

Oracle® Retail Supplier Evaluation Reports User Guide



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Glossary

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Oracle Retail Supplier Evaluation Reports User Guide

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Preface

This document describes the Oracle Retail Supplier Evaluation Reports user interface. It provides an overview of the key features provided by the reporting facility.

Audience

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

Report Layouts

The *Oracle Retail Supplier Evaluation Report Layouts* document provides details on the layout of the reports that are supplied as part of the suite of core reports. The document is available through My Oracle Support:

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<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.

Introduction

The Supplier Evaluation Reports module provides a means of reporting on the data within Supplier Evaluation using the *Oracle BI Publisher* reporting solution. A suite of core reports are provided, along with the ability for clients to build their own custom reports.

This guide describes the concepts behind the reporting solution and provides chapters explaining the user steps for the following:

- [Report Administration](#)
- [Creating Reports](#)
- [Scheduling Reports](#)
- [Viewing Reports](#)
- [Data Extracts](#)

Supporting information includes details of the supplied core reports, and guidelines on designing and building report templates.

The framework of the Supplier Evaluation reporting solution is based around integration with the BI Publisher API. This allows for the administration, design, and scheduling aspects to all be contained within Supplier Evaluation, along with the generated report outputs.

The following diagrams show the components of the framework and their relationships. They are followed by a description of the key aspects.

Figure 1-1 Reports Framework

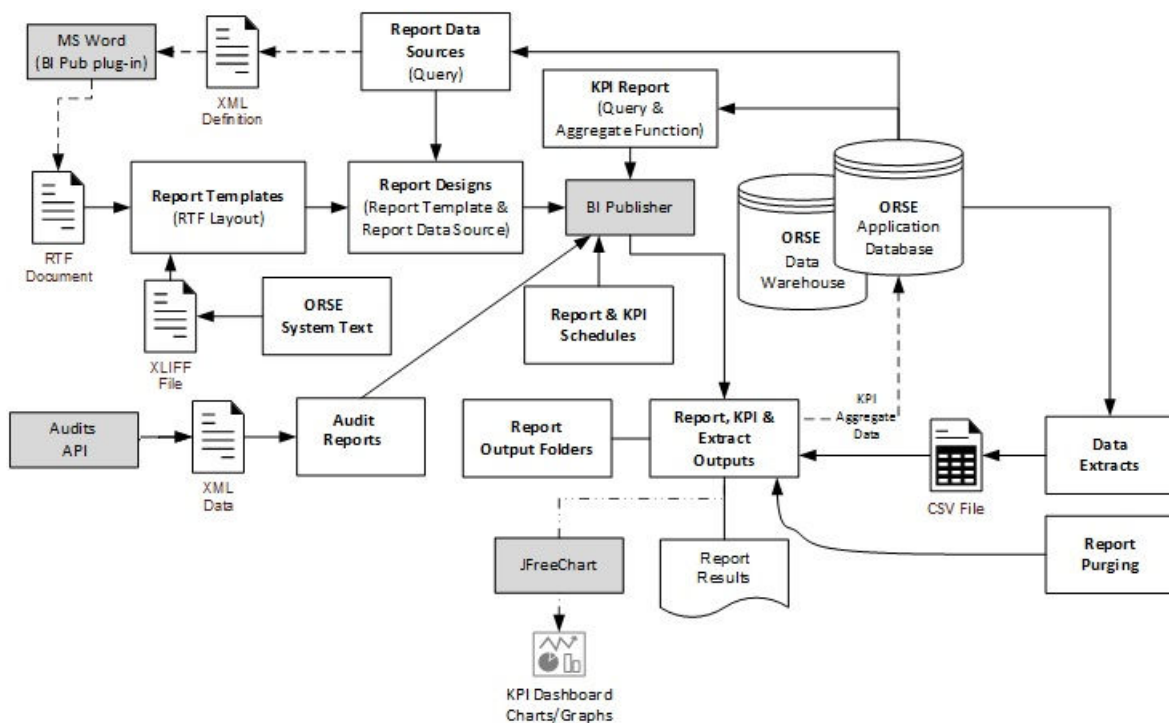
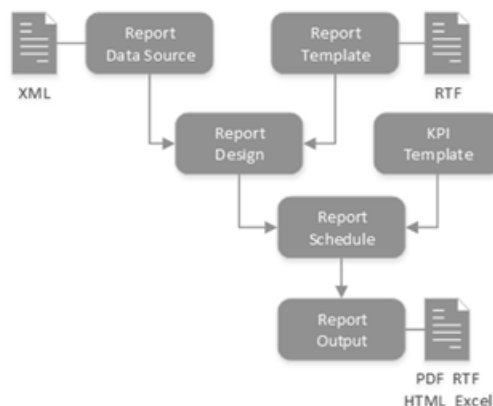


Figure 1-2 Basic Elements of the Reports Framework

Report Data

A set of data sources is provided which make data from the Supplier Evaluation modules available for reporting. The data sources are a predefined set of queries that generate the data in XML format for processing by *BI Publisher*. The data sources are optimized to create discrete data sets relevant to the area being reported on, along with appropriate data from related records. For reports that are likely to process high volumes of data, the data source is located in a separate Data Warehouse database which is regularly synchronized with the application database.

The data sets can be further refined by applying filters to apply additional levels of selection criteria. These may be fixed values, or values for the user to supply when the report is scheduled to run.

The Report Data Source records are located in the Supplier Evaluation Reporting Admin area.

Report Templates and Report Designs

Reports are built from Rich Text Format (RTF) templates which can be authored using a word processor (Microsoft Word has a plug-in available to aid the design process). The RTF templates are combined with the XML data provided by the data source to form report designs.

Like data sources, the report designs can have filters to be applied to further refine the data set, either as fixed values, or values to be supplied at runtime.

The Report Template and Report Design records are located in the Supplier Evaluation Admin area.

For details of the reports supplied as part of the suite of core reports, see [Appendix: Report Layouts](#). The supplied templates can be adapted to form custom variants, or new custom reports can be created. For guidance on the creation of RTF report templates, see [Appendix: Designing RTF Templates](#).

Report Scheduling

The report designs are available to reporting users in the Report Schedules page. To schedule the report, the user chooses when it is to run, whether a single or recurring run, the type and

location of output, and the recipients. Recipients may be an individual or all users with a particular job role.

Additional filters can be applied when scheduling the report to run.

Reports Output

When a report is run, the output will typically be a PDF or Excel file (other formats are available), which is located in the designated folder of the Report Outputs area. An email notification is delivered to the recipients containing a link to the report. Report outputs are presented as tabular reports or forms containing a combination of single values and tables. The outputs may also contain charts.

A reporting user will only have visibility of the reports that they have created or they are a recipient of. If the portal is operating the Enhanced Access Control (EAC) permissions feature, users will only be able to report on data that they can access within the application, according to their EAC area. For further details on the reporting permissions rules, see [Appendix: Permissions](#).

Portal Metrics

A weekly routine run in PSRAF generates metrics used to calculate the usage of ORSE which are displayed on the Retail Home dashboard.

The calculations are based on active sites. Active sites is the total count of all Sites where the Site Status is ACTIVE.

Data Extracts

An additional reporting facility is provided in the form of data extracts, where the full contents of certain record types can be extracted to Comma-Separated Value (CSV) files that can be viewed as a spreadsheet. The data extract facility is available for the Supplier and Site record types.

The data extracts are only available to the reporting administrator user. They are created by filtering the contents of a list view to the desired set of records to be extracted. The results are stored in the Data Extracts folder in the Report Outputs area.

A Process & Activity Brief Extract data extract type is also available for extracting Brief questions and answers for Processes and Activities. The extract is generated as an XLSX Excel spreadsheet and is stored in the Report Outputs library.

Language Translations

The report titles and column headings of the supplied core reports are coded to use system text in the same way as the application caters for alternative languages and customization. A separate Reporting set of system text values is supplied, containing the default values and language translations. These may be customized and extended by the system administrator.

When designing a report, the system text unique key codes are used in place of fixed text. When the report is run, the text for the language of the user who scheduled the report is located, falling back to the portal's base language if no translation is present. Similarly, if the report contains data that has alternative language translation within the application, such as values that are derived from a glossary, the value is translated to the user's language if a translation is present.

Report Purging

A means of automatically purging report outputs after a set period of time is provided. A system parameter is used to set the number of days a report will be retained after its creation. An email is set to the user containing a notification prior to the report being deleted. The default retention period is 90 days.

2

Getting Started

This chapter describes how to access the reports.

Accessing Reports

The Reports option in the navigation bar offers users who have reporting access rights the following options:

- Report Schedules - where reports are scheduled to be run.
- Report Outputs - where the outputs of reports are located on completion.

For administrators, the report design facilities are accessed from the Reporting section of the Admin area.

The Reports module is only available to retailer/portal owner users; supplier users have no access. There are three levels of access, provided by these authority profiles:

- Advanced Reporting Administrator - the ability to build new reports and various administration tasks.
- Advanced Reporting User - the ability to schedule reports and view their outputs.
- Advanced Reporting Reader - the ability to view report outputs, but not to schedule reports.

3

Report Administration

This chapter covers the report administration features of the Reports module. The following topics are covered:

- [Data Sources](#)
- [Report Templates](#)
- [Report Designs](#)
- [KPI Report Templates](#)
- [Other Report Administration Options](#)

Data Sources

Data Sources provide access to the Supplier Evaluation data for reporting purposes. The reportable Supplier Evaluation data is made available through a set of predefined SQL queries and APIs which give access to the majority of the application's data. Related data is grouped and joined in a way that is optimized for efficient reporting. A data source may be used in any number of report templates.

Note

The supplied core data sources cannot be edited, deactivated, or deleted.

While the contents of the supplied data source queries (that is, the records and the fields therein) are not configurable, the Data Source records that contain them can be copied and adapted to form custom variants by creating subsets of the reportable fields and applying filters to the data.

Filters are used to refine the data source contents to a data set appropriate for a particular type of report. Costs and weightings are applied to the data source to help limit reports to a manageable size. A data warehouse is used to source the data for high volume reports, thus reducing the impact on the Supplier Evaluation application.

To access the Data Sources, select the Manage Reporting Data Sources option in the Reporting Admin area. This is only accessible to users with the Advanced Reporting Administrator authority profile.

The list of data sources is displayed, grouped by status. A single *Default* list view is provided. For each data source, the description, code, query name, and version are shown. A column indicates if the data source is one of the system-delivered core sets.

Figure 3-1 Data Sources Page

Select search column	Enter search criteria	Advanced Search	Select List View: Default
All			
(84) Active	☐ Description	Code	Query
(7) Draft	☐ Activity Status/Performance Summary	ACT_STS_PERF_SUM	Activity
(1) De-activated	☐ Activity Summary	ACT_SUM	Activity
(3) Superseded	☐ Audits-Visits by Date Range	AUDITS-VISITS BY DATE RANGE	Audit
	☐ Dietary, Allergen, Additional Info	DIET_ALL_ADDITIONAL	Allergens
	☐ Dietary, Allergen, Suitable For	DIET_ALL_SUITABLE_FOR	Suitable For
	☐ Ingredient Usage Quantity	ING_USAGE_QUAN	Ingredients
	☐ Ingredients Country of Origin	RAWM_ING_COO	Recipe Item Raw Material
	☐ Ingredients Suppliers	RAWM_ING_SUP	Recipe Item Raw Material
	☐ Ingredients Where Used	ING_WHERE_USED	Ingredients
			Version
			System Delive...

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

Note

The Data Source records can be imported and exported using the Import and Export list view actions, however rows in the Filters table that relate to glossary selections or enumerations are excluded.

If using the Import action to create a new data source, the system-delivered flag must be set to No, else the imported data source will not be editable.

Creating a Data Source

To create a new data source:

1. Select the New action. The New Report Data Source page appears.

Figure 3-2 New Report Data Source Page

Home PageAdmin -ReportingReportDataSource

Actions

DetailsFiltersChange History

Details

Code:

Version:

1

Status:

Draft

System Delivered:

No

Description (Default):

Description (Brazilian):

Description (Spanish):

Description (Swedish):

Data Source Type:

Audit API

Query

Query:

Selected Columns:

2. Enter the details.

Table 3-1 New Report Data Source Page

Details	Description
Code	Enter a unique uppercase code for this data source. Mandatory field.
Version	The version will default to 1. Read-only field.
Status	This will default to Draft. Read-only field.
System Delivered	This will default to No. Read-only field.
Description	Enter the description for this data source in the supported languages. The description for the default language is mandatory.
Data Source Type	Select the type of data source. The default option is Query, which is the usual option for a tabular report. The Audit API option is used for form reports that present a page per Audit/Visit.
Query	Select the query that corresponds to the data to be provided by the data source. Mandatory field. This field is hidden if one of the APIs has been selected as the data source type. The options in the list are fixed, based on the set of predefined queries provided by Oracle.
Selected Columns	Once the query has been selected, click the icon to select which of its columns are to be provided by the data source. This field is hidden if one of the APIs has been selected as the data source type, otherwise it is a mandatory field.

- Optionally add any filters to be applied to the data source. See [Filters](#).
- Save the changes and exit.

Editing a Data Source

To edit a data source, select the data source on the Data Sources page and select the Edit action. The data source record opens in edit mode in a new tab.

Data Sources are maintained as a versioned glossary. When the data source is created, it is assigned version 1 and the status will be Draft. At this status, all fields except the code, version, status, and system-delivered flag may be edited.

The system-delivered flag identifies if the record is part of the suite of delivered core reports, in which case the flag will be Yes. The system-delivered data sources may be copied using the Copy action to form new custom variants, in which case the flag will be No.

Figure 3-3 Data Source Details

Details	
Code:	ALL_ADDITIONAL
Version:	1
Status:	Active
System Delivered:	Yes
Description (Default):	Activity
Description (Brazilian):	-
Data Source Type:	Query
Query:	Activity
Selected Columns:	Activity Name Activity Status

Activating the Data Source

Use the Activate action to activate the data source. The status is changed to Active, making the data source available for use in report designs. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Deactivating the Data Source

Use the Deactivate action to deactivate the data source. The status is changed to De-activated, making it unavailable for use in new report designs. Any existing active report designs that use the data source will continue to do so. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Note

Users with the Oracle Authorized Administrator authority profile can edit the record at any status, however the code, version, status, and system delivered flag remain locked.

Deleting the Data Source

Use the Delete action to delete the data source. The data source may only be deleted if it is not active and has not been used by any report designs.

Downloading Data for RTF Template Design

The Download Data for RTF Template Design action creates a file containing the data elements of the selected query. Use this option to download an XML file that can be used in the design of an RTF report template. For information on building RTF templates, see [Appendix: Designing RTF Templates](#).

Filters

Filters can be applied to Data Sources, Report Designs, and Report Schedules to refine the data included in the report when it is run. If no filters are applied to a report, the data in the generated report will be all the records that the data source contains.

Data Source Filters

If a data source has a filter, it will be applied to all report designs and subsequent report schedules that use the data source. This type of filter is of use to always restrict data to a specific set, for example to provide a data source for reporting on a certain type of Audit.

Report Design Filters

If a report design has a filter, it will be applied to all report schedules that use the design. This type of filter is of use to refine the data to a specific subset, for example to provide a design for reporting on Audits, where the data source filters for Audits at a certain status, and the report design filter then only includes those of a certain type.

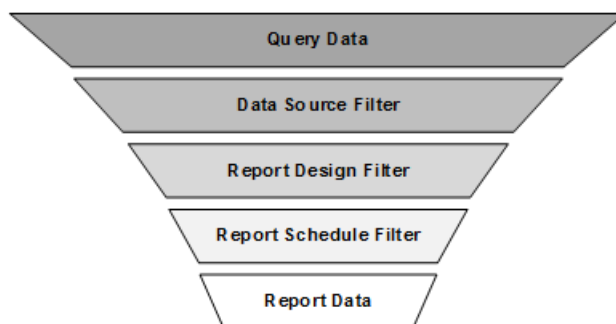
Report Schedule Filters

If a report schedule has a filter, it will be applied in addition to any data source or report design filters to further refine the data to a specific subset, for example to run a report for reporting on Audits of a given category, where the data source filters for Audits at a certain status, the report design filters for those of a certain type, and the report schedule filters those for the required category.

Applying Filters

Filters can be applied as fixed values (such as always selecting records of a certain status), or as runtime values, where the user selects the value when scheduling the report to run (such as choosing which types of Audit to include in that particular run of the report.)

The different levels of filtering allows for flexible, efficient, and intuitive report selection criteria to be designed. The filters are applied cumulatively: any Data Source filters AND any Report Design filters AND any Report Schedule filters.



Filters are applied in the Filters page of the Report Data Source, Report Design, and Report Schedule records. Report designs also show any filters that have been applied at the data source level; report schedules show any filters that have been applied at the data source or report design level.

Each row in the table applies a single condition. For example, if the filter is to include Audits with a status of In Progress or Scheduled, the table will contain two rows:

(Status Equals In Progress) OR (Status Equals Scheduled)

To apply the same search for three named suppliers, the table would contain five rows:

((Supplier Equals ABC Supplies) OR (Supplier Equals DEF Supplies) OR (Supplier Equals XYZ Supplies)) AND (Status Equals In Progress) OR (Status Equals Scheduled)

To add a filter to a data source:

1. Open the data source in edit mode and navigate to the Filter page.

Figure 3-4 Filters Table

Add1DeleteInsertMove UpMove Down

	Column	Operator	Type	Runtime Value	Ignore Case?	Value	Unit		
☐	Country	Equals	Fixed	☐	☒	Brazil		☐	☐ and ☐ or

	Column	Operator	Type	Runtime Value	Ignore Case?	Value	Unit		
☐	Site Name	Contains	Fixed	☐	☒	ABC		☐	☐ and ☐ or

- 2. To add a row to the filters table, click **Add**.
- 3. Enter the details.

Table 3-2 Filters Table

Details	Description
() parenthesis	The parenthesis columns are used to construct simple or complex statements, with and/or logic. Opening and closing pairs must match.
Column	Select from the available columns, based on the data source's query.
Operator	Select from the following options, based on the column type: • If the column type is Boolean, the options are: Equals; Is Not Equal To. • If the column type is Date, the options are: Blank; Not Blank; Equals; Is Not Equal To; Less Than; Greater Than; Less Than or Equal To; Greater Than or Equal To. • If the column type is Entity, the options are: Blank; Not Blank; Equals; Is Not Equal To. • If the column type is Number, the options are: Blank; Not Blank; Equals; Is Not Equal To; Less Than; Greater Than Less Than or Equal To; Greater Than or Equal To. • If the column type is String, the options are: Contains; Starts With; Ends With; Blank; Not Blank; Equals; Is Not Equal To; List Contains; List Does Not Contain; Does Not Contain; Does Not Start With; Does Not End With. • If the column is selected from a glossary. Rather than having to specify a separate filter clause for each glossary item, multiple glossary items can be covered by a single text-based search operator using the <i>Contains Text</i> and <i>Does Not Contain Text</i> operators. They are available for use by the following fields: – Activity Name – Site Activity Name – Supplier Activity Name The operators allow a text string to be applied as a wildcard comparison. For example 'nut' to return matches on records that contain the word nut anywhere in their description (such as nut; nuts; walnut; walnuts; chopped walnuts; water chestnut; and so on.) Thus a single clause can be used instead of having to specify one for each possible record. If multiple clauses are specified to search for multiple strings, such as 'nut' and 'milk' together, they are applied as OR logic, regardless of whether AND or OR has been specified on the clause. For example searching for Contains Text 'nut' and Contains Text 'milk' will return results that contain either 'nut' or 'milk'. When used for versioned glossaries, the current and all previous versions of the glossary ID will be included. The search is also applied to translations for active locales. For example, if the description 'milk' has a French translation of 'lait', applying the search with either 'milk' or 'lait' as the text string will return results. Note: The Editable Text Selector type glossaries, where variable inline values are entered into a predefined statement structure, cannot be used as filters. In this case, the only option for the Operator will be Blank, and the Value will contain the text <i>Not available for this type of glossary</i>. However, they do have corresponding text fields which contain the full constructed statement for reporting and filtering purposes.

Table 3-2 (Cont.) Filters Table

Details	Description
Type	Select from the following options: - Fixed - the value to be applied to the expression is a fixed value. This is the default value. - Relative - this option is available if the selected column is a date. This allows the date value to be applied to the expression relative to the date the report is run, rather than as a fixed date. For examples of usage, see Table 3-3.
Runtime Value	Check the box if the value is to be entered by the user when the report is scheduled. Otherwise, enter a fixed value in the value column. The box is unchecked by default.
Ignore Case	Check the box if the comparison value does not need to be case-sensitive. The box is checked by default; it only shows if the column is a text field.
Value	Enter the value to be applied by the operator. If the column is a lookup to a glossary, or an enumeration, use the picker to select a single value from the available options (see Figure 3-5). Options to filter and search the list appear at the top of the dialog box. Click Search to apply any selections. The paged list of available values shows the item description and code, along with its status in the glossary. For enumerations (lists of keywords), a simple drop-down picker is used. For dates, a date picker is used. When the report is run, the time-zone of the user who scheduled the report is assumed. This field is disabled if the runtime value box is checked; it is hidden if the type is Relative and the unit is Run Date.
Unit	If the type is Relative and is a fixed value (not a runtime value), select from the options: Run Date; Day; Week; Month; Year. This field is hidden unless the type is Relative; if the runtime value box is checked, the field is disabled.

