

Oracle® Retail Supply Chain Collaboration Cloud Service Administration Guide



G42871-01
October 2025



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Contents

Send Us Your Comments

Preface

Audience	i
Documentation Accessibility	i
Related Documents	i
Improved Process for Oracle Retail Documentation Corrections	i
Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)	ii
Conventions	ii

1

Introduction

Synchronize Workflow	1
Admin Functions	1
System Parameters	2
UIM Date Offsets	2
Calendar	2
System Calendar	2
Calendar Year	4
System Calendar Import	5
System Text	6
Languages	6
System Text	6
System Text Imports	8
System Text Exports	10
System Text Snapshots	12

2

Managing User Access

Overview of User Security	1
Implicit Rules	1
Permissions Rules	2
Amending Permissions	2

Authority Profiles	3
Authority Profile Groups	3
Roles	4
Common User Roles	4
Users	6
IDCS or OCI IAM Integration for Authentication	6
Provisioning a New System	7
Migration of Users	7
Managing Authority Profiles	8
Managing User Roles	8
Adding a User Role	8
Editing a User Role	9
List Configuration	9
Managing Contact Roles	11
Adding a Contact Role	11
Editing a Contact Role	12
Managing Users	13
Creating a User	13
Editing a User	15
Synchronization with IDCS or OCI IAM	15
Disabling a User	16
Deleting a User	16
Upload Retailer User Data	17
Download Retailer User Upload Spreadsheet	18
Managing External Systems	18
Creating an External System	19
Editing an External System	20
Disabling an External System	20
Deleting an External System	20
Managing Endpoints	21
Managing Services	22
System Parameters	23

3 Custom Configuration

Custom Fields	1
Branding & Theming	2
Managing Styles	2
Managing Images	3
Managing User Ts & Cs	4
Managing Supplier Ts & Cs	4

	Email Templates	5
4	Job Management	
	Opening a Batch Job	2
	System Parameters	2
5	Global Changes	
	Change Responsibility	1
	Change Site Managers by Spreadsheet	2
	Change Process Manager	3
	Change Process User Names	3
	Change Product Responsibility	4
6	News App	
	Create a News Item	1
	Edit the News Item Details	3
	Publish a News Item	4
	Archive a News Item	5
	Alter the Sequence of the News Items	6
	View the Reader Log	6
	Delete a News Item	7
	System Parameters	7
7	Supplier Administration	
	Alerts	1
	Mailing Lists	1
	Manage Alert Status	1
	Manage Alert Response Status	2
	Suppliers & Sites	2
	Billing Codes	3
	Supplier Statuses	3
	Site Statuses	4
	Business Categories	4
	Supplier Types	5
	Site Types	5
	Maintenance Audit Reasons	6
	Invoicing Systems	6
	Supplier Top Grades	6

Site Top Grades	6
Reference Statuses	7
Reference Types	7
Business Units	8
Currencies	8
Countries	8
Other Production Details	10
Area	10
Delete Supplier	10
Delete Site	11
Upload Supplier and Site Data	13
Download Supplier and Site Upload Spreadsheet	14
Assessments	14
Assessment Questions	14
Assessment Templates	17
Assessment Status	21
Accredited Bodies	21
Assessment Picklists	22
Selection Status	22
Audits & Visits	22
Certification Bodies	23
Audit/Visit Templates	23
Supplier Access to Audits	27
Audit/Visit Issue Types	28
Auditor Types	29
Audit/Visit Risk Levels	29
Audit/Visit Scores	29
Audit/Visit Standards	29
Audit/Visit Statuses	29
Issue Statuses	30
Visit Locations	30
Visit Reasons	30
Checklist Templates	31
Checklist Answers	32
Checklist Questions	35
Checklist Question Colour Management	37
Checklist Question Colours	37
Roles and Permissions	38
Integration with Merchandising	38
Supplier Evaluation Scoring	41
System Parameters	43

8 Product Administration

Item Assessments	1
Integration with Merchandising	1
Item Evaluation Scoring	3
Global Glossaries	3
Business Category Configuration	3
System Parameters	4
Upload Product Record Data	10
Download Product Record Upload Spreadsheet	11

9 Process Administration

Process Folders	2
Activity Status	2
Activity Sub-Status	2
Activity Type	3
Activity Template	4
Brief Templates	6
Process Status	7
Process Type	7
Process Template	8
Team	9
System Parameters	10
Email Templates	10

10 Library Administration

Locating a Document	2
Managing Folders	3
Creating a Folder	3
Editing a Folder	4
Deleting a Folder	5
Managing Archive Folders	6
Managing Documents	6
Creating a New Document	6
Available to Suppliers Field	8
Internal Readers Field	9
Attachments	11
Copying a Document	11
Deleting a Document	11
Archiving a Document	11

Translating Folders and Documents	12
Translating Folders	12
Translating Documents	12
Viewing Translations	13
System Parameters	13

11 Glossary Administration

Bulk Glossary Export	1
Single Glossary Export	2
Bulk Glossary Import	4
Single Glossary Import	5
Using Glossary Import/Export to Populate a Clean System	7
Single Language Glossaries	7
Multi-Language Glossaries	7

12 Supply Chain

Supply Chain Hub	1
System Parameters	1
Application Options	1
Codes	2
Procure to Pay – Purchase Orders	2
System Parameters	2
Application Configuration	3
Procure to Pay – Shipments	3
System Parameters	3
Application Configuration	4
Procure to Pay – Finance Documents	4
System Parameters	4
Other System Parameters	5
Return to Vendor	5
System Parameters	5
Inventory and Sales	6
System Parameters	6
Application Configuration	6
Items Management	6
System Parameters	7
Other System Parameters	9
Application Configuration	10
Cost Changes Management	11
System Parameters	11

Other System Parameters	12
Application Configuration	12
Supplier Performance	13
System Parameters	13
Application Configuration	14
Quality Control	15
System Parameters	15
Other System Parameters	15
Deals Management	16
System Parameters	16
Application Configuration	17
Supplier Penalties	20
System Parameters	20
Application Configuration	21
Retail Price	21
System Parameters	21
Other System Parameters	22
Application Configuration	22
Financial Summary	23
System Parameters	23
Appointments Management	24
System Parameters	24
Application Configuration	25
Customer Order Fulfillment	25
System Parameters	26
Custom Validations Framework	26
System Parameters	26

13 Internationalization

Translation	1
Supplier Evaluation	1
Supply Chain Hub	2

14 Artwork

Enabling Artwork with SSO	1
---------------------------	---

15 Post Release Tasks

System Parameters	1
Glossaries	2

System Text	3
Permissions	3
Email Templates	3

A Appendix: SSL Certificate Management

Domain (URL) Management	A-1
Domain Mapping Example	A-1
Procedure Summary	A-2

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Oracle Retail Supplier Chain Collaboration Cloud Service Administration Guide

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Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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- Does the structure of the information help you with your tasks?
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- Are the examples correct? Do you need more examples?

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Note

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Preface

Oracle Retail Supply Chain Collaboration Cloud Service Administration Guides are designed so that you can view and understand the application's behind-the-scenes processing, including such information as the following:

- Key system administration configuration settings
- Technical architecture
- Functional integration dataflow across the enterprise
- Batch processing

Audience

This document is intended for administrators of Oracle Retail Supply Chain Collaboration Cloud Service.

Documentation Accessibility

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Related Documents

For more information, see the Oracle Retail Supply Chain Collaboration Cloud Service documentation set at the following URL:

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

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

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

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

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

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

Conventions

The following text conventions are used in this document:

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

1

Introduction

Retail Supply Chain Collaboration Cloud Service enables retailers to collaborate directly with their suppliers for pre-selection and ongoing evaluation of sites, production facilities and items, and to accomplish streamlined merchandising operations, leveraging data provided by partners through a single portal with a common navigation.

Oracle Retail Supply Chain Collaboration Cloud Service is composed of the following modules:

Supplier Evaluation

Supports the on-boarding, evaluation and management of Merchandising suppliers, enabling assessment and governance of ethical, environmental, safety, and quality performance, automatically scoring and grading suppliers and items against multiple business disciplines for actionable insight.

Functions incorporate supplier self-certification survey, item assessment, audit and action management, process management and incident alert notifications.

Retail Supply Chain Hub

Improves collaboration between retailers and suppliers with a platform to share information integrated in the Oracle Retail suite, increasing order and fulfilment efficiency and accuracy and reducing supply chain disruption and risk through direct collaboration on merchandising operations.

Functions include supplier self-configuration and enable collaboration on item, cost and price management, deals, inventory & sales, payments, purchase orders, customer orders and appointments.

Synchronize Workflow

Workflow-enabled records can occasionally result in their displayed status not matching their actual progression in the workflow, typically from the failure of the background job that progresses the status.

A *Synchronise Workflow* option is available in the Actions menu of records that are subject to a workflow process, providing a means of performing a manual refresh, thus allowing the record to continue to be used while the root cause of the synchronization issue is investigated. This option is intended for use by Oracle when investigating workflow related issues, so by default it is hidden from all users except those with the *Oracle Authorized Administrator* authority profile, however its use is controllable by the Permissions spreadsheet. The option appears when the record is opened in read mode. When selected, a dialog box is presented for confirmation of the action.

Admin Functions

To access the Admin functions, select the Admin option from Company. The Admin - System Control tab opens. The available options are shown in the left pane. For an example, see [Figure 1-1](#).

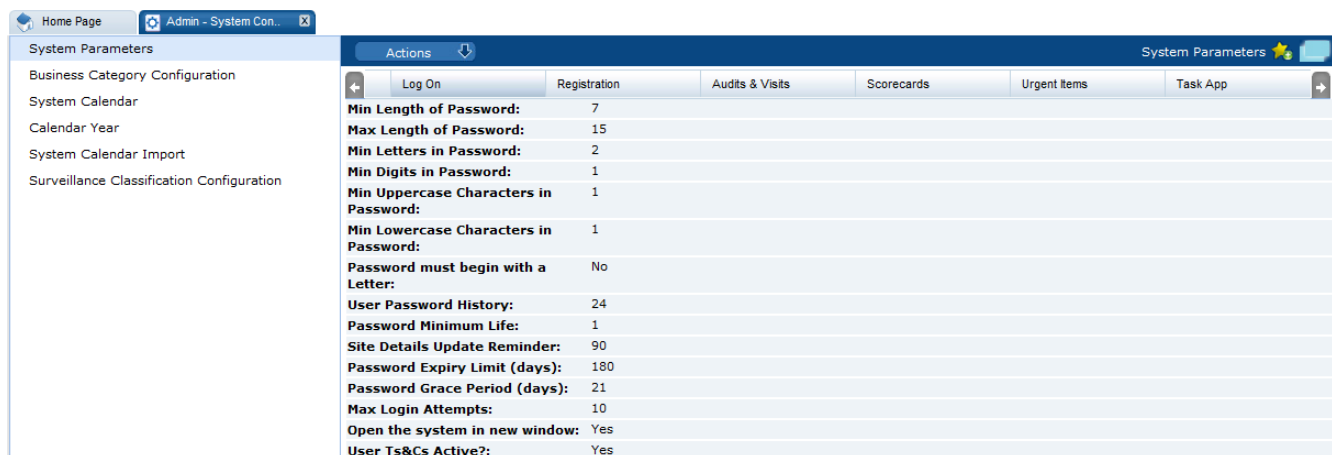
Access to the Admin functions is controlled by Authority Profiles. A user may not have access to all the Admin functions described in this guide.

System Parameters

System parameters are used to manage the functionality of features and modules. To access the system parameters, select the System Control option from the Admin drop-down list. Select System Parameters from the left pane. The System Parameters page appears. Each subtab shows the system parameters available to maintain a specific feature or module. [Figure 1-1](#) shows an example of the System Parameters page for the Log On subtab.

In each of the following chapters, a System Parameters section is included if system parameters are available for that feature or module. A table shows the specific system parameters, listed by subtab, used for that feature or module.

Figure 1-1 System Parameters Page



System Parameters	
Business Category Configuration	
System Calendar	
Calendar Year	
System Calendar Import	
Surveillance Classification Configuration	

Log On	
Min Length of Password:	7
Max Length of Password:	15
Min Letters in Password:	2
Min Digits in Password:	1
Min Uppercase Characters in Password:	1
Min Lowercase Characters in Password:	1
Password must begin with a Letter:	No
User Password History:	24
Password Minimum Life:	1
Site Details Update Reminder:	90
Password Expiry Limit (days):	180
Password Grace Period (days):	21
Max Login Attempts:	10
Open the system in new window:	Yes
User Ts&Cs Active?:	Yes

UIM Date Offsets

Where items appear based on dates, an offset may be configured to make the item appear a number of days before or after the actual event. This can be used to warn the user of the upcoming event or allow for a grace period. This functionality is available for the entire application.

Calendar

To access the system calendar options, select the System Control option from the Admin drop-down list. The following options are available in the left pane:

- [System Calendar](#)
- [Calendar Year](#)
- [System Calendar Import](#)

System Calendar

The System Calendar defines the retailer's financial year, period, and week for a given date:

- The Financial Year is the key of the calendar record. It must be unique.
- Each week is given a number, starting from 1, and start and end dates.
The first week's start date is the given start date. The subsequent week's start dates are allocated based on the day the week starts. The end date is the day before the next week's start date, other than the last week which ends on the given end date.
- The number of weeks is divided by the given number of periods to get the number of weeks in each period. This is used to set each period's start and end dates accordingly. The first and last periods may have irregular start or end dates, respectively, depending on the given data range. If the number of weeks is not exactly divisible by the number of periods, the result is rounded and the final period adjusted accordingly.
- Period is the key for each entry within the calendar record. It must be unique, that is, there can only be a single period 1, period 2, and so on.
- Each period's quarter number is based on the Q2, Q3, and Q4 week numbers. Q1 starts on week 1. Each period has a period number, period start and end dates, quarter number, and a list of weeks, each with a week number and start and end dates.

Figure 1-2 System Calendar Page

Financial Year	Q2 Start Week	Q3 Start Week	Q4 Start Week	Week Begins on
2011/2012	13	29	41	Sunday
2012/2013	13	29	41	Sunday
2013/2014	13	29	41	Sunday
2014/2015	17	29	41	Sunday
2015/2016	17	29	41	Sunday
2016/2017	17	29	41	Sunday
2017/2018	17	29	41	Sunday
2018/2019	17	29	41	Sunday
2019/2020	17	29	41	Sunday

To edit the System Calendar, select a row and then select the Edit action. The row opens in edit mode. For an example of this page, see [Figure 1-3](#).

To add a new entry:

1. Select the New action. The New System Calendar tab opens.

Figure 1-3 New System Calendar Page

Financial Year:	2011/2012	Week Begins On:	Sunday
Q2 Commences On Week:	13	Q3 Commences On Week:	29
Q4 Commences On Week:	41		

2. In the Details section:
 - Financial Year: Select the financial year from the drop-down list. This field is mandatory.
 - Week Begins On: Select the first day of the week from the drop-down list.

- Q2 Commences on Week, Q3 Commences on Week, and Q4 Commences on Week: Each field defines the start of a quarter. For each quarter, enter the number of the week in the year on which that quarter starts.
3. In the Periods page: set the period number and select the start and end dates for each period.

Details Periods Unavailable Dates Change History			
Start Date ▲	End Date	Period	Quarter
20/03/11	16/04/11	1	1
17/04/11	14/05/11	2	1
15/05/11	11/06/11	3	1
12/06/11	09/07/11	4	2

Details Weeks Change History	
= Details	
Start Date:	20/03/11
End Date:	16/04/11
Period:	1
Quarter:	1

The list of weeks of each period shows the week start and end dates and the week number within the period and year. This record is read-only.

Details Weeks Change History			
Start Date ▲	End Date	Period Week	Year Week
20/03/11	26/03/11	1	1
27/03/11	02/04/11	2	2
03/04/11	09/04/11	3	3
10/04/11	16/04/11	4	4

Details Change History	
= Details	
Start Date:	20/03/11
End Date:	26/03/11
Period Week:	1
Year Week:	1

4. In the Unavailable Dates subtab, dates to be treated as non-working days can be added to the calendar. For example, a holiday such as New Year's Day could be added. For each unavailable date:
 - a. Name: Enter the name in the default language. This field is mandatory. Enter any translations.
 - b. Date: Enter a date or click the icon to select a date.
 - c. Comments: Enter any comments.
5. Select the Save action.

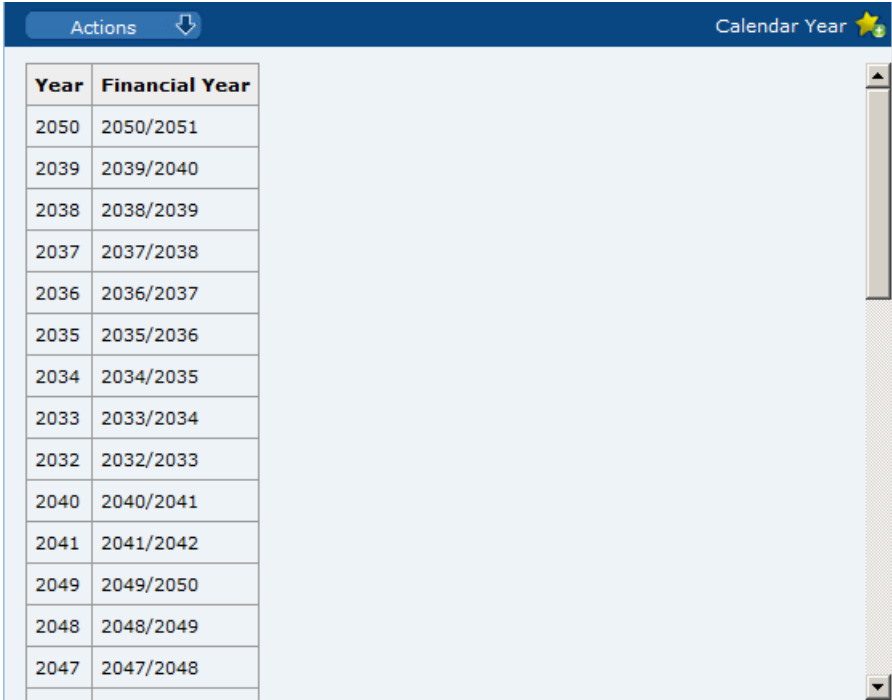
Calendar Year

The Calendar Year page lists the years available for selection when creating a new System Calendar. The years are maintained as a simple keyword list.

To edit the list, select the Edit action. The list opens in edit mode. You can edit any of the entries.

To add a new entry, click **Add**. An entry is added to the list. Enter the year and financial year. To reposition an entry in the list, select the entry and then click **Move Up** or **Move Down**.

Figure 1-4 Calendar Year Page



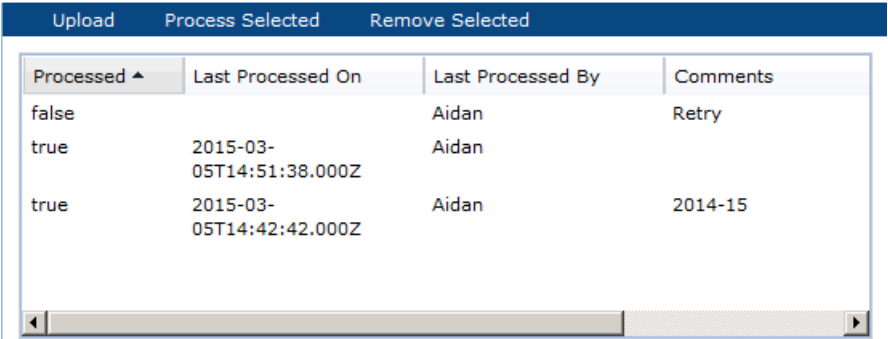
The screenshot shows a web interface for the 'Calendar Year' page. At the top, there is a blue header bar with 'Actions' and a dropdown arrow on the left, and 'Calendar Year' with a star icon on the right. Below the header is a table with two columns: 'Year' and 'Financial Year'. The table contains 15 rows of data, listing years from 2032 to 2050 and their corresponding financial years. A vertical scrollbar is visible on the right side of the table.

Year	Financial Year
2050	2050/2051
2039	2039/2040
2038	2038/2039
2037	2037/2038
2036	2036/2037
2035	2035/2036
2034	2034/2035
2033	2033/2034
2032	2032/2033
2040	2040/2041
2041	2041/2042
2049	2049/2050
2048	2048/2049
2047	2047/2048

System Calendar Import

An import facility is provided to load the system calendar from a CSV file.

Figure 1-5 System Calendar Import Page



The screenshot shows a web interface for the 'System Calendar Import' page. At the top, there is a blue header bar with three tabs: 'Upload', 'Process Selected', and 'Remove Selected'. Below the header is a table with four columns: 'Processed', 'Last Processed On', 'Last Processed By', and 'Comments'. The table contains three rows of data. The first row has 'Processed' as 'false' and 'Comments' as 'Retry'. The second and third rows have 'Processed' as 'true' and show specific timestamps and the user 'Aidan'. A horizontal scrollbar is visible at the bottom of the table.

Processed	Last Processed On	Last Processed By	Comments
false		Aidan	Retry
true	2015-03-05T14:51:38.000Z	Aidan	
true	2015-03-05T14:42:42.000Z	Aidan	2014-15

The following actions are available on this page:

- **Upload:** The user is prompted, with the standard file selector, to attach a file to be processed. When a CSV file has been uploaded, it has false in the Processed column.
- **Process Selected:** Select the file to be processed. If the selected file validation is successful, the contents are added as system calendar entries. When a CSV file has been processed, it has true in the Processed column.
- **Remove Selected:** Select the file to be deleted. The user is prompted to confirm the deletion. The System Calendar is not affected in any way by the deletion; only the list entry is removed from the import area.

Previously imported and processed versions are retained until selected for deletion.

System Text

The configuration of the portal's languages, and system text (field labels, menu options, error messages, and so on, and the associated help text and translations) is accessible to administrators with the Power Administrator and Oracle Authorized User authority profiles.

To access the system text options, select the System Control option from the Admin drop-down list. The following options are available in the left pane:

- [Languages](#)
- [System Text](#)
- [System Text Imports](#)
- [System Text Snapshots](#)

Languages

Retailer users with the Oracle Authorized Administrator authority profile have access to the Languages option.

To activate, deactivate, or amend the description of a supported system language:

1. Select the Languages option in the left hand pane. The Languages page opens.

Figure 1-6 Languages Page

Actions													Language
Code	Active	Description (Default)	Description (Chinese (Simplified))	Description (Dutch)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Japanese)	Description (Portuguese)	Description (Russian)	Description (Spanish)	Description (Swedish)
en_GB	Yes	English (British)	英語 (英國)	Brits-Engels	-	Anglais (britannique)	Englisch (Großbritannien)	Inglese (britannico)	英語 (英國)	Inglés (Británico)	Английский (Великобритания)	Inglés (británico)	Engelska (brittisk)
en_US	Yes	English (American)	英語 (美國)	Amerikaans-Engels	-	Anglais (américain)	Englisch (USA)	Inglese (americano)	英語 (美國)	Inglés (Americano)	Английский (США)	Inglés (americano)	Engelska (amerikansk)
de	Yes	German	德语	Duits	-	Allemand	Deutsch	Tedesco	ドイツ語	Alemão	Немецкий	Alemán	Tyska
es	Yes	Spanish	西班牙语	Spaans	-	Espagnol	Spanisch	Spagnolo	スペイン語	Espanhol	Испанский	Español	Spanska
fr	Yes	French	法语	Frans	-	Français	Französisch	Francese	フランス語	Francés	Французский	Francés	Franska
it	Yes	Italian	意大利语	Italiaans	-	Italien	Italienisch	Italiano	イタリア語	Italiano	Итальянский	Italiano	Italienska
ja	Yes	Japanese	日本語	Japanes	-	Japonais	Japanisch	Giapponese	日本語	Japonés	Японский	Japonés	Japansk
nl	Yes	Dutch	荷語	Nederlands	-	Néerlandais	Niederländisch	Olandese	荷語	Holandés	Голландский	Holandés	Hollandska
pt	Yes	Portuguese	葡萄牙语	Portugees	-	Portugais	Portugiesisch	Portoghese	葡萄牙语	Português	Португальский	Português	Portugiesiska
ru	Yes	Russian	俄语	Russisch	-	Russe	Russisch	Russo	俄语	Russo	Русский	Ruso	Ryska
sv	Yes	Swedish	瑞典	Zweeds	-	Suédais	Schwedisch	Svedese	瑞典	Sueco	Шведский	Sueco	Svenska
zh_CN	Yes	Chinese (Simplified)	中文 (简体)	Chinees-Versimpeld	-	Chinois (simplifié)	Chinesisch (Vereinfacht)	Cinese (semplificato)	中文(简体)	Chínés (Simplificado)	Китайский (упрощенный)	Chino (simplificado)	Kinesiska (Förenklad)

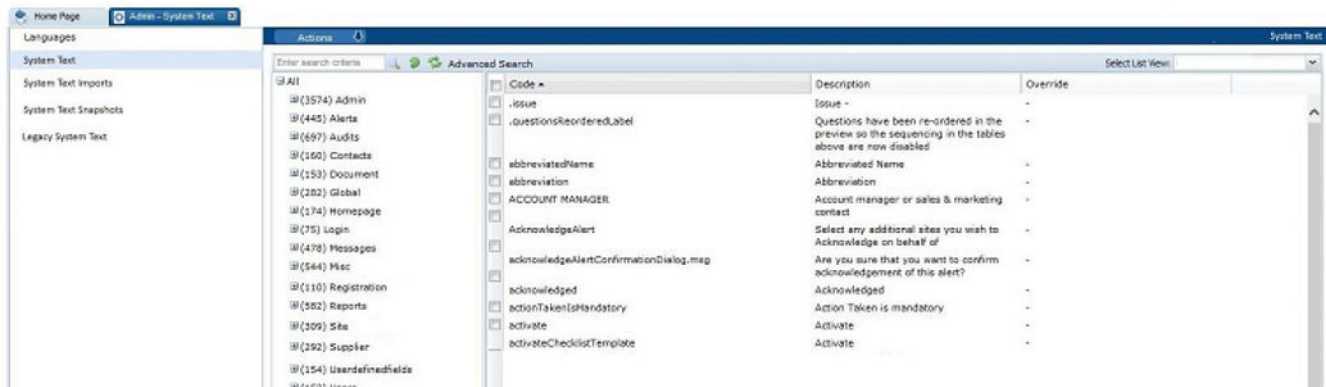
2. Select Edit and then either select or deselect one of the available languages.
3. Select Save & Exit.

System Text

Selecting this option presents a list view containing the portal's system text files.

The core default system text cannot be changed, however custom overrides can be set up to replace the system text within the portal. This can be used to apply custom terminology, guidance help text, and alternative translations.

