they will not appear in the Read and Accept logs.

Viewing the Accept Log

The Accept Log page enables users to see who has accepted the document.

Figure 4-9 Accept Log Page



The list of internal users is sorted by the user name in ascending order. The list of external users is sorted by the supplier name and then user name, both in ascending order.

Supplier users have visibility to mandatory documents so they can see who else within their organization has accepted the document (restricted to only being able to see information relating to their organization). They are not able to see the Internal Users field set.

Users are able to perform a Quick Search on the full contents of the log and export the log to Microsoft Excel.

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Note

The Site code and Site Name columns are populated if the user is assigned to one or more individual sites. If the user is an All Sites user or is a Supplier user, they will not appear in the Read and Accept logs.

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