Figure 3-5 Filter Selector

Filter Selector

Specification Type:

Include Status: ☐ Draft ☐ Inactive ☒ Active

Search

Active	Description	Code
Yes	Certification Body	CERTIFICATION_BODY
Yes	Contract Auditor	CONTRACT_AUDITOR

Page: 1 of 1 Rows per page: 30 Displaying items 1 to 2 of 2

Table 3-3 Examples of Filters

Filter	Column	Operator	Type	Runtime Value	Ignore Case	Value	Unit
Created today	Creation Date	Equals	Relative	N	-	-	Run Date
Created in the last x days	Creation Date	Less Than or Equal To	Relative	Y	-	0	Day
	and Creation Date	Greater Than or Equal To	Relative	Y	-	[runtime value]	Day
Created in the last x	Creation Date	Less Than or Equal To	Relative	Y	-	0	[runtime value]
	and Creation Date	Greater Than or Equal To	Relative	Y	-	[runtime value]	[runtime value]
Not created this year	Creation Date	Not Equals	Relative	N	-	0	Year
Approved in the last week	Approval Date	Less Than or Equal To	Relative	N	-	0	Week
	and Approval Date	Greater Than or Equal To	Relative	N	-	-1	Week
Due in the next 2 months	Due Date	Greater Than or Equal To	Relative	N	-	0	Month
	and Due Date	Less Than or Equal To	Relative	N	-	2	Month
Due last month or next month	Due Date	Greater Than or Equals OR Less Than or Equals	Relative	N	-	1	Month
List of dates includes the run date	List of Dates	Contains	Relative	N	-	-	Run Date

Filters for Audit API Data Sources

If the data source is Audit API, an alternative filters table is presented, with the available filters being those that the associated Supplier Evaluation API provides.

Figure 3-6 API Filter Table

Add 1 Delete Insert Move Up Move Down		
Column	Runtime Value	Value
☐	☒	
☐	☒	-

Table 3-4 API Filters Table

Details	Description
Column	Select from the available columns, based on the API's filter parameters.
Runtime Value	Check the box if the value is to be entered by the user when the report is scheduled. Otherwise, enter a fixed value in the value column. The box is unchecked by default.
Value	Enter the value to be applied by the operator. If the column is a lookup to a glossary, or an enumeration, use the picker to select a single value from the available options (see Figure 3-5). Options to filter and search the list appear at the top of the dialog box. Click Search to apply any selections. The paged list of available values shows the item description and code, along with its status in the glossary. For enumerations (lists of keywords), a simple drop-down picker is used. For dates, a date picker is used. When the report is run, the time-zone of the user who scheduled the report is assumed. This field is disabled if runtime value box is checked. It is hidden if the type is Relative and the unit is Run Date.

The filtering parameters available for the Audit API data source are as follows (data for Audits and Visits and their Non-conformances/Issues is returned, Checklist data is not returned):

- Audit Code
- Audit Template
- Completed Date From/Until date range (searches the Status History table)
- Due Date From/Until date range
- Technologist (select from all users, list can be filtered to just retailer users)
- Supplier (text field searches name and code for an exact match)
- Site (text field searches name and code for an exact match)

Note

The Supplier Evaluation APIs are optimized to just return data from the Audit/Visit record. There are therefore limitations on how much related data is available in the API data sources. For example, the status of the Site associated to an audit is held on the Site record, so is not returned by the Audit APIs.

Query Costs and Weightings

In order to minimize the risk of reports with excessive content, validation is applied to limit the number of columns that can be selected based on the *cost* of a column.

Columns with a single value per output row have a cost based solely on the complexity of calculating the value (which for non-calculated columns is near zero); columns where there may be multiple values are significantly more expensive while columns where there may be multiple sets of multiple values are significantly more expensive still.

The columns selected in filters count toward the total, with each row in the filters table incurring a cost. If the limit is exceeded, the following message is shown: *Maximum number of report*

columns exceeded. Please reduce the number of selected columns or filters. The maximum number of rows returned in a report is 200,000.

Report Templates

Report Templates define the layout and data content of a report. Report templates are combined with data sources to form report designs which are scheduled to run as a report. A report template may be used in any number of report designs. Report Template records act as a container for the actual report template, which is a Rich Text Format (RTF file).

Note

The supplied core report templates cannot be edited directly, but can be copied and adapted to form custom variants. The system-delivered templates cannot be deactivated or deleted.

To access the Report Templates, select the Manage Report Templates option in the Reporting Admin area. This is only accessible to users with the Advanced Reporting Administrator authority profile.

The list of report templates is displayed, grouped by status. A single *Default* list view is provided. For each template, the description, code, and version are shown. A column indicates if the template is one of the system-delivered core set.

Figure 3-7 Report Templates Page

Select search column

Enter search criteria

Advanced Search

Select List View: Default

All

(85) Active

(8) Draft

(8) Superseded

☐	Description	Code	Version	System Delive...
☐	Activity Status Performance Summary	ACTIVITY STATUS PERFORMANCE SUMMARY	1	Yes
☐	Activity Status Performance Summary per Business Category	ACTIVITY STATUS PERFORMANCE SUMMARY PER BUSINESS CATEGORY	1	Yes
☐	Activity Status Performance Summary per Project Manager	ACTIVITY STATUS PERFORMANCE SUMMARY PER PROJECT MANAGER	1	Yes
☐	Activity Status Performance Summary per Supplier	ACTIVITY STATUS PERFORMANCE SUMMARY PER SUPPLIER	1	Yes
☐	Audits-Visits by Date Range	AUDITS-VISITS BY DATE RANGE	1	Yes

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

Note

The Report Template records can be imported and exported using the Import and Export list view actions, however the RTF template files are excluded.

If using the Import action to create a new template, the system delivered flag must be set to No, otherwise the imported data source will not be editable.

Creating a Report Template

To create a new template:

1. Select the New action. The New Report Template page appears.

Figure 3-8 New Report Template Page

The screenshot shows the 'New Report Template' page. At the top, there are tabs for 'Home Page', 'Admin - Reporting', and 'ReportTemplate'. Below the tabs is an 'Actions' menu. The main section is titled 'Details' and contains the following fields:

- Code:** A text input field.
- Version:** A text input field with the value '1'.
- Status:** A text input field with the value 'Draft'.
- System Delivered:** A text input field with the value 'No'.
- Description (Default):** A text input field.
- Description (Swedish):** A text input field.
- RTF Template File:** A text input field with the value 'CR62_Site_Attachments.rtf' and a 'Browse...' button.

2. Enter the details.

Table 3-5 New Report Template Page

Details	Description
Code	Enter a unique uppercase code for this template. Mandatory field.
Version	The version will default to 1. Read-only field.
Status	This will default to Draft. Read-only field.
System Delivered	This will default to No. Read-only field.
Description	Enter the description for this template in the supported languages. The description for the default language is mandatory.
RTF Template File	Click Browse to select a single RTF file to be used as the actual report template. The name of the selected file is then shown here. For information about RTF template files, see Appendix: Designing RTF Templates .

3. Save the changes and exit.

Editing a Report Template

To edit a template, select the template on the Report Templates page and then select the Edit action. The report template record opens in edit mode in a new tab.

Report Templates are maintained as a versioned glossary. When the template is created, it is assigned version 1 and the status will be Draft. At this status, all fields except the code, version, status, and system delivered flag may be edited.

The system delivered flag identifies if the record is part of the suite of delivered core reports, in which case the flag will be Yes. The system delivered templates may be copied using the Copy action to form new custom variants, in which case the flag will be No.

Figure 3-9 Report Template Details

Actions	
Details	Change History
Details	
Code:	COUNTRY OF ORIGIN
Version:	1
Status:	Active
System Delivered:	Yes
Description (Default):	Country of Origin
Description (Swedish):	-
RTF Template File:	CR62_Site_Attachments.rtf

Activating the Report Template

Use the Activate action to activate the template. The status is changed to Active, making the template available for use in report designs. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Deactivating the Report Template

Use the Deactivate action to deactivate the template. The status is changed to De-activated, making it unavailable for use in new report designs. Any existing active report designs that use the template will continue to do so. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Note

Users with the Oracle Authorized Administrator authority profile can edit the record at any status, however the code, version, status, and system delivered flag remain locked.

Deleting the Report Template

Use the Delete action to delete the template. The template may only be deleted if it is not active and has not been used by any report designs.

Downloading RTF Template Files

The Download Template action downloads the attached RTF template file. Use this option to download the actual template file for editing or creating a variant of the report. For information on building RTF templates, see [Appendix: Designing RTF Templates](#).

Report Designs

Report Designs combine a data source with a report template to form a report that can be scheduled to run. A report design may be used in any number of report schedules.

Note

The supplied core report designs cannot be edited directly, but can be copied and adapted to form custom variants. The system-delivered designs cannot be deactivated or deleted.

Filters can be used to refine the report design to a data set appropriate for a particular type of report.

To access the Report Designs, select the Manage Report Designs option in the Reporting Admin area. This is only accessible to users with the Advanced Reporting Administrator authority profile.

The list of report designs is displayed, grouped by status. A single *Default* list view is provided. For each report design, the description, code, query name, and version are shown. A column indicates if the design is one of the system delivered core set.

Figure 3-10 Report Designs Page

Select search column

Enter search criteria

Advanced Search

Select List View: Default

All

(120) Active

(4) Draft

(1) De-activated

(10) Superseded

☐ Description	Code	Version	System Delive...
☐ Activity Status Performance Summary	ACTIVITY STATUS PERFORMANCE SUMMARY	1	Yes
☐ Activity Status Performance Summary per Business Category	ACTIVITY STATUS PERFORMANCE SUMMARY PER BUSINESS CATEGORY	1	Yes
☐ Activity Status Performance Summary per Project Manager	ACTIVITY STATUS PERFORMANCE SUMMARY PER PROJECT MANAGER	1	Yes
☐ Activity Status Performance Summary per Supplier	ACTIVITY STATUS PERFORMANCE SUMMARY PER SUPPLIER	1	Yes
☐ Audits-Visits by Date Range	AUDITS-VISITS BY DATE RANGE	1	Yes

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

Note

The Report Design records can be imported and exported using the Import and Export list view actions, however rows in the Filters table that relate to glossary selections or enumerations are excluded.

If using the Import action to create a new report design, the system delivered flag must be set to No, otherwise the imported report design will not be editable.

Creating a Report Design

To create a new report design:

1. Select the New action. The New Report Design page appears.

Figure 3-11 New Report Design Page

The screenshot shows the 'New Report Design' page in the Oracle Reports application. The page has a tabbed interface with 'Home Page', 'Admin -Reporting', and 'ReportDesign' tabs. Below the tabs is an 'Actions' menu with a dropdown arrow. The main content area is divided into 'Details', 'Filters', and 'Change History' sections. The 'Details' section contains the following fields:

- Code:** A text input field with an asterisk (*) indicating it is mandatory.
- Version:** A text input field with the value '1'.
- Status:** A text input field with the value 'Draft'.
- System Delivered:** A text input field with the value 'No'.
- Description (Default):** A text input field with a dropdown arrow.
- Description (Swedish):** A text input field with a dropdown arrow.
- Report Template:** A dropdown menu with the selected value 'Activity Status Performance Summary'.
- Report Data Source:** A dropdown menu with the selected value 'Activity Status/Performance Summary'.

2. Enter the details.

Table 3-6 New Report Design Page

Details	Description
Code	Enter a unique uppercase code for this report design. Mandatory field.
Version	The version will default to 1. Read-only field.
Status	This will default to Draft. Read-only field.
System Delivered	This will default to No. Read-only field.
Description	Enter the description for this report design in the supported languages. The description for the default language is mandatory.
Report Template	Click the icon to select the report template to be used for this report design.
Report Data Source	Click the icon to select the data source to be used for this report design.

3. Optionally add any filters to be applied to the report design. See [Filters for Report Designs](#).
4. Save the changes and exit.

Editing a Report Design

To edit a report design, select the report design on the Report Designs page and select the Edit action. The report design record opens in edit mode in a new tab.

Report Designs are maintained as a versioned glossary. When the report design is created, it is assigned version 1 and the status will be Draft. At this status, all fields except the code, version, status and system delivered flag may be edited.

The system delivered flag identifies if the record is part of the suite of delivered core reports, in which case the flag will be Yes. The system delivered report designs may be copied using the Copy action to form new custom variants, in which case the flag will be No.

Figure 3-12 Report Design Details

Details	Filters	Change History
Details		
Code:	ACTIVITY STATUS PERFORMANCE SUMMARY I	
Version:	1	
Status:	Active	
System Delivered:	Yes	
Description (Default):	Activity Status Performance Summary	
Description (Swedish):	-	
Report Template:	Activity Status Performance Summary	
Report Data Source:	Activity Status Performance Summary	

Activating the Report Design

Use the Activate action to activate the report design. The status is changed to Active, making the report design available to report schedules. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Deactivating the Report Design

Use the Deactivate action to deactivate the report design. The status is changed to Deactivated, making it unavailable to report schedules. Any existing active report schedules that use the report design will continue to do so. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Note

Users with the Oracle Authorized Administrator authority profile can edit the record at any status, however the code, version, status, and system delivered flag remain locked.

Deleting the Report Design

Use the Delete action to delete the report design. The report design may only be deleted if it is not active and has not been used by any report schedules.

Filters for Report Designs

Filters can be applied to report designs to refine the data included in the report when it is run.

The Filters page shows any filters that have been applied to the data source (these cannot be edited), above the table for adding filters to the report design. For information about adding filters, see [Filters](#) in the Data Sources section.

Figure 3-13 Report Design Filters

The screenshot shows the 'Report Design Filters' interface. It has tabs for 'Details', 'Filters', and 'Change History'. The 'Filters' tab is active, showing two sections: 'Data Source Filters' and 'Report Design Filters'.

Data Source Filters:

	Column	Operator	Type	Runtime Value	Ignore Case?	Value	Unit		
-	Spec Type	Equals	Fixed	No	Yes	Food	-	-	and

Report Design Filters:

Buttons: Add, 1, Delete, Insert, Move Up, Move Down

	Column	Operator	Type	Runtime Value	Ignore Case?	Value	Unit		
☐	Country	Equals	Fixed	☐	☒	UK			☒ and ☐ or

If the data source is Audit API, an alternative filters table is presented, with the available filters being those that the associated Supplier Evaluation API provides.

When the report is run, the filters are applied as any data source filters AND any report design filters.

KPI Report Templates

A Key Performance Indicator (KPI) is a specific type of report where a single item of data can be aggregated over time to provide a measure which can be reported on or presented in a dashboard as a simple table or as a chart. An example of a KPI could be a weekly count of the number of supplier sites, or the number of audits due to be completed in the next 30 days.

The KPI values are keyed by the Report Schedule Code and timestamp of when the KPI was measured. The KPI value can be selected as a data source to be included in a report template to define the actual KPI report, or presented in a dashboard.

KPIs are scheduled to run in the same way as reports; each time the KPI is run, the measure is calculated and stored. The values are stored in a separate *KPI Results* folder within the Report Outputs area. A KPI template may be used in any number of report schedules.

The aggregation function allows for measures to be calculated based on minimum, maximum or average values or the sum, count or number of distinct values in a set of data.

Filters can be used to refine the template to a data set appropriate for a particular type of KPI.

To access the KPI Report Templates, select the Manage KPI Report Templates option in the Reporting Admin area. This is only accessible to users with the Advanced Reporting Administrator authority profile.

The list of KPI report templates is displayed, grouped by status. A single *Default* list view is provided. For each template, the description, code, and version are shown.

Figure 3-14 KPI Report Templates Page

The screenshot shows the 'KPI Report Templates' page. It has a search bar at the top with 'Select search column' and 'Enter search criteria'. Below the search bar, there are two sections: 'All' and 'Advanced Search'. The 'All' section shows a list of templates grouped by status: (9) Active and (4) Draft. The 'Advanced Search' section shows a table of templates.

Description	Code	Version
☐ TM_RUNTIME_FILTER	TM_RUNTIME_FILTER	1
☐ TM_NV_NEW_FILTER	TM_NV_NEW_FILTER	1
☐ SH Filter Test 2	SH2	1
☐ SH Filter Test 1	SH FILTER 1	1
☐ KPI REPORT TESTING	KPI REPORT TESTING	1
☐ KPI Report Spec name	IMPORT	1
☐ KPI Report BWS	KPI REPORT	1

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

Note

The KPI Report Template records can be imported and exported using the Import and Export list view actions, however rows in the Filters table that relate to glossary selections or enumerations are excluded.

Creating a KPI Report Template

To create a new KPI report template:

1. Select the New action. The New KPI Report Template page appears.

Figure 3-15 New KPI Report Template Page

2. Enter the details.

Table 3-7 New Report Design Page

Details	Description
Code	Enter a unique uppercase code for this template. Mandatory field.
Version	The version will default to 1. Read-only field.
Status	This will default to Draft. Read-only field.
Description	Enter the description for this template in the supported languages. The description for the default language is mandatory.
Query	Select the query that corresponds to the data to be measured by the KPI. Mandatory field. The options in the list are fixed, based on the set of predefined queries provided by Oracle.
Selected Columns	Once the query has been selected, pick the column to be measured by the KPI. Mandatory field.

Table 3-7 (Cont.) New Report Design Page

Details	Description
Aggregate Function	Select the aggregate function to be applied the KPI measure. Mandatory field. The available options are: • Minimum - the minimum in a range of values • Maximum - the maximum in a range of values • Sum - the sum of a set of values • Average - the average of a set of values • Count - the number of occurrences in a set of values • Distinct - the number of unique occurrences in a set of values The Sum and Average options are only available if the selected columns is a numeric field.

3. Optionally add any filters to be applied to the report design. See [Filters for KPI Report Templates](#).
4. Save the changes and exit.

Editing a KPI Report Template

To edit a KPI report template, select the template on the KPI Report Templates page and select the Edit action. The template record opens in edit mode in a new tab.

KPI Report Templates are maintained as a versioned glossary. When the template is created, it is assigned version 1 and the status will be Draft. At this status, all fields except the code, version and status may be edited.

Figure 3-16 KPI Report Template Details

Details	Filters	Change History
= Details		
Code:	AUDIT30	
Version:	1	
Status:	Active	
Description (Default):	Audits due in 30 days	
Description (Swedish):	-	
Query:	Audit	
Selected Column:	Code	
Aggregate Function:	Distinct	

Activating the KPI Report Template

Use the Activate action to activate the template. The status is changed to Active, making the template available for use. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Deactivating the KPI Report Template

Use the Deactivate action to deactivate the template. The status is changed to De-activated, making it unavailable for use in new KPIs. Any existing active KPIs that use the template will continue to do so. At this status, no fields may be edited (see the note below), but the Create

New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Note

Users with the Oracle Authorized Administrator authority profile can edit the record at any status, however the code, version, status, and system delivered flag remain locked.

Deleting the KPI Report Template

Use the Delete action to delete the template. The template may only be deleted if it not active and has not been used by any KPIs.

Filters for KPI Report Templates

Filters can be applied to a KPI template to refine the data included in the KPI when it is run.

For information about adding filters, see [Filters](#) in the Data Sources section.

Figure 3-17 KPI Template Filters

Column	Operator	Type	Runtime Value	Ignore Case?	Value	Unit
Country	Equals	Fixed	No	Yes	UK	None

When the KPI is run, the filters are applied in addition to any filters that may have been applied when the KPI was scheduled.

Other Report Administration Options

Various other report administration options are available, for the purging of report outputs, monitoring the queue of scheduled report, and controlling the data warehouse synchronization.

Report Purging

Report outputs may be deleted individually by the user who scheduled the report, or by reporting administrators.

To avoid relying on users deleting their reports when no longer required, and in order to not store reports longer than necessary, an automated purging facility is available.

The purging of reports takes place automatically, with the retention period being controlled by the *Number of days to keep Reports* system parameter. The initial default is 90 days; the maximum is 365 days; if not set, no purging takes place. The parameter may be configured by users with the Oracle Authorized Administrator authority profile. If the parameter is changed, a message is shown, warning that changing the number of days that reports are retained may result in existing reports becoming due for purging.

If enabled, two daily batch jobs run on a regular schedule:

- To check for reports that, based on the last update date, are due to be purged in the next 5 days. An email (the template is REPORTPURGE) is sent to the user who scheduled the report, warning that the report will be deleted within the next 5 days.
- To delete reports that have reached the deadline for being deleted (that is x days after their creation date, where x is the system parameter).

Note

The outputs of reports and data extract are eligible for automated purging, however the outputs of KPIs are excluded from the purge facility. They must be manually deleted when no longer required.

Monitoring Scheduled Reports

When reports are scheduled, they are submitted to run on the portal's batch job queue. Facilities are provided for users to view the progress of scheduled reports and to cancel a report that is scheduled or running.

Viewing Scheduled Reports

For system administrators with access to the batch job log, the description column in the log list view will include details of scheduled reports.

For users with the Advanced Reporting Administrator authority profile, a Manage Scheduled Reports option is available in the Reporting Admin area. This presents a subset of the batch job log, filtered to just show reporting jobs that are scheduled, in progress, complete, or have failed. It includes all reporting jobs, regardless of who submitted them. Also included are the jobs that synchronize the data warehouse reporting data.

Figure 3-18 Manage Scheduled Reports Page

Actions 					
☐	Date & Time	Scheduled By	Description	Status	Sub Status
☐	21/11/18 11:52	John Smith	Scheduled Report Sites with Audits-Visits Due or Overdue		Completed
☐	21/11/18 11:52	Jane Doe	Scheduled Report Sites with Audits-Visits Due or Overdue		Completed
					Job Number
					13182
					13181

To see the details for a job, double-click the row. A tab opens with the report's Report Schedule details. You can also select the Open Report Schedule action.

If the job is in progress, the sub status column indicates the stage of process, such as:

- Stage 1 of 3: Counting results
- Stage 2 of 3: Processing data
- Stage 3 of 3: Creating output

Individual users who submit the report can monitor it through the Schedules page of the Report Schedule record. For details, see [Scheduling Reports](#).

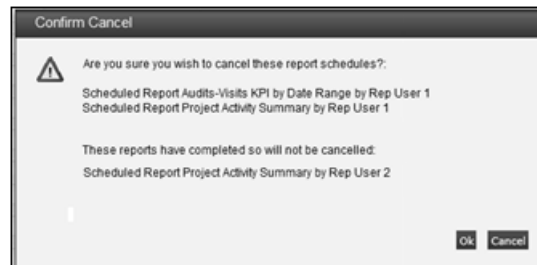
Cancelling Scheduled Reports

Users with the Advanced Reporting Administrator authority profile have the ability to cancel any reporting job through the Manage Schedule Reports page.