Figure 1-7 System Text Page



To edit the System Text, select a row and then select the Edit action. The row opens in edit mode. For an example of this page, see [Figure 1-8](#).

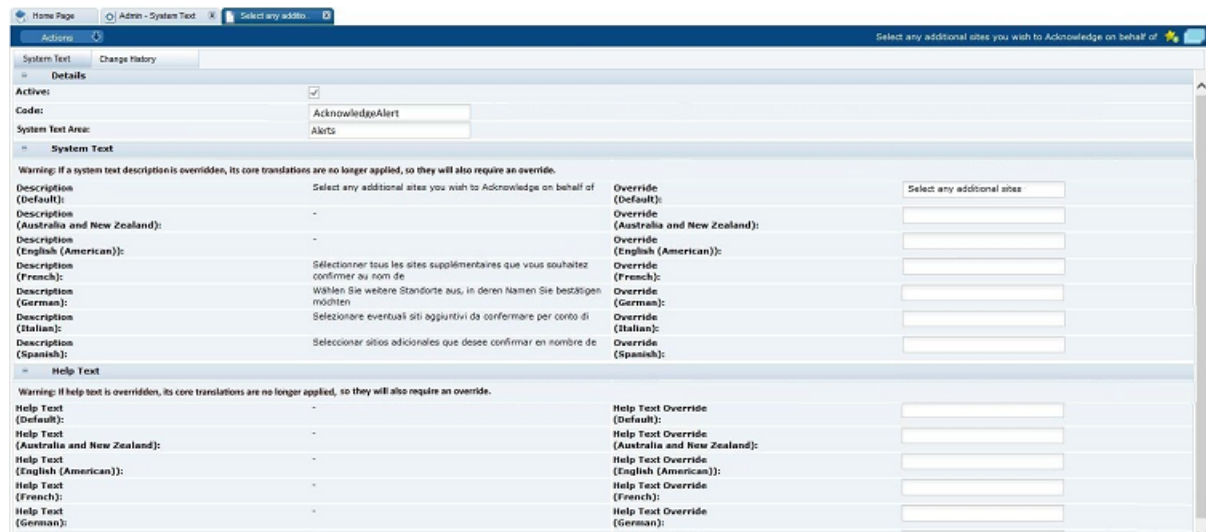
To add a new entry:

1. Select the New action. The New System Text tab appears.

Note

The actions to add and delete System Text items will usually only be used when new Custom Fields are being added to the portal.

Figure 1-8 System Text Details Page



2. In the Details section, set the following values:
 - Active - check the box to activate this item.
 - Code - enter an identity code for the item.
 - System Text Area - the area of the system that this item relates to.

The System Text and Help Text sections are arranged with the core default text on the left hand side, which cannot be edited, and the custom overrides on the right. If the override is left blank, the core default text will be used. The fields are repeated for each of the portal's supported languages. If an override is subsequently removed, the system will revert to using the core system text.

Note

If the core default language system text description or help text has an override applied, the associated core translation value is no longer applied as it is assumed the translation is no longer valid. An override translation must be created where translations are required.

3. In the System Text section, set the following values:
 - Description - the core default system text.
 - Override - the custom text to override the core default value.
4. In the Help Text section, set the following values:
 - Help Text - the core default help text.
 - Help Text Override - the custom help text to override the core default value.
5. Select the Save action.
6. Select the Reload System Text action from the System Text page to apply the changes to the portal.

System Text Imports

The System Text page includes the option to import system text changes as an alternative to manually editing the individual system text item. Used in conjunction with the System Text Export option, the import allows exported files of system text to be edited offline with a text editor prior to being imported back in through a single action.

Selecting this option presents a list view showing previous imports.

Figure 1-9 System Text Imports Page

Version	Created By	Created On	Comments
1	Super User	04/01/16 12:22	New Translations

To view the details of a previous import, select a row and then select the View action. The row opens in read mode. For an example of the content this page, see [Figure 1-13](#).

To perform a new import:

1. Select the Import System Text action. The Import System Text dialog box appears.

Figure 1-10 Import System Text Dialog Box

- a. Click Browse to select an individual text file (or a ZIP file containing multiple text files) to import.
- b. Choose to either automatically apply the system text to the application on completion of the import, or to manually apply it through the Reload System Text action. The manual option will typically be used where a series of system text changes are being imported and are to then be applied simultaneously.
- c. Enter a comment to describe the changes being imported. This is a mandatory field.
- d. Click **Ok**.

Note

The import file must be a text file with the extension `.translation`.

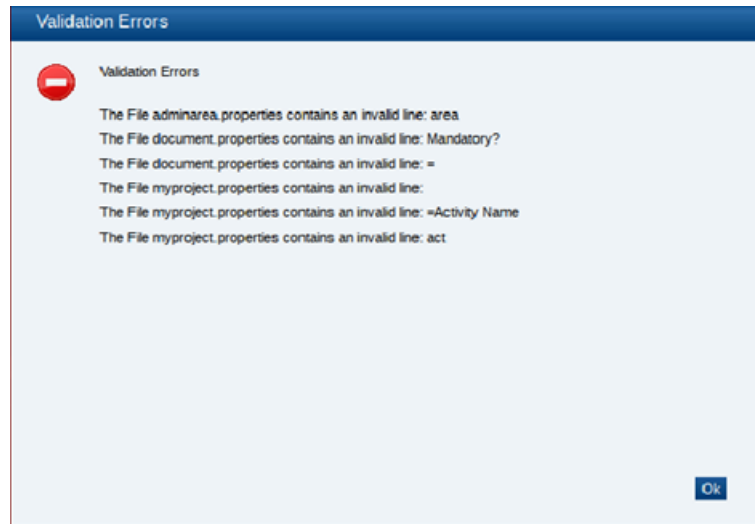
Any special characters must be UTF-8 encoded. The file may contain blank rows or comments (rows that start with #); they will simply be ignored by the import process.

For further details of the file layout, see [System Text Exports](#).

2. If the `"\u"` ASCII character escape sequence prefix is encountered in the file, indicating the presence of special characters that have not been UTF-8 encoded, the following message is displayed with the option to continue or cancel:

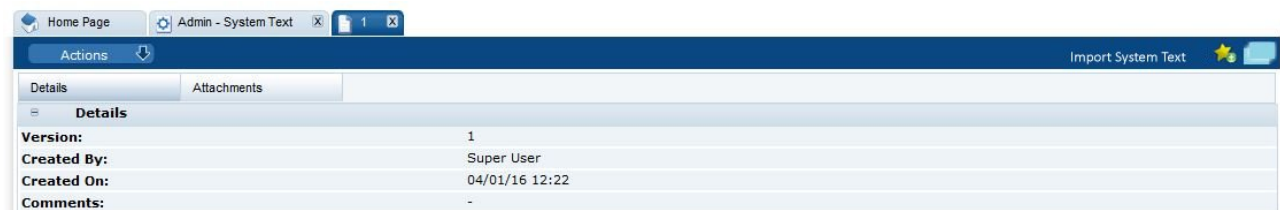
Figure 1-11 Import System Text Warning Dialog Box

3. To continue the import, click **Ok**. To return to the System Text page, click **Cancel**.
4. If errors are encountered the following dialog box appears:

Figure 1-12 Import System Text Errors Dialog Box

If no errors are encountered the system text is imported and a row is added to the System Text Import page.

- To view the details of the import, select the row in the System Text Import page and then select the View action. The row opens in read mode.

Figure 1-13 System Text Import Details Page

- In the Details section (all fields are read-only):
 - Version - this is automatically incremented for each import.
 - Created By - the name of the person who submitted the import.
 - Created On - the date and time of the import.
 - Comments - the comments that were entered when the import was run.

A copy of the imported file is automatically stored in the Attachments section.

- If the option was selected to manually apply the changes, click the Reload System Text action when ready for the text to be applied to the portal.

System text records cannot be deleted.

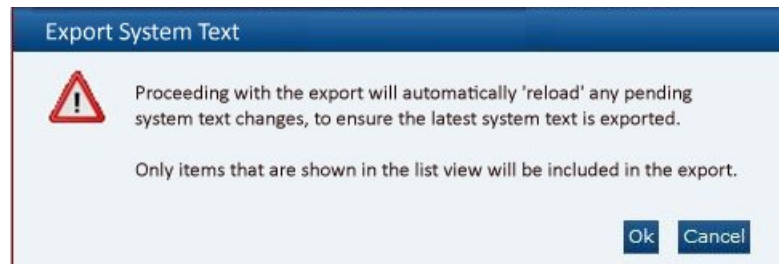
System Text Exports

The System Text page includes the option to download system text files to your PC for offline editing prior to importing the changes back into the portal.

To perform an export:

1. Select the Export System Text action. The Export System Text dialog box appears, explaining that the Reload System Text action will automatically run as part of the export to ensure any outstanding updates are first applied.

Figure 1-14 Export System Text Dialog Box

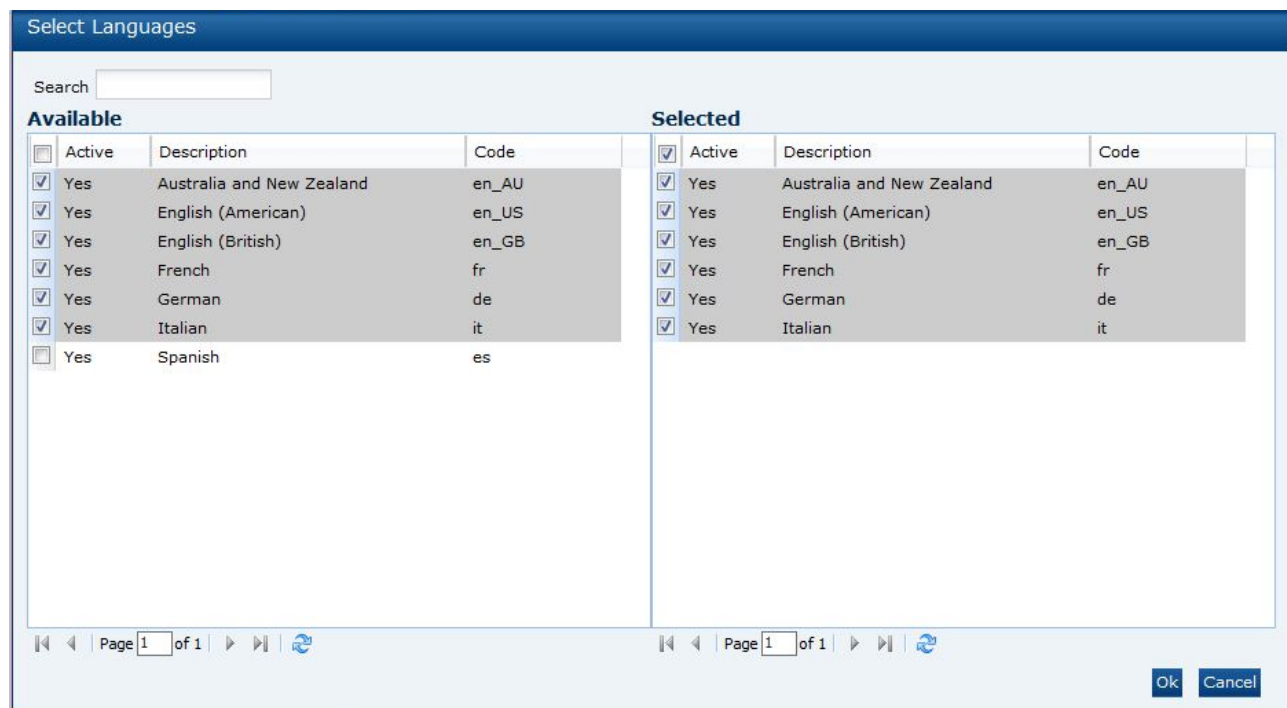


Note

The export is based on the contents of the System Text page. Filter the list view using the quick or advanced search to contain the required system text items to be included. If no languages are selected, the export file will be empty.

2. Click **Ok**. The System Text Export Languages dialog box appears, with all the active languages selected.

Figure 1-15 System Text Export Select Languages Dialog Box



3. Select the required languages to be included in the export and click **Ok**. A ZIP file is created containing the individual translation text files for the selected system text items and languages.

4. To save to a local location from which to open the text file, select Save or Save As.

The file is a text file with the .translation extension which can be opened and edited using any UTF-8 compliant text editor, such as Microsoft WordPad.

The file contains the current text value/description as it appears within the system. If a custom override has been set, that will be the value; otherwise the value will be the core default value. If a value is removed/ blanked and reloaded, the system will revert to showing the core default value. Each item is prefixed with its unique identity code, for example, the Oracle Login page contains a login field and a page title; if the system text of these items are "Log In" and "Oracle UK Login" respectively, they would appear in the file as:

```
oracle.loginPage.login=Log In
oracle.loginPage.loginPageTitle=Oracle UK Login
```

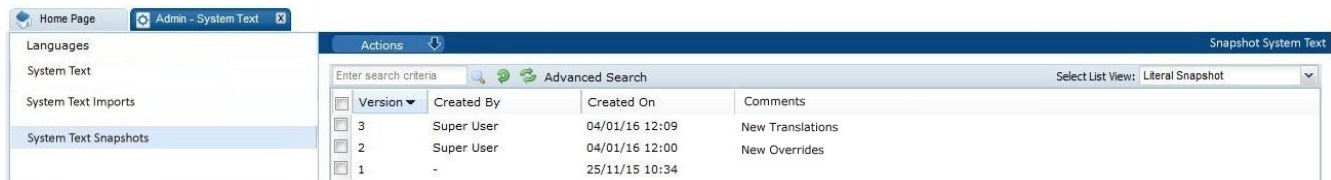
The file names are based on the system text area, with the language code appended, separated by underscore (for example, Audits_de.translation).

System Text Snapshots

The System Text page includes the option to take a copy of system text files prior to changes being made. This is similar to the export option, and if necessary, the snapshot files can be imported back into the system in order to regress changes back to a prior state.

Selecting this option presents a list view showing previous snapshots.

Figure 1-16 System Text Snapshots Page

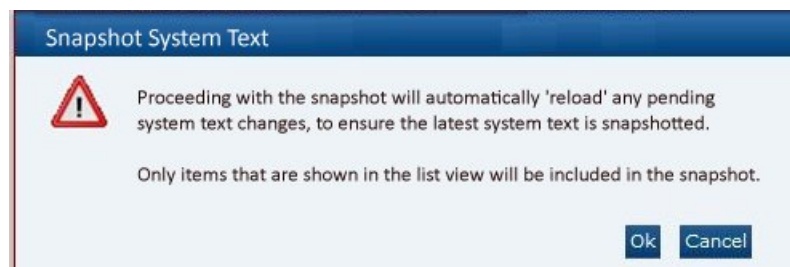


To view the details of a previous snapshot, select a row and then select the View action. The row opens in read mode. For an example of this page, see [Figure 1-19](#).

To create a new snapshot:

1. Select the Snapshot System Text action. The Snapshot System Text dialog box appears, explaining that the Reload System Text action will automatically run as part of the snapshot to ensure any outstanding updates are first applied.

Figure 1-17 Snapshot System Text Dialog Box

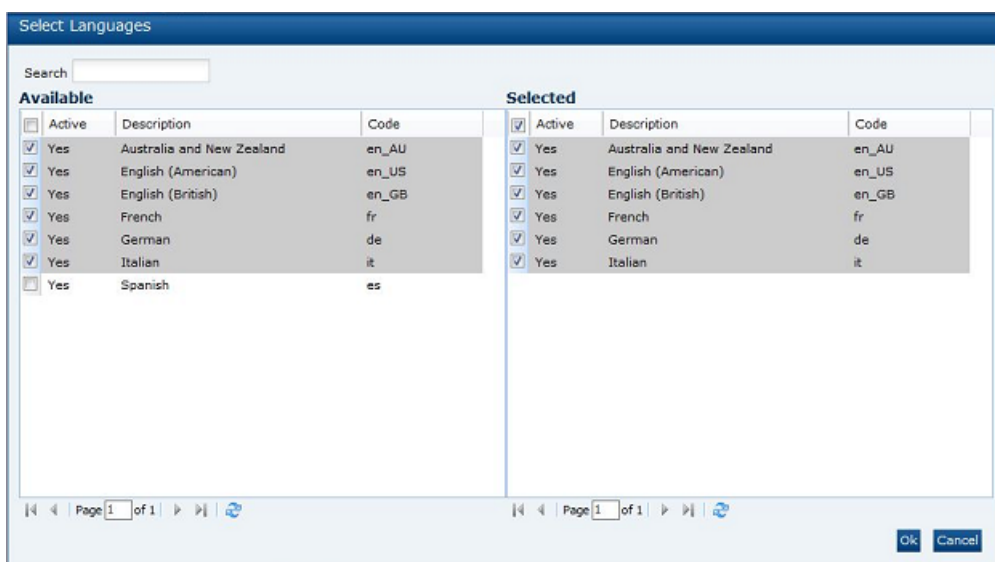


Note

The snapshot is based on the contents of the System Text page. Filter the list view using the quick or advanced search to contain the required system text items to be included.

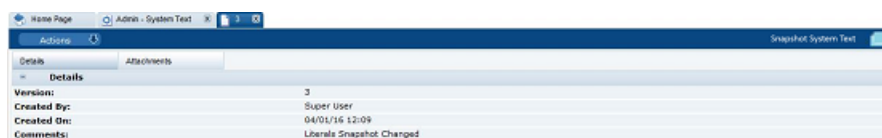
- Click **Ok**. The System Text Snapshot Languages dialog box appears, with all the active languages selected.

Figure 1-18 System Text Snapshot Select Languages Dialog Box



- Select the required languages to be included in the snapshot and click **Ok**. A ZIP file is created containing the individual translation text files for the selected system text items and languages and a row is added to the System Text Snapshots page.
- To edit the details of the import, select the row in the System Text Snapshots page and then select the Edit action. The row opens in edit mode.

Figure 1-19 System Text Snapshot Details Page



- In the Details section (all fields except Comments are read-only):
 - Version - this is automatically incremented for each snapshot.
 - Created By - the name of the person who submitted the snapshot.
 - Created On - the date and time of the snapshot.
 - Comments - this is the only editable field.

The snapshot ZIP file is automatically stored in the Attachments section.

To delete a System Text Snapshot, select a row and then select the Edit action. The row opens in edit mode. Select the Delete action.

2

Managing User Access

This chapter describes how user access to Oracle Retail System Evaluation Cloud Service is managed. Retailer users who are assigned the User Administrator Authority Profile can create and edit users.

The following topics are covered in this chapter:

- [Overview of User Security](#)
- [Managing User Roles](#)
- [Managing Users](#)
- [Managing External Systems](#)
- [System Parameters](#)

Overview of User Security

Following are the components of user security for Oracle Retail Supplier Evaluation Cloud Service:

- Access rights are defined in the Permissions Rules spreadsheet.
- Authority Profiles are grouped into Authority Profile Groups.
- A role is comprised of Authority Profiles which assign the access rights.
- A user is assigned roles.
- A user may also be assigned individual Authority Profiles.

The system differentiates between internal (retailer) users and external (supplier) users, and controls the respective access to data and functionality based on implicit rules and configurable permissions rules. The permissions and implicit rules are applied wherever data or functionality is accessed: access to records, contents of list views and embedded lists, pick-list contents, wizard screens, and so on.

Note

If the new Workspace UI is enabled, see the *Oracle Retail Supplier Evaluation Cloud Service Workspace User Guide* for the alternative method of administering the JET UI user access permissions.

Implicit Rules

The system has a set of hard-coded rules that control fundamental access to data and functionality, such as, a supplier can only access their own data and the retailer has visibility to all suppliers' data.

Permissions Rules

The actual rules for each Authority Profile's access to the system (create, read, update, delete) are defined in the Permission Rules spreadsheet. The permissions can be defined at record, page, field-set, or field level, allowing access to be granted to entire records down to a more granular field-level where necessary. The permissions are also applied to grant access to menu options and actions, and can be set to take records' status into account.

Retailer users with the Oracle Authorized Administrator authority profile have access to the Permissions option within the Admin - Roles & Permissions menu.

Amending Permissions

The Permissions spreadsheet can be amended using the following steps:

Note

It is recommended that Oracle be consulted before making changes to the Permissions spreadsheet.

1. Open the Roles & Permissions / Permissions page in the Admin area.
2. Select the active permission row in the list view.
3. Click **Download Spreadsheet** and save the file locally.
4. Edit the *Permissions* file using a spreadsheet editor such as Excel and save the changes.

The spreadsheet is organized with a separate tab for each record type. Each page contains the following columns:

- **Authority Profile** - This is the grouping for which the access rights are provided. Authority Profiles are assigned to users, either grouped together as Roles, or individually. They collectively grant the user the appropriate level of access to the system. This column must contain an entry that is present in the Authority Profiles glossary. The remaining columns specify the profile's access rights for the type of record.
- **Menu Option** and **Sub Menu Option** - These columns are used to assign access rights to menu options and sub menu options.
- **Action** - This column is used to assign access rights to actions such as buttons or table actions.
- **Record** - This column identifies the record that the permission rule applies to.
- **Page, Field Set, and Field** - These columns identify individual pages, field sets, or fields within the page which are to have access rights that differ to the overall level of access to the record. For example, an Authority Profile may be assigned edit access to a record in general, but specific pages, field sets, or individual fields may be overridden to have read-only access.
- **Status (Record and Parent Record)** - This column can be used to apply rules specific to the status of the record and/or its parent record.
- **User Mode** - This column can be used to apply a separate set of rules for a restricted level of access. It will usually be set to NORMAL.

- **Access Level** - This column defines the level of access to be granted. The options are:
 - **R** - Read: Read-only access (also allows the Print action where the option is available).
 - **W** - Write: Write access (also assumes Read access).
 - **C** - Create: Ability to create a new record (also assumes Read and Write access).
 - **D** - Delete: Ability to delete a record (also assumes Read and Write access).
 - **F** - Full Access: Full access to a record (Read, Write, Create, and Delete access).
 - **N** - No Access: No access to the record, item, or action.
 - **Y** - Access Permitted: Ability to access an action.
- 5. Click **Upload Permissions Spreadsheet** and locate the spreadsheet. Add a comment and click **Ok**.
- 6. Select the uploaded entry in the list view and click **Process Selected**. The permission changes will become effective to users the next time they log in.

Authority Profiles

Authority Profiles are the lowest form of control over functionality. Authority Profiles are sets of permissions that together set a level of access to specific areas of the application, both data and functionality, and can be set at the function, record, page, field-set, or field level. The permissions for each Authority Profile are defined in the Permissions Rules spreadsheet.

Each Authority Profile record has a unique name, unique code, and a mandatory default description. A description can also be provided for each of the supported languages. The system comes with default sets of retailer and supplier authority profiles.

An Authority Profile record also includes a field called "Control" which can be used to describe what the authority profile does. This becomes useful to an Administrator when using the Display effective permissions button within a user record because, as the cursor hovers over an Authority Profile within the dialog box, a tool tip will display whatever has been entered in the Control field. As text for the field can be entered in all supported languages for the portal, the system will be able to show the text in the language of the user using the system.

One or more Authority Profiles are assigned to a role to define its access rights. This enables new roles to be introduced without having to change the Permissions Rules spreadsheet.

The following are examples of Authority Profiles:

- Configuration Editor
- Audit Administrator
- News Administrator
- Library Reader

Authority Profile Groups

Authority profiles are grouped to set an order of precedence so that if a user has a number of conflicting authority profiles, such as Audit Reader and Audit Editor, the user is always assigned the highest level of access.

For example, the Technologist role may contain the News Reader authority profile as standard. If a particular Technologist user is granted the News Administrator role to give the user the

rights to also publish news items, there would be a resulting clash between News Reader and News Administrator when the system determines the permissions. Authority profile groups therefore facilitate giving the News Administrator precedence over News Reader.

Retailer users with the Oracle Authorized Administrator authority profile have access to the Authority Profile Groups option within the Admin - Roles & Permissions menu.

Roles

Roles are constructed from Authority Profiles that define different levels of access to data and functionality within each area of the system, such as, Audit Reader, Audit Editor, and News Administrator. Users may also be assigned individual additional Authority Profiles to grant them specific privileges, such as granting a particular Technologist the ability to publish news items.

Note

If a user is assigned individual additional authority profiles, the user's overall access to the system also takes into account the authority profiles associated to any roles the user has been assigned.

A user role is made up of one or more authority profiles. Each role has a unique name and a list of authority profiles. A role has a predefined level of access to the system determined by its associated Authority Profiles.

Each user is assigned one or more roles appropriate to that user's use of the system. Roles are configurable and a number of standard roles are supplied with the system for the common types of user, such as, Technologist. These may then be amended to reflect retailer-specific terminology or business processes as required. Any number of additional roles can be created to enable alternative types of users.

Roles are user classifications that relate to a job title, such as:

- Technologist
- Assistant Technologist
- Product Development Manager

Roles can be created to build common variants, for example, a Trainee Assistant Technologist where the level of access is restricted to read-only.

Common User Roles

The system comes with a predefined set of common user roles which can then be amended or extended as necessary. [Table 2-1](#) describes the internal roles.

Table 2-1 Internal (Retailer) Roles

Role Name	Description
Account Administrator	Enables access to orders generated from the supplier registration process.
Assistant Technologist	Enables the user to work with Technologists and perform some tasks on their behalf. Therefore, the user by default has the same level of access as a Technologist.

Table 2-1 (Cont.) Internal (Retailer) Roles

Role Name	Description
Auditor	May be internal (retailer) or external (third-party audit house/certification body) users. The users carry out supplier site audits on behalf of the retailer, so the users can create and complete audits and visits.
Restricted Auditor	For internal (retailer) or external third-party audit house/certification body user who needs only to have limited visibility of audits. This user role is expected to utilize the same authority profiles as the Auditor user role but replaces the Auditor authority profile with a new Restricted Auditor authority profile.
Buyer	Enables access to supplier information. The level of access is generally restricted to read-only, such as read access to supplier details.
Laboratory	External users. Initially just basic access to news and documents.
Power User	Allows the configuration of system text and the deletion of unused Site accounts.
Process Administrator	Enables the configuration of templates for processes and their activities.
Process Manager	Enables the creation and management of processes.
Retailer Supplier Administrator	Can be given to a retailer user to enable the user to edit the name, address, and contact details of supplier and site accounts.
Site Inspector	Initially, just basic access to news and documents.
System Administrator	Provides access to the configuration and administration features.
Technologist	Main users of the system. These users have access to most areas of the system and work in collaboration with the suppliers of products, carrying out site visits and audits.

Each supplier has their own account within the system, comprising a single supplier (head office) record plus a site record for each of their manufacturing or packing locations. Supplier users have their own individual user accounts. Supplier users are either a supplier level user associated to the head office and all its sites, or a site level user associated to one or more sites within the organization and may be granted administration rights. [Table 2-2](#) describes the external roles.

Table 2-2 External (Supplier or Site) Roles

Role Name	Description
Supplier Administrator	A supplier level user with permission to administer supplier and site users and addresses and contacts, that is, Supplier and Site records and their Contacts.
Supplier User	A supplier level user with access to all sites for that supplier including any new sites that are created. This user type can be a contact for the supplier and for any site.
Site Administrator	A site level user with permission to administer site users for their sites only and address and contacts for those sites they have access to, that is, Site Records and their contacts.
Site User	A site level user with access to specified sites. As new sites are added, they do not have access to those sites unless specifically granted by an administrator. They can be a site contact, but not a supplier contact.

Users

Each user of the system is assigned an individual password-protected user account identified by a personal user name and email address. Most transactions made within the system are recorded in time-stamped audit trail logs, identifying the user responsible for the transaction.

Designated administrators, within the retailer and supplier organizations, create and manage their users and access rights. Individual users can then maintain their own contact details, preference settings, and passwords.

User records are assigned one or more roles to set their default level of access. Authority Profiles can also be assigned directly to a user to give them specific access rights.

The User record includes flags to control whether the user is to appear in the drop-down lists of Technologist, Assistant Technologists, Auditors, and so on.

Note

The creation of users, their allocation to suppliers, and activation/deactivation is managed in the Supplier Evaluation module; the Supplier Evaluation user account is then automatically synchronized with the Supply Chain Hub user account.

For more details, see the *Oracle Retail Supply Chain Collaboration Cloud Service User Integration Guide* and the *Oracle Retail Supply Chain Hub User Guide*.

IDCS or OCI IAM Integration for Authentication

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

Note

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

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

- All users log in to the portal using an individual IDCS or OCI IAM profile.
- Each portal instance has dedicated IDCS or OCI IAM tenants, for its production and staging/UAT environments (unless the customer has opted to use a unified tenant for both).
- New users are created in Supply Chain Collaboration, which automatically triggers creation of an IDCS or OCI IAM profile.

- User roles map to groups in IDCS or OCI IAM to control users' level of access.
- All maintenance of user passwords and email addresses is carried out by the user in IDCS or OCI IAM.
- The user maintains all other account details in Supply Chain Collaboration.
- An hourly batch job automatically synchronizes changes between Supply Chain Collaboration and IDCS or OCI IAM.
- External system accounts also require an OAuth configuration into the IDCS/OCI IAM tenant, in order to access the portal's APIs.

Note

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

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

User documentation for OCI IAM can be found at the *Oracle Cloud Infrastructure Identity and Access Management Documentation*:

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

Provisioning a New System

When a new Supply Chain Collaboration portal is implemented, the necessary IDCS or OCI IAM tenant will be installed and configured to include an IDCS or OCI IAM Administrator profile for the on-going administration by a retailer administrator.

Once the IDCS or OCI IAM tenant has been configured, its environment variables will be visible in the System Parameters page.

Migration of Users

When provisioning a new portal, a migration process can be used to automatically create the IDCS or OCI IAM profiles. This facility allows accounts to be provisionally created in the portal, then enabled as part of the launch.

The key features of the migration tool are as follows:

- The migration tool is run by Oracle Application Management Services (AMS) as part of the portal upgrade process. It may be run multiple times during the deployment.
- All users have an IDCS or OCI IAM user profile created.
- The login id becomes the unique reference that links the Supply Chain Collaboration and IDCS or OCI IAM accounts.
- Users are assigned to the appropriate IDCS or OCI IAM access control groups based on their Supply Chain Collaboration access rights.

The core set of roles is as follows:

RETAILER_ROLE	RGBU_BCCS_%s_Retailer
EXTERNAL_SYSTEM_ROLE	RGBU_BCCS_%s_ExternalSystem
AREA_ROLE	RGBU_BCCS_%s_Retailer_%s

SUPPLIER_ROLE	RGBU_BCCS_%s_Supplier
ARTWORK_ROLE	RGBU_BCCS_%s_Artwork
REPORTING_ADMIN_ROLE	RGBU_BCCS_%s_Reports_Admin
REPORTING_READER_ROLE	RGBU_BCCS_%s_Reports_Reader
REPORTING_USER_ROLE	RGBU_BCCS_%s_Reports_User
TEST_ROLE	RGBU_BCCS_%s_Test
TEST_AREA_ROLE	RGBU_BCCS_%s_Test_%s

- The migration process can create IDCS or OCI IAM profiles at either activated or deactivated status. The flag in Supply Chain Collaboration that disables the login has no effect on the IDCS or OCI IAM profile, however access to Supply Chain Collaboration is prevented if the account has been set as disabled.
- During the migration, the automated emailing of notifications to new users from IDCS or OCI IAM will be temporarily disabled, to prevent users attempting to access prior to launch. The notification emails may be manually sent from IDCS or OCI IAM, post migration.
- After migration, the client administrator user has the ability to configure and enable/disable the individual IDCS or OCI IAM email templates.
- Once the portal is deployed, creating a new user in Supply Chain Collaboration will trigger the automatic creation of a corresponding IDCS or OCI IAM profile. An hourly scheduled job thereafter synchronizes any changes to email address or user roles.
- The migration tool can also be used to create the IDCS or OCI IAM user profiles when refreshing a staging/UAT environment with data from the production environment.

As the linking of the Supply Chain Collaboration accounts to their IDCS or OCI IAM profiles is by the login id, when a portal's staging/UAT environment has its data refreshed with that from another environment, accounts that have a corresponding profile in the staging/UAT environment's IDCS or OCI IAM tenant should authenticate without the need to create new profiles. Otherwise new accounts will need to be created in Supply Chain Collaboration, which will automatically create the corresponding IDCS or OCI IAM profiles.

Managing Authority Profiles

The descriptions in the supported languages can be changed for the Authority Profiles. Select Authority Profiles from the left pane. The Authority Panels page opens. Select the Edit action. The page opens in edit mode. Make any changes and save the updates.

Managing User Roles

Select User Roles in the left panel. The List Roles page opens. For each role, the code, user type (Retailer, Site, Supplier), and description is shown.

Adding a User Role

To add a new user role:

1. Select the New User Role action. The Role Details page appears.

Figure 2-1 New User Role Page

Home PageAdmin - Roles &...New User Role

Actions

Role DetailsAttachments

Details

Code:

*

User Type:

Retailer

Description (Default):

*

Description (Australia and New Zealand):

Description (English (American)):

Description (French):

Description (German):

Description (Italian):

Description (Spanish):

Authority Profiles:

-

Grant Roles:

-

2. Enter the details for the role and select the Save action.

Table 2-3 New User Role Page Details

Details	Description
Code	Enter a unique code for this user role. Mandatory field.
User Type	Select the type of users for which this role is intended: - Retailer - Supplier - Retailer and Supplier - Site
Description	Enter the description for this role in the supported languages. The description for the default language is mandatory
Authority Profiles	Click the icon and select the Authority Profiles that define this role.
Grant Roles	Click the icon and select the roles that a user assigned this new role can assign to other users.

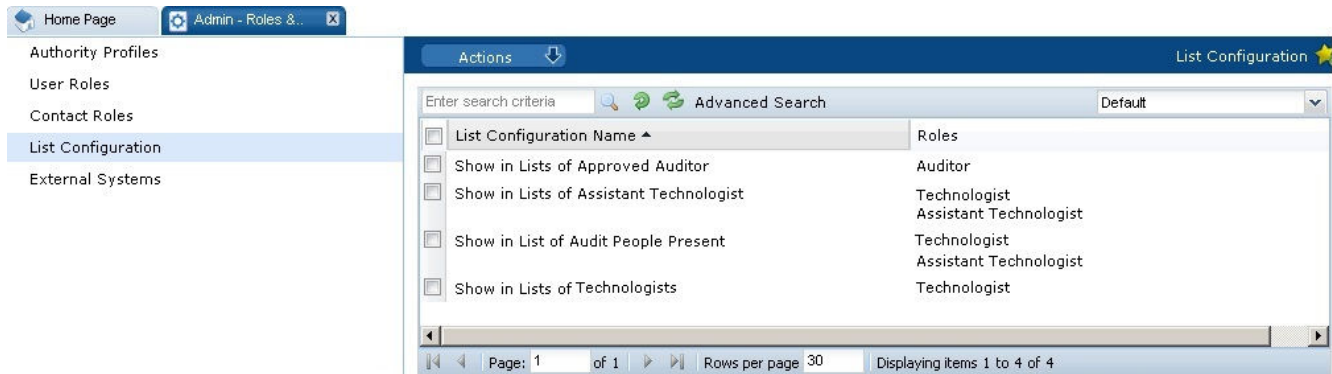
Editing a User Role

Select the role and select the Edit action. The Role Details are displayed in edit mode. The Code, User Type, and Default Description, and any descriptions entered for a supported language cannot be edited. Descriptions for additional languages can be added.

List Configuration

List configuration enables the auto-selection of users into a list. These lists can be filled with the names of users that have the selected roles for the list.

Select the List Configuration option in the left pane. The List Configuration page opens.

Figure 2-2 List Configuration Page

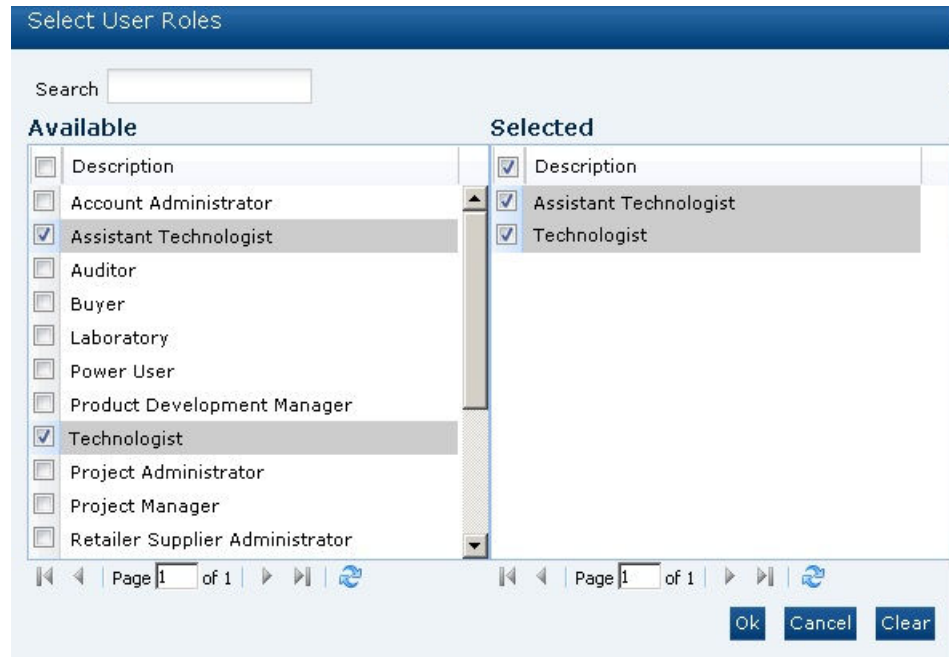
For each list configuration, the roles assigned for that list are shown.

To edit a list configuration, select the entry and then the Edit action. The Details page for the selected list appears.

Figure 2-3 List Configuration Details Page

Select the icon in the Roles panel to see the list of available roles. The Select User Roles dialog box appears. Select the roles you want for this list configuration and select **Ok**.

Figure 2-4 Select User Roles Dialog Box



Managing Contact Roles

To access contact roles, select the Contact Roles option in the left pane. The Contact Roles page opens. For each contact role, the description is shown and a column for each of the following with a Yes/No status for each role:

- Is Supplier Role?
- Is Mandatory Supplier Role?
- Is Site Role?
- Is Mandatory Site Role?

Adding a Contact Role

To add a new contact role:

1. Select the New Contact Role action. The New Contact Role page opens.

Figure 2-5 New Contact Role Page

2. Enter the details and select the Save action.

Table 2-4 New Contact Role Page Details

Details	Description
Code	Enter a unique code for this user role. Mandatory field.
Description	Enter the description for this role in the supported languages. The description for the default language is mandatory.
Supplier Level	Check if this is a supplier level contact role.
Supplier Level Mandatory	Check if this is supplier level contact role is mandatory. If a role is mandatory, a contact must be assigned to that role for a supplier record to be approved. A role may also be mandatory if it is required to automatically notify the relevant users when an action is required.
Mandatory Supplier Types	Click the icon and select the mandatory supplier types for this role.
Site Level	Check if this is a site level contact role.
Site Level Mandatory	Check if this site level contact role is mandatory. If a role is mandatory, a contact must be assigned to that role for a site record to be approved. A role may also be mandatory if it is required to automatically notify the relevant users when an action is required.
Mandatory Site Types	Click the icon and select the mandatory site types for this role.

Editing a Contact Role

To edit a contact role, select the role in the Contact Roles page and select the Edit action. The contact role record opens in edit mode in a new tab. The Code, Default Description, and any descriptions entered for a supported language cannot be edited. Descriptions for additional languages can be added.

Managing Users

To access the users, select Users from the Company menu. The Company Users tab opens. The list of users is displayed. For each user, the user name, login ID, and email address are shown. If available, a phone number and mobile phone number are also shown.

Creating a User

To create a new user, select the New User action. The New User page appears. [Figure 2-6](#) shows the format of the page when a retailer user is being created. [Figure 2-7](#) shows the format when a supplier user is being created.

Figure 2-6 New User Page for a Retailer User

The screenshot shows the 'New User Page for a Retailer User' with the following sections and fields:

- Details:**
 - Name: [Text Field]
 - Login Id: [Text Field]
 - Login id Disabled?: ☐
 - IDCS Profile Created: [Text Field]
 - Job Title: [Text Field]
 - Department: [Text Field]
 - Team Manager: [Text Field]
 - Delegates: [Text Field]
 - Language: English (British) [Text Field]
 - Time Zone: Coordinated Universal Time (UTC) [Text Field]
 - Area: [Text Field]
 - Comments: [Text Field]
- Address:**
 - Local Address: [Text Field]
 - Country: [Text Field]
 - Address Line 1: [Text Field]
 - Address Line 2: [Text Field]
 - City: [Text Field]
 - County: [Text Field]
 - Post Code: [Text Field]
 - GPS latitude: [Text Field]
 - GPS longitude: [Text Field]
- Roles and Permissions:**
 - Display Effective Permissions: [Button]
 - User Roles: System Administrator [Text Field]
 - Show in List of Audit People Present: ☐
 - Show in Lists of Approved Auditor: ☐
 - Show in Lists of Assistant Technologists: ☐
 - Show in Lists of Technologists: ☐
 - Restricted Auditor Access: ☐
 - Authority Profiles: [Text Field]

Enter the information in the following sections for the new retailer user:

- **Details**
The Name, Email, Login Id, and Language fields are mandatory.
Area only appears if the Restrict Access by Area system parameter has been set. Assigning a user to an Area, or Areas, limits the user's visibility of Supplier information to just those that are assigned to that Area or Areas.
- **Address**
- **Roles and Permissions:**
 - User Roles is a mandatory field.
 - If this user should appear in a list configuration, check the box.

- Additional Authority Profiles can be selected for this user.
- Restricted Audit Access determines if the user has limited access to Audits.

Clicking **Display effective permissions** shows the authority profiles that provide this user's highest level of access, based on their assigned roles and authority profiles.

Figure 2-7 New User Page for a Supplier User

Enter the information in the following sections for the new supplier user:

- Details
- Address
- Roles and Permissions

The Name, Email, Login Id, and Language fields are mandatory.

The list of available roles for this user is dependent on the user type selected. User Roles is a mandatory field.

Clicking **Display effective permissions** shows the authority profiles that provide this user's highest level of access, based on their assigned roles and authority profiles.

Validation will prevent the account being created if another User record has the same login id. The Login Id Disabled flag has no effect on the status of the IDCS or OCI IAM profile, however if set, it will prevent access to Supplier Evaluation.

Validation also ensues the last part is at least two alphabetic characters, as required by IDCS or OCI IAM. For example, a@b.cd is valid; a@b.c, a@b.c-d, and a@b.cd1 are invalid. Any leading or trailing spaces are automatically stripped from the email address

Use the **Save & Exit** action to create the account (the **Save** action does not appear until the account has been created).

When the User record is saved, the creation of a corresponding IDCS or OCI IAM profile is triggered (see [Synchronization with IDCS or OCI IAM](#)). An email message is automatically generated and sent to the user, instructing them to set the password of their IDCS or OCI IAM profile. The administrator can resend the emails from within IDCS or OCI IAM.

Note

The user must be assigned at least one role or authority profile.

Editing a User

To edit a user, select the user on the Company Users page and select the **Edit** action.

The user record opens in edit mode in a new tab. The Login Id and Email Address cannot be changed. The user maintains their password and email address in IDCS or OCI IAM. Changes to the Email Address and User Roles are synchronized between IDCS or OCI IAM and Supplier Evaluation (see [Synchronization with IDCS or OCI IAM](#)).

The IDCS Profile Created flag is set if the corresponding IDCS or OCI IAM profile has been successfully created.

Use the **Save** or **Save & Exit** action to apply the changes.

Synchronization with IDCS or OCI IAM

When a new user is created (whether manually, as part of a bulk upload, or by the Users API), a corresponding user profile is automatically created and activated in IDCS or OCI IAM. The IDCS or OCI IAM profile is automatically assigned to a group that represents its Supply Chain Collaboration user role access rights.

Note

Supply Chain Collaboration and IDCS or OCI IAM use different formats for storing names: Supply Chain Collaboration has a single name field; IDCS or OCI IAM has three separate fields. Therefore, there is no synchronization of the name fields.

When the IDCS or OCI IAM profile is created, the First Name field is populated with the full name from Supply Chain Collaboration; the Middle Name and Last Name fields are set to blank or a dash. The user can subsequently change these in IDCS or OCI IAM, without affecting the name in Supply Chain Collaboration.

The user maintains their password and email address in IDCS or OCI IAM; changes to the email address are automatically synchronized with Supply Chain Collaboration, where the email address is read-only. The rules for password strength and reuse are configured in IDCS or OCI IAM.

The synchronization between Supply Chain Collaboration and IDCS or OCI IAM is performed by an hourly *ORSE-IDCS User Synchronization* scheduled batch job. When the job runs, it updates the *Identity Cloud Service Last Synchronisation* timestamp system parameter.

Note

The job checks for any users updated in Supply Chain Collaboration and immediately updates the user in IDCS or OCI IAM. It also checks for user profiles updated in IDCS or OCI IAM and, for each, submits a further batch job to update the Supply Chain Collaboration User record. If an IDCS or OCI IAM profile was manually created before the Supply Chain Collaboration user account was created, assuming the login id is the same, the job will link to the existing IDCS or OCI IAM profile. Users will always be initially created in Supply Chain Collaboration.

In the event of the IDCS or OCI IAM tenant not being accessible when a new user account is created, the IDCS or OCI IAM profile will be subsequently created automatically on completion of the next hourly synchronization job.

If the IDCS or OCI IAM profile is subsequently deactivated, the user will receive an email notification, and access to Supply Chain Collaboration is revoked; if reactivated, the user will receive an email notification, and access is reinstated. The user's password is unaffected by the profile being deactivated, so if reactivated, it will remain valid (subject to password expiry rules).

If a User record is deleted (subject to it not having been referenced by any records), the corresponding IDCS or OCI IAM profile is automatically deleted.

Disabling a User

A user can be prevented from logging in the next time the user tries to log in. You must have the required permissions to be able to disable a login. To disable a user from logging in:

1. Select the user on the Company Users page.
2. Select the Edit action. A tab is opened with the user record in edit mode.
3. Check the Login id Disabled field. The field is found in the Details section. See [Figure 2-6](#).
4. Save the changes.

Deleting a User

To delete a user:

1. Select the user in the Company Users page.
2. Select the Edit action. A tab opens with the user record in edit mode.
3. Select the Delete action. The Confirm Delete User dialog box appears.
4. Click **Ok**. If the user has enabled their account by completing the self-registration and setting their initial password, the system will not permit deletion of the account. In this case, a dialog box appears, preventing the deletion; click **Ok**.

Note

If deletion is not permitted, and an alternative is to deactivate the account, see [Disabling a User](#). You may also wish to reduce the roles and permissions to the minimum permitted.

If deletion is permitted, the corresponding IDCS or OCI IAM profile is also deleted, automatically.

Upload Retailer User Data

Retailer users with the Upload Administrator authority profile have access to the Upload Data option within the Admin menu for the upload of retailer users.

To upload new retailer user records:

1. Select the Import action from the Users List View actions menu. The Data Upload dialog box opens.

Figure 2-8 Data Upload Dialog Box

The screenshot shows a 'Data Upload' dialog box. It has a title bar 'Data Upload'. Inside, there are three main sections: 'Upload location:' with a 'Browse...' button and 'No file selected.' text; 'Comment:' with a large text area; and 'Send new user email :' with radio buttons for 'Yes' and 'No' (where 'No' is selected). At the bottom right are three buttons: 'Submit', 'Submit Go to Manage Batch Jobs', and 'Cancel'.

2. Click Browse to search for the upload file.
3. Enter any comments to describe the reason for the upload.
4. Select whether the system is to automatically send email to each newly created user on successful completion of the upload. The email will invite the user to register on the portal. The default is No, which will not send an email.
5. To upload the file, select either the **Submit** or **Submit Go to Manage Batch Jobs** action. At this point, the system will create a background job to process the spreadsheet. The spreadsheet used to upload the data will be stored within the Attachments tab of the batch job.

Note

As part of the user account creation, the corresponding IDCS or OCI IAM user profile is automatically created and activated. The user will receive an email notification from IDCS or OCI IAM.

Validation will prevent the user account being created if another User record has the same login id.

An email will be sent to the job submitter if the data within the upload file fails validation.

Download Retailer User Upload Spreadsheet

Retailer users with the Upload Administrator authority profile also have access to the option to download a blank spreadsheet.

To download the latest version of the upload spreadsheet:

1. Select the Download Blank Spreadsheet option in the Users List View menu. An operating system specific dialog box opens with the option to either open or save the file.
2. Select the save option to download the ZIP file to your desktop.

Note

The ZIP file contains a spreadsheet workbook with the first tab used to upload the data. The second tab contains guidance notes and the remaining tabs contain the valid glossary values.

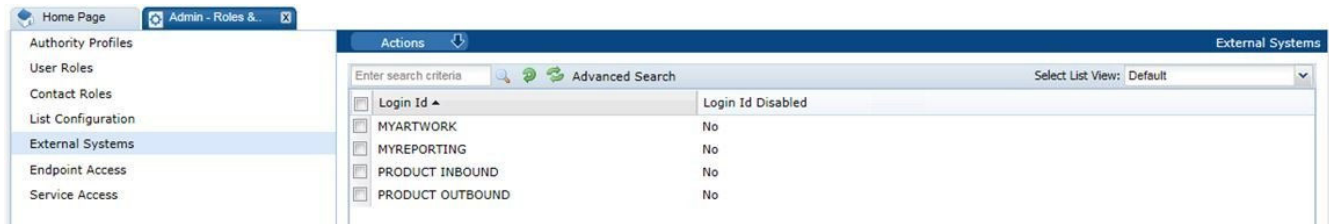
The column heading text shown on the first tab is in the user's language. If translations are not present for the user's language in the system, the portal's default language is substituted. An asterisk (*) will be shown in a column heading if an entry is mandatory.

Managing External Systems

External systems can access the application through its suite of web service APIs. In order for an external system to access an API, it must be granted permissions to access both the IDCS/OCI IAM tenant, and the application. The External System record must also be configured to identify the services and end point that is authorized to utilise.

To access the external system options, select the Roles & Permissions option from the Admin drop-down list and select External Systems in the left pane. A list of existing external system accounts appears, showing the login IDs and whether the accounts are active or disabled.

Figure 2-9 External Systems Page



Creating an External System

To create a new external system, select the New External System action. The New External System page appears.

Figure 2-10 External System Details Page

Enter the required information for the external system:

- The Login Id is mandatory and must be unique.
- The account can be disabled by checking Login Id Disabled.
- Additional information about the external system can be entered in the Comment field.
- Select the Services and/or the individual Endpoints the external system is to be granted access to.

Validation will prevent the account being created if another External System record has the same login id.

Setting the Login Id Disabled flag will prevent access to the portal's API services; setting it has no effect on preventing access into the IDCS or OCI IAM tenant.

Use the **Save & Exit** action to create the account (the **Save** action does not appear until the account has been created).

Once a new External System record has been created, it is then necessary to setup access into the IDCS or OCI IAM tenant. See the API Overview and Architecture chapter in the *Implementation Guide*. Note that access to the portal's APIs is by OAuth, utilising a Bearer Token.

Editing an External System

To edit an external system, select the external system on the External Systems page and then select the Edit action. The external system record appears in edit mode in a new tab. The Login Id and Email Address cannot be changed.

Service Access, and Endpoint Access can be set/changed, to define what API access the External System has visibility of. Use the **Save** or **Save & Exit** action to apply the changes.

When the record is saved, the creation of a corresponding IDCS or OCI IAM profile is triggered (see [Synchronization with IDCS or OCI IAM](#)). An email message is automatically generated and sent to the associated user, instructing them to set the password of the IDCS or OCI IAM profile. The administrator can resend the emails from within IDCS or OCI IAM.

The IDCS Profile Created flag is set if the corresponding IDCS or OCI IAM profile has been successfully created.

The record opens in edit mode in a new tab. The Login Id and Email Address cannot be changed. The user maintains their password and email address in IDCS or OCI IAM. Changes to the Email Address and User Roles are synchronized between IDCS or OCI IAM and Supplier Evaluation (see [Synchronization with IDCS or OCI IAM](#)).

Use the **Save** or **Save & Exit** action to apply the changes.

Note

As the external system's IDCS or OCI IAM profiles are not aligned with an individual, in order to allow for their passwords to be reset, retailer User Administrator users will be assigned the IDCS or OCI IAM User Administrator role, providing them the ability to change all users' passwords (regardless of EAC groups if the portal has the Enhanced Access Control facility applied).

Other users (including all supplier users) will only have the ability to change their own passwords.

Disabling an External System

An external system can be prevented from accessing Oracle Retail Supplier Evaluation Cloud Service. To disable an external system:

1. Select the external system on the External Systems page.
2. Select the Edit action. A tab is opened with the external system record in edit mode.
3. Check the Login Id Disabled checkbox.
4. Save the changes.

An alternative to disabling the account is to deselect the services and endpoints, or to deactivate the corresponding IDCS or OCI IAM OAuth profile.