To cancel a scheduled report:

1. Choose the reporting job to be cancelled.
2. Select the Cancel action. The Confirm Cancel dialog box appears.

Figure 3-19 Confirm Cancel Scheduled Report



If multiple schedules have been selected, the confirmation prompt lists those that have been selected. If any cannot be cancelled because they have since completed, they are listed beneath.

3. To continue the cancellation, click **Ok**. To return to the Manage Schedules Report page, click **Cancel**.

When a report schedule job is cancelled, the job is terminated, or is removed from the scheduler if it has yet to run. The History page of the Report Schedule record will show the status as having been cancelled, and a notification email (the template is REPORT_CANCELLED) is sent to the user who scheduled the report.

Individual users who submit the report can cancel it through the Schedules page of the Report Schedule record. For details, see [Scheduling Reports](#).

Note

To prevent a recurring report from being automatically scheduled again, delete or edit its Report Schedule record.

Note

Status shows the status of the batch job. Sub Status shows the status of the report generation, within the batch job.

In the event of an unexpected error during report generation, Status may show the batch job as completed, but with Sub Status showing as a failure.

A failure in either Status or Sub Status indicates the report has not run successfully.

System Parameters

To manage the parameters for reporting, select the System Control option and then System Parameters. Table 3-8 describes the available parameters.

Table 3-8 System Parameters Used to Manage Reports

Subtab	Parameter	Description
Global	Number of days to keep Reports	Sets the number of days a report will be retained after creation, before being deleted by the automated purging facility. The user who scheduled the report will receive an email notification 5 days prior to the deletion date. Default is 90 days. The maximum is 365 days. If not set, no purging takes place.
Global	Reporting Data Warehouse Update Interval (mins)	Sets the data refresh interval for the synchronization of certain application data with a Data Warehouse for reporting purposes. Mandatory field. Default is 90 minutes. The minimum is 10 minutes.
Global	Do not run Data Warehouse after	These parameters allow for the data warehouse data synchronization to be suppressed during a time range.
Global	Do not run Data Warehouse before	The selectors allow 30 minute time intervals to be selected; a specific valid time may alternatively be keyed. To run the synchronization continuously, the parameters should be set to the same time. To stop the synchronization entirely, set the range to 00:00 - 23:59 (by keying in the 23:59). Validation ensures that if a value is present in either, both must be valid times (between 00:00 and 23:59), and Before (to) cannot be earlier than After (from).

Report Output Folders

When reports are generated, they are saved in a library of folders. A hierarchical structure of nested folders can be maintained. The library has three separate areas for the outputs of reports, KPIs, and data extracts.

The Report Output Folders can be created by users with the Advanced Reporting Administrator authority profile.

Note

Folders cannot be added to the KPI Reports area, as they are managed by the system.

Figure 3-20 Report Output Folders Page



Creating a Report Output Folder

To create a report output folder:

1. Select an existing folder in the left hand pane, under which the new folder is to appear.
2. Select the New Folder action in the left hand pane. The Enter Folder Name dialog box appears.

Figure 3-21 Folder Name Dialog Box



3. Enter the folder name and any language translations.
4. To continue, click **Ok**. To return to the Report Outputs page, click **Cancel**.

Editing a Report Output Folder

To change the name of a report output folder or to add language translations:

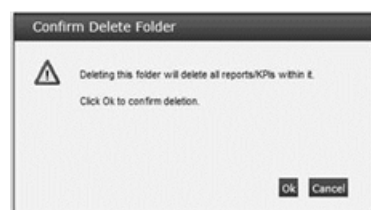
1. Choose the folder and select the Edit Folder action in the left hand pane. The Folder Name dialog box appears.
2. Enter the new name and any language translations.
3. To continue, click **Ok**. To return to the Report Outputs page, click **Cancel**.

Deleting a Report Output Folder

To delete a report output folder:

1. Choose the folder and select the Delete Folder action in the left hand pane. A delete confirmation dialog box appears. If the folder contains report outputs, they will also be deleted, in which case the message *Deleting the folder will delete all reports/KPIs within it* is shown.

Figure 3-22 Confirm Delete Folder



2. To continue with the deletion, click **Ok**. To return to the Report Outputs page, click **Cancel**.

4

Creating Reports

This chapter describes the process for creating new reports.

The Reports module is supplied with a suite of core reports that cover various areas of the Supplier Evaluation data. The core reports cannot be changed, but can be copied to form variants, and new custom reports can be created.

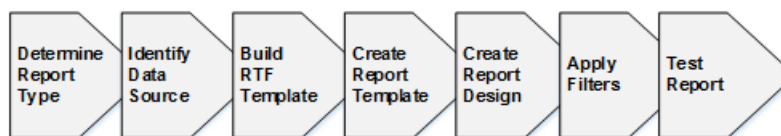
Reports are run from templates that define the layout and data content of the report. Each report has a template that is configured by combining a Data Source and Report Template as a Report Design (see [Report Administration](#)). New report templates can be configured by users with the Advanced Reporting Administrator authority profile.

Reports layouts can be configured to include sorting, grouping, conditional logic, totalling, and charts.

Once a report template has been created, it is scheduled to run (see [Scheduling Reports](#)), at which point the actual report output is generated (see [Viewing Reports](#)). The report outputs may be generated as PDF, Excel, RTF, or HTML documents.

Building New Templates

The general process for creating a new template is as follows:



1. Determine the Record Type.

First determine the type of report to be built, that is, is it a tabular report, a form report or simply a KPI measure:

- The majority of the supplied reports present data in a tabular format where each row of the table represents an item at the level of the report's granularity, such as a row per supplier.
- Some reports present the data in a form layout, where each page or set of pages represents an item. The pages of the form can contain individual fields as well as tables. Examples of form reports are the Audit Certificate report, where details of a supplier's latest audit and any non-conformances are presented as a document.
- An alternative to a report is a KPI, which measures a single value, typically over a period of time. These can be reports, or represented as a dashboard table or chart. KPI templates are configured in a similar way to report templates.

If a template does not already exist for the report, check if there is a similar template either in terms of report layout or data content. Copying an existing template and adapting it is usually quicker than building from scratch. For details of the reports supplied as part of the core suite, see [Appendix: Report Layouts](#).

2. Identify the Data Source.

Report data sources (see [Data Sources](#)) provide the domains of data that can be used within reports. Each data source represents a set of columns from one of the predefined queries that expose the Supplier Evaluation data for reporting purposes.

If a suitable data source exists, it can be used for the report design. Otherwise, create a new data source, selecting the required columns and applying any filters.

3. Build the RTF Template.

The actual contents and layout of the report are defined by its RTF template. The RTF templates can be built using a word processor such as Microsoft Word, that has a purpose-built *Template Builder* plug-in. For information on building RTF templates, see [Appendix: Designing RTF Templates](#).

4. Create the Report Template.

Report templates (see [Report Templates](#)) act as a container for the RTF template.

Create a new Report Template record and attach the RTF file as an attachment.

5. Create the Report Design.

Report designs (see [Report Designs](#)) combine a data source and report template together to provide the means of scheduling the report.

Create a new Report Design record and select the report's data source and report template.

6. Apply Filters.

Filters are used to refine the data source to a subset that is appropriate for the purpose of the report.

Filters can be applied as selection criteria at three levels: directly to the data source, to the report design, or when the report is scheduled to run. The filters can be fixed values, or can be a runtime prompt to the user to enter the value when they schedule the report.

Filters can be added to fields without actually including the field itself in the report layout.

In order to minimize the impact of users submitting reports that result in high volumes of processing or content, a means of assigning a cost to the columns added to a report design is used to limit the content. A maximum limit of 200,000 rows within a report is also imposed.

7. Test the Report.

Before deploying the new report, test the layout, content, and any filters. Some considerations are as follows:

- Identify a specific record that you expect to appear in the report, so that you can use this as a marker to filter the report and check that the report output is as expected.
- Apply an initial filter which limits the report output to just the marker record you have identified, for example, the particular type of Audit. The filter can be removed once you have finished designing the report.
- For reports that are expected to return a large number of records, which could exceed the allowed size of the report, it is useful to add filters that can limit the number of records a particular instance of the report will return. For example, limit the records by Audit type and status.
- Where filters have been applied, initially test using a minimal set of data.

- For reports that routinely require different values to be selected for a particular filter (such as the same report filtered and run for different business categories), use runtime filters.

5

Scheduling Reports

This chapter describes the process for scheduling a report to run.

Users with the Advanced Reporting User or Advanced Reporting Administrator authority profiles have the ability to schedule a report to run by selecting a report design and choosing its run frequency and recipients. Filtering may also be applied at the point of scheduling the report, to further refine the data contained within the report.

Reporting users may view existing report schedules they are associated with, and can edit those that they have created. Reporting administrators have full access to all report schedules.

KPIs are scheduled in a similar way to reports.

Note

There are no system delivered report schedules.

To access the Report Schedules, select the Report Schedules option in the Reports navigation menu.

The list of report schedules is displayed, grouped by status. A single *Default* list view is provided, plus *My Report Schedules* (those the user has scheduled) and *Associated Report Schedules* (those the user is a recipient of.) For each schedule, the code, version, description, report type, and scheduled from/to dates are shown.

Figure 5-1 Report Schedules Page

Select search column

Enter search criteria

Advanced Search

Select List View: Default

All	Description	Code	Version	Report Type	Schedule From Date	Schedule To Date
(173) Active	External System Email	EXTERNAL_SYSTEM_EMAIL	1	Report	04/10/18	-
(15) Draft	Suppliers (3)	SUPPLIERS	1	Report	02/08/18	-
(1) De-activated	Suppliers (3)	SUPPLIERS	1	Report	24/09/18	-

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

Creating a Report Schedule

To create a new report schedule:

1. Select the New action. The New Report Schedule page appears.
2. Enter the details.
3. Save the changes and exit.

Report Schedule Details Tab

Figure 5-2 Report Schedule Details Page

Table 5-1 New Report Schedule Page - Details

Details	Description
Code	Enter a unique uppercase code for this template. Mandatory field.
Version	The version will default to 1. Read-only field.
Status	This will default to Draft. Read-only field.
Description	Enter the description for this schedule in the supported languages. The description for the default language is mandatory.
Report Type	Select whether scheduling a report, a KPI, or a Process & Activity Brief Extract type. The default option is Report.
Extract Criteria	If the Report Type is Process & Activity Brief Extract, this field is mandatory, to select a single extract criteria from the Process & Activity Brief Extracts glossary. Otherwise, the field is hidden.
Extract Criteria Status	If the Report Type is Process & Activity Brief Extract, this field shows the status of the selected Process & Activity Brief Extracts glossary extract criteria. Otherwise, the field is hidden The purpose of this field is to indicate whether the schedule is using the latest version of the criteria, per the Report Design Status field.
Report Design	If scheduling a report, click the icon to select the report design. This field is hidden if KPI is selected as the report type. Mandatory field.
Report Design Status	This indicates whether the schedule is using the latest version of the report design or not. The message <i>Report Design is up to date</i> is shown if the report design has not been changed since it was selected. If the report design has changed, the message <i>A new version of the Report Design is available, please create a new version to get the latest design</i> is shown, in which case a new version of the report schedule should be created to utilize the latest design. This field is hidden if KPI is selected as the report type. Read-only field.

Table 5-1 (Cont.) New Report Schedule Page - Details

Details	Description
KPI Report	If scheduling a KPI, click the icon to select the KPI report template. This field is hidden if Report is selected as the report type. Mandatory field. Note: If this is changed once the first KPI value has been created, the cumulative result for the KPI may no longer be valid, as it will be a mixture of different measures.

Table 5-2 New Report Schedule Page - Report Schedule

Details	Description
Schedule Type	Select whether the report is to run as a single instance, or on a recurring or periodic schedule. The default option is Single. If set to Single, the report will run once on the specified date and time. In this case, the recurring and periodic fields are hidden. If set to Recurring, the report will run repeatedly on a selected day of the week or day of the month (within a date range if one is specified) at a given time. In this case, the periodic fields are hidden. If set to Periodic, the report will run repeatedly every x weeks or months (within a date range if one is specified) at a given time. In this case, the recurring fields are hidden.
Recurring Frequency	If the schedule type is recurring, select the frequency the report is to be run. The options are to repeatedly schedule the report by days of the week, or by days of the month. The default option is day of the week. The field is hidden unless the schedule type is Recurring.
Day of the Week	If the schedule type is recurring and the recurring frequency is days of the week, select the days of the week on which the report is to run. Mandatory field. The field is hidden unless the schedule type is Recurring and the recurring frequency is days of the week.
Day of the Month	If the schedule type is recurring and the recurring frequency is days of the month, select the days of the month on which the report is to run. Mandatory field. The field is hidden unless the schedule type is Recurring and the recurring frequency is days of the month.
Periodic Frequency	If the schedule type is periodic, select whether the scheduling frequency is by a number of weeks or months. The field is hidden unless the schedule type is Periodic.
Schedule From Date	Pick the first date that the report is to run. If the schedule type is Single, it will only run on this date. The default is the current date. Mandatory field.
Schedule To Date	Optionally pick the last date that the report is to run. The field is hidden if the schedule type is Single.
Schedule Time	Set the time that the report is to run on its scheduled dates. The time may be selected from the picker in half hour intervals, or a precise time can be entered.
Current scheduled report submission	If the report has already been scheduled, this indicates the next time the report will run based on the schedule criteria. Read-only field.

The scenarios catered for by the schedule types are as follows:

Single

The report will just run once - on the specified from date.

Recurring

The report will run repeatedly, either by day of the week or day of the month. At least one day of the week (Monday to Sunday) or day of the month (between 1st and 31st). The report will run on the selected days that occur from the start date to the end date (if one has been set), inclusive.

The scheduler takes into account the number of days in the month, and if scheduled to run on the 29th, 30th, or 31st and that date does not exist in a month, it adjusts to the last day of the month. For example, if scheduled to run on the 31st from January, in February it will run on 28th (or 29th if a leap year). When this occurs, however, for subsequent months it will continue to run on the adjusted day of the month.

Periodic

The report will run repeatedly over a set number of weeks or months, such as every 2 weeks or every 3 months. The report will run on the specified start date, repeating thereafter on the same day of the week or month for the selected interval, from the start date to the end date (if one has been set), inclusive.

For example, if set to run every 2 weeks and the first date is a Monday, it will next run on the Monday of 2 weeks hence, or if set to run every 3 months and the first date is the 7th, it will next run on the 7th 3 months hence.

For a periodic scheduling by days, the Recurring option by Day of the Week can be used.

Note

The scheduler handles any necessary conversion to the portal server's time zone, so the report will run at the scheduled date and time in the time zone of the user who scheduled the report.

It should be noted that reports that use the current date to determine whether something is to be reported as due or overdue, the current date is based on the time zone of the server (which should be UTC). For portals that operate across multiple time zones, this should be taken into account when scheduling the time the report is to run.

The field-set, shown in the following table, is hidden if the report type is KPI, as there is no output as such, a single calculated result is written to the database instead.

Table 5-3 New Report Schedule Page - Report Output

Details	Description
Save Output To	Click the icon to select the folder where the report output is to be saved. Mandatory field. See Report Output Folders .

Table 5-3 (Cont.) New Report Schedule Page - Report Output

Details	Description
Overwrite Existing Outputs	Select Yes if the generated output is to overwrite any existing output for the same report. The default option is Yes. If set to Yes, the list of report outputs will just contain the latest run of the report, with its run date and time appended to the report name. If set to No, the list of report outputs will contain all runs of the report, each with its run date and time appended to the report name. Note: If Yes and multiple outputs already exist, all existing instances will be removed and replaced by the new output.
Report Output Name	Enter the name the report is to show as when it appears in the report outputs folder. The run date and time will be appended to this name when the report is generated. Mandatory field. Characters that would result in an invalid file name, such as / and \, are not permitted.
Format	Select which format you wish the report to be generated in. More than one option can be chosen. The options are MS Excel (xls), HTML, PDF, Rich Text Format, MS Excel (xlsx) and MS Word (docx).

Access Control/Recipients Tab

This page controls which users have access to the report or KPI output and who will be sent an email with a link when the output is generated.

Figure 5-3 New Report Schedule Access Control/Recipients Page
Table 5-4 New Report Schedule Access Control/Recipients Page

Details	Description
Users	Click the icon to select individual users to be recipients. Select the user's job role to locate them. The list is restricted to those that have access to the Reports module.
User Roles	Click the icon to select job roles for any users with the role to be a recipient.
External Systems	Click the icon to select any external systems that are to have access to a report output using the Report Attachment API.

Filters Tab

Optionally add any filters to be applied to the report schedule. For information about adding filters, see [Filters](#).

Figure 5-4 Report Schedule Filters Page

The screenshot displays the 'Report Schedule Filters' page with three main sections:

- Data Source Filters:** A table with columns: Column, Operator, Type, Runtime Value, Ignore Case?, Value, Unit, and and. It lists filters for Spec Name, Brand, Ingredient Ambiguous, Spec No., Ingredient Total Percent, and Ingredient Total Percent.
- Report Design Filters:** A table with the same columns as Data Source Filters. It lists filters for Status, Spec No., and Section Product Covered Quantity.
- Report Schedule Filters:** A section with 'Add', 'Delete', 'Insert', 'Move Up', and 'Move Down' buttons. It contains two filter rows: 'Out of Store Date' and 'Event'.

The Data Source Filters and Report Design/KPI Filters tables show any filters that have been applied to the data source or report design respectively.

If any have been specified as runtime filters, enter the value here, otherwise these tables show as read-only. The runtime filter option is not relevant for report schedule filters.

The filters are applied as any data source filters AND any report design filters AND any report schedule/KPI filters. For date filters, the time-zone of the user who scheduled the report is assumed.

Note

A snapshot of any filters applied in the associated data source, KPI, or report design is held on the report schedule. If changes are made to the associated filters, a new version of the report schedule must be created.

When a new version of a report schedule is created, its filters are refreshed from the current filters in the associated glossary records (if any).

When at draft status, the Actions menus include a *Refresh Report Filters* option which will reset the filters that have been derived from the associated data source, KPI, or report design. A confirmation prompt is presented prior to the filters being reset. The values of any runtime filters will be cleared.

Editing a Report Schedule

To edit a report schedule, select the schedule on the Report Schedules page and select the Edit action. The report schedule record opens in edit mode in a new tab.

Report Schedules are maintained like a versioned glossary. When the report schedule is created, it is assigned version 1 and the status will be Draft. At this status, all fields except the code, version, and status may be edited.

Figure 5-5 Report Schedule Details

Submitting a Schedule

When the required schedule details have been entered, to submit the report to run:

1. Select the Activate action. A submission confirmation prompt dialog box appears. It shows when the report will run, based on the schedule details.

Figure 5-6 Confirm Report Submission

If the portal is operating the Enhanced Access Control (EAC) permissions feature, a check is made to compare any named recipients' EAC Area restrictions to those of the user submitting the report. [Table 5-5](#) indicates the scenarios that would result in the recipient not being permitted to access the report, in which case an exception will be listed in the dialog box.

Table 5-5 EAC Report Schedule Exception Scenarios

Scheduler's EAC Areas	Recipient's EAC Areas	Recipient can access the report?
None	None	Yes
None	A, B	No
A, B	None	Yes
A, B	A, B	Yes
A, B	A	No
A, B	C	No
A, B	A, B, C	Yes

Also, if the folder was created by a user with EAC Area restrictions, only users with equivalent Area access will have visibility of the folder.

2. To continue the submission, click **Ok**. To return to the Report Schedule page, click **Cancel**.

The report schedule record is saved, the status is set to Active, and the job is submitted to the scheduler job queue.

When the status becomes Active, the report schedule record becomes read-only. If changes are required, deactivate the schedule and create a new version.

Note

Users with the Oracle Authorized Administrator authority profile can edit the record at any status. Users with the Advanced Reporting Administrator authority profile can edit any draft schedule. Users with the Advanced Reporting User authority profile can edit draft schedules that they have created.

Deactivating the Report Schedule

Use the Deactivate action to deactivate the schedule. The status is changed to De-activated, making it unavailable for scheduling. At this status, no fields may be edited, but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Any report outputs that have been created by the schedule remain unaffected.

Deleting the Report Schedule

Use the Delete action to delete the schedule. The template may only be deleted if it is not active and has not generated any report outputs.

Report Generation

When the report runs, the following takes place:

- The report is constructed using the associated RTF template. The contents appear in the language/local of the user who scheduled the report, translations being automatically applied to system text and glossary data where appropriate. If language, then for any translations that do not exist, the portal's base language is substituted.

- The report is created in the chosen file formats. The file name is in the format:

[Report Name] - [YYYY-MM-DD-HH-MM-SS].[File Type]

For example: Site Audit Summary - 2018-07-27-14-58-21.pdf

- If the user who scheduled the report has EAC Area access control restrictions, they are applied to the data - so the report will only contain data that their EAC Area permits them access to.
- A Report Output record is created containing the report files. The execution date and time is appended to the report output name. See [Viewing Reports](#).

If the report contains no data, the Report Output record is created, but the actual output file attachment is not created.

- An email with a hyperlink is sent (as BCC) to the recipients (the template is REPORTDELIVERY or KPIDELIVERY for KPIs). The content of the email is based on the recipient's language/locale.

Note

In order to avoid the creation of reports with excessive content, a maximum number of rows is permitted. If the report generation exceeds the 200,000 limit, the report generation is terminated with the error message: *Maximum number of permitted report rows exceeded. Please use filters to reduce the size and retry.*

- An entry is added to the report schedule's History page.

History Tab

When the report has run, details will appear in the schedule's History page.

Figure 5-7 Report Schedule History Page

Ran On	Duration	Results	Scheduled By	Status
09/10/18 17:47	00:00:08	8	John Smith	✓
09/10/18 17:21	00:00:08	8	John Smith	✓

The list shows the date and time of the run (most recent first), how long it took to run, the number of results in the report (reports only, not KPIs), who scheduled it, and the status of the job.

Double-click a row in the list to view the full details. The page is read-only.

Figure 5-8 Report Schedule History Details

Schedule Code:	SITES WITH AUDITS-VISITS DUE OR OVERDUE PER SUPPLIER	Schedule Description:	27B_Sites with Audits-Visits Due or Overdue per Supplier
Report Type:	Report	Report Design:	Sites with Audits-Visits Due or Overdue per Supplier
Ran On:	09/10/18 17:21	Duration:	00:00:00
Scheduled By:	John Smith	Results:	8
Status:	Success	Failures:	-

Table 5-6 Report Schedule History Details

Details	Description
Schedule Code	The code that uniquely identifies the report schedule.
Schedule Description	The name of the report schedule.
Report Name	The name of the generated data extract file.
Report Type	Whether a report, a KPI, or a Process & Activity Brief Extract.
Report Design	The report design that the report is based on.
Ran On	The date and time the report ran.
Duration	The length of time it took to generate the report.

Table 5-6 (Cont.) Report Schedule History Details

Details	Description
Scheduled By	The name of the user who scheduled the report.
Results	The number of rows that appear in the report. This will be blank if the Report Type is KPI.
Status	The status of the schedule. If the status shows the success  icon, it has successfully completed; if it shows the failure  icon, an error occurred. If a report exceeds the maximum number of permitted rows, the stop  icon is shown.
Failures	In the event of a failure or stoppage, the exception message.

The Query Log page is available to the Report Administrator. It shows the data selection and record count SQL query statements that the report or KPI has applied.

Figure 5-9 Report Schedule History Details - Query Log

Report History	Query Log
Details	
Query:	<pre>select KPI.c_duration duration, KPI.c_ran_on ran_on, KPI.fk_reportfolder report_folder, KPI.c_value_big_dec value_number, KPI.c_value_text value_text, coalesce(KPI.c_value_big_dec, KPI.c_value_text) value, SCHEDULED_BY_PERSON.c_name scheduled_by from t_kpires KPI left outer join t_user SCHEDULED_BY_USER on SCHEDULED_BY_USER.c_id=KPI.fk_scheduledby left outer join t_person SCHEDULED_BY_PERSON on SCHEDULED_BY_PERSON.c_id=SCHEDULED_BY_USER.fk_person limit 200001</pre>
Count Query:	<pre>select count(*) from (select KPI.c_id kpi_id from t_kpires KPI) countinnerquery</pre>

Reports that use an API as their data source rather than an SQL query will show the text *Queries executed are not available for API-based Reports* instead.

Monitoring Scheduled Reports

Once a report is submitted, the user who submitted it, and reporting administrators can monitor its progress, and may cancel the job if necessary.

Schedules Tab

To view the job progress of the scheduled report, open the Schedules page. The page shows the current status of the schedule and a list of any queued or running instances of the report.

There will typically not be more than one entry in this list, if a report is already scheduled and is resubmitted, the existing schedule will be updated with the new date and time.

The list has columns for the scheduled date and time, the name of the user who submitted it, its status, and a sub status. If the job is in progress, the sub status indicates the stage of process, such as:

- Stage 1 of 3: Counting results

- Stage 2 of 3: Processing data
- Stage 3 of 3: Creating output

Figure 5-10 Report Schedule Schedules Page

Details	Recipients	Filters	Schedules	History	Change History
Schedules					
Current scheduled report submission:			Not Scheduled		
Actions					
Date & Time	Scheduled By		Status	Sub Status	
06/09/18 09:22	John Smith			2 of 3 - Retrieving Data	

Cancelling a Scheduled Report

To cancel a scheduled report:

1. From the Schedules page, select the Cancel action. A Confirm Cancel dialog box appears.
2. To continue the cancellation, click **Ok**. To return to the Schedules page, click **Cancel**.

When a report schedule job is cancelled, the job is terminated, or is removed from the scheduler if it has yet to run. The History page will show the status as having been cancelled, and a notification email (the template is REPORT_CANCELLED) is sent to the user who scheduled the report.

3. Click the Refresh icon to refresh the contents if the schedules list.

Report Scheduling Best Practices

Some best practices to consider when scheduling reports are as follows:

- Avoid excessive reports and potential performance issues by planning for the report contents before submitting it to run. Choose the report design and filters appropriate to the required output.
- For reports that run regularly, particularly large reports, where feasible, schedule them to run outside of the usual business hours.
- When setting the schedule time, avoid regular maintenance times, when the server may be being taken down.
- For reports that focus on data at a point in time, take into account that users who enter the data may have their working day in a different time zone.
- Ensure other recipients of the report have permission to access the report and the data therein. Recipients will only be able to view the report output if they are a user of the system with access to the Report module.

Note that other than any EAC Area restrictions, it is possible for a report to contain data that a recipient would not usually have access to when accessing Supplier Evaluation. For further details on the reporting permissions rules, see [Appendix: Permissions](#).

- Select the report output formats (typically Excel or PDF) that are appropriate to the report type and the recipients. Avoid choosing more formats than are necessary.
- After submitting a report to run, avoid repeatedly resubmitting it while waiting for it to complete. Use the schedule monitoring facility (see [Monitoring Scheduled Reports](#)).

- Where it is not necessary to retain previous versions of the report, use the option to overwrite existing report outputs rather than creating a new output each time the report is run.
- Delete report outputs that are no longer required, rather than relying on the automated purging.
- If historic copies of the report are required to be retained, save the report output to a local or network location rather than storing them within the system.

6

Viewing Reports

This chapter describes the process for viewing reports that have been generated.

Users with the Advanced Reporting User, Advanced Reporting Reader, or Advanced Reporting Administrator authority profiles have access to the report outputs. Reporting users and readers have access to reports they have scheduled or are the recipient of; reporting administrators have access to all report outputs.

To access the Report Outputs, select the Report Outputs option in the Reports navigation menu.

The report outputs are stored in a library of folders, which can be nested within a hierarchy. The folder is specified when the report is scheduled to run. The folder structure has separate areas for reports, KPIs, and data extracts. The number of entries within each folder is indicated.

Figure 6-1 Report Outputs Page



The screenshot shows the 'Report Outputs' page. On the left, a 'Select Folder' pane displays a hierarchy: 'Report Results' (containing 'Test Reports (1)' and 'John Smith' (containing 'Reports (11)'), 'KPI Results', and 'Data Extracts'. The 'Reports (11)' folder is selected. On the right, a table lists reports with columns: 'Report Name', 'Run On', 'Scheduled By', 'Results', and 'Open'. Two rows are visible, both for 'Test Report'.

Report Name	Run On	Scheduled By	Results	Open
Test Report	28/11/18 09:12	John Smith	10	
Test Report	28/11/18 09:13	John Smith	1	

Locate a report by navigating through the folder hierarchy, or using the search box. The columns can be sorted in ascending or descending sequence.

Selecting a folder in the left-hand pane shows its report outputs in the right-hand pane with columns for the report name, date and time the report ran, the name of the user who scheduled the report, the number of rows that appear in the report, and links to the actual reports.

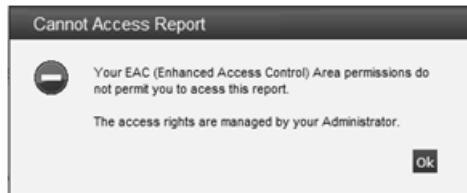
The list is filtered to just show reports that the user is permitted to access.

For KPI results, the list shows the schedule description, the run date and time, who scheduled it, and the actual calculated value. All the KPI information is shown in the list, so for KPIs there is no Report Output record to open.

Viewing Report Outputs

To see the details for a report, double-click the row. A tab opens with the details. You can also open the actual report by clicking the icon in the Open column, then choosing to open or save the file. The page is read-only.

If the portal is operating the Enhanced Access Control (EAC) permissions feature, if you are assigned EAC Area restriction, they must match those of the user who scheduled the report in order to open it, otherwise the Cannot Access Report message box is shown.

Figure 6-2 Cannot Access Report Message Box

In the case of KPIs, the KPI result will not be visible if the EAC Area restrictions do not match.

See [Table 5-5](#) for the EAC Area restriction scenarios.

If attempting to open report output that has subsequently been overwritten by the report running again, that is, where the schedule is set to replace the existing output, or it has been deleted by another user, the message *The Report has been deleted or replaced, please refresh the results and try again* is shown.

Report Output Details Tab

Figure 6-3 Report Outputs Details Page

Actions					
Report Results		Filters			
Details					
Schedule Code:	CR61 Supplier Attachments	Schedule Description:	Supplier Attachments		
Report Type:	Report	Report Design:	Supplier Attachments		
Report Schedule					
Ran On:	27/11/18 12:51	Duration:	00:00:01		
Results:	10	Scheduled By:	John Smith		
Schedule Type:	Single	Schedule Last Modified:	28/11/18 09:12		
Schedule From Date:	27/11/18	Schedule Time:	20:43		
Next Scheduled Run:	29/11/18 07:00				
Access Control / Recipients - Users					
User Name		Email			
Access Control / Recipients - User Roles					
User Role					
External Systems					
Login Id		Email			
Output					
Download	File Name or URL	Description	Bytes	Attached By	Attached On
	CR61 Supplier Attachments	Supplier Attachments	25 KB	John Smith	27/11/18
	CR61 Supplier Attachments	Supplier Attachments	126 KB	John Smith	27/11/18

Table 6-1 Report Output Details Page

Details	Description
Schedule Code	The code that uniquely identifies the report's schedule record.
Schedule Description	The name of the report's schedule record.
Report Name	The name of the generated data extract file.
Report Type	Whether a report, a KPI, or a Process & Activity Brief Extract.

Table 6-1 (Cont.) Report Output Details Page

Details	Description
Report Design	The report design that the report is based on.
Ran On	The date and time the report ran.
Duration	The length of time it took to generate the report.
Scheduled By	The name of the user who scheduled the report.
Schedule Type	Whether a Single, Recurring, or Periodic schedule.
Schedule Last Modified	The date and time the report's schedule record was last modified.
Schedule From Date	The first date the report was scheduled to run on.
Schedule To Date	The last date the report is scheduled to run on (if any).
Schedule Time	The time the report is scheduled to run at.
Next Scheduled Run	The next date and time the report is scheduled to run.
Access Control/Recipients - Users	A list of any individuals that have been designated recipients (in addition to the user who scheduled the report), showing name and email address.
Access Control/Recipients - Users	A list of any job roles that have been designated recipients (in addition to the user who scheduled the report). All users with the roles will become a recipient of the report (subject to them being a reporting user).
External Systems	A list of any external systems that have are permitted to access to the report using the Report Attachment API.
Output	A list of the actual report files, held as attachments, with columns showing an icon of the file format, the file name, the report description, the size of the file in bytes, the name of the user who scheduled the report, and the date it was created.

Click the icon in the Download column to view the report, then choose to open or save the file.

The actual report can then be viewed using an application appropriate to the file type (such as Microsoft Excel or Adobe Acrobat PDF Reader).

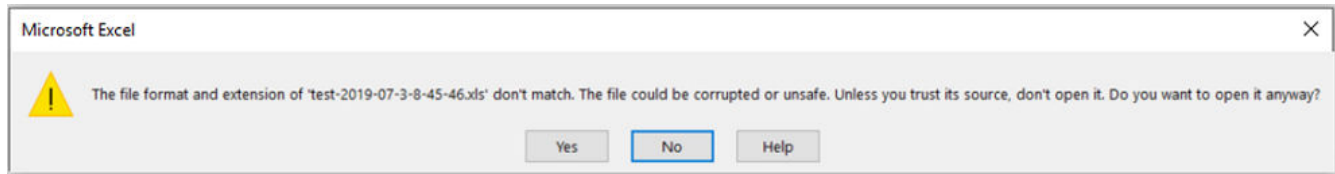
Note

If opening a report in Excel, it may be necessary to manually adjust the columns, rows, and wrapping to suit the layout.

Tabular reports are best viewed using Excel, form reports are less suited to the Excel format.

Form reports generated in Excel (xlsx) format will split page breaks across separate tabs, whereas the Excel (xls) format will just contain a single tab.

If opening a report in Excel issues a warning message as shown in [Figure 6-4](#), it can be avoided by choosing the MS Excel (xlsx) option.

Figure 6-4 Warning Message from Excel

Report Output Filters Tab

The Filters page shows any Data Source Filters, Report Design/KPI Filters, or Report Schedule Filters that were applied to the report. The page is read-only.

For information about filters, see [Filters](#).

Deleting Report Outputs

Reporting administrators may delete any report output record; reporting users may delete only those that they have scheduled.

To delete a report:

1. Check the report to be deleted (more than one may be selected).
2. Select the Delete action. A Delete Document dialog box appears.
3. To continue the deletion, click **Ok**. To return to the Report Outputs page, click **Cancel**.

Alternatively, open the report output record in edit mode and select the Delete action.

7

Data Extracts

This chapter describes the facilities for extracting the full contents of certain records to Comma-Separated Value (CSV) format files. The files can be viewed as spreadsheets or processed for further analysis by an external system.

The records that can be exported to CSV are Supplier and Site. Users with the Advanced Reporting Administrator authority profile have access to the export options.

The extract options are available from the list views of the supported record types. The Advanced Search facility can be used to filter the list view to the desired set of records to extract. The extract is run as a batch job, with an email notification being sent on completion. The generated CSV files are stored in the Report Outputs library.

In order to avoid the generation of excessively large CSV files, a size limit is imposed, based on the setting of the portal's *File Attachment Size Limit* system parameter.

A Process & Activity Brief Extract data extract type is also available for extracting Brief questions and answers for Processes and Activities. The extract is generated as an XLSX Excel spreadsheet and is stored in the Report Outputs library.

Extracting Suppliers

To extract Suppliers:

1. Open a list view of Suppliers.
2. Use the Advanced Search facility to filter the contents to the suppliers you wish to extract.
3. Select the Extract Data action. The Confirm Data Extract dialog box appears.

Figure 7-1 Confirm Data Extract Dialog Box



4. Click the icon to select a language for which locale-dependent fields are to appear in the extract file. The default is your locale/language. This is a mandatory field.
5. Click the icon to select a report output folder where the generated data file is to be saved.
6. To continue with the extract, click **Ok**. To return to the list view, click **Cancel**.

A submission confirmation message box is shown. Click **Ok** to return to the Suppliers list view.

A Supplier-Site Data Extract batch job is submitted to create the extract file. On completion, you will receive an email notification with a link to the file in the Data Extracts area of the Report Outputs (see [Viewing Extract Files](#)).

Note

In the event of the maximum file size being exceeded, the extract file will truncated at the end of the last complete record and a final row output, reading: FILE TRUNCATED - SIZE LIMIT EXCEEDED. In this case, the file name will be prefixed: * INCOMPLETE.

Suppliers Extract File Contents

The same extract file is used for both supplier and site data extracts. The CSV file name is SupplierExtract, with the batch job number appended.

The file contains a row for each of the supplier's sites, but for the supplier extract, the only site data included is the site name (both local and business languages), site code, and site status.

The first row will contain the unique system text for the field; the second row will contain the system text specifically for reporting (both shown in the selected language). The first column will contain an incrementing sequence number, starting from 1 (this is of use to reset the file to the original sequence after making changes in Excel). The second column will contain an automatically assigned unique compound key based on the record type and field.

All fields on the Supplier record will be output, including any custom fields, but excluding change history data. The contents of any embedded list views (such as the list of Contacts) are not output.

The individual rows of tables are output as separate rows (the parent data is not repeated). For example, a supplier with two sites, each with two entries in their References table would output as:

1	Supplier A details	Supplier A, Site 1 details	Site A-1	Reference 1
2				Reference 2
3		Supplier A, Site 2 details	Site A-2	Reference 1
4			Site A-2	Reference 2
5	Supplier B details	Supplier B, Site 1 details	Site B-1	Reference 1
6				Reference 2
7		Supplier B, Site 2 details	Site B-2	Reference 1
8			Site B-2	Reference 2

Columns that relate to a glossary (such as Business Category) contain the Description (not the Code) of the glossary record. Contact information is included, but not contact roles.

Extracting Sites

To extract Sites:

1. Open a list view of Sites.
2. Use the Advanced Search facility to filter the contents to the sites you wish to extract.

3. Select the Extract Data action. The Confirm Data Extract dialog box appears.
4. Click the icon to select a language for which locale-dependent fields are to appear in the extract file. The default is your locale/language. This is a mandatory field.
5. Click the icon to select a report output folder where the generated data file is to be saved.
6. To continue with the extract, click **Ok**. To return to the list view, click **Cancel**.

A submission confirmation message box is shown. Click **Ok** to return to the Sites list view.

A Supplier-Site Data Extract batch job is submitted to create the extract file. On completion, you will receive an email notification with a link to the file in the Data Extracts area of the Report Outputs (see [Viewing Extract Files](#)).

Note

In the event of the maximum file size being exceeded, the extract file will truncated at the end of the last complete record and a final row output, reading: FILE TRUNCATED - SIZE LIMIT EXCEEDED. In this case, the file name will be prefixed: * INCOMPLETE.

Site Extract File Contents

The same extract file is used for both supplier and site data extracts (see [Extracting Suppliers](#)). The CSV file name is SiteExtract, with the batch job number appended.

The file contains a row for each site, with the parent supplier name (both local and business languages) and supplier code on the first site row.

All fields on the Site record will be output, including any custom fields, but excluding change history data. The contents of any embedded list views (such as the list of Contacts) are not output. The Growers List table is excluded.

Note

If a full combination of supplier and site data is required, two separate Supplier and Site extract files must be created and manually merged using the common Supplier Code as the key.

Viewing Extract Files

The generated data files are stored as Report Output records in a similar way as report and KPI outputs. See [Viewing Report Outputs](#).

To access the Data Extract files, select the Report Outputs option in the Reports navigation menu.

The extract files are located in the Data Extracts area, as a library of folders. The folder is specified when the extract is submitted.

Locate an extract file by navigating through the folder hierarchy, or using the search box. The columns can be sorted in ascending or descending sequence. The Report Name column shows the name of the extract file.

To see the details for an extract, double-click the row. A tab opens with the details. You can also open the actual file clicking the icon in the Open column, then choosing to open or save the file.

Report Output Details Tab

Figure 7-2 Data Extract Report Output Details Page



Table 7-1 Data Extract Report Output Details Page

Details	Description
Report Name	The name of the generated data extract CSV file.
Report Type	This will show as Data Extract.
Ran On	The date and time the extract ran.
Duration	The length of time it took to generate the file.
Results	The number of records in the file.
Scheduled By	The name of the user who scheduled the extract.
Output	A list of the actual extract files, held as attachments, with columns showing an icon of the file format, the file name, the report description, the size of the file in bytes, the name of the user who scheduled the extract, and the date it was created.

Click the icon in the Download column to view the extract, then choose to open or save the file.

Process & Activity Brief Extracts

A data extract of Process and Activity Brief data can be scheduled as a report, utilizing pre-configured criteria for filtering Processes, Activities, and their Brief questions.

The Process & Activity Brief Extracts glossary is used to configure reusable data extract criteria. When scheduling the report, setting the report type as a Process & Activity Brief Extract allows for the extract criteria to be selected.

The extract is created as a spreadsheet, containing columns that represent data from the Process and Activity records, and their Brief questions and answers, as defined by the extract criteria. The generated extract is output to a Process & Activity Brief Extracts folder in the Report Outputs library. The user is emailed a link to the report output on completion.

Note

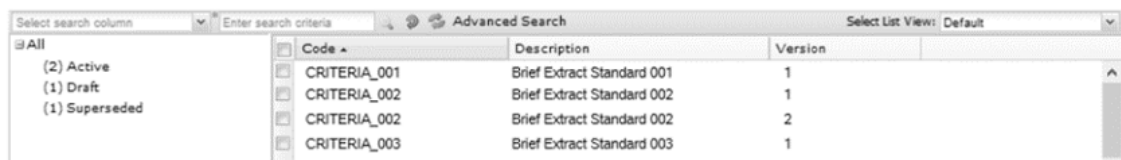
A less comprehensive version of the Brief Extract is available for selection from the Processes and Activities list views. The output is also placed in the Process & Activity Brief Extracts folder in the Report Outputs library, and a link to the report output is emailed to the user on completion. Section Name is not visible in the Brief Extract confirmation step as it is not available to select as a list view field, however it is included in the generated output.

Maintaining the Extract Criteria

An Extract Criteria glossary is used to maintain a library of reusable extract criteria for applying filters to the Brief Extract reports, by optionally selecting Processes, Activities, and questions from the associated Process and Activity Briefs and current Brief template glossary records.

To access the Extract Criteria, select the Manage Process & Activity Brief Extracts option in the Reporting Admin area. This is only accessible to users with the Advanced Reporting Administrator authority profile.

Figure 7-3 Extract Criteria Page



The screenshot shows the 'Extract Criteria' page with a search bar at the top and a table of criteria records. The table has columns for Code, Description, and Version. The left sidebar shows filters for 'All', '(2) Active', '(1) Draft', and '(1) Superseded'.

Code	Description	Version
CRITERIA_001	Brief Extract Standard 001	1
CRITERIA_002	Brief Extract Standard 002	1
CRITERIA_002	Brief Extract Standard 002	2
CRITERIA_003	Brief Extract Standard 003	1

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

Note

Extract Criteria glossary records cannot be imported and exported using the Import and Export list view actions.