Deleting an External System

To delete an external system:

1. Select the external system on the External Systems page.

2. Select the Edit action. A tab is opened with the external system record in edit mode.
3. Select the Delete action. The delete confirmation dialog box appears.
4. Click **Ok**. The External System record is deleted.

After deleting the External System record, the corresponding IDCS or OCI IAM OAuth profile can be deleted or deactivated in the IDCS or OCI IAM tenant.

Managing Endpoints

Endpoints define the individual methods of the web services that are available through the portal's APIs. Endpoints cannot be manually created or deleted, and should only be edited to activate or deactivate the endpoint.

Figure 2-11 Endpoint Access Page

Active	Code	Description
☒	AUDIT_ADD	AUDIT_ADD - Creates a new audit and returns a link to the record's details
☒	AUDIT_CHECK	AUDIT_CHECK - Retrieves the header information of a single audit
☒	AUDIT_EXISTS	AUDIT_EXISTS - Determines if a audit exists based on it's business key. HTTP 301 for exists, 404 for not exists, 417 for an exception
☒	AUDIT_GET	AUDIT_GET - Retrieves the detail of a single audit
☒	AUDIT_GETVALUES	AUDIT_GETVALUES - Retrieves a single page of the list of audits ordered by their surrogate key
☒	AUDIT_UPDATE	AUDIT_UPDATE - Updates an audit and returns a link to the record's details

To enable or disable an endpoint:

1. Select the endpoint on the Endpoint Access page.
2. Select the Edit action. A tab opens with the endpoint record in edit mode.
3. Check the Active checkbox to activate the endpoint; un-check the checkbox to deactivate the endpoint.
4. Save the changes.

Figure 2-12 Endpoint Access Details Page

Active	Code	Description
☒	AUDIT_ADD	AUDIT_ADD - Creates a new audit and returns a link to the record's details
Description (Default): Description (Australia and New Zealand): Description (English (American)): Description (French): Description (German): Description (Italian): Description (Spanish):		

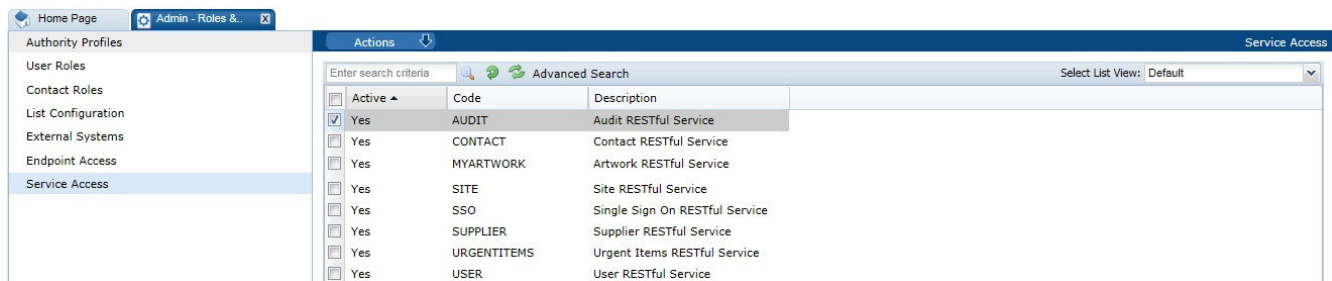
Note

Deactivating an endpoint prevents it from being selected as part of a service, it does not stop the endpoint being accessed in existing services. To prevent an external system accessing an endpoint, deselect the endpoint and/or service in the External System record.

Managing Services

Services define the web services that are available as the portal's APIs. Services cannot be manually created or deleted, and will usually only be edited to activate or deactivate the service.

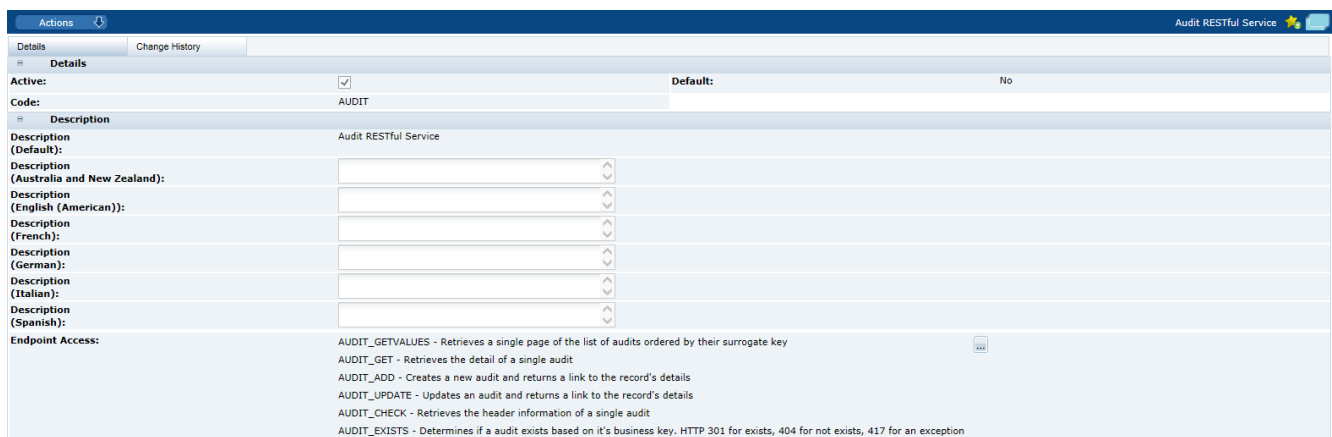
Figure 2-13 Service Access Page



To edit, disable or enable a service:

1. Select the service on the Service Access page.
2. Select the Edit action. A tab is opened with the service record in edit mode.
3. Check the Active checkbox to activate the service; un-check the checkbox to deactivate the service.
4. Select the endpoints to be made available through this service.
5. Save the changes.

Figure 2-14 Service Access Details Page



Note

Deactivating a service prevents it from being granted to an external system, it does not stop the service being accessed where it has already been granted to an external system. To prevent an external system accessing a service, deselect the service in the External System record.

System Parameters

To manage the parameters for users, select the System Control option and then System Parameters. [Table 2-5](#) describes the available parameters.

Table 2-5 System Parameters Used to Manage Users

Subtab	Parameter	Description
Log On	Site Details Update Reminder	Used for supplier login. Number of working days when a reminder is shown in a user's UIM when the user has logged in. It is used to ensure that Mandatory Contact details are kept up to date on both the supplier and sites. Default is 90 days. When the first supplier user logs in, they see an entry in the UIM drawing their attention to this. If they use the Confirm Details action, this stamps the date onto the record so that the next time a user logs in, the system checks if the current date is greater than the stamped date.
Log On	Open the system in new window	If set to Yes, the system opens in a new browser window after valid login credentials are entered. If set to No, the system opens in the current browser window. Default is Yes.
Log On	User Ts&Cs Active	If set to Yes, a new user will have to accept the Terms and Conditions before completing login. If set to No, the user is not prompted to accept Terms and Conditions. Default is Yes.
Log On	Include 'Login Disabled' Users in the Synchronisation	Used in the synchronization of user accounts with the IDCS or OCI IAM identity provider service. The setting controls whether all User accounts are included in the synchronization, or only active accounts. An active account is one that is not set as <i>login disabled</i> . If set to Yes, all accounts, both active and disabled are synchronized. Default is Yes.
Global	Default Language	Determines the default language used by the system once the user is logged in. Default is English. Note: Once set, the default language cannot be changed.

Table 2-5 (Cont.) System Parameters Used to Manage Users

Subtab	Parameter	Description
Global	Enable user preference option for the auto refresh of list views	If checked, users will have an option in their user preferences to set whether the contents of list views automatically refresh each time the user returns to it, rather than each time it is initially opened. If unchecked, the user will not have the preference option, and list views will only refresh when initially opened, or the Refresh action is manually selected. This parameter is used to reduce the amount of processing time spent on automatically refreshing list views, a potential performance overhead. For new installations the default is unchecked (no auto refresh); for portal upgrades, the default is checked (individual users choose to enable auto refresh). This is only editable by users with the Oracle Authorized Administrator authority profile.
Global	Number of days to keep Web Service Logs	Controls how long entries in the Web Service Log are retained for (number of days). A daily scheduled batch job purges any entries from the Web Service Log that are older than the specified number of days. The default value is 30 days. Only whole days can be specified (any decimals are stripped); there is no upper limit. If a value of zero is entered, all entries in the log will be removed each time the job is run (daily); a negative value is treated as zero. If no value is entered, no purging will be applied, so the log entries will be retained indefinitely.
Global	Identity Cloud Service URL	The URL of the IDCS or OCI IAM tenant associated to the Supplier Evaluation portal. This read-only parameter is set when the IDCS or OCI IAM tenant is deployed; it cannot be edited.
Global	Identity Cloud Service Client ID	The ID of the IDCS or OCI IAM tenant associated to the Supplier Evaluation portal. This read-only parameter is set when the IDCS or OCI IAM tenant is deployed; it cannot be edited.
Global	Identity Cloud Service Last Synchronisation	The date and time of the last synchronization of user details between Supplier Evaluation and its IDCS or OCI IAM tenant. This read-only parameter is set when the IDCS or OCI IAM tenant is deployed; it cannot be edited.
Global	Identity Cloud Service Environment	The code that identifies the Supplier Evaluation portal environment (such as a production or staging/UAT environment) for the coding of groups within IDCS or OCI IAM. This read-only parameter is set when the IDCS or OCI IAM tenant is deployed; it cannot be edited.

Table 2-5 (Cont.) System Parameters Used to Manage Users

Subtab	Parameter	Description
Global	Identity Cloud Service Brand Compliance App ID	The code that uniquely identifies the Supplier Evaluation portal for integration with its IDCS or OCI IAM tenant. This read-only parameter is set when the IDCS or OCI IAM tenant is deployed; it cannot be edited.
Global	Base URL	Base URL of the portal.
Global	Base URL (ENV)	Base URL override environment variable.
Global	Rest API Path	URL path of the REST APIs.
Global	Artwork Application URL	URL of the Artwork application.
Global	Portal Name	Description of the portal. Primarily used when part of a Global Network Bus multi-portal installation.
Global	Import/Export File Format	For file imports and exports that use the Microsoft Excel format, this parameter controls the type of file format to be imported or exported. The values are xls orxlsx. The default is xls.
Global	RSCH URL Override URL	Used to override the URL used to form a hyperlink from User and Supplier Site records to the corresponding Supply Chain Hub records.
Urgent Items	Show missing mandatory user details	If set to Yes, when a user logs on and if there are any mandatory user details missing from the user's user record, an entry is shown in the UIM. Default is Yes.
Static Settings	Show Base Language Translation	This parameter is used in portals that have changed the base/default language from English (British) to another language, in which case additional translation fields are required to be displayed. This parameter is set during the release upgrade process in any portals that it is applicable for. Note: The Static Settings page is only visible to Oracle administrators, and the contents are read only.

Note

The parameters that control the password format and strength can only be edited by the Oracle authorized Administration logon. Changing these parameters results in all users' passwords being automatically expired, forcing each user to reset their password the next time they log in.

If the password parameters are changed, the following message is displayed. Click **Ok** to continue.

A change made affects the strength of the required passwords. Click Ok to immediately Expire All User Passwords.

Note

The Supplier Evaluation timeout is not configurable, but is set to 8 hours, to match the IDCS or OCI IAM default.

3

Custom Configuration

Brand owners may customize aspects of the portal. Custom fields can be used to extend records for the capture of additional data; images and styles can be overridden to apply custom branding and theming. The contents of the notification emails can also be customized.

Custom Fields

The layout of the custom fields depends on the different types of fields specified when the record is defined. The actual configuration of the custom fields is a portal implementation task, currently only accessible by the Oracle Authorized User administrator.

[Figure 3-2](#) shows an example of a page layout with different field types.

The Custom Fields subtab appears to the left of the Change History subtab. If a record is copied, the custom fields are copied to the new record.

If custom fields are available for a record, the Custom Fields subtab is available on the record page. [Figure 3-1](#) shows an example of the location of the tab.

Figure 3-1 Custom Fields Tab

The screenshot shows a web application interface for a supplier record. At the top, there are tabs: Home Page, Suppliers, and DB Test Supplier A. Below the tabs, there is a subtab bar with: Actions, Supplier Details, Contacts, Sites, Product Records, Custom Fields (selected), Change History, and Attachments. The main content area is titled 'Details' and contains a form with the following fields:

Name:	DB Test Supplier A	Code:	A0002
Contact Name:	Supplier Admin A	Email:	dbull@mi
Phone:	0123 456789	Fax:	0987 654
Supplier Type:	Supplier Type *	VAT Number:	0987564
Website:	-	Billing Code:	large
Lead Business Unit:	UK *	Supplier Top Grade:	
Registered Company No:	0123456789		

To see the custom fields data, select the Custom Fields subtab. The Custom Fields page opens.

Figure 3-2 Custom Fields Page

The screenshot shows the 'Custom Fields' subtab selected. The main content area is titled 'Field Set' and contains a table with the following fields:

Date Field 1:	-	Number Field 1:	-
Short Text Field 1:	-	Short Text Field 2:	-
Long Text Field 1:	-		
Rich Text Field 1:	-		

To enter data into the fields, select the Edit action. The input fields open. Make any updates and select the Save action.

Figure 3-3 Custom Fields Open for Editing

Branding & Theming

The Oracle Retail Supplier Evaluation Cloud Service images and style sheets can be overridden to use custom styles, such as alternative logos or color schemes. Also, the terms and conditions can be customized. Select the System Control option and then Branding.

Managing Styles

Custom styles are applied by uploading CSS stylesheets in the Theming & Branding record. In read mode, the existing CSS files can be downloaded by clicking the hyperlinks. In edit mode, the option to upload alternative stylesheets is available. Administrators with the Oracle Authorized Administrator authority profile can edit the Theme page.

To apply a custom style:

1. Select Branding in the left pane. The Theme page appears.

Figure 3-4 Theming & Branding Theme Page

2. Edit the record.
3. Click the Upload button to load a CSS file into the Custom Theme field.
4. Select the Save action. The changes should become visible to users the next time they log in.

Note

To customize the portal's theme, the following files need to be uploaded:

- The Login page splash icon (800 x 400 pixels; name: loginBackground.png)
- The portal logo displayed on the top right of the application toolbar (200 x 37-40 pixels; name: portalLogo.png)
- The supplier registration logo (200 x 40 pixels; name: supplierRegistration.png)

The default versions can be found in the Attachments page. When changing the theme, all of the files in the Attachments page should be deleted apart from these. A quick way to do this is to select all attachments and deselect these three.

If necessary, the portal's theme can be reset to the default by Oracle Development as a support activity.

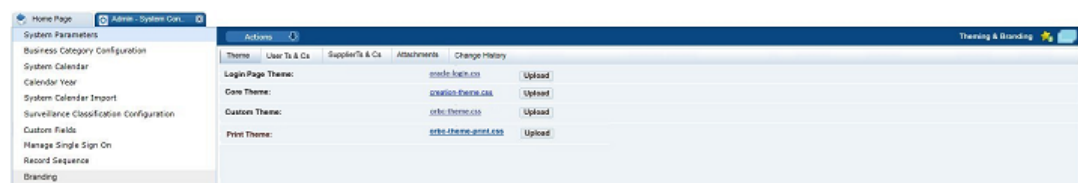
Managing Images

Custom logos and other images are applied by uploading the files in the Theming & Branding record. The Attachments page contains the resource files that are referenced by the CSS stylesheets. Administrators with the Oracle Authorized Administrator authority profile can edit the Attachments page.

To apply a custom image:

1. Select Theming & Branding in the left pane.
2. Edit the record and open the Attachments page.

Figure 3-5 Theming & Branding Attachments Page



3. Click the New Attachment action to load a file and enter a description.

Multiple resource files can be uploaded through a single action by uploading a ZIP file that contains the individual files. The upload will automatically unpack the individual files; the same description will be applied to each of them.

If any of the file names are already attached, the entire upload will be prevented with the error: "The selected attachments cannot be uploaded because the file names are not unique." In this case, delete the original files before re-uploading (and amending the stylesheet if necessary).

If changing an image such as the portal logo, upload the new image and ensure the file is referenced accordingly in the custom CSS stylesheet file.

Note

Image dimensions for logos should be 200x40 pixels (ideally max 200Kb).

Image dimensions for login page backgrounds should be 400x800 pixels (ideally max 300Kb).

To display correctly, image file types must be JPEG, GIF, or PNG format.

The core Supplier Evaluation themes are available for download from the Glossaries Import/Export area, in the form of a ZIP file containing collections of the image and stylesheet files.

4. Select the Save action. The changes should then become visible to users, if any necessary changes have been made to the CSS stylesheets.

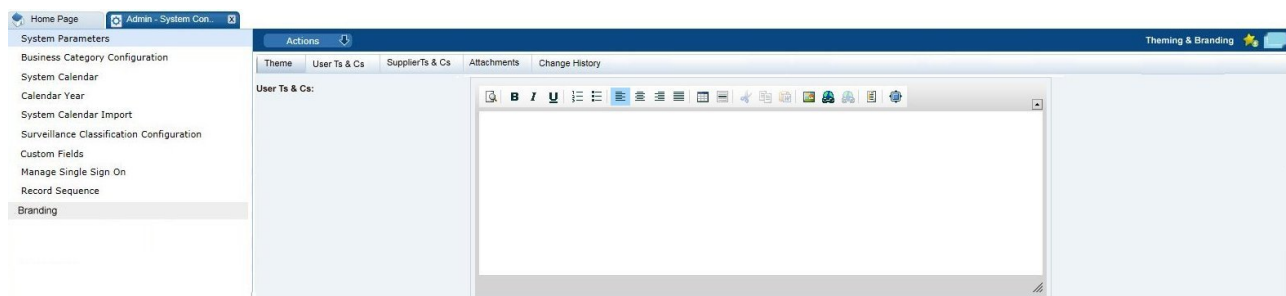
Managing User Ts & Cs

The terms and conditions text that is presented to the user when they first log in to the system can be customized through the Theming & Branding record. Administrators with the Configuration Editor authority profile can edit the User Ts & Cs page.

To edit the User Ts & Cs text:

1. Select Theming & Branding in the left pane.
2. Edit the record and open the User Ts & Cs page.

Figure 3-6 Theming & Branding User Ts & Cs Page



3. Edit the text in the User Ts & Cs field. The text editor options can be used to apply text formatting such as bold and underline, and to insert hyperlinks or images. Enter any translations.
4. Select the Save action. The changes will then become visible to new users when they log in for the first time.

Managing Supplier Ts & Cs

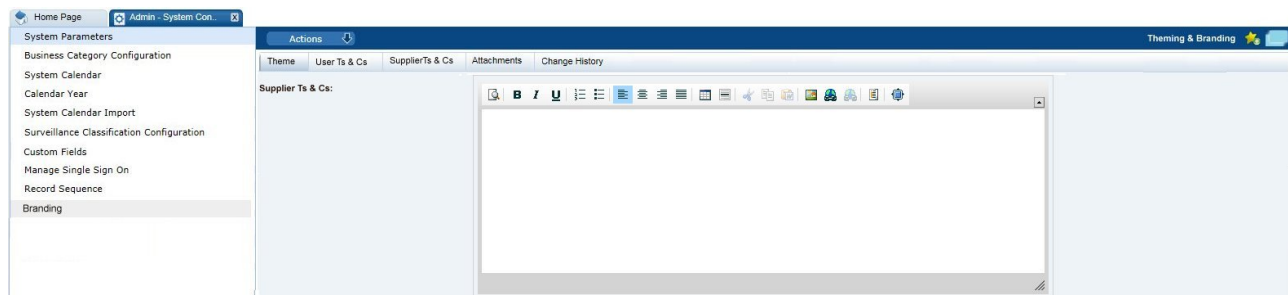
The terms and conditions text that is presented to the Supplier when they complete the Registration wizard can be customized through the Theming & Branding record. Administrators with the Configuration Editor authority profile can edit the Supplier Ts & Cs page.

To edit the Supplier Ts & Cs text:

1. Select Theming & Branding in the left pane.

2. Edit the record and open the Supplier Ts & Cs page.

Figure 3-7 Theming & Branding Supplier Ts & Cs Page



3. Edit the text in the Supplier Ts & Cs field. The text editor options can be used to apply text formatting such as bold and underline, and to insert hyperlinks or images. Enter any translations.
4. Select the Save action. The changes will then become visible to new Suppliers when they complete the Registration wizard.

Email Templates

The emails that are generated automatically by the system, based on certain predefined events each have a configurable template. The templates are provided as part of the portal installation.

The maintenance of the templates, in the Notifications / Email Templates page of the Admin area, is limited to just allowing the administrator to customize the content of the email; templates cannot be added or deleted.

The emails are capable of containing dynamic content through the use of predefined parameters, such as to substitute the name of the user, supplier, and so forth.

[Table 3-1](#) describes the parameters are used in email templates.

Table 3-1 Email Parameters

Parameter	Description
General	
\$createdByEmail	Email address of the user who triggered the email.
\$createdByName	Name of user who triggered the email.
\$emailComments	Comments in the email body.
\$link	Hyperlink to a Supplier Evaluation record.
\$loginID	Login user name of the user.
\$userName	
\$loginUrl	Portal URL.
\$portalURL	
\$name	Name of the user.
\$portalName	Name of the portal.
\$portal	

Table 3-1 (Cont.) Email Parameters

Parameter	Description
\$recipients	List of email recipients.
\$recipientUserName	Login user name of email recipient.
\$retailerName	Name of the retailer or portal owner.
\$showInternationalNames	Whether international names are used.
\$supportEmail	Email address of support team.
Suppliers & Sites	
\$site	List of sites.
\$sites	
\$site.code	Site code.
\$site.name	Site names, in the business language.
\$siteName	
\$site_names	
\$site.localName	Site names, in the local language.
\$sitelocalname	
\$supplier_local_name	Name of the supplier, in the local language.
\$supplierlocalname	
\$supplier_name	Name of the supplier, in the business language.
\$supplierName	
\$supplierCode	Supplier code.
Batch Jobs	
\$batchJobStatus	Status of batch job.
\$errorMessagees	Batch job error message.
\$jobNumber	Batch job number.
\$jobType	Type of batch job.
Processes	
\$activity_name	Name of activity.
\$activity_status	Status of activity.
\$date_and_time	Date and time of activity notification.
\$end_date	Activity end date.
\$errorText	Brief extract error message.
\$project_name	Name of process.
\$responsible	User responsible for activity.
\$start_date	Activity start date.
\$URL_to_activity	Hyperlink to an activity record.
Audits & Visits	
\$auditLink	Hyperlink to audit/visit record.
\$auditOrVisit	Audit or visit.
Assessments	
\$duedate	Assessment due date.

Table 3-1 (Cont.) Email Parameters

Parameter	Description
\$fromPeriod	Range from period.
\$fromYear	Range from year.
\$scorecardtype	Type of assessment.
\$scorecardUrl	Hyperlink to assessment record.
\$toPeriod	Range to period.
\$toYear	Range to year.
Reports	
\$createdOn	Date report created.
\$purgeDays	Number of days before report is purged.
\$reportCanceller	Name of user who cancelled report.
\$reportLink	Hyperlink to report output record.
\$reportName	Name of report.
\$result	KPI result value.
Data Extracts	
\$attachmentLink	Hyperlinks to report output attachments.
\$attachmentLinks	
\$criteriaName	Data extract criteria.
\$extractErrors	Data extract error message.
\$extractLink	Hyperlink to data extract report output record.
\$listViewName	Data extract list view.

Note

Usage of a parameter is subject to it being specifically coded to be available to the template.

[Table 3-2](#) shows the parameters that can be used within each email template.

Table 3-2 Email Parameters for Email Templates

Email Code	Description	Parameters
Alerts		

Table 3-2 (Cont.) Email Parameters for Email Templates

Email Code	Description	Parameters
ALERT1	Notify suppliers and sites of a new alert.	\$alertTitle \$alertDescription \$link \$recipientUserName \$suppliername \$showInternationalNames \$supplierlocalname \$siteName \$sitelocalname
ALERT2	Notify internal users of a new alert.	\$alertTitle \$emailComments \$alertDescription \$link
ALERT3	Remind suppliers to respond to an alert.	\$alertTitle \$alertIssueDate \$alertDescription \$link \$recipientUserName \$suppliername \$showInternationalNames \$supplierlocalname \$siteName \$sitelocalname
ALERT4	Notify suppliers that an alert has been cancelled.	\$alertTitle
ALERT5	Notify suppliers that an alert response can be resubmitted.	\$alertTitle \$alertDescription \$link \$recipientUserName \$suppliername \$showInternationalNames \$supplierlocalname \$siteName \$sitelocalname
ALERT6	Notify a user that an extract of alert responses has completed.	\$alertTitle \$link
ALERT7	Notify a user that an extract of alert responses has errors.	\$alertTitle \$alertExtractError \$link
ALERT8	Notify the Alert Administrator that alert responses have been generated, listing any errors.	\$alertTitle \$alertProcessReport \$link

Table 3-2 (Cont.) Email Parameters for Email Templates

Email Code	Description	Parameters
ALERT9	Notify the Alert Administrator that a supplier would like to change their responses.	\$alertTitle \$link \$suppliername \$showInternationalNames \$supplierlocalname \$siteName \$sitelocalname
ALERT10	Notify suppliers that an alert response cannot be resubmitted.	\$alertTitle \$alertDescription \$link \$recipientUserName \$suppliername \$showInternationalNames \$supplierlocalname \$siteName \$sitelocalname
Audits & Visits		
AUDIT AWAITING AMENDMENT	Generated when an audit or visit has actions rejected.	\$auditOrVisit \$portal \$auditLink
AUDIT AWAITING CORRECTIVE ACTION	Generated when an audit or visit has actions to be addressed.	\$auditOrVisit \$portal \$auditLink
Batch Jobs		
BATCHJOBCOMPLETE	Notify user that a job has completed.	\$jobType \$jobNumber
BATCHJOBSUBMIT	Notify user that a job has been initiated.	\$jobType \$jobNumber
General		
EXTRACT1	Notify user that a data extract job has failed.	\$jobType \$extractLink
EXTRACT2	Notify user that a data extract job has successfully completed.	\$jobType \$extractLink
EXTRACT3	Notify user that a data extract job has failed for an unknown reason.	\$jobType \$extractErrors
IDCS1	Registration request raised for a new supplier/site.	\$createdByEmail \$createdByName \$portalName \$portalURL \$supportEmail \$userName

Table 3-2 (Cont.) Email Parameters for Email Templates

Email Code	Description	Parameters
IDCS2	New user created.	\$createdByEmail \$createdByName \$portalName \$portalURL \$retailerName \$supportEmail \$userName
PREVALIDATIONFAILURE	Notify the job submitter that an uploaded file has been checked and there are problems with it.	\$jobType \$jobNumber
Processes		
PROJECT1	Notification of an activity status change.	\$activity_name \$project_name \$activity_status \$date_and_time \$URL_to_activity \$project_name \$start_date \$end_date
PROJECT2	Activity notification.	\$activity_name \$URL_to_activity \$project_name \$start_date \$end_date \$activity_status \$responsible
PROJECT3	Notify user that a process/activity brief job has failed.	\$jobType \$errorText \$listViewName \$criteriaName
PROJECT4	Notify user that a process/activity brief extract job has successfully completed.	\$jobType \$listViewName \$criteriaName
Reports		
KPIDELIVERY	Notify the recipients that a KPI has been generated.	\$reportName
REPORT_CANCELLED	Notify user that a report schedule has been cancelled.	\$reportName \$reportCanceller
REPORTDELIVERY	Notify the recipients that a report has been generated.	\$reportName \$reportLink
REPORTNOTIFICATION	Notify the external system that a report has been generated providing an API URL to retrieve the attachments.	\$reportName \$attachmentLink \$attachmentLinks

Table 3-2 (Cont.) Email Parameters for Email Templates

Email Code	Description	Parameters
REPORTPURGE	Notify user that a report is due to be purged.	\$reportName \$createdOn \$purgeDays
Assessments		
SCORE1	Overdue assessment reminder.	\$site \$scorecardtype \$duedate \$showInternationalNames \$suppliername \$suppliercode \$supplierlocalname \$site \$sites \$site.name \$site.code \$site.localName \$scorecardUrl
SCORE2	Assessment extract notification.	\$scorecardtype \$fromPeriod \$fromYear \$toPeriod \$toYear \$userName
Suppliers & Sites		
REG2	Registration completed by supplier.	\$portalName \$showInternationalNames \$suppliername \$suppliercode \$supplierlocalname \$sitename \$sitecode \$sitelocalname \$link \$supportEmail
REG4	Registration request raised by retailer for additional sites.	\$portalName \$showInternationalNames \$site \$sites \$site.name \$site.code \$site.localName \$supportEmail

Table 3-2 (Cont.) Email Parameters for Email Templates

Email Code	Description	Parameters
SUPPLIER ACTIVATED	Supplier activated notification.	\$retailerName \$showInternationalNames \$suppliername \$suppliercode \$supplierlocalname \$site \$sites \$site.name \$site.code \$site.localName \$supportEmail

Some email templates contain conditional and looping logic to form lists of values. For example:

- List of a report output's attachments:

#foreach(\$attachmentLink in \$attachmentLinks)\$attachmentLink

#end
- List of email recipients:

#foreach(\$recipient in \$recipients) \$recipient.personName

(\$recipient.email)#end

4

Job Management

Batch jobs are initiated by users when required to perform updates to records.