Creating an Extract Criteria

To create a new extract criteria:

1. Select the New action. The New Extract Criteria page appears.

Figure 7-4 New Extract Criteria Page

Details	
Code:	
Version:	1
Status:	Draft
Description (Default):	
Description (Argentina):	
Description	

2. Enter the details.

Table 7-2 New Extract Criteria Page

Details	Description
Code	Enter a unique uppercase code for this extract criteria. Mandatory field.
Version	The version will default to 1. Read-only field.
Status	This will default to Draft. Read-only field.
Description	Enter the description for this extract criteria in the supported languages. The description for the default language is mandatory.

3. Optionally add any filters to be applied to the extract criteria. See [Filters](#).
4. Save the changes and exit.

Editing an Extract Criteria

To edit an extract criteria, select the extract criteria on the Extract Criteria page and then select the Edit action. The extract criteria record opens in edit mode in a new tab.

Extract Criteria are maintained as a versioned glossary. When the extract criteria is created, it is assigned version 1 and the status will be Draft. At this status, the code, version, and status may not be edited.

Figure 7-5 Extract Criteria Details

Details	
Code:	454564
Version:	1
Status:	Active
Description (Default):	19.4_Project Title Filter
Description (Argentina):	-
Description	-

Activating the Extract Criteria

Use the Activate action to activate the extract criteria. The status is changed to Active, making the extract criteria available for use in report schedules. The Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Deactivating the Extract Criteria

Use the Deactivate action to deactivate the extract criteria. The status is changed to Deactivated, making it unavailable for use in report schedules. Any existing active report schedules that use the extract criteria will continue to do so. At this status, no fields may be edited (see the note below), but the Create New Version action can be used to create a new version at Draft status, with the version automatically incremented by 1.

Note

Users with the Oracle Authorized Administrator authority profile can edit the record at any status, however the code, version, status, and system delivered flag remain locked.

Deleting the Extract Criteria

Use the Delete action to delete the extract criteria. The extract criteria may only be deleted if it is not active and not in use by any report schedules.

Filters

Use the Filters page to define the extract criteria to be applied as the filter when generating the Brief Extract report.

Figure 7-6 Extract Criteria Details - Filters

The screenshot shows the 'Filters' tab of the 'Extract Criteria Details' page. It contains four main sections:

- Project Filters (Optional):** A table with two columns: 'Process Title' and 'Process Status'. It also includes fields for 'Template Used', 'Business Categories', 'Process Type', and 'Process Manager'.
- Activity Filters (Optional):** A table with two columns: 'Activity Template' and 'Responsible Roles'.
- Process Extract Questions:** A table with two columns: 'Question Name' and 'Brief Name'. It includes buttons for 'Add', 'Delete', 'Move Up', and 'Move Down'.
- Activity Extract Questions:** A table with two columns: 'Question Name' and 'Brief Name'. It includes buttons for 'Add', 'Delete', 'Move Up', and 'Move Down'.

To add a filter to an extract criteria:

1. Open the extract criteria in edit mode and navigate to the Filters page.
2. Add a row to the Questions tables and click **Add**.

3. Enter the details.

Table 7-3 Filters

Details	Description
Process Filters	Optionally choose any specific Processes to be included in the extract by selecting any combination of Process Titles, Parent Processes, Process Status, Process Templates, Process Types, Business Categories, and Process Managers. The Proposed Start and End dates can also be used to apply filters: - Proposed Start Date (From) includes Processes with a start date later than that specified; Proposed Start Date (To) includes Processes with a start date earlier than that specified. Use of both the filters creates a date range between which Process records will be included. - Proposed End Date (From) includes Processes with an end date later than that specified; Proposed End Date (To) includes Processes with an end date earlier than that specified. Use of both the filters creates a date range between which Process records will be included. If none are selected, all will be included (subject to other filters).
Activity Filters	Optionally choose any specific Activities to be included in the extract by selecting any combination of Activity Templates and Responsible Roles. If none are selected, all will be included (subject to other filters).
Process Extract Questions	When adding a row to the Process Extract Questions table, a list of Process Briefs is presented for the selection of their questions.
Activity Extract Questions	When adding a row to the Activity Extract Questions table, a list of Activity Briefs is presented for the selection of their questions.

4. Save the changes and exit. If no Process or Activity questions have been selected, validation will show a warning message.

Scheduling the Report

To schedule a Process & Activity Brief Extract report, follow [Creating a Report Schedule](#), with the following additional steps:

1. Select Process & Activity Brief Extract as the Report Type.
2. Select the Extract Criteria.

When Process & Activity Brief Extract is selected as the Report Type, the following fields become visible (in place of the Report Design and Report Design Status fields):

- Extract Criteria - a mandatory single selection of the extract criteria to be used, from the Process & Activity Brief Extracts glossary.
- Extract Criteria Status - this indicates whether the schedule is using the latest version of the selected extract criteria or not. This functions in the same way as the Report Design Status field when scheduling a standard report.

3. View the filters.

The filters from the selected extract criteria are shown; no additional filters may be applied.

Figure 7-7 Report Schedule - Filters

Details Access Control / Recipients Filters Schedules History Change History			
Project and Activity Filters			
Process Title:	-	Process Status:	- In Progress, Created
Template Used:	-	Process Type:	-
Business Categories:	-	Process Manager:	- John Smith
Activity Template:	-	Responsible Roles:	-
Process Extract Questions			
Question Name			Brief Name
How many critical issues were raised?			Brief Extract Standard 001
Are all critical issues resolved?			Brief Extract Standard 001
Key area of review			Brief Extract Standard 003
Is another visit required?			Brief Extract Standard 002
Identify Site exceptions			Brief Extract Standard 003
Activity Extract Questions			
Question Name			Brief Name

4. Select the Report Output folder.

The Save Output To selector will display the sub-folders of the Process & Activity Brief Extracts folder.

5. Save and submit the report schedule.

Note

The output format is an Excel xlsx spreadsheet, so the Format field is not selectable.

The Process & Activity Brief Extract Limit system parameter can be set to increase the default limit of 800 Processes included in a single extract, up to a maximum of 5000.

If the number of processes exceeds the limit, the report generation may fail, in which case a message will be shown in the report history page of the Report Output record.

6. View the generated report in the Report Outputs library.

The Process & Activity Brief Extract reports are output to a Process & Activity Brief Extracts folder in the Report Outputs library. Custom sub-folders may be created within this area, per the other report output types.

The Report Output record shows the extract criteria filters that were applied to generate the report.

Process & Activity Brief Extract File Contents

The Process & Activity Brief Extract report is created as an Excel XLSX spreadsheet.

The column headings are configurable system text, allowing for customization.

The generated report contains all Processes and Activities, and the Brief questions and answers for the required extract criteria. Processes are included based on the Process filters, regardless of the Activity filters; the Activity filters determine which Activities (if any) are included.

Briefs are associated to Processes and Activities through their respective Template glossary records. Process Templates can have multiple Briefs linked to them, but Activity Templates only allow a single Brief.

The following provides a guide to the extract layout.

Figure 7-8 Process & Activity Brief Extract Layout

Other Fields	Project Title	Other Fields	Project Question 1			Project Question 2		Other Fields	Activity Name	Other Fields	Activity Question 1		Activity Question 2			Other Fields
			Section Name	How many issues?	Comments	Section Name	Status of site				Section Name	Active contact available 24hrs?	Section Name	Outstanding issues?	Comments	
	Project 1		Supplier	One	Critical	Primary sites	Ready		Activity 1		Product	Yes				
	Project 1		Supplier	One	Critical	Primary sites	Ready		Activity 2				Allergen	Yes	Liaise with contact	
	Project 1		Supplier	One	Critical	Primary sites	Ready		Activity 3		Spec	No				
	Project 2					Secondary sites	Active		Activity 1		Spec	Yes				
	Project 2					Secondary sites	Active		Activity 2							

Table 7-4 Process & Activity Brief Extract Layout

Column	Source Location	Comments
Process ID	Process → Process Details → Details	
Parent Process	Process → Process Details → Details	
Process Title	Process → Process Details → Details	
Template Used	Process → Process Details → Details	
Template Type	Process → Process Details → Details	
Status	Process → Process Details → Details	
Master Process	Process → Process Details → Details	
Proposed - Launch Date	Process → Process Schedule → Process Dates	
Process Type	Process → Process Details → Details	
Master Concept	Process → Process Details → Details	
Process Concept	Process → Process Details → Details	
Target Consumer	Process → Process Details → Details	
Process Manager	Process → Process Details → Details	
Role	Process → Teams	Concatenated list of User Roles.
Users	Process → Teams	Concatenated list of Users.

The following columns are repeated per the Extract Criteria Process brief name/question.

A pattern match to the Process Brief Name/Question based on the Extract Criteria Process Brief Name/Question, for each Process, determines whether the fields are populated or blank. If a question appears more than once under the same brief/section, the information in these fields will be concatenated (ordered the same across the fields).

If there is no match, then all the fields will be blank for the process.

Table 7-4 (Cont.) Process & Activity Brief Extract Layout

Column	Source Location	Comments
Section Name	Process → Brief → Section Name (Correlating to the Extract Criteria Question)	This is the Section field-set name in the Process Brief, corresponding to the particular Question from the Extract Criteria.
Question (Correlating to the Extract Criteria Process Question)	Process → Brief → Answer (Correlating to the Extract Criteria Question)	This is populated with the Answer, if completed, otherwise it will be blank. The extract will contain at least one row per Process. The process information will be repeated for the number of activities against each process. Note: The activities against a process can be filtered out by the Extract Criteria filters.
Comments	Process → Brief → Answer → Comments (Correlating to the Extract Criteria Question)	This column will only be included in the extract if the Answer given against one of the processes requires a mandatory comment. If the Answer for the question requires a mandatory comment, this field will be populated with the mandatory comment. The existing brief extract uses the question as a prefix to comments. This field will also incorporate the prefix.
End of Repeated Process columns		
Activity Name	Process → Activity → Activity Details → Details	Multiple Activities can be selected in the filter. The extract will output separate rows per Activity, with the Process details repeated on each row.
Proposed End Date	Process → Activity → Activity Details → Details	
Actual End Date	Process → Activity → Activity Details → Details	
Proposed Start	Process → Activity → Activity Details → Details	
Actual Start Date	Process → Activity → Activity Details → Details	
Activity Status	Process → Activity → Activity Details → Details	
Sub Status	Process → Activity → Activity Details → Details	
Completed By	Process → Activity → Activity Details → Details	
The following columns are repeated per the Extract Criteria Activity brief name/question. A pattern match to the Activity Brief Name/Question based on the Extract Criteria Activity Brief Name/Question, for each Activity, determines whether the fields are populated or blank. If a question appears more than once under the same brief/section, the information in these fields will be concatenated (ordered the same across the fields). If there is no match, then all the fields will be blank for the Activity.		
Section Name	Process → Activity → Brief → Section Name (Correlating to the Extract Criteria Question)	This is the Section field-set name in the Activity Brief, corresponding to the particular Question from the Extract Criteria.

Table 7-4 (Cont.) Process & Activity Brief Extract Layout

Column	Source Location	Comments
Activity Question (Correlating to the Extract Criteria Activity Question)	Process → Activity → Brief → Answer (Correlating to the Extract Criteria Question)	This is populated with the Answer, if completed, otherwise it will be blank. Note: The activities against a process can be filtered out by the Extract Criteria filters.
Comments	Process → Activity → Brief → Answer → Comments (Correlating to the Extract Criteria Question)	This column will only be included in the extract if the Answer given against one of the activities requires a mandatory comment. If the Answer for the question requires a mandatory comment, this field will be populated with the mandatory comment. The existing brief extract uses the question as a prefix to comments. This field will also incorporate the prefix.
End of Repeated Activity columns		
Planned Working Days	Process → Process Schedule → Process Schedule	
Proposed Launch Date	Process → Process Schedule → Process Dates	
Actual Launch Date	Process → Process Schedule → Process Dates	
Proposed Year	Process → Process Schedule → Process Dates	
Actual Year	Process → Process Schedule → Process Dates	
Proposed Week	Process → Process Schedule → Process Dates	
Actual Week	Process → Process Schedule → Process Dates	
Proposed Start Date	Process → Process Schedule → Process Dates	
Actual Start Date	Process → Process Schedule → Process Dates	
Proposed End Date	Process → Process Schedule → Process Dates	
Actual End Date	Process → Process Schedule → Process Dates	
Code	Process → Activity → Activity Details → Details	
Duration Days	Process → Activity → Activity Details → Details	
Sequence	Process → Activity → Activity Details → Details	
Checkpoint Only	Process → Activity → Activity Details → Details	
Critical Path?	Process → Activity → Activity Details → Details	
Is a Key?	Process → Activity → Activity Details → Details	
Is a Gate?	Process → Activity → Activity Details → Details	

Table 7-4 (Cont.) Process & Activity Brief Extract Layout

Column	Source Location	Comments
Auto Gate?	Process → Activity → Activity Details → Details	
Use Artwork	Process → Activity → Activity Details → Details	
Activity Type	Process → Activity → Activity Details → Activity Type	
Record	Process → Activity → Activity Details → Activity Type	
Started Status	Process → Activity → Activity Details → Activity Type	
Completed Status	Process → Activity → Activity Details → Activity Type	

A

Appendix: Report Layouts

This appendix summarizes the suite of core reports supplied with the Reports module. Following the list of reports are details of common aspects of the report layouts and formatting.

Some common features are as follows:

- When selecting users in a filter, such as a Technologist, Process Manager, or Created By name, the user selector includes a text search on name (including the email address in the case of the fields being concatenated), for an individual user to be selected from the returned list. Alternatively, a partial text search can be applied using the Contains operator.
- For reports that include Process Activities, the default activity name field/filter (also within the lists of linked records) is the name of the activity's template. As the template name may be overridden in the Activity record, that field is available as an optional field/filter.
- For reports that include the Supplier or Site Billing Detail tables: If elements from these tables are included in a custom report, the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.

For further details of each report layout and its fields and filters, see *Oracle Retail Supplier Evaluation Report Layouts*.

Standard Reports

Table A-1 Standard Reports

Report	Description
CR26 Audits/Visits by Date Range	The report provides a KPI trend analysis of completed Audits & Visits within a specified date range by supplier. A monthly analysis of the number of completed Audits/Visits, between specified date range is presented as table of the count of those with a completion date, sorted by audit/visit type, grouped by month of completion. Option is available to show the results by Audit Type.
CR27 Sites with Audits/Visits Due or Overdue	Three versions: a) Sites with Audits/Visits Due or Overdue; b) Sites with Audits/Visits Due or Overdue (per Supplier); c) Sites with Audits/Visits Due or Overdue (per Audit/Visit Type). The report searches due or overdue Audit/Visit, listing them by Site. The number of days due or overdue is calculated (+/- relative to the current date). Option is available to group the output by Supplier or by Audit/Visit Type. Separate reports can be run for due and overdue.
CR28 Audits/Visits with Issues Overdue	Three versions: a) Audits/Visits with Issues Overdue; b) Audits/Visits with Issues Overdue (per Supplier); c) Audits/Visits with Issues Overdue (per Audit/Visit Type). The report searches Audits & Visits that have overdue Issues, listing them by Site. The number of days overdue is calculated (+/- relative to the current date). Option is available to group the output by Supplier or by Audit/Visit Type.

Table A-1 (Cont.) Standard Reports

Report	Description
CR29 Assessments by Date Range	The report provides a KPI trend analysis of completed Assessments within a specified date range by supplier. A monthly analysis of the number of completed Assessments, between the specified date ranges is presented as a time series chart. Option is available to show the results by Assessment Type.
CR30 Sites with Assessments Overdue	Three versions: a) Sites with Assessments Overdue; b) Sites with Assessments Overdue per Supplier; c) Sites with Assessments Overdue per Score Type. The report searches Assessments that are overdue, listing them by Site. The number of days overdue is calculated (+/- relative to the current date). Option is available to group the output by Supplier or by Assessment Type.
CR31 Site References (Certificates) - All Valid / Overdue by Type	Two versions: a) Site References (Certificates) - All Valid/Overdue by Type; b) Site References (Certificates) - All Valid/Overdue by Type (per Supplier); c) Site References (Certificates) - All Valid/Overdue by Type (per Certificate Type). The report searches Sites that have certificates (references). Option is available to group the output by Supplier or by Certificate Type. Two separate reports list certificates that are either overdue or valid (a certificate is considered to be overdue if its expiry date is passed the current date).
CR32 Supplier/Site Contacts	The report searches Contacts by role, listing the Supplier or Site Contact details by contact role for those that match the specified role. The granularity of the report is Contact, so the output is a single row per contact, with their roles concatenated within supplier roles and site roles columns. Provides a similar output to the <i>Download to Excel</i> action on the Contacts list view. Site code, name, type and technologist details are concatenated in the event of multiple sites. The output is a single row per contact, showing all the contact's supplier/site roles – for example, if the filter was <i>Main Contact</i>, the output only include contacts that had that role, but the column in the report would show all the contacts' roles.
CR33 Process Status/Performance Summary	Four versions: a) Process Status/Performance Summary; b) Process Status/Performance Summary (per Supplier); c) Process Status/Performance Summary (per Business Category); d) Process Status/Performance Summary (per Process Manager). The report searches Processes, with option to filter by a range of process launch dates. Option is available to group the output by Supplier, by Business Category, or by Process Manager. If the process is overdue, the number of days overdue is calculated (based on the current date). No. Days Overdue = the <i>actual end date</i> minus the <i>proposed end date</i>, using the date the query is executed if the actual end date is not set. The column will be empty/null if the result of the calculation is less than or equal to 0 (that is, that the proposed end date is after or the same as the actual end date / the date the query is executed.)

Table A-1 (Cont.) Standard Reports

Report	Description
CR34 Process Activity Status/Performance Summary	Four versions: a) Process Activity Status/Performance Summary; b) Process Activity Status/Performance Summary (per Supplier); c) Process Activity Status/Performance Summary (per Business Category); d) Process Activity Status/Performance Summary (per Process Manager). The report searches Process Activities, with option to filter by a range of process launch dates. Option is available to filter by one or more specific activity types. Option is available to group the output by Supplier, by Business Category, or by Process Manager. If the activity is overdue, the number of days overdue is calculated (based on the current date). The report also includes Activities which are not yet Overdue, but where the Due Date is within a specified period from the date the report is run, using a <i>relative</i> date filter. The report can be used to show the name of the last (based on sequence) <i>critical path</i> activity completed and the name of the next (based on sequence) <i>critical path</i> activity due, plus the scheduled start and completion dates.
CR35 Process Resource	The report presents a bar chart of Processes, showing the number of working days for Teams, Roles and Individuals, based on the Activities associated with the Responsible users, by date range of activity scheduled start and end dates. Specify a date range as a relative value, such as <i>this week</i>, <i>this month</i>, or <i>the next x months</i>. The output can be narrowed by Process Type; Business Category; Process Name; Activity Name.
CR48 Audit/Visit Issue Status	Three versions: a) Audit/Visit Issue Status; b) Audit/Visit Issue Status (per Supplier); c) Audit/Visit Issue Status (per Audit/Visit Type). Similar to CR28 Audits/Visits with Issues Overdue, but includes Issues at any status (per the filter), rather than just Overdue Issues. Option is available to group the output by Supplier or by Audit/Visit Type.
CR49 Audit/Visit Summary	Three versions: a) Audit/Visit Summary; b) Audit/Visit Summary (per Supplier); c) Audit/Visit Summary (per Audit/Visit Type). The report searches for Audits/Visits based on the selected Filters. Issue Details can be included, but overall granularity is by Audit. Option is available to group the output by Supplier or by Audit/Visit Type.
CR50 Audit/Visit Certificate	The report searches for Audits/Visits based on the selected Filters. Non Conformance/Issue details are included, but overall granularity is by Audit. The report presents a page per Audit/Visit. Option is available to group the output by Supplier or by Audit/Visit Type. A maximum of 10 Audits/Visit may be selected per run.
CR51 Assessment Summary	Three versions: a) Assessment Summary; b) Assessment Summary (per Supplier); c) Assessment Summary (per Assessment Type). The report searches for Site Assessment records (Assessments with a level of Site) based on the selected Filters. Option is available to group the output by Supplier or by Assessment Type.
CR52 New Suppliers	The report lists Supplier records with a Created On date that is newer than a specified period from the date the report is run, using a relative date filter.

Table A-1 (Cont.) Standard Reports

Report	Description
CR58 Process Summary	Four versions: a) Process Summary; b) Process Summary (per Supplier); c) Process Summary (per Business Category); d) Process Summary (per Process Manager). The report searches Processes, based on the selected filters. If the process is overdue, the number of days overdue is calculated (based on the current date).
CR59 Process Activity Summary	The report searches Activities, based on the selected filters. If the Activity is overdue, the number of days overdue is calculated (based on the current date).
CR60 Global Network Bus Errors	The report is a listing of any errors that have occurred during the synchronization of data within the Global Network Bus (GNB) portal. As the GNB is only accessible by Oracle Hosting, it is not possible for system administrators or Oracle Support to monitor for integration issues. This report can be scheduled to run on the Global or Satellite portals. If any of the following web services listed in the Web Service Log have a status of Failed or Internal Failure in the past 24 hours (assuming scheduled to run every 24 hours), the error is reported. The following API web services are included in the reports referenced below: • MyArtworkRestService - MyArtwork Record Failures Report • ContactRestService - Contact Record Failures Report • TaskRestService - Task Record Failures Report • SiteRestService - Site Record Failures Report • SupplierRestService - Supplier Record Failures Report • UrgentItemsRestService - Urgent Item Record Failures Report • UserRestService - User Record Failures Report
CR61 Supplier Attachments	Based on Attachments in the Supplier record, the report searches Suppliers where the specified filters are met, and returns a list of Attachment details. If no attachments are found for a Supplier, no result is returned for that Supplier.
CR62 Site Attachments	Based on Attachments in the Site record, the report searches Sites where the specified filters are met, and returns a list of Attachment details. If no attachments are found for a Site, no result is returned for that Site.
CR74 New Sites	The report lists Site records with a Created On date that is newer than a specified period from the date the report is run, using a relative date filter.
CR75 Site Audit Summary	The report provides a high-level summary of Site records, showing details from the Last and Next Audits of each audit/visit types. The report shows multiple rows per site, dependent upon the number of Audit/Visit Types against the site. For each Audit/Visit Types: • The last audit/visit is based on the latest change history Changed On date from the audit details where the status is Completed, Failed or Abandoned. • The next audit/visit is based on the earliest change history Changed On date where the status is Scheduled, In Progress, Awaiting Corrective Action, Awaiting Sign-off or Awaiting Amendment. A status of Not Progressed is ignored.

Table A-1 (Cont.) Standard Reports

Report	Description
CR85 Sites with Audit-Visit	The report lists Audits/Visits of a specified type, by Site. The search can be filtered to only include Audits/Visits at a particular status. If searching for <i>completed</i> Audits/Visits, a further refinement can be made using the completion date – for example, to list sites that have an Ethics audit, which has been completed in the last 12 months. This report can be used as a basis for determining which active sites do not have the specified type of Audit/Visit. This is achieved by running a separate report, using the Sites data source query, to generate a list of active sites. The two outputs can then be crosschecked in Excel, or similar tool, to determine which sites appear in the active list, but not in the list of those with a completed Audit/Visit.
CR100 Site Assessment Latest Completed Scores	The report focuses on the Assessment Score, for the Assessment Types selected in the filters. For each Site, the report output will contain: • The <i>latest completed</i> Assessment of each Assessment Type. • The <i>next</i> Assessment of the required Assessment Type. The report output will contain a maximum of two rows per Site per Assessment Type. The default report granularity is the assessment record. If elements from the Supplier/Site Billing Detail tables are included in a custom report, the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.
CR101 Site Assessments Latest Completed Responses	Similar to Site Assessments Latest Completed Scores report in outputting just the <i>latest</i> and <i>next</i> Assessments for each Assessment type, but this report will also output the questions and responses for each qualifying Assessment. For each Site, the report output will contain: • The <i>latest completed</i> Assessment of each Assessment Type. • The <i>next</i> Assessment of the required Assessment Type. The report output will contain a maximum of two rows per Site per Assessment Type multiplied by the number of questions. The report will include columns for Question Id, Question, Response (Score), and Comments, to give a row per Question. The Response column will be populated with the selected responses from the Assessment, with multiple selected checkbox responses concatenated. The Response column will include the score for the selected response if available. If no response has been given yet, the Response column will be blank. The default report granularity is the assessment record question. If elements from the Supplier/Site Billing Detail tables are included in a custom report, the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.
CR102 Site Assessments All Responses	Similar to Site Assessments Latest Completed Responses report in focusing on the Assessment Questions and Responses, but this report will allow the responses to any Assessments to be included, with no restrictions to just the <i>latest</i> and <i>next</i> Assessments of each type. The report will include columns for Question, Response, and Question Score, to give a row per Question. The Response column will be populated with the selected responses from the Assessment, with multiple selected checkbox responses concatenated. The Response column should include the score for the selected response if available. If no response has been given yet, the Response column will be blank. The default report granularity is the assessment record question. If elements from the Supplier/Site Billing Detail tables are included in a custom report, the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.

Table A-1 (Cont.) Standard Reports

Report	Description
CR103 Site Audits Latest Completed Scores	The report focuses on the Audit Score, for the Audit Templates selected in the filters. For each Site, the report output will contain: • The <i>latest completed</i> Audits of the required template. • The <i>next</i> Audit of the required template. The report output will contain a maximum of two rows per Site per Audit Template. The default report granularity is the audit record. If elements from the Supplier/Site Billing Detail tables are included in a custom report, the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.
CR104 Site Audits Latest Issues	Similar to the Site Audits Latest Completed Scores report in outputting just the <i>latest</i> and <i>next</i> Audits for each type, but this report will also output the Issues/Corrective Action Details for each qualifying Audit. For each Site, the report output will contain: • The <i>latest completed</i> Audits of the required template. • The <i>next</i> Audit of the required template. The report output will contain a maximum of two rows per Site per Audit Template multiplied by the number of issues. The default report granularity is the audit issue record. If elements from the Supplier/Site Billing Detail tables are included in a custom report, the expectation is that the report will be filtered on the Invoicing System, so there will be no multiplication of rows.
CR105 Policy Document Acceptance	The report focuses on the acceptance log for External Users - Supplier & Site acceptance of the document (fields from the Internal Acceptance table will not be included). A single report output will contain the acceptance details for multiple Library Documents, dependent on any filters. Only Library Documents that have one or more entries in the External Users Acceptance table will be included.
CR106 Supplier Evaluation Site Summary Scores	The report focuses on each Site and will show summary-level data for each site's Supplier Evaluation Type scores: Soft coded columns will be available to expand the report. • Soft coded columns for the <i>latest completed</i> Assessment Score for each of the selected Assessment Types. • Soft coded columns for the <i>latest completed</i> Audit Score for each of the selected Audit Types. • Soft coded columns for the list of Accepted Documents for the Site.
CR110 Audit Outcome Summary	The report is a form style report. The user applies filters in the report schedule to identify a specific Audit (or limited number of Audits) to be included in the report. The report uses a new Audit Outcome API data source, which is based on the Audits API data source plus a number of additional fields from the Audit's associated Site record (Status, Type, GLN, Top Grade, Business Unit, Business Categories, Technologists, and Custom Fields), as well as from the Contacts (Name, Email, Roles, and Phone). The report provides totals of the Audit's issues/non-conformances (open issues, overdue issues, and total issues). For the tables of the site's Contacts, in order to filter for specific contact roles, the filters must be applied to the report's RTF template file. These filters cannot be applied to the report design or schedule because the data source is an API. See RTF Filtering.

Table A-1 (Cont.) Standard Reports

Report	Description
CR111 Item Assessment Summary	Three versions: a) Item Assessment Summary; b) Item Assessment Summary (per Supplier); c) Item Assessment Summary (per Assessment Type). The report searches for Item Assessment records (Assessments with a level of Item) based on the selected filters. Option is available to group the output by Supplier or by Assessment Type. If the row relates to multiple sites, the columns contents are concatenated.
CR112 Item Assessments Latest Completed Scores	The report focuses on the Assessment Score, for the Assessment Types selected in the filters. For each Product the report output will contain: • The <i>latest completed</i> Assessment of each Assessment Type. • The <i>next</i> Assessment of the required Assessment Type. The report output will contain a maximum of two rows per Product per Assessment Type. If the row relates to multiple sites, the columns contents are concatenated.
CR113 Item Assessments Latest Completed Responses	The report focuses on the Assessment Score, for the Assessment Types selected in the filters. For each Product the report output will contain: • The <i>latest completed</i> Assessment of each Assessment Type. • The <i>next</i> Assessment of the required Assessment Type. The report output will contain a maximum of two sets of rows per Product per Assessment Type. The assessment's questions and responses are also included: • The report includes columns for Question, Response and Question Score, to give a row per Question. • The Response column will be populated with the assessment's question responses (multiples are concatenated). • Table response types are not included in the report queries due to the complexity of the data structure. • If no response has been given the Response column will be blank. • The Question Score column will output the numeric score for the selected response (multiples are concatenated). If the row relates to multiple sites, the columns contents are concatenated.
CR114 Item Assessments All Responses	The report focuses on the Assessment Score, for the Assessment Types selected in the filters. The report lists all Item Assessments for products, with their scores, status and due date. It is not restricted to just the <i>latest</i> and <i>next</i> assessments of the required types, meaning the output may contain any number of sets of rows per Product per Assessment Type. The assessment's questions and responses are also included: • The report includes columns for Question, Response and Question Score, to give a row per Question. • The Response column will be populated with the assessment's question responses (multiples are concatenated). • Table response types are not included in the report queries due to the complexity of the data structure. • If no response has been given the Response column will be blank. • The Question Score column will output the numeric score for the selected response (multiples are concatenated). If the row relates to multiple sites, the columns contents are concatenated.

Table A-1 (Cont.) Standard Reports

Report	Description
CR115 Item Evaluation Summary Scores	The report focuses on each Product and will show summary-level data for each product's Item Evaluation scores. If the row relates to multiple sites, the columns contents are concatenated. Soft coded columns are available to expand the report.

Reports Layout and Formatting

This section describes the common rules applied to the core reports, in terms of content layout and formatting. Further information on the styling of the core reports can be found in [Appendix: Designing RTF Templates](#).

The following topics are covered in this section:

- [Multiple Rows and Concatenation in Tabular Reports](#)
- [Linked Records](#)
- [Soft-Coded Columns](#)

Multiple Rows and Concatenation in Tabular Reports

Depending on the level of granularity of the report, occurrences of multiple rows of data will either be output as separate rows, or concatenated into single cells.

Where columns have contents concatenated, the separator is a comma, and if any item in the list is blank or null, it is replaced with the text Unknown, otherwise blank or null values show as blank in the report.

Suppliers

Suppliers are output as separate columns for code and name. A column containing the concatenated code and name is available to add as an optional additional column, and may be used where a report is grouped by supplier.

Sites

Sites are output as separate columns for code and name. A column containing the concatenated code and name is available to add as an optional additional column, and may be used where a report is grouped by site.

Business Categories

Business Categories are output as separate columns for each level (the portal may have up to five levels configured). Multiples are concatenated, alpha sorted by the first level, so that the concatenated levels correspond. Reports contain separate columns for Lead and Other business categories, for where a portal is configured to use a separate single lead category and a list of other categories.

A column containing the full path is available to add as an optional additional column, and may be used where a report is to be grouped by business category.

Where Business Category appears as a default field in a core report, it is the full path. Where listed as an additional field that may be added, either the full path or individual levels can be used.

Linked Records

Process Activities may be linked to certain other types of record within Supplier Evaluation, such as an activity to activate or complete an Audit.

When records that are linked to a process are opened within the application, a Process Links page appears containing a list of any processes the record is linked to. [Table A-2](#) shows the details available for reporting process record links.

Table A-2 Process Activity Linked Records

Linked Record	Fields Available for Reporting
Audit/Visit	Supplier Code, Site Code, Audit Template, Due Date
Assessment	Supplier Code, Site Code, Assessment Type, Due Date
Product Record	Product Code, Product Title, Product Number, Alternative Product Number, Division
Site	Supplier Code, Site Code, Site Name

The link values are concatenated to give a single comma-separated set of values per Activity (or per Process, depending on granularity).

 Note

Where a report has Linked Process fields available to be included as additional columns, the available fields are Process Id, Process Name, Activity Id, and Activity Name (the name of the associated activity template).

Soft-Coded Columns

The soft-coded columns facility is provided to cater for the reporting of values as columns, where the number of columns is variable based on how the system has been configured.

B

Appendix: Designing RTF Templates

This appendix provides instruction and best practices for the creation of the Rich Text Format (RTF) templates that form the basis of reports.

The recommended method for creating RTF templates is using the *Oracle BI Publisher Template Builder* plug-in for Word. This appendix provides information on installing the plug-in, along with guidance and examples for building templates for different types of reports, using the core Supplier Evaluation style.

The following topics are covered in this appendix:

- [Types of Reports](#)
- [BI Publisher Template Builder Plug-in for Word](#)
- [Building RTF Templates](#)
- [Formatting Report Contents](#)
- [System Text and Language Translations](#)
- [Style Guidelines](#)

For a summary of the reports supplied as part of the core suite of default core reports, see [Appendix: Report Layouts](#). For further details of the layout of each report layout, see *Oracle Retail Supplier Evaluation Report Layouts*.

Types of Reports

There are three distinct types of report in Supplier Evaluation, referred to as Tabular Reports, Form Reports, and KPIs.

Tabular Reports

This type of report presents data in a tabular format where each row of the table represents an item at the level of the report's granularity such as a row per supplier.

Form Reports

This type of report presents the data in a form layout, where each page or set of pages represents an item. The pages of the form can contain individual fields as well as tables. Examples of form reports Audit Certificate reports, where details of a supplier's latest audit and any non-conformances are presented as a report.

BI Publisher Template Builder Plug-in for Word

The *Oracle BI Publisher plug-in for Word* (also known as *Template Builder*) is an extension of Microsoft Word. It aids the development of RTF documents for use as templates of BI Publisher reports. RTF templates can be created without *Template Builder*, but using it provides an easier way to build, preview, and validate templates, and has the capability of creating XLIFF language translations.

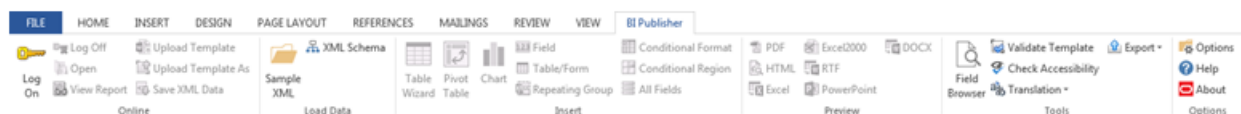
Installing and Launching Template Builder

To install the latest version of *Template Builder* from Oracle:

1. Download the executable file from:
<http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>
2. Accept the License Agreement.
3. Select the link appropriate to your version of Word (if the 64-bit installation has presentation issues, try the 32-bit version).
4. Save and/or run the BI Publisher Desktop exe file.

Once installed, the BI Publisher ribbon appears within Word.

Figure B-1 Word Ribbon with BI Publisher Plug-in Installed



Template Builder Tutorial

The *Template Builder* plug-in comes with a set of tutorials with sample data. The Balance Letter sample demonstrates the creation of a simple form containing a table; the Sales Report sample demonstrates the use of charts.

The *Report Designer's Guide for Oracle Business Intelligence Publisher* user guide provides full details on designing and building BI Publisher reports. The guide can be located by clicking **Start / All Programs / Oracle BI Publisher Desktop / BI Publisher User Guide**.

Balance Letter Sample

This example shows how data is inserted into a form layout using form fields from an XML data file.

1. Open the sample template from the Windows start menu by clicking **Start / All Programs / Oracle BI Publisher Desktop / Samples**, then select RTF Templates / Balance Letter / Balance Letter Start.rtf.

Alternatively, the file can be opened directly from the Samples folder where Template Builder was installed, such as: *C:/Program Files (x86)/Oracle/BI Publisher/BI Publisher Desktop/Template Builder for Word/samples*

2. Load the XML data to be used with the template by clicking **Load Data / Sample XML** within the BI Publisher ribbon.

Locate the Balance.xml file in the same location as the template; click Open. You should receive a *Data loaded successfully* message.

3. Insert the data bookmarks into the form by clicking **Insert / Field** and selecting the required field.

Start by placing the cursor at the <INSERT_ADDRESS_HERE> placeholder in the form and replace it by selecting the Customer Name and related Address fields from the dialog box, clicking **Insert** (or by dragging the field) to add each one individually.

The form should then look like [Figure B-2](#). Continue inserting the AS_OF_DATE, TRX_CURRENCY_CODE, TRX_CURRENCY_CODE, and C_INV_OPEN_BALANCE fields at their placeholders.

Figure B-2 Balance Letter Fields Added

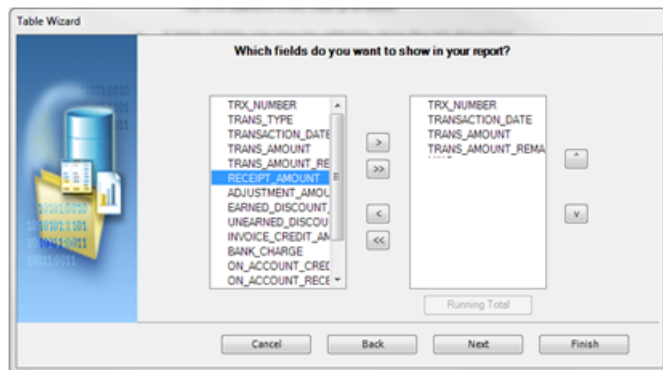
4. The form can now be previewed as a PDF file by clicking **Preview / PDF**, or as any of the other formats. The preview presents the form with sample data from the selected XML file inserted into the form fields.

Figure B-3 Balance Letter Preview

5. A table of data can now be added to show a list of invoices.

To select the data to show in the table, click **Insert / Table Wizard**, select Table as the report format and click **Next**. Then select the //ARXCOBLX/G_CUSTOMER/G_CURRENCY/G_INVOICES data set.

Clicking **Next** presents the list of available fields to appear as column in the table. Individually select Trx Number, Transaction Date, Trans Amount, and Trans Amount Remaining in the left hand pane, clicking > to add them to the right hand pane (the order of the selected columns can be changed using the up and down buttons).

Figure B-4 Table Wizard Dialog Box

6. Click **Finish** (clicking **Next** will present advanced grouping or sorting options). The table appears in the form per [Figure B-5](#).

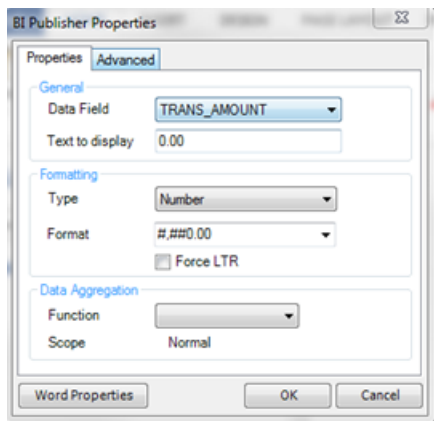
Figure B-5 Balance Letter Table

TRX_NUMBER	TRANSACTION_DATE	TRANS_AMOUNT	TRANS_AMOUNT_REMAINING
F TRX_NUMBER	TRANSACTION_DATE	TRANS_AMOUNT	TRANS_AMOUNT_REMAINING E

Note that F and E appear at the start and end of the row respectively to indicate a repeating section. The order of the columns may be edited directly in Word, however the F and E must always remain in the first and last columns.

7. The table may be formatted using the Word options for changing font, size, position, bold/underline, color, and so forth. Fields may be further formatted by selecting the field, right-clicking, and selecting BI Publisher / Properties. The Properties dialog box allows the field to be specified as a Text, Number, or Date type (which can show the Current Date or Current Time), with formatting options appropriate to the field type.

Set the TRANS_AMOUNT column to be a Number with #,##0.00 formatting, appropriate to showing the value as a currency amount. A default value can be entered in the Text to display field.

Figure B-6 BI Publisher Properties Dialog Box

8. Click **OK** to apply the formatting. The field name in the table will be replaced with the formatted value, but can be seen in the Properties dialog box, or in the column heading. The column heading may be edited to be more descriptive.

Set the Transaction Date, Transaction Amount, and Transaction Amount Remaining columns to the appropriate data type, with formatting, and edit the column headings, for the table to appear in the form per [Figure B-7](#).

Figure B-7 Balance Letter Properties Dialog Box

Transaction Number	Transaction Date	Transaction Amount	Transaction Amount Remaining
F TRX_NUMBER		0.00	0.00 E

9. Preview the form again to see the table, populated with data, and then save a local copy of the completed RTF template.

Figure B-8 Balance Letter Preview

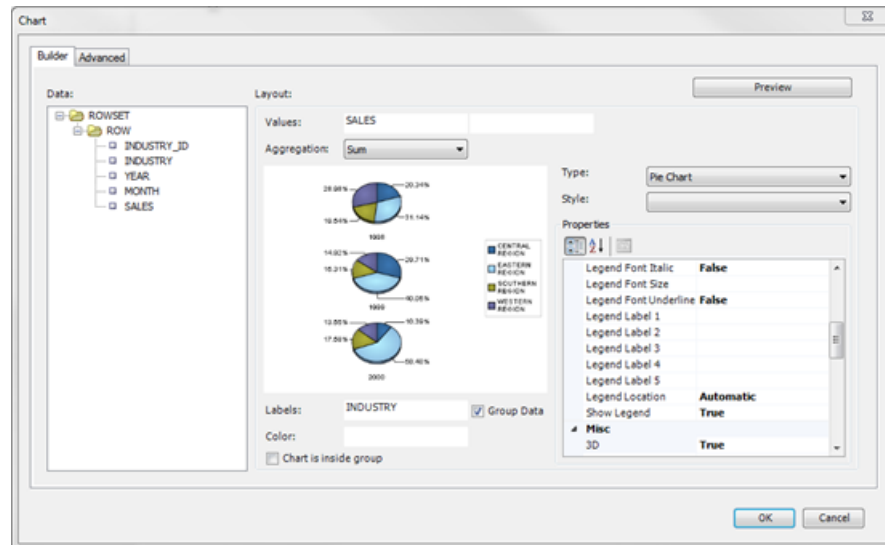
Dear Sirs/Madam,			
According to our records, as of 01-JAN-08, we show the following open balances.			
Your CAD balance is 31500, made up as follows:			
Transaction Number	Transaction Date	Transaction Amount	Transaction Amount Remaining
502444	06-DEC-07	19,125.00	19,125.00
502445	06-DEC-07	12,375.00	12,375.00
10019903	18-NOV-07	132,733.84	132,733.84
10020178	20-NOV-07	71,577.42	71,577.42
10020219	21-NOV-07	89,344.81	89,344.81
502394	22-NOV-07	11,250.00	11,250.00
10020280	24-NOV-07	128,654.96	128,654.96

Sales Report Sample

This example shows how tabular data can be presented as a chart within a report template.

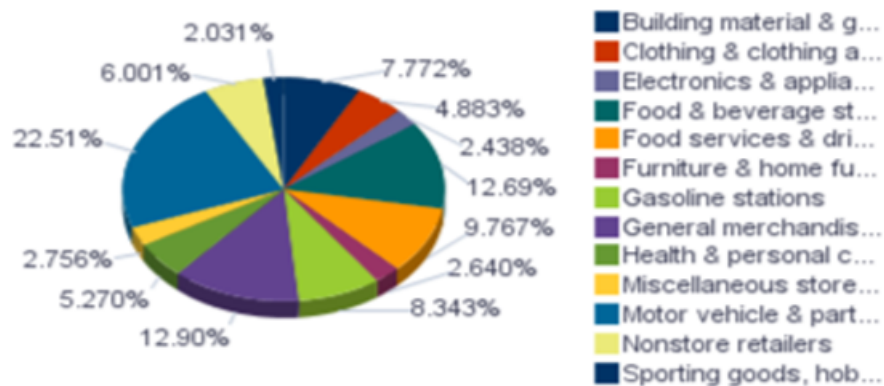
1. Open a new Word document and load the XML data to be used by clicking **Load Data / Sample XML** within the BI Publisher ribbon.
2. Locate the RetailSales.xml file from RTF Templates / Sales Report / Retail Sales.rtf in the same location as Step 1.
3. Click **Open**. You should receive a *Data loaded successfully* message.
4. Now select **Insert / Chart** to open the Chart dialog box.