To manage batch jobs, select Batch Jobs from the Admin list. The Manage Batch Jobs page shows the list of all jobs. The jobs are shown in descending order with the most recent job at the top of the list.

Figure 4-1 Manage Batch Jobs Page

Job Number	Submitted On	Submitted By	Job Type	Description	Data	Status
4	05/03/15 13:36:58 GMT	John Smith	Update site address for supplier	Update site address for supplier	-	✓
3	05/03/15 13:36:17 GMT	John Smith	Update site address for supplier	Update site address for supplier	-	✓
2	05/03/15 13:36:16 GMT	John Smith	Update site address for supplier	Update site address for supplier	-	✓
1	05/03/15 13:36:14 GMT	John Smith	Update site address for supplier	Update site address for supplier	-	✓

The following columns are shown for each job:

- Job Number
- Submitted On: Date and time when the job was submitted.
- Submitted By: Name of the user who submitted the job.
- Job Type
- Description: Any comments entered when the job was submitted. If no comments were entered, the filename of any uploaded files will appear here.
- Data: If a job was submitted using a spreadsheet, an icon is shown in this column. The user can click the spreadsheet icon and select whether to open or download the spreadsheet.
- Status: The following icons show the job status:

Table 4-1 Manage Batch Jobs Icons

Icon	Status	Description
	Created	The job is created.
	Submitted	The job is ready to run.
	In Progress	The job is currently running.

Table 4-1 (Cont.) Manage Batch Jobs Icons

Icon	Status	Description
✓	Completed	The job completed. All changes were successfully made.
⚠	Failed	Errors were encountered. Changes were not made.
✗	Cancelled	The job was cancelled.
❗	Internal Failure	An internal failure occurred.

You can choose which batch jobs you want to view. The following list views are available:

- All Jobs
- Failed Jobs: Show jobs with a status of failed.
- Running Jobs: Shows jobs with a status of in progress.
- Site TM Changes: Shows jobs with a job type of Change Site Technologist.

Note

A housekeeping job automatically removes entries with a status of Completed from the Batch Job log 90 days after their submission date.

Opening a Batch Job

To open a batch job, double click the job in the list. The job will open as a new tab.

- The job's bookmark shows the Job Number and the Job Type.
- A Messages tab appears if any errors were encountered when the job ran.
- An Attachments tab stores the file used to upload data, or where applicable, a rejects file containing records that could not be uploaded due to errors.
- A Linked Jobs tab shows links to related jobs if part of a series of jobs.

System Parameters

Configuration used to manage the timing of batch jobs and their associated actions can be found in the Admin area by selecting the System Control option and then System Parameters.

Table 4-2 System Parameters to Support Job Management

Subtab	Parameter	Description
Global	System Time Zone	Allows the selection of a time zone.

5

Global Changes

This chapter describes the functionality available for making global changes to the assignment of users and Technologists. To make global changes, select Global Changes from the Admin list. The Admin - Global Changes tab opens. From this tab, the following updates can be made:

- [Change Responsibility](#)
- [Change Site Managers by Spreadsheet](#)
- [Change Process Manager](#)
- [Change Process User Names](#)
- [Change Product Responsibility](#)

For more information on the users and responsibilities for the modules, see the following chapters in this guide:

- For Supplier, see [Supplier Administration](#).
- For Process, see [Process Administration](#).

Change Responsibility

The Technologist responsible for managing sites can be changed.

To change this responsibility:

1. Select Change Responsibility in the left pane. The Change Responsibility page opens.

Figure 5-1 Change Responsibility Page

The screenshot shows the 'Change Responsibility' page. On the left, a navigation pane lists 'Change Responsibility', 'Change Site Managers by Spreadsheet', 'Change Process Manager', and 'Change Process User names'. The 'Change Responsibility' option is selected. The main content area has a header with 'Actions' and a dropdown arrow. Below this, there are fields for 'Person:' (set to 'Technologist'), 'From:' (a dropdown menu), and 'To:' (a dropdown menu). Below these fields are three tabs: 'Site', 'Audit', and 'Assessment'. The 'Site' tab is selected. Below the tabs, there is a section for 'Technologist Role:' with three radio buttons: 'Lead' (selected), 'Other', and 'Both'. At the bottom, there is a table with four columns: 'Site Name' (with a dropdown arrow), 'Site Code', 'Supplier Name', and 'Business Categories'. The 'Site Name' column has a checkbox icon to its left.

When the Site subtab is selected, the associated site name, site code, and supplier name are shown. You can also select to the role to be displayed in the list.

To see information based on audits, select the Audit subtab. To see information based on assessments, select the Assessment subtab. The site list is updated to display the selected information.

2. Select the change for the Technologist. The list of available of Technologists is shown in the From and To drop-down lists.

3. The list of sites is built based on the selection in the From field, that is, the list is filled with the records that are currently assigned to that person. Select the sites where the Technologist is to be changed. To select a site from the list, click the row.
4. To make this global change, select the Submit action.

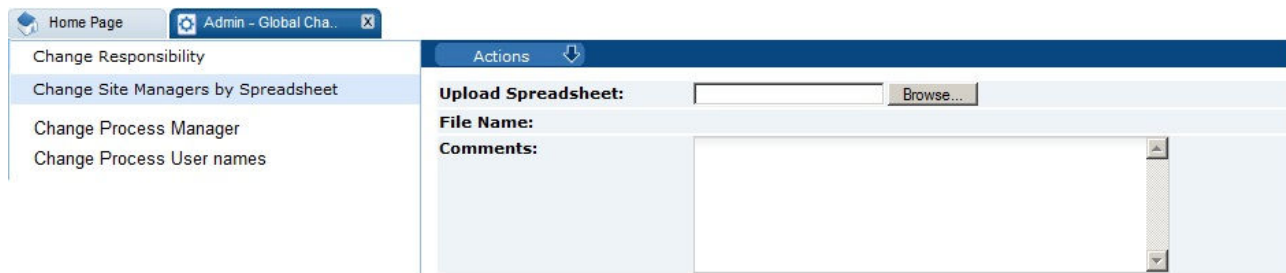
Change Site Managers by Spreadsheet

Instead of changing a particular technologist from one to another through the user interface, changes can be made using a spreadsheet and then uploading the changes.

To change site managers by uploading a spreadsheet:

1. Select Site Managers by Spreadsheet in the left pane. The Change Site Managers by Spreadsheet page opens.

Figure 5-2 Change Site Managers by Spreadsheet Page



2. Click **Browse** to search for the spreadsheet.
3. Enter any comments to describe the reason for the upload.
4. To upload the spreadsheet, select either the Submit or Submit, go to Manage Batch Jobs action.

Note

The spreadsheet comprises six columns:

Supplier Code, Site Code, Lead Technologist, Other Technologist Update, Other Technologist Add, and Other Technologist Delete.

The Lead Technologist column in the spreadsheet replaces the existing Lead Technologist.

The Other Technologist Update column removes all Other Technologists and replaces with the values in this column.

Other Technologist Add adds this Technologist to the existing list.

Other Technologist Delete removes this Technologist from the existing list.

The above columns must be present in the spreadsheet, but can be left blank if not making those changes.

Change Process Manager

The Process Manager for selected processes can be changed.

To change the process manager:

1. Select Change Process Manager in the left pane. The Change Process Manager page opens.

Figure 5-3 Change Process Manager Page

Process Title	Parent Process	Process ID	Supplier Name	Business Categories
☒				

For each process in the list, the process title and parent process are shown.

2. Select the change for the Process Manager. The list of available of Process Managers is shown in the From and To drop-down lists.
3. Select the processes where the Process Manager is to be changed. To select a process from the list, click the row.
4. To make this global change, select the Submit action.

Change Process User Names

The users assigned to a process can be changed.

To change the users:

1. Select Change Process User Names in the left pane. The Change Process User Names page opens.

Figure 5-4 Change Process User Names Page

Process Title	Parent Process	Process ID	Supplier Name	Business Categories
☒				

For each process in the list, the process title and parent process are shown.

2. Select the role to be changed from the drop-down list. The available roles are Responsible, Owner, or Viewer. The available choices in the From and To drop-down lists depend on the selected role.
3. Select the change for the role. The list of available of users is shown in the From and To drop-down lists.
4. The list of processes is built based on the selection in the From field, that is, the list is filled with the records that are currently assigned to that person. Select the processes where the Process Manager is to be changed. To select a process from the list, click the row.
5. To make this global change, select the Submit action.

Change Product Responsibility

Responsibility for selected products can be changed.

To change product responsibility:

1. Select Change Product Responsibility in the left pane. The Change Product Responsibility page opens.

Figure 5-5 Change Product Responsibility Page

Actions	Business Category:	to:	Business Categories
☒ Title ▲	Quantity	Product Number	Product Code
	Supplier Name	Site Name	

For each product in the list, the name of the product, quantity, product number, supplier name, site name, and business categories are shown.

2. Select the Contact Role to be changed from the drop-down list. The available roles are Technologist, Buyer, and Production Development Manager. The available choices in the From and To drop-down lists depend on the selected role and business category.
3. To select a business category, click the icon. The Select Business Categories dialog box appears. Select a category and select **Ok**. The list of products is changed to include only the selected business category.
4. The list of products is built based on the selection in the From field, that is, the list is filled with the records that are currently assigned to that person. Select the products where the selected role is to be changed. To select a product from the list, click the row.
5. To make this global change, select the Submit action.

6

News App

If you have the News Administrator Authority Profile assigned to you, you can work with news items. Select Manage News on the Home page. The Maintain News Items tab opens.

Figure 6-1 Maintain News Items Tab

Sequence	Title	Effective Date	Expiry Date	Published?	Priority	News Category
1	Food Poisoning	07/10/14	07/10/15	Yes	Important	-
2	Grocery shopping is changing	07/10/14	07/10/15	Yes	Important	-

For more information, see the following sections:

- [Create a News Item](#)
- [Edit the News Item Details](#)
- [View the Reader Log](#)
- [Delete a News Item](#)

Create a News Item

To create a news item, select the New News Item action. A tab to create the item opens. After entering all the information, select the Save or Save & Exit action to create the item.

In the following figure, the Body field is only shown for the default language. When creating a new item, a Body field appears for each supported language.

Figure 6-2 New News Item Tab

News Details		Attachments	
Details			
Title (Default):		* Priority:	Normal v *
Title (Australia and New Zealand):			
Title (English (American)):			
Title (French):			
Title (German):			
Title (Italian):			
Title (Spanish):			
Effective Date:	02/03/15 G *	Published?:	☐
Archived?:	☐	News Category:	v
Body (Default):			
Expiry Actions			
Expiry Date:	G		
Archive?:	☐		
Unpublish?:	☐		
Logging and Mandatory Details			
Mandatory?:	☒		
Contact Roles:	- xxx		
User Roles:	- xxx		
Read By Date:	G		
Log Readership?:	☒		

[Table 6-1](#) describes the information that is provided for a new item.

Table 6-1 Information Needed to Create a News Item

Field	Description
Details	
Title	Enter the title of the news item to display. This default title is mandatory. You can enter a title in each supported language.
Priority	Select the priority for reading this item. This field is mandatory.
Effective Date	The date defaults to the current date. It cannot be set to an earlier date. This field is mandatory.

Table 6-1 (Cont.) Information Needed to Create a News Item

Field	Description
Published?	Check this box to make the news item visible to users.
Archived?	Check this box if the news item has been archived.
News Category	Select the news category for this item from the drop-down list.
Body	Description displayed in the News App. This information can be entered for each supported language.
Expiry Actions	
Expiry Date	If set, this date must be on or after the effective date.
Archive?	Check this box if the item is to be archived when the expiry date is reached.
Unpublish?	Check this box if the item is to be unpublished when the expiry date is reached.
Logging and Mandatory Details	
Mandatory?	Check this box if a reader is required to read the item. In the News App, the Read and Confirm link appears for the item.
Contact Roles	This field only appears if Mandatory is checked. Select the contact roles that determine who must read the news item.
User Roles	This field only appears if Mandatory is checked. Select the user roles that must determine who must read the news item.
Read By Date	This field only appears if Mandatory is checked. Enter the date by which the news item must be read.
Log Readership?	Check this box if a log of the readers is created. If the Mandatory field is selected, this field is automatically selected.

Edit the News Item Details

Click an item in the Maintain News Items page. A tab with the item details opens. The record is opened in read mode. To edit the details, select the Edit action. For information on the fields, see [Table 6-1](#).

Figure 6-3 Item Details Page

Home Page
Maintain News Items
Food Poisoning

Actions
Food Poisoning

News Details
Reader Log
Change History
Attachments

Details

Title (Default):	Food Poisoning	Priority:	Important
Title (Australia and New Zealand):	-		
Title (English (American)):	-		
Title (French):	-		
Title (German):	-		
Title (Italian):	-		
Title (Spanish):	-		
Effective Date:	07/10/14	Published?:	Yes
Archived?:	No	News Category:	-
Body (Default):	 In the UK 70,000 customers get food poisoning every year The Food Standards Agency have estimated that 45% of food handlers are untrained. All staff working in food handling and preparation roles must be given appropriate training. Ensure your staff are properly trained so that you're not included in this statistic.		
Body (Australia and New Zealand):	-		
Body (English (American)):	-		
Body (French):	-		
Body (German):	-		
Body (Italian):	-		
Body (Spanish):	-		

Expiry Actions

Expiry Date:	07/10/15
Archive?:	Yes
Unpublish?:	Yes

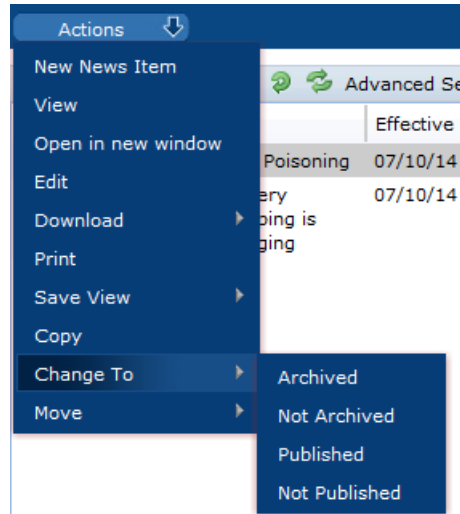
Logging and Mandatory Details

Mandatory?:	Yes
Contact Roles:	Main Contact
User Roles:	-
Read By Date:	09/10/14
Log Readership?:	Yes

Publish a News Item

You can manually publish and un-publish news items. For a single news item, you can edit the news item record. You can also publish and un-publish from the Maintain News Items page:

1. Select the rows in the list.
2. Select the Change To action.

Figure 6-4 News Item Actions

3. Select the change to be made:
 - Published: The Change to published dialog box appears. To confirm the change to published, select **Ok**. The Publish field in the news item record is checked.
 - Not Published: The Change to not published dialog box appears. To confirm the change to not published, select **Ok**. The Publish field in the news item record is unchecked:
 - The item is removed from any user's News App.
 - The item is removed from any user's UIM.
 - The item is removed from any user's Recent Items list.
 - The item is removed from any user's Favourites App.

Archive a News Item

You can manually archive and un-archive news items. For a single news item, you can edit the news item record. You can also archive and un-archive from the Maintain News Items page:

1. Select the rows in the list.
2. Select the Change To action. See [Figure 6-4](#).
3. Select the change to be made:
 - Archived: The Change to archived dialog box appears. To confirm the change to archived, select **Ok**:
 - The Archive field in the news item record is checked.
 - The item is removed from any user's News App.
 - The item is removed from any user's UIM.
 - The item is removed from any user's Recent Items list.
 - The item from any user's Favourites App.
 - Not Archived: The Change to not archived dialog box appears. To confirm the change to not archived, select **Ok**. The Archive field in the news item record is unchecked.

Alter the Sequence of the News Items

You can move a row in the list of news items up or down in the list. Select a row in the list and then select one of the following actions:

- Move up. The item is moved above the preceding row.
- Move down. The item is moved below the following row.
- Move to. Enter a row number and select whether to move the item before or after the selected row. Select **Ok**.

Figure 6-5 Move To Dialog Box

Move to

☒ Move Before

☐ Move After

Row:

Ok

Cancel

View the Reader Log

To view the reader log for a news item, select the Reader Log subtab. A tab opens with the log.

Figure 6-6 Reader Log

Home PageMaintain News ItemsFood Poisoning

Food Poisoning

News DetailsReader LogChange HistoryAttachments

Internal users

Actions

enter search criteria..

User name	Date read	Date confirmed
-----------	-----------	----------------

Page: 1 of 0Rows per page: 5Displaying items 1 to 0 of 0

External users

Actions

enter search criteria..

Supplier Name	User name	Site Name	Site Code	Supplier Code	Date read	Date confirmed
Supplier Name: DB Test Supplier A (1 Item)						
DB Test Supplier A	Supplier Admin A			A0002	09/10/14 16:45:17 BST	09/10/14 16:45:19 BST
Supplier Name: VH Test Supplier 1 (1 Item)						
VH Test Supplier 1	Supplier Admin 1			A0003	10/12/14 15:50:46 GMT	10/12/14 15:51:29 GMT

Page: 1 of 1Rows per page: 5Displaying items 1 to 2 of 2

Administration Guide
G42871-01
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October 14, 2025
Page 6 of 7

[Table 6-2](#) describes the fields in the reader log. The Internal Users list is sorted by User Name. The External Users list is sorted by Supplier Name and then by User Name within each supplier.

Table 6-2 Reader Log Fields

Field	Description
Internal Users	
User Name	User name of the person who read the item.
Date Read	Date and time the item was first opened.
Date Confirmed	Date and time the item was marked as read.
External Users	
Supplier Name	Name of supplier this user is associated with.
User Name	User name of the person who read the item.
Site Name	Name of site this user is associated with.
Site Code	Code for the site this user is associated with.
Supplier Code	Code for the supplier this user is associated with.
Date Read	Date and time the item was first opened.
Date Confirmed	Date and time the item was marked as read.

Delete a News Item

To delete a news item:

1. In the Maintain News Items page, select a news item from the list.
2. Select the Delete action. The Confirm Delete News Item dialog box appears.
3. Select **Ok**. The news item is deleted:
 - The item is removed from any user's UIM list.
 - The item is removed from any user's Recent Items list.
 - The item is removed from any user's Favourites App.

System Parameters

To maintain the parameter used to support the News App, select the System Control option and then System Parameters.

[Table 6-3](#) shows the specific system parameter used to support the News App.

Table 6-3 System Parameter to Support the News App

Subtab	Parameter	Description
Urgent Items	Show News Items	If set to Yes, news items are shown in the UIM. If set to No, news items are not shown.

7

Supplier Administration

The following topics are covered in this chapter:

- [Alerts](#)
- [Suppliers & Sites](#)
- [Assessments](#)
- [Audits & Visits](#)
- [Roles and Permissions](#)
- [Integration with Merchandising](#)
- [Supplier Evaluation Scoring](#)
- [System Parameters](#)

Alerts

Select the Alerts option from the Admin drop-down list. The following options are available in the left pane:

- [Mailing Lists](#)
- [Manage Alert Status](#)
- [Manage Alert Response Status](#)

Mailing Lists

Mailing lists can be used to create a predefined list of recipients to receive alerts.

To create a mailing list:

1. Select the New Mailing List action. The New Mailing List tab opens.
2. Enter the name of the mailing list. This field is mandatory.
3. Select the list of users from which you can choose the recipients in this mailing list. You can select Sites, Suppliers, or Sites & Suppliers. Open the Recipients tab to select from the list of available users.
4. Select the Save action.

Manage Alert Status

This option enables you to view the alert status codes and descriptions defined for each. To edit the list, select the Edit action. You can change the descriptions and add new status codes.

Figure 7-1 Alert Status Page

Actions		Alert Status 					
Status	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
UNSENT	Unsent	-	-	Non envoyé	Nicht gesendet	Non inviato	Sin enviar
SENT	Sent	-	-	Envoyé	Gesendet	Inviato	Enviado
RESENT	Re-sent	-	-	Renvoyé	Erneut gesendet	Inviato di nuovo	Enviado de nuevo
ARCHIVED	Archived	-	-	Archivé	Archiviert	Archiviato	Archivado
CANCELLED	Cancelled	-	-	Annulé	Storniert	Annulato	Cancelado

Manage Alert Response Status

This option enables you to view the alert status response codes and the descriptions defined for each. To edit the list, select the Edit action. You can change the descriptions and add new status response codes. The Alert Response Status page has the same format as the Alert Status page shown in [Figure 7-1](#).

Suppliers & Sites

- [Billing Codes](#)
- [Supplier Statuses](#)
- [Site Statuses](#)
- [Business Categories](#)
- [Supplier Types](#)
- [Site Types](#)
- [Maintenance Audit Reasons](#)
- [Invoicing Systems](#)
- [Supplier Top Grades](#)
- [Site Top Grades](#)
- [Reference Statuses](#)
- [Reference Types](#)
- [Business Units](#)
- [Currencies](#)
- [Countries](#)
- [Other Production Details](#)
- [Supplier Evaluation Scoring](#)
- [Area](#)
- [Delete Supplier](#)

- [Delete Site](#)

Billing Codes

This option is used to define the billing codes used when creating a new supplier. The billing code determines how costs are calculated during the registration process. Billing codes are optional. If billing is not applicable or a portal, a code could be defined with a zero charge.

During the registration of a new supplier in the Supplier module, the values in this table are used to determine the cost charged for the registration:

Registration Cost equals Fixed Price plus (Charge Per Site multiplied by the number of sites registered)

For more information, see the *Oracle Retail Supplier Evaluation Cloud Service Supplier User Guide*.

Figure 7-2 Billing Codes Page

Actions		Billing Codes 							
Code	Charge Per Site	Fixed Price	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
SMALL	100	500	small	-	-	-	-	-	-
MEDIUM	250	1500	medium	-	-	-	-	-	-
LARGE	-	5000	large	-	-	-	-	-	-

To edit the list of billing codes, select the Edit action. The table opens in edit mode. The code and any existing descriptions cannot be edited.

To add a new billing code, click **Add**. A new row is added to the table. Enter the code, charge per site, fixed price, description in the default language. Enter any translations. Select the Save action.

Supplier Statuses

This option is used to define the statuses that can be associated with the registration of a supplier. The codes are defined by the system; new codes cannot be added. To edit the existing codes, select the Edit action. The table opens in edit mode. Any translations that do not already exist can be added. No other changes can be made.

Figure 7-3 Supplier Statuses Page

Actions		Supplier Statuses 					
Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
AWAITING REGISTRATION	Awaiting Registration	-	-	En attente d'enregistrement	Warten auf Registrierung	In attesa di registrazione	En espera de registro
REGISTERED	Registered	-	-	Enregistré	Registriert	Registrato	Registrado
POTENTIAL	Potential	-	-	Potentiel	Eventuell	Potenziale	Potencial

Site Statuses

This option is used to define the statuses that can be associated with a site. The statuses are defined by the system; new statuses cannot be added. To edit the existing statuses, select the Edit action. The table opens in edit mode. Any translations that do not already exist can be added. No other changes can be made.

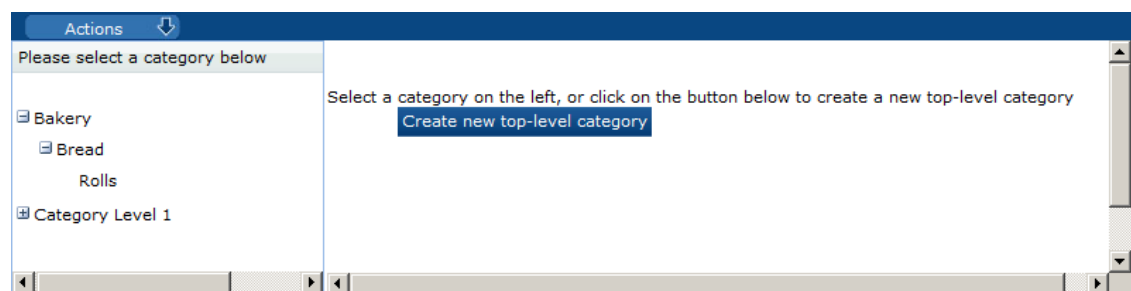
Figure 7-4 Site Statuses Page

Actions		Site Statuses					
Status	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
AWAITING REGISTRATION	Awaiting Registration	-	-	En attente d'enregistrement	Warten auf Registrierung	In attesa di registrazione	En espera de registro
AWAITING APPROVAL	Awaiting Approval	-	-	En attente d'approbation	Warten auf Freigabe	In attesa d'approvazione	En espera de aprobación
ACTIVE	Active	-	-	Actif	Aktiv	Attivo	Activo
UNAPPROVED	Unapproved	-	-	Non approuvé	Nicht freigegeben	Non approvato	No aprobado
INACTIVE	Inactive	-	-	Inactif	Nicht aktiv	Inattivo	Inactivo
DELISTED	Delisted	-	-	Sorti de la liste	Ausgelistet	Fuori elenco	Fuera de lista

Business Categories

Select the Business Categories option in the left pane. The list of defined business categories appears in the right pane. Each top-level category can be expanded to show its child categories.

Figure 7-5 Business Categories Page



To edit a category entry, select the entry in the left pane and then select the Edit action in the right pane. The category opens in edit mode. The descriptions can be edited. For an example of the content of this page, see [Figure 7-6](#).

To create a new top-level category:

1. Click **Create new top-level category**. The Business Category Details page opens.

Figure 7-6 Add Business Category Details Page

2. Enter the details for the new category:
 - Enter the code. This is a mandatory field.
 - Enter the description for the default language. This is a mandatory field. Enter any translations.
3. Select the Save action. The business category is added to the list of categories.
4. To add child categories, select the top-level category and then select the Add Child Category action.
5. Enter the details for the child level and select the Save action.

Supplier Types

This option is used to define the types of suppliers that can be created.

Figure 7-7 Supplier Types Page

Supplier Types							
Code	Supplier Type (Default)	Supplier Type (Australia and New Zealand)	Supplier Type (English (American))	Supplier Type (French)	Supplier Type (German)	Supplier Type (Italian)	Supplier Type (Spanish)
SUPPLIER_TYPE	Supplier Type	-	-	-	-	-	-

To edit the list of supplier types, select the Edit action. The table opens in edit mode. For existing supplier types, only the translated descriptions that do not already exist can be edited. To add a supplier type, click **Add**. A new row is added to the table. Enter the new supplier type and description in the default language. Enter any translations. Select the Save action.

Site Types

This option is used to define the types of sites that can be created.

To edit the list of site types:

1. Select the Edit action. The table opens in edit mode. For existing site types, only the translated descriptions that do not already exist can be edited.
2. To add a site type:
 - a. Click **Add**. A new row is added to the table.
 - b. Enter the new site type and description in the default language. Enter any translations.
3. Select the Save action.

Maintenance Audit Reasons

This option is used to define the reasons why a maintenance audit needs to take place. The Maintenance Audit Reasons page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of reasons, select the Edit action. The table opens in edit mode. For existing reasons, only the translated descriptions that do not already exist can be edited. To add a maintenance audit reason, click **Add**. A new row is added to the table. Enter the new reason code and description in the default language. Enter any translations. Select the Save action.

Invoicing Systems

Invoicing systems are used in the Billing Details area of the Supplier and Site records to assign alternative account codes, such as the supplier's account number in the retailer's corporate purchasing system. This option is used to define the available invoicing systems. The Invoicing Systems page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of invoicing systems, select the Edit action. The table opens in edit mode. For existing invoicing systems, only the translated descriptions that do not already exist can be edited. To add an invoicing system, click **Add**. A new row is added to the table. Enter the new invoicing system code and description in the default language. Enter any translations. Select the Save action.

Supplier Top Grades

This option is used to define the grades that can be associated with a supplier for an audit/visit, for example, A, B, and C. The Supplier Top Grades page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of grades, select the Edit action. The table opens in edit mode. For existing grades, only the translated descriptions that do not already exist can be edited. To add a new grade, click **Add**. A new row is added to the table. Enter the new grade code and description in the default language. Enter any translations. Select the Save action.

Site Top Grades

This option is used to define the grades that can be associated with a site for an audit/visit, for example, A, B, and C. The Site Top Grades page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of grades, select the Edit action. The table opens in edit mode. For existing grades, only the translated descriptions that do not already exist can be edited. To add a new grade, click **Add**. A new row is added to the table. Enter the new grade code and description in the default language. Enter any translations. Select the Save action.

Reference Statuses

This option is used to define the reference codes that can be associated with a supplier site, for example, the health mark codes used in the UK or the FDA registration numbers used in the US. The Reference Status page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of statuses, select the Edit action. The table opens in edit mode. For existing statuses, only the translated descriptions that do not already exist can be edited. To add a new status, click **Add**. A new row is added to the table. Enter the new code and description in the default language. Enter any translations. Select the Save action.

Reference Types

This option is used to define the reference types, or certificate types, that can be associated with a supplier.

Figure 7-8 Reference Types Page

Actions		Reference Types					
Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
DAIRY	Dairy Est. No.	-	-	-	-	-	-
EC_LICENCE	EC Licence Number	-	-	-	-	-	-
HEALTHMARK	Healthmark	-	-	-	-	-	-
SEDEX	Organic Certification	-	-	-	-	-	-
ORGANIC CERT	Sedex Reference No.	-	-	-	-	-	-
BRC	BRC Ref. No.	-	-	-	-	-	-
EQOS	EQOS Ref. No.	-	-	-	-	-	-
GSI	GS1 Ref. No.	-	-	-	-	-	-
HACCP	Organic Certification	-	-	-	-	-	-
KOSHER	Kosher Certification	-	-	-	-	-	-
MEAT EST	Meat Est. No.	-	-	-	-	-	-
PLANT LICENCE	Plant License Number	-	-	-	-	-	-
PROCESS PRODUCTS	Process Products Est. No.	-	-	-	-	-	-

To edit the list of reference types, select the Edit action. The table opens in edit mode. For existing types, only the translated descriptions that do not already exist can be edited. To add a new type, click **Add**. A new row is added to the table. Enter the new type code and description in the default language. Enter any translations. Select the Save action.

Business Units

This option is used to define the classifications of suppliers and sites.

Figure 7-9 Business Units Page

Actions		Business Units					
Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
UK	UK	-	-	-	-	-	-
ROI	Republic Of Ireland	-	-	-	-	-	-
USA	United States of America	-	-	-	-	-	-
CENTRAL_EUROPE	Central Europe	-	-	-	-	-	-
FAR_EAST	Far East	-	-	-	-	-	-

To edit the list of business units, select the Edit action. The table opens in edit mode. For existing business units, only the translated descriptions that do not already exist can be edited. To add a new business unit, click **Add**. A new row is added to the table. Enter the new business code and description in the default language. Enter any translations. Select the Save action.

Currencies

This option is used to define the supported currencies, for example, Sterling and Dollars. The Currencies page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of currencies, select the Edit action. The table opens in edit mode. For existing currencies, only the translated descriptions that do not already exist can be edited. To add a new currency, click **Add**. A new row is added to the table. Enter the new currency code and description in the default language. Enter any translations. Select the Save action.

Countries

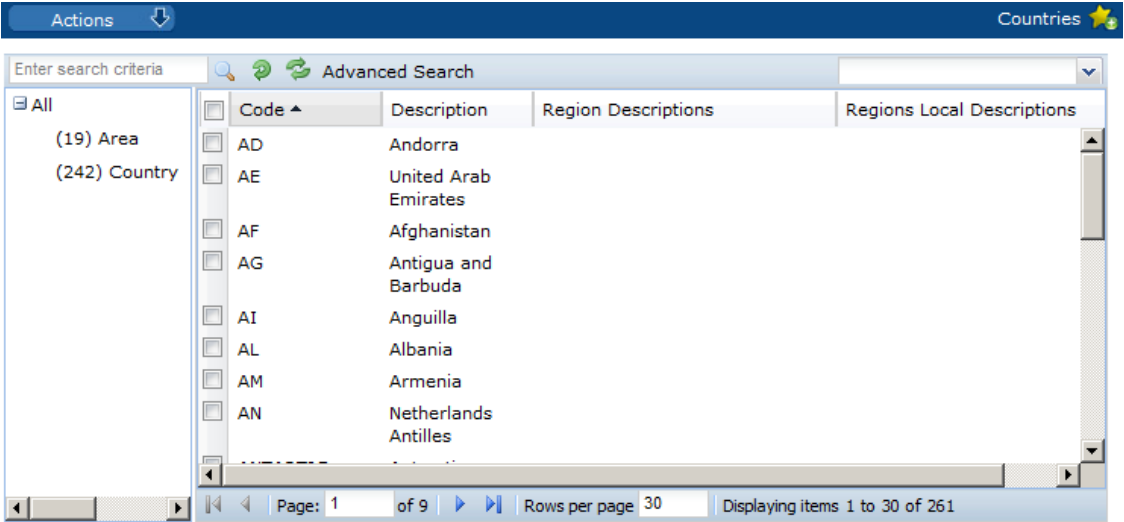
This option is used to define the list of countries used throughout the system (in addresses, countries of origin, countries of manufacture, and so on).

The maintenance of Countries also incorporates Areas and Regions. Areas are geographical areas that are not countries, but may be referenced in a similar way within the system. For example, the country of origin of a product may be a country or may be an area, such as the Atlantic Ocean.

When the user selects from the pick-list of countries, it either contains a list of just Countries (for example, where completing an address), or Countries and Areas (for example, where selecting a country of origin).

A list of Regions can be maintained against a Country to provide, for example, the states or countries of that country. The list can be used to provide a pick-list of the states/counties for use when entering the address for that country.

Figure 7-10 Countries Page

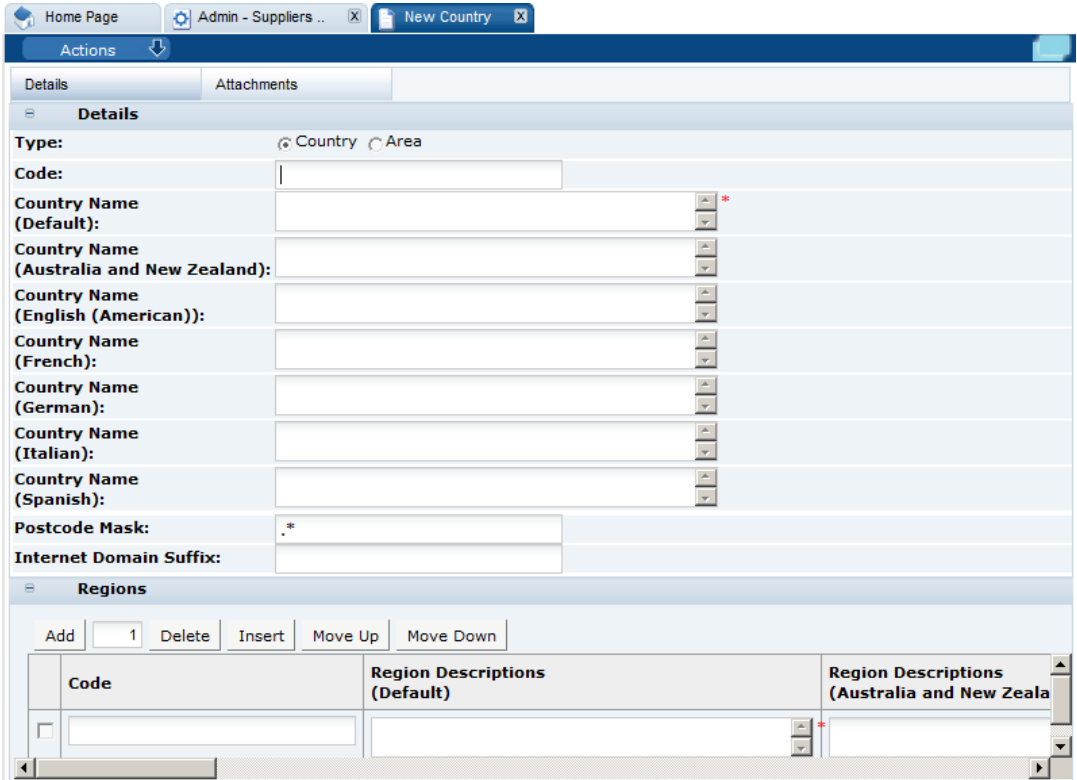


To edit a country entry, select the entry in the list and then select the Edit action. A tab opens in edit mode. Translated descriptions that do not already exist and additional regions can be added. For an example of the content of this page, see [Figure 7-11](#).

To add a new country:

1. Select the New Country action. The New Country tab opens.

Figure 7-11 New Country Page



2. In the Details section:
 - Type: Select whether this is a country or area.
 - Code: Enter a code for the country.
 - Country Name: Enter the country name in the default language. This field is mandatory. Enter any translations.
 - Postcode Mask: The Postcode Mask is used to define the format of the postal or zip code for the country. Enter a post code mask to be used for this country.
 - Internet Domain Suffix: Enter the Internet domain suffix used for this country.
3. In the Regions section, enter any regions for this country or area. To add a region, click **Add**. A row is added to the table. Enter the code for the region. Enter a description in the default language. The description is a mandatory field. Enter any translations.
4. Select the Save action.

Other Production Details

This option is used to define the list of production details that can be assigned to a site. The Other Production Details page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of production details, select the Edit action. The table opens in edit mode. For existing details, only the translated descriptions that do not already exist can be edited. To add a new production detail, click **Add**. A new row is added to the table. Enter the new detail code and description in the default language. Enter any translations. Select the Save action.

Area

This option is used to define the supported areas. The Areas page has the same format as the Supplier Statuses page shown in [Figure 7-3](#).

To edit the list of areas, select the Edit action. The table opens in edit mode. For existing areas, only the translated descriptions that do not already exist can be edited. To add a new area, click **Add**. A new row is added to the table. Enter the new area code and description in the default language. Enter any translations. Select the Save action.

Delete Supplier

This option is used to delete suppliers. In order for a supplier to be deleted, the following criteria must be met:

- The supplier has not gone through the registration process, that is, only a supplier with sites at a status of AWAITING REGISTRATION can be deleted.
- There is no Alert Response record beyond the status of OUTSTANDING for the supplier being deleted.
- There are no Assessments beyond the status of FUTURE for any of the sites of a supplier being deleted.

To delete a supplier:

1. Select the Delete Supplier option from the Admin drop-down list. The Select Suppliers page appears.
2. To display the list of suppliers, select the icon. The Suppliers to Delete page appears.

Figure 7-12 Suppliers to Delete Page

The screenshot shows the 'Suppliers to Delete' page. The left sidebar contains navigation links: Home Page, Admin - Suppliers, Billing Codes, Order Requests, Supplier Statuses, Site Statuses, Business Categories, Supplier Types, Site Types, Maintenance Audit Reasons, Invoicing Systems, Supplier Top Grades, Site Top Grades, Reference Statuses, Reference Types, Business Units, Currencies, Countries, Other Production Details, Area, Delete Supplier, and Delete Site. The main content area has a header 'Select Suppliers: AR Supplies Ltd. (A0009) / South West Bakery'. Below this is a 'Suppliers to Delete' section with a 'Suppliers' dropdown, 'Sites and Suppliers By A-Z', 'Select All Pages', and 'Deselect All Pages' buttons. A 'Display By' section shows 'A - Z' selected. A table with columns 'Supplier Name' and 'Supplier Code' lists 'AR Supplies Ltd.' with code 'A0009'. The table has 'Available' and 'Selected' tabs, with 'Selected' currently active.

3. Select the suppliers to be deleted and click **Ok**. The selections are shown in the right pane.
4. To delete the suppliers, select the Submit action. A dialog box appears to enable you to confirm the deletion. To confirm the deletion, click **OK**. A batch job is submitted to perform the deletion.

Figure 7-13 Delete Suppliers Confirm Change Dialog Box

The 'Confirm change' dialog box has a blue header. Below the header is a warning icon (a triangle with an exclamation mark) and the text: 'The deletion of the Supplier(s) selected will be done via a batch job which may take some time to complete. Do you wish to continue?'. At the bottom of the dialog box are three buttons: 'Submit', 'Submit Go to Manage Batch Jobs', and 'Cancel'.

Note

Supplier accounts may also be deleted as a result of deleting all Site accounts individually. For details, see the *Oracle Retail Supplier Evaluation Cloud Service Supplier User Guide*.

Delete Site

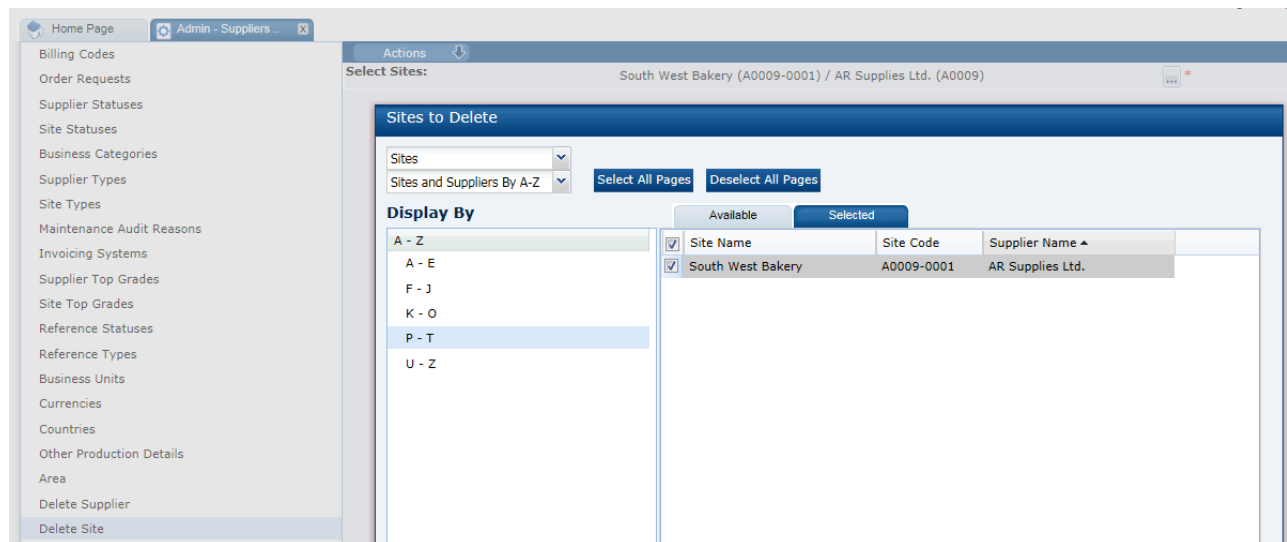
This option is used to delete sites. In order for a site to be deleted, the following criteria must be met:

- The site has not gone through the registration process, that is, only sites at a status of AWAITING REGISTRATION can be deleted.
- There is no Alert Response record beyond the status of OUTSTANDING for the site being deleted.
- There are no Assessments beyond the status of FUTURE for the site being deleted.

To delete a site:

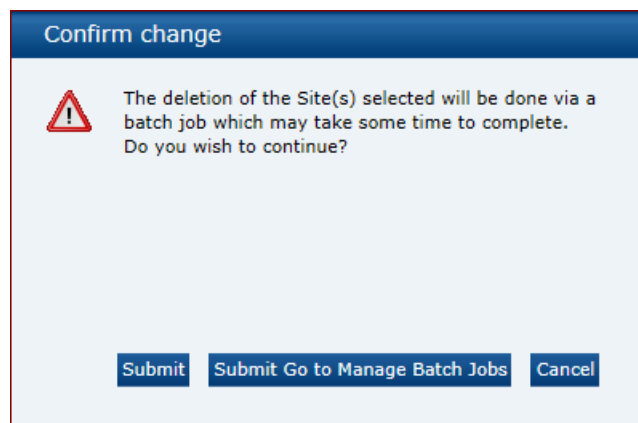
1. Select the Delete Site option from the Admin drop-down list. The Select Sites page appears.
2. To display the list of sites, select the icon. The Sites to Delete page appears.

Figure 7-14 Sites to Delete Page



3. Select the sites to be deleted and click **Ok**. The selections are shown in the right pane.
4. To delete the sites, select the Submit action. A dialog box appears to enable you to confirm the deletion. To confirm the deletion, click **OK**. A batch job is submitted to perform the deletion.

Figure 7-15 Delete Sites Confirm Change Dialog Box



Note

Site accounts may also be deleted individually. For details, see the *Oracle Retail Supplier Evaluation Cloud Service Supplier User Guide*.

Upload Supplier and Site Data

Retailer users with the Upload Administrator authority profile have access to the Upload Data option within the Admin menu for the upload of suppliers and sites.

To upload new suppliers and sites:

1. Select the Import action from the Suppliers List View actions menu. The Data Upload dialog box opens.

Figure 7-16 Data Upload Dialog Box

The screenshot shows a 'Data Upload' dialog box. It has a title bar with the text 'Data Upload'. Below the title bar, there are three main sections. The first section is 'Upload location:' with a 'Browse...' button and the text 'No file selected.' to its right. The second section is 'Comment:' with a large text area below it. The third section is 'Send new user email :' with two radio buttons, 'Yes' and 'No', where 'No' is selected. At the bottom of the dialog, there are three buttons: 'Submit', 'Submit Go to Manage Batch Jobs', and 'Cancel'.

2. Click Browse to search for the upload file.
3. Enter any comments to describe the reason for the upload.
4. Select whether the system is to automatically send email to the primary contact user of each newly created supplier/site on successful completion of the upload. The email will invite the user to register on the portal. The default is No, which will not send an email.
5. To upload the file, select either the **Submit** or **Submit Go to Manage Batch Jobs** action. At this point, the system will create a background job to process the spreadsheet. The spreadsheet used to upload the data will be stored within the Attachments tab of the batch job.

Note

An email will be sent to the job submitter if the date within the upload file fails validation.

Download Supplier and Site Upload Spreadsheet

Retailer users with the Upload Administrator authority profile also have access to the option to download a blank spreadsheet.

To download the latest version of the upload spreadsheet:

1. Select the Download Blank Spreadsheet action from the Suppliers List View actions menu. An operating system specific dialog box opens with the option to either open or save the file.
2. Select the save option to download the ZIP file to your desktop.

Note

The ZIP file contains a spreadsheet workbook with the first tab used to upload the data. The second tab contains guidance notes and the remaining tabs contain the valid glossary values.

The column heading text shown on the first tab is in the user's language. If translations are not present for the user's language, the system the portal's default language is substituted. An asterisk (*) is shown in a column heading if an entry is mandatory.

Assessments

Select the Assessments option from the Admin drop-down list. The following options are available in the left pane:

- [Assessment Questions](#)
- [Assessment Templates](#)
- [Assessment Status](#)
- [Assessment Picklists](#)
- [Selection Status](#)

Assessment Questions

Each assessment template is comprised of a series of questions which may be selected from this glossary.

Figure 7-17 Glossary Assessment Question Page

Actions

Glossary Assessment Question

Enter search criteria

Advanced Search

Default

All

(16) Active

Type	Id.	Seq.	Question
General	25BAQ	1.0	Social responsibility sourcing policy compliance
General	ETH002	12.0	Provide SEDEX registration code.
General	ETH003	13.0	SEDEX category
General	ETH004	14.0	Please attach a copy of latest risk assessment
General	GEN001	1.0	Confirm correct business categories.
General	GEN002	2.0	Name & job title of person completing the scorecard.
General	GEN003	3.0	Latest Audit score.
General	GEN004	4.0	Number of products supplied.
General	GEN005	5.0	Number of product withdrawals.
Universal	28DNP	1.0	Total number of products supplied
Universal	ETH001	11.0	SEDEX registered?
Universal	UNI001	1.0	I confirm that the Person Responsible stated above is my principal contact.
Universal	UNI002	2.0	Briefly describe staff training procedures.
Universal	UNI003	3.0	Briefly describe personal hygiene procedures.
Universal	UNI004	4.0	Briefly describe staff screening procedures.
Universal	UNI005	5.0	Are training record available?

Page: 1 of 1

Rows per page 30

Displaying items 1 to 16 of 16

To edit a question, select the question and then select the Edit action. A tab opens with the record in edit mode.

To create a new assessment question:

1. Select the New Question action. The Assessment Question tab opens.

Figure 7-18 New Assessment Question Page

The screenshot shows the 'New Assessment Question Page' with the following details:

- Actions:** Details, Change History
- Details Section:**
 - Question Id: [Empty field]
 - Status: Deactivated
 - Question (Default): [Empty field]
 - Question (Australia and New Zealand): [Empty field]
 - Question (English (American)): [Empty field]
 - Question (French): [Empty field]
 - Question (German): [Empty field]
 - Question (Italian): [Empty field]
 - Question (Spanish): [Empty field]
 - Sequence: 0
 - Question Type: ☒ Universal ☐ General
 - Comments: [Empty field]
- Answers Section:**
 - Answer Type: Checkbox
 - Includes Comments: ☐ Yes ☒ No
 - Table:

Code	Automatic Disqualification	Description (Default)	Description (French)
☐	☐	[Empty field]	[Empty field]

2. In the Details section:

- Question Id: Enter the ID for this question. The ID must be between 3 and 10 characters and unique. The value cannot be changed once the question has been created. This field is mandatory.
- Status: The status is set to Deactivated.
- Question: Enter the question in the default language. This field is mandatory.
- Sequence: Enter the sequence number for this question. The sequence number is used to set the default order of questions within the assessment template.
- Question Type: Select the type of question:
 - Universal questions are automatically added to a assessment template. These questions may be removed and individually re-added as required (if configured in System Parameters to allow removal).
 - General questions are manually added to a assessment template from the questions glossary. This is the default.
- Comments: Enter any comments. This field is not mandatory.

3. In the Answers section:

- Answer Type: Select the type of answers allowed for this question.
The available options are:
 - Text - for descriptive responses.
 - Radio - for a single response from multiple options.
 - Checkbox - for one or more responses from multiple options.

- Single-select Picker - where the response is a single selection from a predefined list of options – see Assessment Picklists below.
 - Multi-select Picker - as Single-select Picker but multiple response options can be selected.
 - Tabular - for responses in the form of a table, where rows can be added to a table of predefined columns.
 - Date - the response is a selected from a date picker.
 - Numeric - requires the response to be a number.
 - URL - when the answer is viewed it is shown as a link to the location given as the response.
 - Includes Comments: If set to Yes, a text field is included in the questionnaire to enable the user to enter any comments.
 - For Radio and Checkbox answer types, to add an answer choice, click Add. Enter the answer in the default language. This is a mandatory field. Enter any translations.
- For Picklist answer types, select an option from the list of Assessment Picklists, click **Ok**. This is a mandatory field.
- For Tabular answer types, configure the table columns by populating the table (each row represents a table column):
- Type is the type of data the column will accept – the options are Text, Numeric, URL or Single-select Picker.
 - Assessment Picker is used when Type is Single-select Picker, to set the picklist to be presented, in which case this is a mandatory field.
 - Description is the column heading. Enter the answer in the default language. This is a mandatory field. Enter any translations.
 - The answer types that offer a choice have a Code automatically assigned to give each answer a unique reference.
 - The answer types that offer a choice can have answers set to Automatic Disqualification; when completing the Assessment, if the user chooses the option as their response, the Assessment it is flagged as being *disqualified*.
- The disqualifications and a count of them are shown in the Assessment, to retailer users only.