Figure B-9 Chart Dialog Box



5. Drag Sales in the left hand pane to the Values field to set data to be shown, and drag Industry to the Labels field to set how the values are to be accumulated.
6. Click **Preview** to see how the chart will be presented.
7. Click **OK**. The chart will be inserted into the form per [Figure B-10](#).

Figure B-10 Sales Report Chart



The size of the chart can be changed by resizing the placeholder image.

8. The form can now be previewed as a PDF file by clicking **Preview / PDF**, or as any of the other formats.
9. Save a local copy of the completed RTF template.

Building RTF Templates

This section provides guidance on building RTF report templates.

The key steps are to first decide the type of report to be built (whether it is a table of a form based layout, see [Types of Reports](#)), to locate the data source for the report, then to create the

RTF file, build the content, apply formatting and styling, and finally to preview the finished report.

Further details on designing and building report templates can be found in the *Oracle Business Intelligence Publisher Report Designer's Guide* and *Report Designer's Guide for Oracle Business Intelligence Publisher* documents, located at <https://docs.oracle.com>.

Locating the Data Source

Before creating a report template, you must locate the data source in the form of an XML file. This provides the data structure of the report.

The XML files are downloaded from their Report Data Source records (see [Data Sources](#)). Open the data source record and use the Download Data for RTF Template Design action to save the file locally for use when building the template.

Creating an RTF Template for a Table Report

The following instructions are for creating an RTF template for a table report using Template Builder. For details on installing the plug-in, see [Installing and Launching Template Builder](#).

1. Create a new Word document and click **Sample XML** in the BI Publisher ribbon.

An alternative is to copy an existing RTF template and amend accordingly.

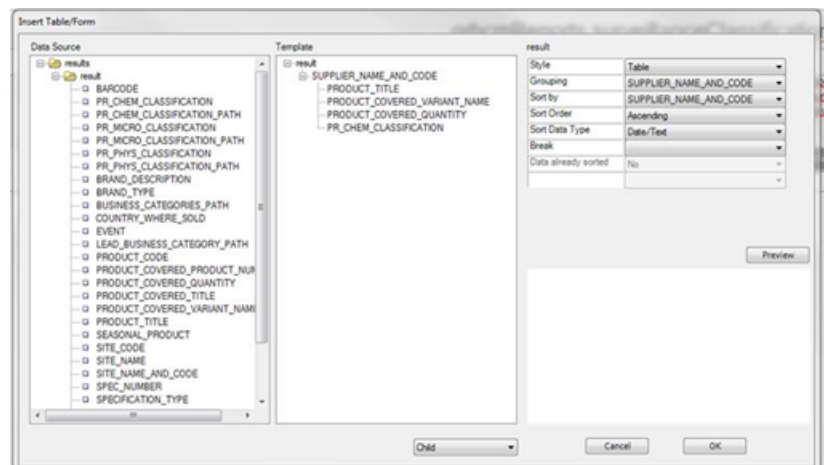
2. Select the data source XML file and click **OK** to load the data definition. The *Data loaded successfully* message is shown.

3. Set the page size to suit the report, typically A3 landscape with narrow margins.

If necessary, change to a custom page size, such as 55cm x 30cm under Page Layout / Page Setup / Paper changing the paper size to *Custom size* and setting the width and height as required (the maximum is 55).

4. Add a report title in the document header, the current date and time, and page number functions in the document footer, along with an identifier for the report.
5. Insert the table in the body of the document by clicking **Table/Form**. The Insert Table/Form dialog box opens.

Figure B-11 Insert Table/Form Dialog Box



Note

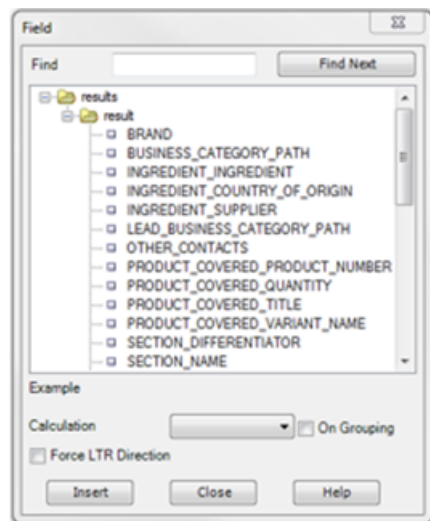
An alternative method for adding a table is to click **Table Wizard** and follow the steps to create the table, or use the regular Word options to manually insert an empty table, click **Field Browser** to insert fields in columns individually, highlight the row, and click **Repeating Group**.

If the template has been created by copying an existing RTF file, insert a new temporary table beneath the existing table, then copy the contents of the columns into the existing table before removing the temporary table.

6. Drag the *result* node from the Data Source pane to the Template pane, selecting the Drop Single Node option when prompted. Repeat for the other fields to appear as columns in the table.

Alternatively, choose the Drop all nodes to copy all fields across and then drag back any that are not required. Fields can be individually added/removed later if necessary by clicking **Field Browser**.

Figure B-12 Field Browser Dialog Box

**Note**

If the report is grouped by the first column, as the rows are not repeated, the repeating group should start with the second column and this is where the remainder of the sorting should be applied. If a column is grouped, any sorting in that column should be for the grouping itself. See report CR31c for an example.

7. Set any grouping and sort sequence by clicking the *result* node and setting the Grouping and Sort by options with the appropriate columns.

If grouping is required, select the field to group by in the right-hand properties box. Also, set its sort sequence and data type. Leave the Break option blank. If secondary sorting is required, select the grouping field, and in the right-hand properties box, select the next field to be sorted, the sort sequence and data type. Up to four levels of sorting can be set.

If sorting is required in a non-grouped table, or additional levels of sorting are required in a grouped table, you can apply the sorting after the table has been applied.

If adding grouping to a report that already contains a table (for the above method of adding a temporarily table), add the grouped column plus others then copy the first and last columns to the main table and complete the other columns.

8. Click **OK** to create the table.

Markers are inserted in columns, such as F and E, to indicate the first and last columns for a repeating group, and G to indicate a grouping column.

9. If a count is required at the end of the report, select **Insert / Field**, choose the field, then Count as the Calculation. When the count is inserted, double-click and set the Format to 0, to show as an integer. Add a field label prefix to the count. By default, only the number of data row occurrences are counted, not the distinct occurrences or number of groups.
10. If a chart is required, click **Insert / Chart** and then select the values and labels by dragging from the Data list. Choose the chart type and any other formatting, then add a label.
11. Click **Tools / Validate Template** to check for errors.
12. Apply formatting and styling, such as resizing or rearranging the table columns as required - including replacing the headings and other fixed text with links to the Supplier Evaluation system text, to allow for the dynamic translation for supported languages.

Further details on some of the options available for formatting and styling can be found in [Formatting Report Contents](#), [System Text and Language Translations](#), and [Style Guidelines](#).

13. Save the document as a Rich Text Format type.
14. Preview the report by clicking **Preview** and then choose a format. If system text keys are used, the preview does not look up the column headings and fixed text, so the system text keys will continue to show.

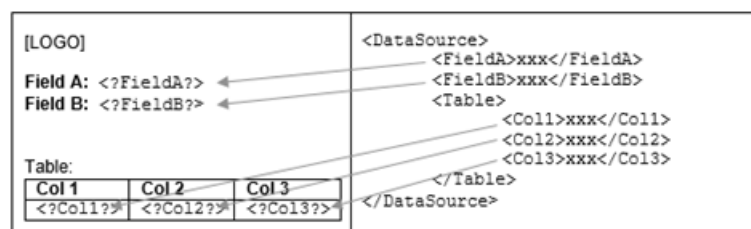
Creating an RTF Template for a Form Report

An RTF template for a form report is created in the same way as described in [Creating an RTF Template for a Table Report](#), with the following additional considerations:

- The page size and orientation will typically be A4 portrait rather than A3 landscape.
- The report body may contain a combination of individual fields (with their field labels), small tables, and static text.
- Individual fields can be organized by manually creating a two column table (with no borders), with the fields added individually to the right hand columns by clicking **Insert / Field**, with the field labels placed in the adjacent left hand column.

The following figure shows how data elements in the XML file are mapped to placeholders in the RTF template when the report is run.

Figure B-13 XML Data to RTF Template Mapping



- If the report is to contain multiple records, the form will need to be specified as a repeating group, by selecting the body of the report and clicking **Repeating Group**.

Formatting Report Contents

This section describes some of the formation options that have been used in the suite of core reports, with guidance on their usage.

The positioning of data within the report template is achieved by bookmarking. The design of the report layout can include formatting of text and tables, and the insertion of images and charts. Conditional formatting and logic may also be included.

General Considerations

1. For information on the core default style and catering for language translations, see [Formatting Report Contents](#), [System Text and Language Translations](#), and [Style Guidelines](#).
2. Use the standard Word formatting options for applying formatting such as font styles, alignment, table borders, page headers/footers, page numbering, date, and time.
3. Set table header rows to repeat on page break.
4. Place report headers and footers and record counts within a single table cell (with no borders), otherwise, issues can occur with system text being derived and extraneous columns being added in Excel format.
5. Where a report includes details of a record being linked to a Process, the Linked Process fields available to be included as columns are Process Id, Process Name, Activity Id, and Activity Name.
6. Data from the API data sources has namespace markup (ns0 / ns1 / ns2 prefix tags) automatically removed so it should not be necessary for any additional coding in the RTF templates.
7. Images may not render within headers and footers.
8. There is a known limitation in the output of bulleted and numbered lists in BI Publisher reports. This affects the rich text fields with text formatting options, and results in the bullet point or number being omitted or replaced with a question mark. Typical rich text fields are in the Process Controls and Custom RTF fields. For list formatting in these fields, manually number the list, or use a character such as a hyphen as an alternative to a bullet point.

BI Publisher Properties

- Right-click on field and select BI Publisher / Properties to apply data type and formatting for numbers and dates, and for applying data aggregation functions.

Figure B-14 BI Publisher Properties Dialog Box

- The default date format used is dd-mmm-yy (for example 2-Jun-18).
- The Advanced tab in the Properties dialog box can be used to apply more advanced functions to data field location, formatting, and aggregation.

Figure B-15 BI Publisher Advanced Properties Dialog Box

- When specifying the location of a data field, if the field name is not unique or the field is a column within a table, it may be necessary to specify the full path or a partial path. Notation can also be used to specify a relative path. Fields that have language translations may be contained within a localeData element.

Examples of specifying the varying levels of path for a description field are as follows:

Full Path:

```
<?/dto/specificationSectionDetail/specificationSectionFoodMainDetailsSection/brand/localeData/description?>
```

Partial Path:

```
<?specificationSectionFoodMainDetailsSection/brand/localeData/description?>
```

Locate Data Element:

```
<?brand/localeData/description?>
<?../brand/localeData/description?>
<?./brand/localeData/description?>
```

Data Element Only:

```
<?description?>
```

The meaning of the dot and slash notation is as follows (see the *Oracle Business Intelligence Publisher Report Designer's Guide* for full details):

/ Absolute (separates child elements)

// Root (all elements)

- . Current node
- .. Parent node

Conditional Formatting

- To apply conditional formatting, select the field, label, or table and click **Conditional Format**. Open the Properties dialog box to apply the conditions and formatting.

Repeating Groups

- The Repeating Groups facility is for constructing tables and form reports where more than one record may be present in the report. Individual fields that contain multiple values must also be defined as a repeating group for all values to be shown.
- To create a repeating group, select the field, table, row, or the block of content to be repeated and click **Repeating Group**.
- Select Absolute Path if the XML contains the same element names within different parent elements.
- Set any grouping or sorting requirements and then click **OK**.
- Repeating groups are shown between each (F) and end (E) markers.
- Once the repeating group has been applied, it can be amended by right-clicking the F or G marker and opening the BI Publisher Properties dialog box.

The Advanced tab contains the code equivalent of the rules, which can also be edited.

Grouping

- Grouping is used to categorize a table within a report so that rows with a common value appear together. Grouping is applied when the table is created using the Table Wizard or Table/Form options.
- In the Table Wizard, there are grouping options for Group Left and Group Above. Group Left creates a nested table. Group Above creates a new table for each new value for the grouping field, displaying the value of the group by field as the table title.
- The grouping is contained within G and E markers.
- When selecting an element to group by, the report is sorted by the grouping. Checking the *Data already sorted* option improves performance.

Sorting

- The rules for the column sorting sequence of tables is applied when the table is created using the Table Wizard or Table/Form options. Up to four levels can be sorted.
- Select the appropriate data type. Note that alpha 12 will come before 2; numeric 2 will come before 12; numeric will come before alpha. The default BI Publisher sort sequence orders all upper case before lower case.

To override the default sort sequence, so that uppercase and lowercase appear together:

1. Open the BI Publisher Properties dialog box for the column that applies the sorting.
2. In the Advanced tab, edit the field name as per this example:

Current Code: `<?sort:SPEC_TITLE; 'ascending'; data-type='text' ?>`

New Code: `<?sort:(
(xdoxslt:convert_case(SPEC_TITLE, 'UPPER'))); 'ascending'; data-type='text' ?>`

Note

If the field is part of a group, replace the `current-group()/<column name>` part of the statement with `(xdoxslt:convert_case(current-group()/<column name>, 'UPPER'))`. For example:

Current Code:

```
<?sort:current-group()/SCORECARD_TEMPLATE; 'ascending'; data-type='text' ?>
```

Updated Code:

```
<?sort:(xdoxslt:convert_case(current-group()/  
SCORECARD_TEMPLATE, 'UPPER'))); 'ascending'; data-type='text' ?>
```

3. Click **OK** to close the Properties dialog box.

This will apply a sort sequence of numeric / lowercase / uppercase. For example, changing the default sequence of: 9876; A0001; R1234; a0001, r9001 to: 9876; a0001; A0001; R1234; r9001.

- If sorting by all four columns and if the XML tag names are excessively long, it is possible to exceed the maximum permitted 393 characters.

Counts

- The Count calculation counts the number of occurrences of the field within a group.
- If a count is required at the end of the report for a distinct number rather than total count, use for example:

```
<?count(xdoxslt:distinct_values(PRODUCT_COVERED_PRODUCT_NUMBER)) ?>
```

- To add a total to a grouping, create the grouping and add the field, setting as a calculated value, check the On Grouping option, and then paste into the grouped cell.

Charts

- To add a chart to a report, click **Chart** and set the following parameters:
 - *Values* - the data values to measure (may be multiples, depending on the chart type).
Combination Graph, Scatter Graph, Bubble Graph, and Stock Graph allow for multiple values.
Can choose to calculate sum count or average values.
 - *Labels* - the data elements for which the values are to be charted.
- Can select to group the label elements before displaying in the chart (for example, to consolidate values by month or year).
- By default, the data will be grouped by the Value element and aggregated by Sum. Deselecting the Group Data checkbox shows each occurrence of the Value element and aggregation functions will not be available.
- Can choose to insert a chart within a group so that it only contains data for the group.

Boolean Fields and Conditional Regions

- Boolean fields are stored in the database as true or false values. When included in reports, the values typically are required to show as Yes or No. This is achieved by applying conditional formatting, where the value is hidden unless the condition is true.
 - In the template, add two fields: orseReports.true and orseReports.false. Use font size 9.5 and avoid any whitespace.
 - Select each individually and click **Conditional Region**.
 - In the BI Publisher Properties dialog box, set the data type to Date/Text and the Data field values to *Equal to true* for orseReports.true and *Equal to false* for orseReports.false.

The fields are contained within C and EC markers. Double-clicking the C marker (or right-clicking and opening the BI Publisher Properties dialog box) allows the properties to be edited.

- Further conditional logic can be applied if required, in the Advanced tab, for example:


```
<?xdoxf:replace(seasonalProduct, 'false', 'No')?>
<?xdoxf:decode(seasonalProduct, 'true', 'Yes', 'false', 'No', '')?>
<?
xdoxf:decode(seasonalProduct, 'true', orseReports.true, 'false', orseReports.false, ''
)?>
```

Editable Text Selector and Enumeration Fields

- Editable Text Selectors are the selectors in Supplier Evaluation that allow glossary selections to be made with variable content inserted. They allow for the consistent wording of statements without the need to create numerous glossary entries.
- Enumerations are fields that are selected from a set of predefined options which are not configurable glossaries, for example Yes/No or Day/Month/Year.

In the XML returned from the APIs for Audit, enumerations have an element for the code and an element for the description (in the selected language):

```
<specType>F00D</specType>
<specTypeDescription>Food</specTypeDescription>
<specTypePackCopyDescription>Food</specTypePackCopyDescription>
```

HTML Markup

- For fields that contain HTML markup, add the html2fo: prefix to the path, for example:


```
<?html2fo:productSpecificationFullDTO/specificationSectionDetail/
specificationSectionFoodRecipeAndRawMaterialsSection/businessLanguageIngredientsList?
>
```
- If a text field contains formatting such as bullet points, the formatting will only render if the XML data is wrapped in a CDATA tag with the necessary formatting tags. In the RTF template, the path must also include the ?html2fo tag (as above).

If coded appropriately in the XML, the HTML formatting features supported by BI Publisher are as follows (see the *Oracle Business Intelligence Publisher Report Designer's Guide* for full details):

- Hyperlinks

- Lists
- Bulleted and ordered lists
- Paragraph
- Font style (bold, italic, plain, underline, subscript, superscript, strike-through)
- Font size and family
- Background and foreground colors
- Paragraph alignment (center, left, right, and justify) and indent

Pivot Tables

- Pivot tables represent data within multiple categorizations, such as totals per area, summarized by year and by month.

Figure B-16 Example BI Publisher Pivot Table

		Building material & garden eq. & supplies dealers	Clothing & clothing accessories stores	Electronics & appliance stores	Food services & drinking places	Food & beverage stores	Furniture & home furnishings stores
2006		48,531.00	31,528.00	15,472.00	61,967.00	81,303.00	17,073.00
	February	23,146.00	15,511.00	7,710.00	30,803.00	40,449.00	8,418.00
	March	25,385.00	15,917.00	7,762.00	31,164.00	40,854.00	8,655.00
2007		79,625.00	48,991.00	24,726.00	99,088.00	127,991.00	26,468.00
	February	26,359.00	16,497.00	8,320.00	33,239.00	42,723.00	8,859.00
	January	26,480.00	16,316.00	8,114.00	32,852.00	42,553.00	8,805.00
	March	26,776.00	16,178.00	8,292.00	32,997.00	42,715.00	8,804.00
		128,156.00	80,519.00	40,198.00	161,055.00	209,294.00	43,541.00

- To add a pivot table, click **Insert / Pivot Table** and drag the required categorization or grouping data elements from the left pane to the right-hand Layout pane.
- Set the type to Sum or Count and click **OK** to add the table.
- Apply any formatting or styling required. Ensure the column widths are sufficient, otherwise the data will be truncated.

Considerations for Excel

When designing RTF templates for reports that may have the output opened as an Excel workbook, the following points should be considered:

- The data source XML file must not contain whitespace padding, otherwise extraneous blank rows can appear in Excel.
- The report header and footer areas that contain the report title, run date, reference, and page number must be contained within a single cell. The presence of multiple columns results in extraneous columns appearing in Excel. The same applies to chart sub-headings.
- The data row of a table must not contain extraneous spaces or carriage returns where the field is inserted (or between multiple fields), otherwise extraneous blank rows or columns can appear in Excel.

The Show/Hide ¶ option can be used in Word to check for spaces and carriage returns when editing the RTF template.

- When adding columns to a table, if the table exceeds the page width to the right, it can result in extraneous blank rows or columns appearing in Excel. Avoid this by containing the table in a single cell (with no borders). The same can occur when copying tables from one RTF template to another.

System Text and Language Translations

This section describes how the Supplier Evaluation system text facility is used to present fixed text within reports, and the translation of report content for the portal's supported languages, covering the following topics:

- [Translation of Report Content](#)
- [Configuring System Text and XLIFF for Reports](#)
- [Configuring System Text in RTF Report Templates](#)

Translation of Report Content

When a report is run, the output (field labels, column headings, and data) is generated in the language specified by the locale of the user that scheduled the report.

In order to translate system text within the generated reports, the RTF report template must contain a means of linking the field label or column heading to a Supplier Evaluation System Text item. The language translations are achieved using an XLIFF file, which is generated in Supplier Evaluation, and is then bound to a report's RTF template, providing the necessary references.

The translation is achieved using the system text key generated by Supplier Evaluation. The keys are in a human-readable form (in English), so the report designer can identify the labels within the RTF at a glance. This approach also caters for where a portal has overridden the core system text to use client-specific terminology.

When a report is run, the XLIFF file applies the language translations. The labels and column headings in the report are automatically translated to the user's language, with the usual fall-back to the base language where translations are not present. The translation of data within the report, for fields that are derived from a glossary, are also automatically translated to the user's language, with the fall-back rules applied.