4. Select the Save action.

Note

When updating a question, the change is cascaded to any Assessment Templates and future Assessments which use the question. A batch job is submitted to apply the updates. Depending on the number of templates and assessments to be updated, the job may take some time to complete.

Assessment Templates

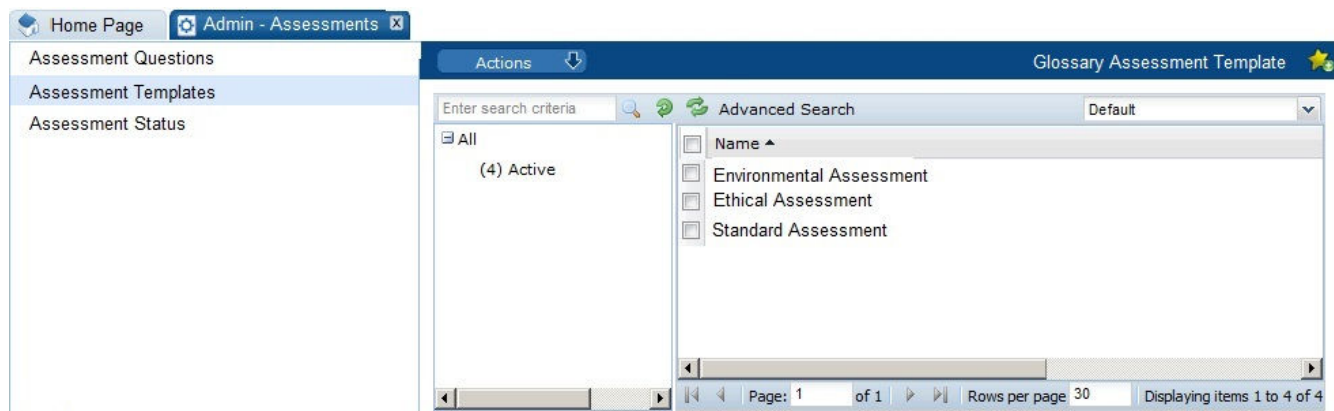
Assessments provide a means for the retailer to assess their suppliers on an on-going (or ad hoc) basis against a set of predefined criteria. Assessments are made up of a series of

questions which may be answered by the supplier as a self-assessment or completed by the retailer.

Any number of types of assessment can be configured, with the option to use weighted scoring for the overall grading of suppliers' responses. On completion of a assessment, the next one can be automatically scheduled based on a predefined periodic or quarterly frequency.

Assessment templates define the rules that control the behavior of the different types of assessments. Every assessment is created from a template which defines the rules for how it behaves within the system, that is, the set of questions and permitted answers, the setting of basic default values, and whether certain fields are used or hidden.

Figure 7-19 Glossary Assessment Templates Page



To edit a template, select the entry and then select the Edit action. A tab opens in edit mode to enable you to edit the template. For an example of the content, see [Figure 7-20](#).

To create a new template:

1. Select the New Assessment Template action. The New Assessment Template tab opens.

Figure 7-20 New Assessment Template Page

Home Page Admin - Assessments New Assessment

Actions

Details Questions Scoring Change History

Details

Code: [Text Field]

Assessment Name: [Text Field]

Assessment Name: (Default): [Text Field]

Assessment Name: (Australia and New Zealand): [Text Field]

Assessment Name: (English (American)): [Text Field]

Assessment Name: (French): [Text Field]

Assessment Name: (German): [Text Field]

Assessment Name: (Italian): [Text Field]

Assessment Name: (Spanish): [Text Field]

Assessment Level: ☐ Item ☐ Site

Status: Deactivated

Approval Required: ☐

Overdue Email: ☒

Grace Period: 0 Weeks

Future Date derived from : ☒ Due Date ☐ Completion Date

Auto Schedule: ☐

Due Day Of Week: Friday

Comments: [Text Area]

Evaluation Type: [Text Field]

Supplier Can Create Assessment: ☐

Supplier Can Change Due Date: ☐

Supplier Can Complete Scorecard: ☐

Contact Roles: [Text Field]

Automate Future: ☒

Default Frequency: ☐ Quarter ☒ Period 1

Level of Business Category: [Text Field]

Business Category Required: ☐

Accredited Body Integration

Integration Type: [Text Field]

Accredited Bodies: [Text Field]

[Table 7-1](#) describes the fields in the Details section.

Table 7-1 New Assessment Template Fields

Field	Description
Code	Enter a unique code for this template. This field is mandatory.
Assessment Name	Enter the name for the template in the default language. This field is mandatory. Enter the translations.
Status	The status is set to Deactivated.
Supplier Can Create Assessment	If checked, the supplier user can choose to create this type of assessment. The default is unchecked.
Supplier Can Change Due Date	If the supplier can create this type of assessment and this field is checked, the supplier user may also change the due date of this type of assessment. The default is unchecked.
Supplier Can Complete Assessment	If checked, the supplier user may choose to complete this type of assessment. The default is unchecked.
Approval Required	If the supplier can complete this type of assessment and if this field is checked, the retailer user is required to approve this assessment before the supplier can complete it. The default is unchecked.
Grace Period	Enter the number of days or weeks after the assessment's due date when it becomes overdue.

Table 7-1 (Cont.) New Assessment Template Fields

Field	Description
Overdue Email	If checked, an email is automatically generated to the supplier if the supplier has not completed the assessment by the time it becomes overdue.
Contact Roles	Select the roles for which supplier users receive the notifications if the assessment becomes overdue. The field is mandatory.
Future Date Derived From	These fields are used to control the rules for automatically scheduling subsequent assessments of this type, and when a assessment becomes overdue. Automate Future versus Auto Schedule If a assessment's template is set to <i>Automate Future</i> the system will automatically create the next future assessment of this type for active sites that have previously had this type of assessment and do not already have one currently scheduled, or do have one scheduled but its due date has been reached. This ensures all sites that have this type of assessment always have one scheduled. If a assessment's template is set to <i>Auto Schedule</i>, the system prompts the user with the option to auto-schedule the next future assessment of this type for the site when the existing assessment is completed.
Automate Future	
Auto Schedule	
Default Frequency	
Due Day Of Week	
Level of Business Category	Enter the number of levels of business category to be recorded for this type of assessment. Set to zero if none are required. This is a mandatory field.
Business Category Required	If checked, the business category becomes mandatory when the assessment is completed.
Comments	Enter a comment regarding this template.
Evaluation Type	This is used to determine the type of assessment that is scored and potentially included in the integration with Merchandising. Once the template has been made active, the type cannot be changed.
Integration Type	If this type of assessment is to be integrated with a third party for sourcing of data, set the integration type to Supplier Owned if the supplier will manage its progress with the Accredited Body, or set to Retailer Owned if the retailer will manage its progress with the Accredited Body without necessarily involving the supplier.
Accredited Bodies	If this type of assessment is to be integrated with a third party for sourcing of data, set the Accredited Bodies who may be used for this type. One or many Accredited Bodies may be selected; when the assessment is created the user will confirm which of them is to be used.

- Set the questions for this type of assessment in the Questions tab using the tables of questions for Universal, General, and Ad Hoc Questions:

- Universal questions are automatically added.
- General Questions are selected from the glossary of Assessment Questions.
- Ad Hoc questions can be entered specifically for this type of assessment.

The Preview indicates any answers that have been set as being an Automatic Disqualification, for example:

Once the questions have been added, the Refresh Preview action can be used to show the assessment as it will be presented to the supplier.

3. Select any scoring rules for this type of assessment in the Scoring subtab.
4. Select the Save action.

Assessment Status

This option enables you to view the assessment status codes and descriptions defined for each. To edit the list, select the Edit action. You can change the descriptions and add new status codes. The Assessment Status page has the same format as the Alert Status page shown in [Figure 7-1](#).

Accredited Bodies

Accredited Bodies are assigned to assessments that are carried out by a third-party organization. An Accredited Body defines the details of an organization that carries out an assessment. On the Accredited Bodies page, the name and contact details of existing Accredited Bodies are shown.

The glossary is accessed by using the Roles & Permissions>Accredited Bodies menu option in the Admin area.

To edit the details for an Accredited Body, select the entry and then select the Edit action. A page opens in edit mode with the details of the Accredited Body. For an example of the content, see the following figure.

To add a new Accredited Body, select the New Accredited Body action. The New Accredited Body tab opens. The Name and Code fields are mandatory. The contact details and address may also be entered.

Figure 7-21 New Accredited Body Page

If the URL is set, such as to the third party's proprietary system, an option will appear in the Accredited Bodies navigation Tasks menu, providing a direct link to the third party system. The URL must be prefixed with `http://` or `https://`.

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

Assessment Picklists

This option enables you to configure the picklist contents to be available for the Single-select Picker and Multi-select Picker answer types.

Each Assessment Picklist is given a unique Code, a Description (with translations), and a Table of Terms containing the picklist's list of options:

- Code is a unique reference to identify each option.
- Score is a numeric value for use in assessment scoring. The value will be added to the assessment's score total if the user chooses this option.
- Mandatory Comments can be used to require the user to enter a supporting comment if they choose this option.
- Automatic Disqualification can be used to flag the assessment as being *disqualified* if the user chooses this option.

The disqualifications and a count of them are shown in the Assessment, to retailer users only.

- Description is the text that will show in the picklist (with translations).

Selection Status

The Selection Status glossary is used to define the available selection statuses as a description.

The glossary is accessed using the Integration & Scoring>Selection Statuses menu option in the Admin area.

Audits & Visits

Select the Audit & Visits option from the Admin drop-down list. The following options are available in the left pane:

- [Certification Bodies](#)
- [Audit/Visit Templates](#)
- [Audit/Visit Issue Types](#)
- [Auditor Types](#)
- [Audit/Visit Risk Levels](#)
- [Audit/Visit Scores](#)
- [Audit/Visit Standards](#)
- [Audit/Visit Statuses](#)
- [Issue Statuses](#)
- [Visit Locations](#)
- [Visit Reasons](#)
- [Checklist Templates](#)

- [Checklist Answers](#)
- [Checklist Questions](#)
- [Checklist Question Colour Management](#)
- [Checklist Question Colours](#)

Certification Bodies

Certification bodies are assigned to audits/visits that are carried out by a third-party organization. A certification body defines the details of an organization that carries out an audits. On the Certification Bodies page, the name and contact details of existing auditors and certification bodies are shown.

To edit the details for a certification body, select the entry and then select the Edit action. A page opens in edit mode with the details of the certification body. For an example of the content, see [Figure 7-22](#).

To add a new certification body, select the New Certification Body action. The New Certification Body tab opens. The Name and Type fields are mandatory. The contact details and address may also be entered.

Figure 7-22 New Certification Body Page

The screenshot shows the 'New Certification Body' page. At the top, there are browser tabs for 'Home Page', 'Admin - Audits & am...', and 'New Certification ...'. Below the tabs is a blue header bar with the word 'Actions' and a dropdown arrow. Underneath the header are three tabs: 'Details', 'Attachments', and 'Change History'. The 'Details' tab is selected and shows a form with the following fields:

- Name:** (text input, mandatory)
- Phone:** (text input)
- Contact Name:** (text input)
- Comments:** (text area)
- Code:** (text input, value: 123)
- Type:** (dropdown menu, value: Certification Body, mandatory)
- Fax:** (text input)
- Contact Email :** (text input)

Below the 'Details' section is the 'Address' section, which is expanded. It contains the following fields:

- Local Address** (section header)
- Country:** (dropdown menu)
- Address 1:** (text input)
- Address 2:** (text input)
- City:** (text input)
- County:** (text input)
- Post Code:** (text input)
- GPS latitude:** (text input)
- GPS longitude:** (text input)

Audit/Visit Templates

Audit/visit templates define the rules that control the behavior of the different types of audits and visits. Every audit or visit is created from a template which defines the rules for how it behaves within the system, that is, the setting of basic default values and whether certain fields are used or hidden.

Figure 7-23 Audit/Visit Templates Page

Record Type	Name	Default Audit / Visit Frequency (months)
Audit	Audit Test Allow	0
Audit	Audit Test Specific	0
Audit	Ethical Audit	0
Audit	Name1	0
Audit	Nut Handling Audit	0
Audit	Scorable Ethical Audit	0
Audit	Scorable Standard Food Audit	1
Audit	Scorable Standard Food Audit, Optional Visibility	0
Audit	Standard Food Audit	1
Visit	Standard Visit	12

To edit a template, select the entry and then select the Edit action. A tab opens in edit mode to enable you to edit the template. For an example of the content, see [Figure 7-24](#).

To create a new template:

1. Select the New Audit/Visit Template action. The New Audit/Visit Template tab opens.

Figure 7-24 New Audit Template Page

Home Page Admin - Audits &am... New Audit Template

New Audit Template

Actions

Details Auditors Checklists Attachments Change History

Audit/Visit Details

Code: *

Record Type: ☒ Audit ☐ Visit

Audit/Visit Template Name (Default): *

Audit/Visit Template Name (Australia and New Zealand):

Audit/Visit Template Name (English (American)):

Audit/Visit Template Name (French):

Audit/Visit Template Name (German):

Audit/Visit Template Name (Italian):

Audit/Visit Template Name (Spanish):

Scope (Default):

Scope (Australia and New Zealand):

Scope (English (American)):

Scope (French):

Scope (German):

Scope (Italian):

Scope (Spanish):

Comments:

Audit / Visit Type: ☒ Internal ☐ Third Party

Record Date Of Last Audit / Visit: ☒ Yes ☐ No

Audit / Visit Visibility: ☐ Announced ☐ Unannounced ☒ Optional

Create Issues: ☒ No ☐ Manually ☐ Via Checklists

Score Audit / Visit: ☐ Yes ☒ No

Score Mandatory: ☒ Yes ☐ No

Allowable Score Options: -

Audit / Visit Standards Used: ☐ Yes ☒ No

Active: ☒

Supplier Generated: ☐ Yes ☒ No

Auto schedule: ☐ Yes ☒ No

Default Issue Completion (days): 0 *

Default Audit / Visit Frequency (months): 0 *

Business Categories Required:

Business Category Levels Required: 2

Allowable Audit / Visit Standards: -

Lost Recovery: ☐ Yes ☒ No

2. [Table 7-2](#) describes the fields in the Audit/Visit Details section.

Table 7-2 Audit/Visit Template Fields

Field	Description
Active	Check the box if this template is set active when created.
Allowable Audit/Visit Standards	Click the icon to select the standards for this audit/visit.
Allowable Score Options	If scoring is used, click the icon to select the scoring options to use.
Audit/Visit Standards Used	If set to Yes, this type of audit is aligned with a particular standard.
Audit/Visit Template Name	Enter the name for the template in the default language. This field is mandatory. Enter the translations.
Audit/Visit Type	- Select Internal if the audit/visit is carried out by the retailer. - Select Third Party if a third-party auditor or certification body carries out the audit/visit.
Audit/Visit Visibility	This field determines whether the supplier knows in advance of an audit/visit. If Unannounced, the supplier is not notified until the audit/visit is started by the retailer. See Supplier Access to Audits .
Auto Schedule	If set to Yes, a new future audit/visit is automatically scheduled on completion of the current audit/visit.
Business Category Levels Required	If the Business Categories Required field is set to Yes, enter the number of levels of business category to use on the audit/visit record.
Business Categories Required	If set to Yes, a business category is required for this type of audit/visit.
Code	Enter a unique code for this template. This field is mandatory.
Comments	Enter a comment regarding this template.
Cost Recovery	If set to Yes, the all or part of the cost of the audit/visit is recharged to the supplier.
Cost Recovery Comments	If the Cost Recovery field is set to Yes, the amount to be recharged can be entered as a comment.
Create Issues	If set to Yes, issues can be raised against audits/visits of this type regardless of whether the issue is created by the supplier or retailer.
Default Audit/Visit Frequency (months)	Enter the frequency of the audit/visit in months. This is used when auto-scheduling the next audit/visit.
Default Issue Completion (days)	Enter the number of days an outstanding issue must be completed by before being flagged as urgent.
Record Date of Last Audit/Visit	If set to Yes, the site record is updated with the date when the latest audit is completed.
Record Type	Select whether this template is for an audit or a visit.
Scope	This is the summary of the purpose of the audit/visit. This is the default text for the Scope field in the audit/visit.
Score Audit/Visit	If set to Yes, an overall score/grade is required.
Evaluation Type	This is used to determine the type of audit/visit that is scored and potentially included in the integration with Merchandising. Once the template has been made active, the type cannot be changed.
Score Mandatory	If set to Yes, scoring is mandatory when scoring is being used.

Table 7-2 (Cont.) Audit/Visit Template Fields

Field	Description
Supplier Generated	If set to Yes, the supplier can create new audits/visits of this type.

3. In the Auditors subtab, select the certification bodies and internal auditors who are allowed to perform the audit:
 - If All is selected, all defined certification bodies or internal auditors are allowed to perform the audit.
 - If Only Allowable is selected, the list of certification bodies or internal auditors is chosen. Click the icon and select the certification bodies or internal auditors.

Figure 7-25 New Audit Template Auditors Subtab

The screenshot shows the 'New Audit Template' window with the 'Auditors' subtab selected. The 'Details' section contains the following fields:

- Certification Bodies Selectable:** Radio buttons for 'All' (selected) and 'Only Allowable'.
- Allowable Certification Bodies:** A dropdown menu showing '-' and a selection icon.
- Internal Auditors Selectable:** Radio buttons for 'All' (selected) and 'Only Allowable'.
- Auditors Allowed:** A dropdown menu showing '-' and a selection icon.

4. Select the Checklists subtab. Add any checklists to be used for the audit. When an audit/visit is created, if its template has checklists assigned, the checklists are automatically created as Audit/Visit Checklist records for completion during the audit/visit.
5. In the Attachments subtab, attach any documents to the audit.
6. Select the Save action.

Supplier Access to Audits

The table below shows the Supplier user's visibility of, and access to, audits/visits based on the status, whether announced or unannounced, and if generated by the Supplier or the Retailer.

Table 7-3 Supplier Visibility and Access to Audits Based on Status

Status	Supplier Generated	Announced	Supplier Access
Scheduled	Y	Y	Edit
	N	Y	Visible but cannot open record to view details
	Y	N	No visibility
	N	N	No visibility
In Progress	Y	Y	Edit
	N	Y	Visible but cannot open record to view details
	Y	N	No visibility
	N	N	No visibility

Table 7-3 (Cont.) Supplier Visibility and Access to Audits Based on Status

Status	Supplier Generated	Announced	Supplier Access
Not Progressed	Y	Y	Read
	N	Y	Visible but cannot open record to view details
	Y	N	No visibility
	N	N	No visibility

The Announced/Unannounced visibility setting controls whether the Supplier has visibility of an internal audit. If *unannounced* at the above statuses, the audit/visit is hidden from the list views for Supplier users.

If a Supplier creates an audit/visit, its visibility is set to *announced*. Once created, an audit/visit's visibility setting cannot be changed.

Validation in the template prevents an audit being set to being both *supplier generated* and *unannounced*.

Audit/Visit Issue Types

Audit/visit issue types define the types or levels of non-conformance that can be raised against an audit. An audit/visit template may not be edited once it has been made active; to make any changes it must first be deactivated. The Audit/Visit Issue Types page has the following columns:

- Set to Yes if the issue type is active.
- Code for the issue type.
- Description for the issue type in the default language.
- Descriptions for each supported language.

Figure 7-26 Audit/Visit Issue Types Page

Actions		Audit/Visit Issue Types						
Active	Code	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
Yes	CRITICAL	Critical	-	-	Critique	Kritisch	Critico	Critico
Yes	MAJOR	Major	-	-	Majeur	Schwerwiegend	Importante	Mayor
Yes	MINOR	Minor	-	-	Mineur	Minder	Marginale	Menor
Yes	RECOMMENDATION	Recommendation	-	-	Recommandation	Empfehlung	Raccomandazione	Recomendación

To edit the list of issue types, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new issue type, click **Add**. If the issue type should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Auditor Types

Audit types are used to differentiate between individuals (Auditors) and organizations (Certification Bodies). The Auditor Types page has the same format as the Audit/Visit Issue Types page shown in [Figure 7-26](#).

To edit the list of auditor types, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new auditor type, click **Add**. If the auditor type should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Risk Levels

Where used, the levels of risk may be assigned to a site based on the type of product the site produces, for example, High Risk and Low Risk. The levels can be used, based on risk level, to vary the frequency of an audit/visit type per site. The Audit/Visit Risk Levels page has the same format as the Audit/Visit Issue Types page shown in [Figure 7-26](#).

To edit the list of risk levels, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new risk level, click **Add**. If the risk level type should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Scores

Audit/visit scores provide the scoring or grading options for audits, for example, Red and Green. The Audit/Visit Scores page has the same format as the Audit/Visit Issue Types page shown in [Figure 7-26](#).

To edit the list of scores, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new score, click **Add**. If the score should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Standards

Each type of audit can be aligned with a specific standard. The Audit/Visit Standards page has the same format as the Audit/Visit Issue Types page shown in [Figure 7-26](#).

To edit the list of standards, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new standard, click **Add**. If the standard should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Audit/Visit Statuses

Statuses define the names of the stages of the Audit/Visit workflow.

To edit the list of statuses, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

Figure 7-27 Audit/Visit Statuses Page

Actions 				Audit/Visit Statuses			
Status	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
ABANDONED	Abandoned	-	-	Abandonné	Zurückgezogen	Abbandonato	Abandonado
AWAITING AMENDMENT	Awaiting Amendment	-	-	En attente de modification	Warten auf Berichtigung	In attesa di modifica	En espera de modificación
AWAITING CORRECTIVE ACTION	Awaiting Corrective Action	-	-	En attente d'action corrective	Warten auf Abhilfemaßnahme	In attesa di azione correttiva	En espera de acción correctiva
AWAITING SIGN-OFF	Awaiting Sign-Off	-	-	En attente d'autorisation	Warten auf Freigabe	In attesa di approvazione	En espera de aprobación
COMPLETED	Completed	-	-	Terminé	Abgeschlossen	Completato	Completada
FAILED	Failed	-	-	Echoué	Fehlgeschlagen	Non superato	Erróneo
IN PROGRESS	In Progress	-	-	En cours	In Bearbeitung	In corso	En proceso
NOT PROGRESSED	Not Progressed	-	-	Sans progression	Nicht abgeschlossen	Non avanzato	Sin progresar
SCHEDULED	Scheduled	-	-	Programmé	Geplant	Programmato	Programado

Issue Statuses

Issue statuses define the names of the stages of the Issues (non-conformances) workflow. The Issue Statuses page has the same format as the Audit/Visit Statuses page shown in [Figure 7-27](#).

To edit the list of statuses, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

Visit Locations

Only used in visits, the locations are a predefined list of options for specifying where the visit takes place, for example, Head Office or Conference Room. The Visit Locations page has the same format as the Audit/Visit Issue Types page shown in [Figure 7-26](#).

To edit the list of locations, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new location, click **Add**. If the location should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Visit Reasons

Only used in visits, the reasons are a predefined list of options for why the visit takes place, for example, Audit Follow-up or Complaint Investigation. The Visit Reasons page has the same format as the Audit/Visit Issue Types page shown in [Figure 7-26](#).

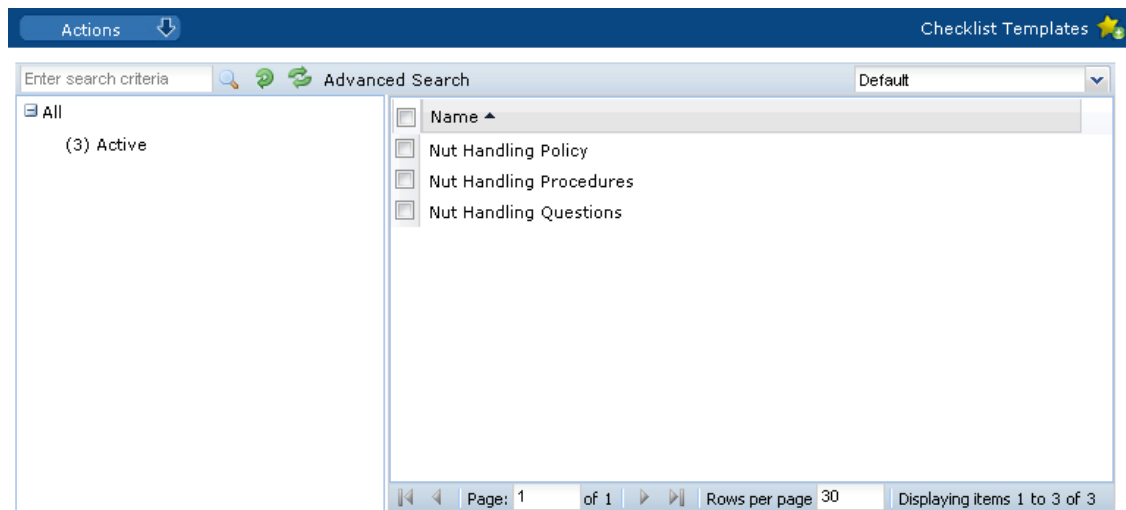
To edit the list of reasons, select the Edit action. The table opens in edit mode. Only the translated descriptions can be edited.

To add a new reason, click **Add**. If the reason should be set active, check the box in the Active column. The code and description in the default language are mandatory fields.

Checklist Templates

A checklist is the breakdown of items to be assessed as part of an audit or visit. The items may correspond to individual clauses in corporate standards or policy documents. A checklist template is the grouping together of checklist questions and their permissible answers to form reusable common questionnaires for completion during an audit.

Figure 7-28 Checklist Templates Page



To edit a template, select the Edit action. The template record opens in edit mode.