Configuring System Text and XLIFF for Reports

When a report administrator edits the RTF report template, rather than hard-coding the text for field labels and column headings, keys to items of System Text are used. The keys are substituted with translations appropriate to the user when the report runs. The process for locating the appropriate system text keys, and creating those that do not exist is as follows:

- A separate area of system text is provided specifically for use in reports, with a prefix of *orseReports*.
- Whenever the Supplier Evaluation System Text is updated, a new XLIFF file containing the translations of fixed text used in reports is automatically generated (a separate file for each of the portal's supported languages).
- The XLIFF file is downloadable from the System Text Admin area (by system administrators) and from the Reporting Admin area (by report administrators). The file contains the existing system text used in reports.
- The report designer refers to the XLIFF file to locate the appropriate system text key and uses that rather than fixed text in the RTF template. The XLIFF file can be viewed using a text editor, such as *Notepad++*. The system text keys are located by simply searching for the relevant text.

An example of a simple XLIFF file, where the source element is field label and the target element is the system text is as follows:

```
<xliff version='1.0'>
<file source-language='en-GB' target-language='en-GB' datatype='biprtf'>
  <header/>
  <body>
    <trans-unit id="orseReports.activeIngredients">
      <source>orseReports.activeIngredients</source>
      <target>ACTIVE INGREDIENTS:</target>
    </trans-unit>
    <trans-unit id="orseReports.additionalConsumerInformation">
      <source>orseReports.additionalConsumerInformation</source>
      <target>ADDITIONAL CONSUMER INFORMATION:</target>
    </trans-unit>
  </body></file></xliff>
```

- If a label or piece of text to appear in the report cannot be found in the XLIFF, it must be added to the System Text area for Reports in the Admin area. This can be done by a user with the System Text Administrator authority profile. When the system text is updated, new XLIFF files are automatically generated.
- See [Configuring System Text in RTF Report Templates](#) for further details, including dealing with multiple occurrences of a system text label within a report, where a separate system text key is required for each occurrence.
- When the template is complete and the report is run, the system combines the XLIFF and RTF files to derive the translations for the required language.

Configuring System Text in RTF Report Templates

In order to enable the translation of a report's field labels and column headings into the language of the user's locale, the RTF report template uses placeholders instead of hard-coding the text. The placeholder is the code to an item of configurable system text.

For example, a table that shows a Site's Certificates, such as:

Type	Certificate No.
EC Licence Number	123456
Organic Certification	987654

May be coded in the RTF template as:

orseReports.type	orseReports.certificateNo
F description	referenceCertNo E

Where orseReports.type is the key to the system text for the Type label, and orseReports.certificateNo is the key for the Certificate No. label.

System Text Translations

When coded accordingly, the report run by an English user would present the table as:

As Sold

Attribute	Red	Amber	Green

And run by a French user would present the table as:

Non préparé

Attribut	Rouge	Ambre	Vert
----------	-------	-------	------

Duplicated Text

If the RTF template contains multiple occurrences of item of text, such as Product Attributes for As Sold and As Consumed values, each with Red, Amber, and Green column headings, the placeholders must contain unique values, typically by appending an incrementing number, such as:

orseReports.asSold

orseReports.attr	orseReports.red	orseReports.amber	orseReports.green
F description	red	amber	green E

orseReports.asConsumed

orseReports.attr_2	orseReports.red_2	orseReports.amber_2	orseReports.green_2
F description	red	amber	green E

If a placeholder is not unique, when the report is run, the first occurrence of the placeholder will show the appropriate system text, but subsequent occurrences will just show the placeholder name, such as:

As Sold

Attribute	Red	Amber	green
-----------	-----	-------	-------

As Consumed

orseReports.attr_2	orseReports.red_2	orseReports.amber_2	orseReports.green_2
--------------------	-------------------	---------------------	---------------------

Note

An alternative to using an incrementing numeric suffix as above, is to use a descriptive differentiator to form a unique placeholder, such as orseReports.asSoldRed and orseReports.asConsumedRed.

If the portal operates just a single language and there is no requirement for translations, the fixed text could simply be hard-coded, however the use of placeholders is recommended, as it allows for changes to system text, and the introduction of languages without the need to rebuild report templates.

The system text must be on its own line, and must not include any spaces, tabs, or other characters:

Correct	Incorrect
"orseReports.totalChargedCost"	"orseReports.totalChargedCost "
	"orseReports.totalChargedCost : "
orseReports.totalCost: 999,999.00	orseReports.totalCost: 999,999.00
orseReports.totalChargedCost: 999,999.00 RS	orseReports.totalChargedCost: 999,999.00 RS

If a new item of system text needs to be created to cater for a duplicate reference, the process described in [Configuring System Text and XLIFF for Reports](#) is used.

API Data Source XML Contents

In the XML returned from the APIs for Audit, fields that can have language translations have their value returned in a localeData element, in the language of the user who scheduled the report.

Style Guidelines

This section describes the style standards used for the Supplier Evaluation core reports.

Header	A single row containing the report title, inserted in the report header area. Background color: 245-245-245 Title: Albany WT, 18, centre, color: 32-32-32
Sub Heading	Albany WT, 12, left, color: 32-32-32
Table	Column Headings: Albany WT, 11 (or 9 if many columns), left (or center if spanned), text color: 80-80-80, background color: 245-245-245 Data Rows: Albany WT, 9 (or 8 if many columns), top/left, borders: inside only text color: 112-112-112, border color: 230-230-230
Count/Totals	Label: Albany WT, 11, left, color: 32-32-32 Value: Albany WT, 9, left, color: 112-112-112
Chart	Heading: Albany WT, 11, left, color: 80-80-80, background color: 245-245-245
Body	Field Label: Albany WT 11, left, color: 80-80-80 Field: Albany WT 9, left, color: 112-112-112 Table Heading: Albany WT, 11, bold, left, color: 32-32-32 Table Column Headings: per Table Table Data Rows: per Table Section Heading: per Sub Heading Fixed Text Table: per Table, but vertical
Footer	A single row, inserted in the report footer area. Background color: 245-245-245 Date & Time: Current date and time: Albany WT, 7, left, format: DD/MM/YYYY HH:MM update automatically, color: 112-112-112 Report Ref: Albany WT, 7, color: 112-112-112 The core reports use a CR (core report report) prefix Page Number: Page number: Albany WT, 7, right, format: X / Y, color: 112-112-112

RTF Filtering

This section provides guidance on how to apply filters directly within a report template RTF file, which may be necessary if the filter cannot be applied to the report design or schedule - typically when the report's data source is an API. Such is the case when filtering the Audit Outcome Summary report (CR110) for specific Contact Roles, so that is used here as the example.

See also the *Oracle Business Intelligence Publisher Report Designer's Guide* for further details.

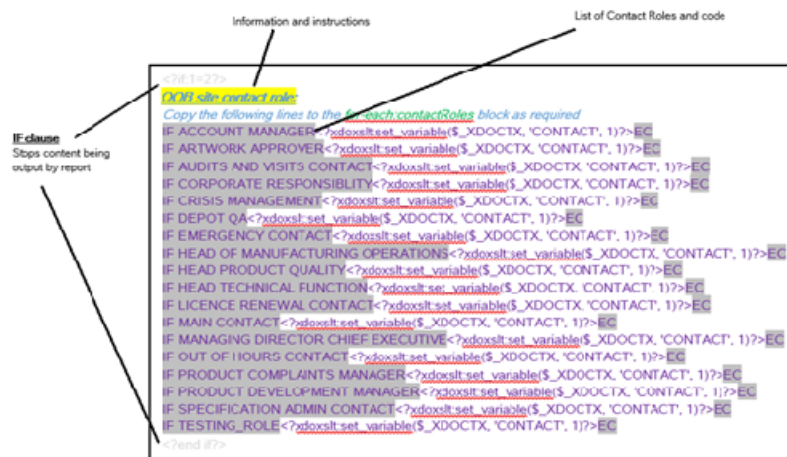
Note

The location/order of text and code within the RTF template can impact the report output, therefore the guidance is to always to take a copy of an RTF file to revert back if necessary.

1. Identify the Contact Role to be included in the report.

the bottom of the RTF template, an IF clause holds a line of code for each of the out of the box (OOB) contact roles. The lines within this IF clause do not impact the report and are included in the RTF Template purely to assist with customizing reports.

Each line is specifically for a given contact role. These lines can be added to the report content so that only contacts with the given contact role for each audit are output.



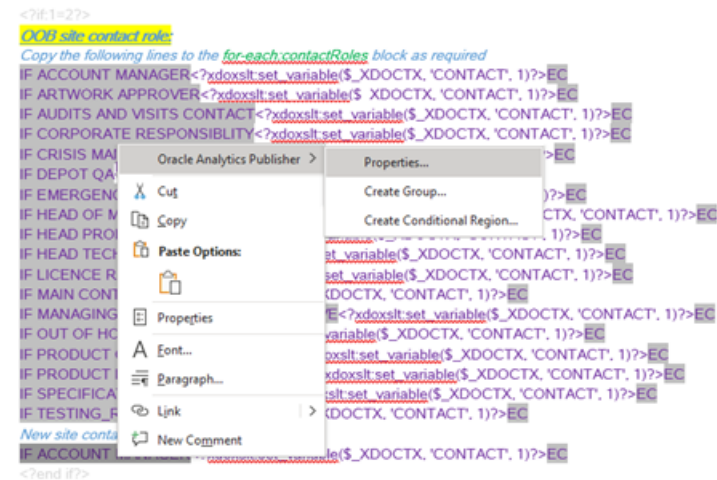
2. Add the new Contact Role to be included or available for the report.
 - a. Copy a line from the list of OOB site contact roles and paste within the IF clause.

```

<?if=2?>
<XSL site contact role>
Copy the following lines to the <for-each:contactRoles> block as required
IF ACCOUNT MANAGER<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF ARTWORK APPROVER<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF AUDITS AND VISITS CONTACT<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF CORPORATE RESPONSIBILITY<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF CRISIS MANAGEMENT<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF DEPOT QA<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF EMERGENCY CONTACT<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF HEAD OF MANUFACTURING OPERATIONS<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF HEAD PRODUCT QUALITY<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF HEAD TECHNICAL FUNCTION<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF LICENCE RENEWAL CONTACT<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF MAIN CONTACT<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF MANAGING DIRECTOR CHIEF EXECUTIVE<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF OUT OF HOURS CONTACT<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF PRODUCT COMPLAINTS MANAGER<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF PRODUCT DEVELOPMENT MANAGER<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF SPECIFICATION ADMIN CONTACT<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
IF TESTING_ROLE<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
New site contact roles:
IF ACCOUNT MANAGER<?xdoxslt:variable($_XDOCTX, 'CONTACT', 1)?>EC
</end if?>

```

- b. Select the copied contact role (right mouse click) and select the Oracle Analytics Publisher (previously BI Publisher) → Properties option.



- c. Edit the properties. Replace the contact role code with the new contact role code within the Code box and the Text to display box.



- d. Accept changes. Select OK. The list of contact roles will be updated to include the new edited contact role.

```

<?if:1=2?>
<XOF site contact role>
Copy the following lines to the for-each:contactRoles block as required
IF ACCOUNT MANAGER<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF ARTWORK APPROVER<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF AUDITS AND VISITS CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF CORPORATE RESPONSIBILITY<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF CRISIS MANAGEMENT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF DEPOT QA<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF EMERGENCY CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF HEAD OF MANUFACTURING OPERATIONS<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF HEAD PRODUCT QUALITY<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF HEAD TECHNICAL FUNCTION<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF LICENCE RENEWAL CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF MAIN CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF MANAGING DIRECTOR CHIEF EXECUTIVE<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF OUT OF HOURS CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF PRODUCT COMPLAINTS MANAGER<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF PRODUCT DEVELOPMENT MANAGER<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF SPECIFICATION ADMIN CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF TESTING_ROLE<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
New site contact roles:
IF ASSISTANT ACC MNGR<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC

```

3. Populate the report with the required Contact Roles.

Populate the for-each:contactRoles with the required lines from the contact roles identified/created in Step 1.

Each contact role and associated code must be on its own line.

```

orbcmReports.siteContacts
orbcmReports.contactName
orbcmReports.contactEmail
for-each:siteContacts<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 0)?>
for-each:contactRoles
IF MAIN CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF AUDITS AND VISITS CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
end:contactRoles
<?if:online(<xdoxslt-set_variable($_XDOCTX, 'CONTACT')=1?>contactName
contactEmail<end if?>
<xdoxslt-set_variable($_XDOCTX, 'CONTACT', 0)?>
end:siteContacts

```



```

orbcmReports.siteContacts
orbcmReports.contactName
orbcmReports.contactEmail
for-each:siteContacts<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 0)?>
for-each:contactRoles
IF MAIN CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF AUDITS AND VISITS CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF OUT OF HOURS CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
IF EMERGENCY CONTACT<?xdoxslt-set_variable($_XDOCTX, 'CONTACT', 1)?>EC
end:contactRoles
<?if:online(<xdoxslt-set_variable($_XDOCTX, 'CONTACT')=1?>contactName
contactEmail<end if?>
<xdoxslt-set_variable($_XDOCTX, 'CONTACT', 0)?>
end:siteContacts

```

C

Appendix: Permissions

This appendix summarizes the rules that are applied to control users' access to the reporting facility and the data that may be reported on.

1. Only retailer users have access to the Reports module. Supplier users cannot configure, schedule, or view reports within the system. If a retailer user wishes to share a report with a supplier user or other individual, the report output can be manually forwarded as an email attachment.
2. Access to the Reports module is controlled by granting the Advanced Reporting Administrator, Advanced Reporting User, and Advanced Reporting Reader authority profiles to retailer users.
3. Advanced Reporting Administrators can:
 - Configure the data sources, templates, and designs for reports and KPIs.
 - Configure the report output folders where the generated reports are stored.
 - Schedule any report, and maintain the schedule details of reports scheduled by other users.
 - View the log of all scheduled reports, and cancel them.
 - View and delete all report outputs.
 - Configure and view KPI dashboards.
 - Run data extracts of Suppliers and Sites.
4. Advanced Reporting Users can:
 - Submit, amend, or delete the schedules for any report.
 - Schedule any report, and maintain the schedule details of those they have scheduled.
 - View the log of reports they have scheduled, and cancel them.
 - View reports they have scheduled or are a designated recipient of, either by name or by role.
 - Delete reports they have scheduled.
 - View KPI dashboards they are designated a recipient of, either by name or by role.
5. Advanced Reporting Readers can:
 - View reports they are a designated recipient of, either by name or by job role.
6. If the portal is operating the Enhanced Access Control (EAC) permissions feature, where retailer users can be restricted to specific suppliers, users may only access report if they are aligned with equivalent EAC areas as the user who scheduled the report.
7. The report schedule specifies the users who are permitted to view the report. The recipients receive an email link to the report when it is generated (the report output is not sent in email) if they have been granted access to that report (either explicitly by name, or implicitly by user role). Reports they are not a recipient of will not appear in their list of reports.

Note

It is possible for a Report Administrator to configure a report that contains data their permissions would not normally permit them to when accessing Supplier Evaluation by the UI.

When assigning the recipients of a report, a warning is issued if their permissions would not usually allow them access to the data, however it does not prevent the report being scheduled. It is the responsibility of the administrator to grant access rights to the appropriate users.

8. An external system can electronically retrieve the content of a report using the Report Attachments web service API if an External System account has been configured. The Report Attachment Service and Endpoint permissions control the access; the external system must be explicitly named as a recipient of the report. Details of the Report Attachments API can be found in the *Oracle Retail Supply Chain Collaboration Cloud Service Implementation Guide*.

D

Appendix: KPI Templates

The following are a set of KPI worked examples for guidance.

KPI Worked Examples

The following worked examples provide a sample of possible KPI metrics that can be generated. The details provided correlate to selections available in the KPI Report Template records in the Admin->Reporting area.

The query Assessment Scores Latest/Completed produces a record for the Latest Completed and Next Assessment of each Assessment Type for all sites. This means for a site there will be a maximum of two records for each Assessment Type (template).

Similarly, the Audit/Visit Scores Latest/Completed produces a maximum of two records of each Audit Template for each site.

Count of Latest Completed Assessment

Query : Assessment Scores Latest/Completed

Selected Column : Site Code

Aggregate Function : Count

Using the following filters, the KPI metric provides a count of sites with the latest completed assessments of the given type with the specified score, across all sites.

Column	Operator	Type	Value	Unit	Logic
Assessment Status	Equals	Fixed	Complete	-	and
Assessment Template	Equals	Fixed	"Assessment Template"	-	and
Assessment Scoring	Equals	Fixed	"Score"	-	and

Using the following filters, the KPI metric provides a count of the latest completed assessments of all types with the specified score for a given site.

Column	Operator	Type	Value	Unit	Logic
Assessment Status	Equals	Fixed	Complete	-	and
Site Name	Equals	Fixed	"Site Name"	-	and
Assessment Scoring	Equals	Fixed	"Score"	-	and

Average Assessment Score

Query : Assessment Scores Latest/Completed

Selected Column : Assessment Overridden

Aggregate Function : Average

Using the following filters, the KPI metric provides an average assessment score of completed assessments across a range of sites. The range is determined by the Business Category in this example.

Column	Operator	Type	Value	Unit	Logic
Assessment Status	Equals	Fixed	Complete	-	and
Business Categories (Description)	Equals	Fixed	"Business Category"	-	and

Assessments Overdue

Query : Assessment Scores Latest/Completed

Selected Column : Site Code

Aggregate Function : Count

Using the following filters, the KPI metric provides a full count of the assessments overdue based on the due date being in the past. If the Aggregate Function is updated to Distinct, you will have a count of sites with one or more overdue assessments.

Column	Operator	Type	Value	Unit	Logic
Due Date	Less Than	Relative	0	Day	and
Assessment Status	Is Not Equal To	Fixed	Complete	-	and

Additional Assessment Filter Options

Additional filters can be applied to the assessment KPIs detailed above to alter the KPI metric criteria. These relate to the Assessment Scores Latest/Completed query.

These filters can be set against the KPI Report Template record and/or Report Schedule record.

Completed within last seven days

Filters to just the records with a Completed Date within the last seven days. This should be used with a filter on the Status column checking that it is set to Completed.

Column	Operator	Type	Value	Unit	Logic
Completion Date	Greater Than	Relative	-7	Day	and
Completion Date	Less than or Equal To	Relative	0	Day	and

Due date in the next seven days

Filters to just records with a Due Date in the next seven days.

Column	Operator	Type	Value	Unit	Logic
Due Date	Greater Than	Relative	0	Day	and

Column	Operator	Type	Value	Unit	Logic
Due Date	Less than or Equal To	Relative	7	Day	and

For Supplier Evaluation Type

Filters to just records with the specified Supplier Evaluation Type.

Column	Operator	Type	Value	Unit	Logic
Supplier Evaluation Type	Equals	Fixed	"Supplier Evaluation Type"	-	and

Count of Latest Completed Audit

Query: Audit/Visit Scores Latest/Completed

Selected Column: Code

Aggregate Function: Count

Using the following filters, the KPI metric provides a count of the latest completed audits of the given type with the specified score across all sites.

Column	Operator	Type	Value	Unit	Logic
Status	Equals	Fixed	Completed	-	and
Audit Template	Equals	Fixed	"Audit Template"	-	and
Score	Equals	Fixed	"Score"	-	and

Using the following filters, the KPI metric provides a count of the latest completed audits of all types with the specified score for a given site.

Column	Operator	Type	Value	Unit	Logic
Status	Equals	Fixed	Completed	-	and
Site Name	Equals	Fixed	"Site Name"	-	and
Score	Equals	Fixed	"Score"	-	and

Audits Overdue

Query : Audit/Visit Scores Latest/Completed

Selected Column : Code

Aggregate Function : Count

Using the following filters, the KPI metric provides a count of sites where the next audits are overdue based one the due date being in the past.

Column	Operator	Type	Value	Unit	Logic
Status	Is Not Equal To	Fixed	Completed	-	and

Column	Operator	Type	Value	Unit	Logic
Due Date	Less than	Relative	0	Day	and

Query : Audit/Visit Scores Latest/Completed

Selected Column : Site Code

Aggregate Function : Distinct

Using the following filters, the KPI metric provides a distinct count of sites where the next audits are overdue based on the due date being in the past.

Column	Operator	Type	Value	Unit	Logic
Status	Is Not Equal To	Fixed	Completed	-	and
Due Date	Less than	Relative	0	Day	and

Site Summary KPI

Query : Supplier Evaluation Site Summary Scores available

Selected Column : Site Code

Aggregate Function : Count

Using the following filters, the KPI metric provides a count of the sites that have achieved a given SE Score.

Column	Operator	Type	Value	Unit	Logic
SE Score	Equals	Fixed	"SE Score"	-	and

Glossary

API

Application Program Interface, a means of extracting data for use in another application or process. The Supplier Evaluation Audit & Visit APIs are used in reporting as a data source for certain reports.

CSV

Comma-Separated Value, the file format used for the Supplier Evaluation data extracts.

data extract

An alternative method of extracting data. Can be used to create CSV files containing the full contents of Supplier or Site records. May also be an XLSX file generated for the Process & Activity Brief data extract.

EAC

Enhanced Access Control, the facility for applying an additional level of permissions in Supplier Evaluation, where retailer users are assigned to specific suppliers and their data using EAC Areas. If EAC is enabled, the additional level of permission is applied to the generation of reports.

PDF

Portable Document Format, one of the supported report output formats.

report data source

Exposes the Supplier Evaluation data for use in reports. The data sources are predefined. The data is extracted automatically within the application using SQL queries and APIs.

report design

Combines a Data Source with a Report Template to form a schedulable report.

report output

The actual report output. May be PDF, Excel, RTF, or HTML format.

report schedule

Controls the execution of a report, either as a single run or on a recurring schedule. Defines the type of output and the recipients.

report template

Templates that define the layout and data content of a report.

RTF

Rich Text Format, one of the supported report output formats.

standard reports

The suite of Supplier Evaluation core reports provided. The core reports typically present a tabular listing of results. Some form-based reports present a paginated form comprised of tables and individual fields.

XLS/XLSX

The data format of Microsoft Excel workbooks, one of the supported report output formats.

XML

eXtensible Markup Language, the data format of the report data sources.