To add a new checklist:

1. Select the New Checklist Template action. The New Checklist Template tab opens.

Figure 7-29 New Checklist Template Page

2. In the Details section:
 - Code: A unique Code must be entered when the template is created, after which it is read-only. This field is mandatory.
 - Checklist Name: Enter the name that appear in the audit/visits. The name must be unique. The name is editable after the record has been created. Enter any translations. This field is mandatory.
 - Status: The status is set to Deactivated.
 - General Comments: If set to Yes, a general comments field is included in the checklist.
3. In the Questions section: To add questions, click **Add**. The Select Glossary Questions dialog box appears with the list of available questions. Select questions and then click **Ok**.
4. In the Block Answer Options section: Allow block answers adds an option to the checklist to allow the user to block answer all the questions with the answers specified here, where it is one of the permissible answers for the question. For example, if block answering is set to Not Assessed, all questions in the checklist that have Not Assessed as one of the answer options are answered in that way. The contents of the Allow Block Answer pick-list are dynamically built based on the set of answers associated to the questions present in this checklist. Any duplicates are excluded.
5. Select the Save action.

Checklist Answers

The sets of available checklist answers are managed using this option.

Figure 7-30 Checklist Answers

[Figure 7-31](#) shows an example of checklist answers.

Figure 7-31 Checklist Answers Example

Answer (Default)	Mandatory Comments	N/C Creation	N/C Type	Answer (Australia and New Zealand)	Answer (English (American))	Answer (French)	Answer (German)	Answer (Italian)	Answer (Spanish)
Complies	No	No	-	-	-	-	-	-	-
Critical Non Compliance	Yes	Yes	Critical	-	-	-	-	-	-
Major Non Compliance	Yes	Yes	Major	-	-	-	-	-	-
Minor Non Compliance	Yes	Yes	Minor	-	-	-	-	-	-
Not Applicable	No	No	-	-	-	-	-	-	-
Not Assessed	Yes	No	-	-	-	-	-	-	-

To edit a set of checklist answers, select the entry and then select the Edit action. The template record opens in edit mode.

To add a new set of checklist answers:

1. Select the New Checklist Answer option. The New Glossary/Answers page opens.

Figure 7-32 New Checklist Answer Page

Home Page Admin - Audits & am... ??newGlossaryAnsw...

Actions

Checklist Answers Change History

Details

Code: *

Answer Name (Default): *

Answer Name (Australia and New Zealand):

Answer Name (English (American)):

Answer Name (French):

Answer Name (German):

Answer Name (Italian):

Answer Name (Spanish):

Answer Type: ☒ Single Choice ☐ Multi Choice ☐ Text

Includes Comments: ☐ Yes ☒ No

Comments:

Use Default Answer: ☐ Yes ☒ No

Add 1 Delete Insert Move Up Move Down

	Answer (Default)	N/C Creation	N/C Type	Answer (Australia and New Zealand)
☐	*	☐ Yes ☒ No		

2. In the Details section:

- Code: Enter a unique code for this answer set. This field is mandatory.
- Answer Name: Enter a unique identifier of this answer set in the default language. This field is mandatory. Enter any translations.
- Answer Type: Select the type of answer presented to the user:
 - Single Choice presents a pick-list.
 - Multi Choice presents a multi-select pick-list.
 - Text presents an auto-expanding text area.
- Include Comments: This field determines a comment is required. If the selected answer type is Text, this field is set to No and cannot be changed.
- Comments: Use this field to enter a comment regarding this checklist answer glossary.
- Use Default Answer: If the answer type is Single Choice or Multi Choice, the Use Default Answer option is used to control whether a default value is to be set for this answer when presented in a checklist. If Yes is selected, the Default Answers field presents a checklist of the answers that have been added to the Answers table for one to be selected. If No is selected the selector is hidden.

3. The table of answers defines the answer choices and is only presented if the answer type is Single Choice or Multi Choice. To add answer, click **Add** to add a row to the table:

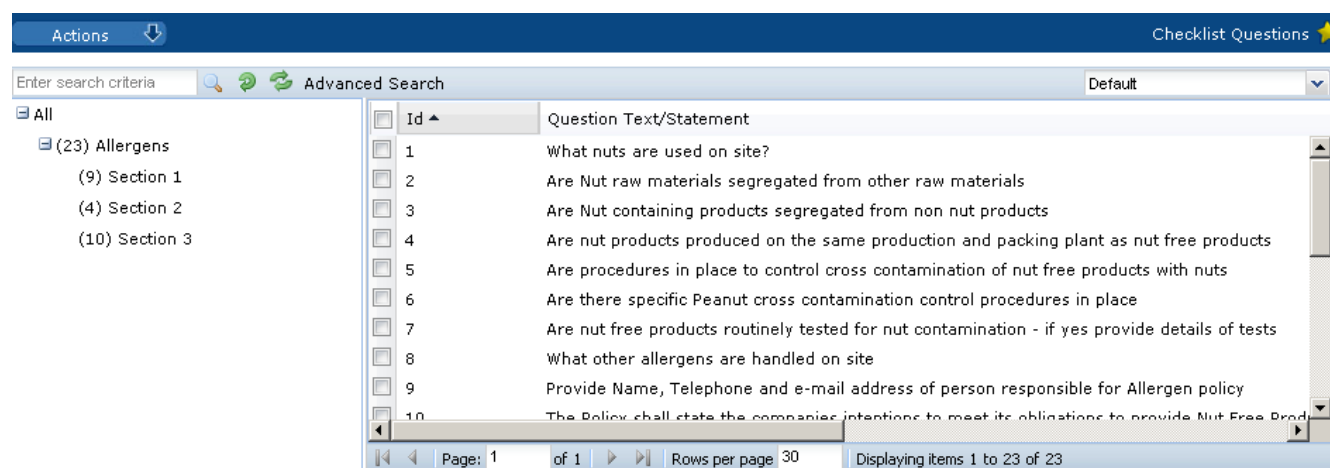
- Enter the answer in the default language. This field is mandatory.

- The N/C Creation field determines whether, when the chosen answer is given to this question, the system should generate an issue for the question.
 - The N/C Type field determines for what issue type an issue is automatically generated. The selection is made from the Issue Types glossary, for example, Critical, Major, Minor, or Recommendation.
 - Enter the descriptions in the supported languages.
4. Select the Save action.

Checklist Questions

The sets of available checklist questions are managed using this option.

Figure 7-33 Checklist Questions



To edit a checklist question, select the entry and then select the Edit action. The question record opens in edit mode.

To add a checklist question:

1. Select the New Checklist Question action. The New Glossary/Question tab opens.

Figure 7-34 New Checklist Question Page

The screenshot shows the 'New Checklist Question Page' in Oracle. The page has a top navigation bar with 'Home Page', 'Admin - Audits & Visits', and '???newGlossaryQues...'. Below is a 'Details' section with tabs for 'Details' and 'Change History'. The 'Details' tab contains fields for 'Id:', 'Audit Type:', 'Answer Type:', 'Section:', 'Question Text/Statement (Default):', 'Question Text/Statement (Australia and New Zealand):', 'Question Text/Statement (English (American)):', 'Question Text/Statement (French):', 'Question Text/Statement (German):', 'Question Text/Statement (Italian):', and 'Question Text/Statement (Spanish):'. There is also a 'Comments:' field. The 'Answers' section is at the bottom.

2. In the Details section:
 - Id: This is a unique identifier of each question. It is automatically assigned as an incrementing sequence number.
 - Audit Type: Select the type of audit associated with this question from the drop-down list. This field is mandatory. A new Audit Type can be created by entering a value into the field rather than selecting from the drop-down list.
 - Answer Type: Select the type of answer associated with this question from the drop-down list. This field is mandatory.
 - Section: Select the section of the questionnaire from the drop-down list. This field is mandatory. A new Section can be created by entering a value into the field rather than selecting from the drop-down list.
 - Question/Text Statement: Enter the question in the default language. This field is mandatory. Enter any translations.
 - Comments: Use this field to enter a comment regarding this checklist question glossary entry.
3. In the Answers section: The table of Answers is automatically built based on the selected answer type. The table is only applicable for Single Choice and Multi Choice answer types. For more information, see [Checklist Answers](#)
4. Select the Save action.

Checklist Question Colour Management

This option is used to define the rules for color-coding within checklists. The system uses this table to apply to present the text in the specific color if it encountered as part of a checklist question.

To edit the list of colors, select the Edit action. The table opens in edit mode. The color and descriptions can be edited.

To add a new color, click **Add**. A row is added to the table. Enter the code, color, and description in the default language. Enter any translations.

Figure 7-35 Checklist Question Colour Management

Actions		Checklist Question Colour Management						
Code	Colour	Description (Default)	Description (Australia and New Zealand)	Description (English (American))	Description (French)	Description (German)	Description (Italian)	Description (Spanish)
PEANUT	Red	Peanut	-	-	-	-	-	-
OTHER	Blue	Other	-	-	-	-	-	-

Checklist Question Colours

This option is used to build the list of colors available for use when defining the color-coding rules.

To edit the list of colors, select the Edit action. The table opens in edit mode. To add a new color, click **Add**.

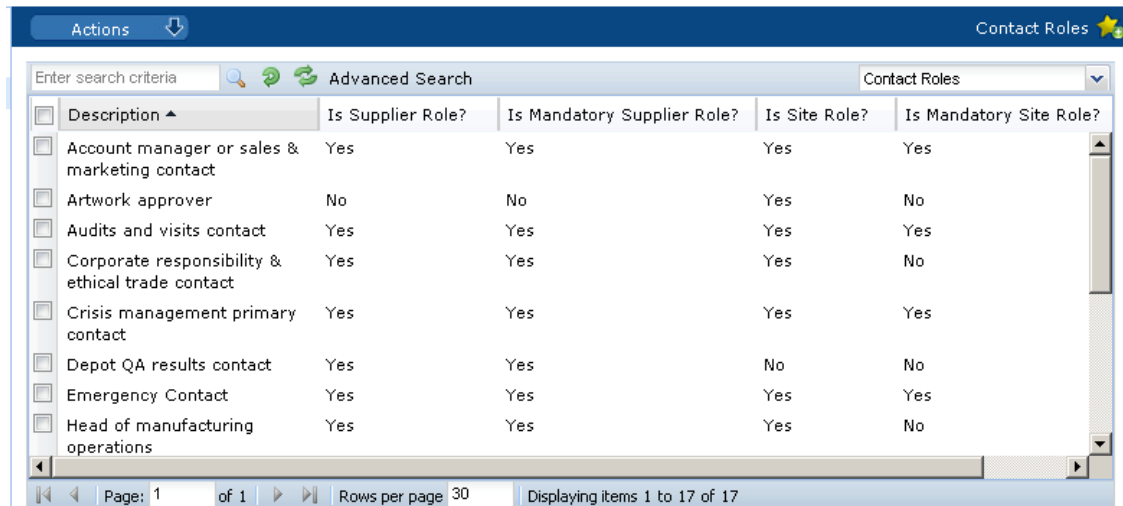
Figure 7-36 Checklist Question Colours

Actions		Checklist Question Colours	
Colour			
Black			
Blue			
Cyan			
DarkGray			
Green			
LightGray			
Magenta			
Orange			
Pink			
Red			
White			
Yellow			

Roles and Permissions

Select the Contact Roles option in the left pane. The Contact Roles page opens.

Figure 7-37 Contact Roles Page



Description	Is Supplier Role?	Is Mandatory Supplier Role?	Is Site Role?	Is Mandatory Site Role?
Account manager or sales & marketing contact	Yes	Yes	Yes	Yes
Artwork approver	No	No	Yes	No
Audits and visits contact	Yes	Yes	Yes	Yes
Corporate responsibility & ethical trade contact	Yes	Yes	Yes	No
Crisis management primary contact	Yes	Yes	Yes	Yes
Depot QA results contact	Yes	Yes	No	No
Emergency Contact	Yes	Yes	Yes	Yes
Head of manufacturing operations	Yes	Yes	Yes	No

The set of contact roles is configurable. Each portal can build their own set of roles that contacts are to be recorded for at the supplier and site levels. The roles may be set as mandatory, in which case, a contact must be assigned to that role for the supplier/site account to be approved.

Some roles are mandatory because they are used by the system to automatically notify the relevant users as part of the system's workflow, for example, an Audits & Visits Main Contact would be notified when an audit requires action.

Where there are mandatory roles that have not been assigned a contact, the supplier/site administrator is alerted through the Urgent Item Manager (UIM) app.

For more information on adding and editing contact roles, see [Managing Contact Roles](#).

Integration with Merchandising

SE and Merchandising will hold corresponding accounts for suppliers and their individual site locations. The accounts will originate in Merchandising, with new accounts and updates being fed to SE through the Merch Supplier API. The synchronization is one-way only: from Merchandising to SE. This will include the automatic creation of the initial supplier user, for them to complete the supplier registration process in SE.

Supplier and Site Integration

The following system parameters must be set in order to enable the Supplier and Site integration:

1. Check *Integration Enabled* is set to enabled/disabled accordingly.
2. Configure the Merch API URL and credentials.

3. Set the *Integration Interval*. Utilize *Do not run Integration before* and *Do not run Integration after* to avoid it running during peak times of the day. The default is to run every 90 minutes.
4. Set the account coding rules for the allocation of Supplier and Site codes.
5. Set the default value for the Technologist. This is the contact that is notified of new Merch sites requiring activation.

The nominated default Technologist is recommended to be a user with appropriate additional Admin permissions, who can assign Sites to the required individual Technologists using Global Changes.

Note

The default Technologist is a regular user account. The client needs to decide what email address they attribute to the retailer user account of the designated default Technologist.

6. Set the default values, first ensuring the value is present in the respective glossary:
 - Business Category
 - Supplier Type
 - Site Type
 - Business Unit
7. Set the Merchandising Invoicing System, first ensuring the value is present in the glossary.
8. Set which user role defines the Supplier Administrator role, used when creating the initial supplier user.
9. Set the Site Status mapping rules:
 - The table will be pre-populated with entries for A=Active and I=Inactive, with Active creating new accounts and Inactive triggering auto de-list in SE.
10. A prerequisite for the integration to succeed will be that the portal be configured so that GLN codes are non-mandatory for suppliers and sites, as the codes are not currently available in the data sent from Merchandising. Validation will reject the creation of a new supplier/site if GLN codes are configured to be mandatory.
11. If the Merchandising supplier and site codes are to also be used as the SE codes, a prerequisite for the integration to succeed will be that the SE supplier and site coding rules be configured in a way that allows for the Merchandising codes being in the range 1 to 9999999999, in particular, the minimum length parameter.
12. Set the *Number of days to keep Outbound Message Queue data* purging interval. The default is 90 days.
13. Set the *External Primary Language* system parameter.
14. Check that the glossaries of Countries in Merchandising and SE correspond. The two character ISO code is used as the key. This mapping is used when populating the Supplier/Site addresses.
15. Configure and additional Regions in the Countries glossary, to match those used in Merchandising. Only UK counties, US states, and CN provinces are added automatically by the data generator.

Inbound Message Queue

If an inbound message fails due to missing or invalid Merchandising data, the message's status will be set to Failure.

If the data is subsequently added or corrected in Merchandising, that maintenance action will trigger a new message, which will be processed by SE separate to the original failed message.

The inbound message queue will automatically retry the original message, however as the message contains a snapshot of the original data, it will continue to fail with the same data exception. The retry does not re-retrieve data from Merchandising, it simply retries the original message.

Messages at Failure status continue to be retried until they are successfully processed or are manually set to Permanent Failure. The purge routine automatically cleans up Permanent Failure messages, but not Failure messages.

While the auto-retry processing will deal with exceptions due to record locks, it will not deal with data exceptions; for these, the administrator must manually set these messages as Permanent Failure, to be removed next time the purge routine runs.

Note

It is not feasible for the system to automatically set the messages to Permanent Failure, as it must cater for the scenario where data subsequently becomes mandatory in SE, but is not available from Merchandising.

Supplier Evaluation Data Integration

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

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

For more information, see the *Oracle Retail Supplier Evaluation Cloud Service Supplier User Guide*.

The following system parameters must be set in order to enable the outbound Supplier Evaluation Data integration:

1. Check Integration Enabled is set to enabled/disabled accordingly.
2. Configure the Merch API URL and credentials.
3. Set the number of messages to be sent per call. The default is 1.
4. Set the Evaluation Types that are to be included in the integration.
5. Set the External Primary Language to correspond with the primary language of the Merchandising system.
6. Set the purging interval. The default is 90 days.

Outbound Message Queue

The outbound messages are managed through the Outbound Message Queue, which is located in the Batch Jobs section of the Admin area.

If a message fails, the message's status will be set to Failure. The outbound message queue will automatically retry the original message. Messages at Failure status continue to be retried until they are successfully processed or are manually set to Permanent Failure. The purge routine automatically cleans up Permanent Failure messages, but not Failure messages.

Supplier Evaluation Scoring

This section provides information on the Scoring glossaries. For information on the system parameters used for scoring, see [System Parameters](#).

- Evaluation Types
- Evaluation Scores
- Entity Scores
- Evaluation Scoring Rules
- Evaluation Site Type Groups
- Review Scores

Evaluation Types

Evaluation scores are calculated for Sites, typically representing the environment, ethical, and governance element. In order to identify which Assessments, Audits, and Documents contribute to the scoring, the Evaluation Type glossary is used. The configured types can then be assigned to the types of record which contribute to the scoring.

The glossary is delivered with predefined entries, but the retailer may maintain it to suit their requirements.

The glossary is accessed by using the Integration & Scoring>Evaluation Types menu option in the Admin area.

The Evaluation Type is also used in the reporting of Supplier Evaluation data; it is used as a report filter and when determining which records are included in the Supplier Evaluation Dashboard.

In a new installation of the SE portal, the following values will be data generated in the Evaluation Types glossary:

- Ethical
- Environmental
- Governance

Evaluation Scores

The Evaluation Scores glossary is used to define the available evaluation scores as a description.

The glossary is accessed through the Integration & Scoring>Evaluation Scores menu option in the Admin area.

Evaluation Scoring Rules

The rules for calculating Evaluation scores for Sites are configurable within the Evaluation Scores glossary. The entries define the scoring rules for each Evaluation Type (a one-to-one relationship, so a single scoring rule per Evaluation Type).

The glossary will be delivered with predefined entries, but the retailer may maintain it to suit their requirements.

The glossary is accessed through the Integration & Scoring>Evaluation Scoring Rules menu option in the Admin area.

The contents are grouped by the following tabs:

- **Details** - identifies the scoring rule and which Evaluation Type it represents.
- **Criteria** - a table for each Evaluation event, with their scores/weighting points. Ensure there are no gaps in the scoring range criteria.
- **Scoring** - a table of the Evaluation scores, their description and optionally a graphic.
- **Change History** - standard Change history logging.

The list view contains columns for Evaluation Type, Description, Code, Version, and Status. The default sequence is ascending Evaluation Type order.

Any changes to the scoring rules are applied by the scoring process the next time it runs.

Entity Scoring Rules

The rules for calculating Entity scores for Sites and Items are configurable within the Entity Scores glossary. The entries define the scoring rules for an overall score based on the site or item's collective Evaluation scores.

The glossary is accessed through the Integration & Scoring>Entity Scoring Rules menu option in the Admin area.

The contents are grouped by the following tabs:

- **Details** - identifies the scoring rule.
- **Criteria** - a table for each Evaluation type, with their scores/weighting points. Ensure there are no gaps in the scoring range criteria.
- **Scoring** - a table of the Entity scores, their description and optionally a graphic.
- **Change History** - standard Change history logging.

The list view contains columns for Description, Code, Version, and Status. The default sequence is ascending Description order.

Any changes to the scoring rules are applied by the scoring process the next time it runs.

Review Scoring Rules

The rules for calculating Review scores for Review Reason folders are configurable within the Review Scores glossary. The entries define the scoring rules for an overall score based on a supplier's sites collective Assessment scores within the folder.

The glossary is accessed through the Integration & Scoring>Review Scoring Rules menu option in the Admin area.

The contents are grouped by the following tabs:

- **Details** - identifies the scoring rule.
- **Criteria** - a table for each Assessment type, with their scores/weighting points. Ensure there are no gaps in the scoring range criteria.
- **Scoring** - a table of the Review scores, their description and optionally a graphic.
- **Change History** - standard Change history logging.

The list view contains columns for Description, Code, Version, and Status. The default sequence is ascending Description order.

Any changes to the scoring rules are applied by the scoring process the next time it runs.

Evaluation Site Types Groups

The Evaluation Site Type Groups glossary is used to combine entries in the existing Site Types glossary, to form logical groupings of Sites. The groupings enable the roll-up scores for Sites with different functional purposes, such as Primary Manufacturing Sites, Supplier Chain Sites, Stores, and do on. The glossary is accessed through the Integration & Scoring>Evaluation Site Type Group menu option in the Admin area.

Review Scores

The Review Scores glossary is used to define the available review scores as a description.

The glossary is accessed through the Integration & Scoring>Review Scores menu option in the Admin area.

System Parameters

To maintain the parameters used to support Supplier, select the System Control option and then System Parameters.

[Table 7-4](#) shows the specific system parameters, by subtab on the System Parameters page, used to support Supplier.

Table 7-4 System Parameters to Support Supplier

Subtab	Parameter	Description
Assessments	Allow creation of Assessments from Assessments list	If checked, assessments can be created from the assessments list views. If not checked, assessments can only be created directly from within a Site record.
Assessments	Grace period	Select if the assessment completion overdue grace period is in days or weeks.
Assessments	Email Agent run on	Controls which days of the week reminder emails are generated for overdue assessments. Specific days can be selected. Buttons are available to select or clear all days.
Assessments	Allow ad hoc (non glossary) questions	If checked, assessment templates have the option to have questions added that do not appear in the questions glossary.
Assessments	Allow removal of universal questions	If checked, whether universal questions may be removed from a assessment template (if not, all universal questions will appear on every assessment type

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description
Audits & Visits	Allow creation of Audits from Audits List	If set to Yes, users may create new audits/visits from within the Audits & Visits area (in which case, they select the supplier and site) as well as through the Site record. If set to No, new audits/visits are created through the Site record (in which case there is no need to select the supplier and site). Default is No.
Audits & Visits	Max Time Spent (hours)	Sets the maximum value a user may record as the time spent on an audit/visit. This prevents excessive time being accidentally entered. Default is 20.
Audits & Visits	Use Risk Levels	Determines whether levels of risk are being assigned to Sites (based on the type of product produced). If set to Yes, a Risk Level classification can be set on the Site record, and the frequency of an audit/visit may be set differently per risk level; thus allowing an audit/visit to be scheduled more (or less) frequently for sites that supply particular types of products. Default is No.
Audits & Visits	Days to show Scheduled in Tasks App	Used to control when Scheduled audits/visits appear in the user's Task App in order to limit the list of audit/visits to just those that will become due in the next 28 days, for example, thereby excluding those that are currently scheduled but not due for a number of months. Default is 28.
Audits & Visits	Edit Score on Completion	If set to Yes, where an audit/visit is scored, the score can be assigned or changed when the audit/visit is completed (through the completion confirmation dialog box). If set to No, any scoring has to be assigned directly within the Audit/Visit record. Default is No.
Audits & Visits	Prompt Supplier to Set to Awaiting Sign Off	If set to Yes, validation is applied to Audits to check if all Issues are Completed, and if so, to prompt the supplier user with an option to set the status to Awaiting Approval, meaning the retailer can then progress the Audit Default is No.

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description
Audits & Visits	Use Issue Type Grouping	If set to Yes, enables the facility for grouping Issue types, for example, to identify those related to Process Controls. If enabled, within the Issue Types glossary entries, an Issue Type Grouping can be selected from the Issue Type Grouping glossary. When an Issue is created for that type of non-conformance, the selected value appears in the Audit Issue. Note: The grouping is not present on the Checklist Audit record, but any Issues created from the Checklist will display the Issue Type Grouping field, based on the value set for that non-conformance type. Default is No.
Audits & Visits	Audit/Visit Due Email Frequency (Days)	Controls the frequency of the Audit/Visit Due email (the number of days since it was previously sent). Default is blank, meaning the email will be sent daily.
Audits & Visits	Audit/Visit Overdue Email Frequency (Days)	Controls the frequency of the Audit/Visit Overdue email (the number of days since it was previously sent). Default is blank, meaning the email will be sent daily.
Audits & Visits	Notify if Site Status	A multi-picklist of Site Statuses, this controls which statuses of site are to have Audit/Visit notification due and overdue notifications. Default is Active and Awaiting Approval. Note: An Audit/Visit notification may still appear in a user's Assignments, but email notifications will not be sent if the Site is not at an applicable status.
Log On	Supplier/Site Details Reminder Frequency (Days)	Controls the frequency of the Supplier/Site Details Reminder Expired email (the number of days since it was previously sent). Default is blank, meaning the email will be sent daily.
Log On	Site Details Update Reminder	Number of working days between a reminder being shown in a user's UIM when a user has logged in. It is used to ensure that Mandatory Contact details are kept up to date on both the supplier and sites. Default is 90 days. When the first supplier user logs in, they see an entry in the UIM drawing their attention to this. If they use the Confirm Details action, this stamps the date onto the record so that the next time a user logs in, the system checks if the current date is greater than the stamped date.
Registration	Notify Lead Technologist	If set to Yes, the Technologist is notified by email when a supplier completes the registration for a site for which they are the Lead Technologist. Default is No.
Registration	Notify Others	User roles, with Role Type equal to Retailer, for which users should be copied on the email sent to a Technologist when a supplier completes registration. For example, it is used to notify Auditors when sites are ready to be audited. Parameter is linked to the user roles.

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description
Registration	Create Initial Audit	If set to Yes, additional fields are made available to allow the user to create the initial audit when a site is approved. Default is No.
Registration	Notify Accounts	If set to Yes, the Account Administrator is automatically notified by email (REG3) that an order has been created when the supplier has completed their part of the registration process (for a standard supplier registration). Default is Yes.
Registration	Create initial assessment	If set to Yes, additional fields are made available to allow the user to create the initial assessment when a site is approved. Default is No.
Registration	Registration Ts & Cs Active	If set to Yes, suppliers are required to accept the portal's terms and conditions during the supplier registration process. Default is Yes. This parameter can only be seen and maintained by users with the Oracle Authorized Administrator authority profile.
Registration	Supplier Code Allocation	If Auto, the system will automatically assign supplier codes to new Suppliers. If Auto/Edit, the system will automatically assign supplier codes, however the auto-allocated code may be manually changed to a unique alternative during the creation process. If Manual, the retailer user must assign a unique supplier code during the creation process. Default is Auto. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Registration	Supplier Code Editable	If checked, the supplier code may be edited in the Supplier record after the account has been created. If Supplier Code Allocation is set to Auto, this parameter is set as unchecked and cannot be changed. Default is unchecked. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Registration	Site Code Allocation	If Auto, the system will automatically assign site codes to new Supplier sites. If Auto/Edit, the system will automatically assign site codes, however the auto-allocated code may be manually changed to a unique alternative during the creation process. If Manual, the retailer user must assign a unique site code during the creation process. Default is Auto. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description
Registration	Site Code Editable	If checked, the site code may be edited in the Site record after the account has been created. If Site Code Allocation is set to Auto, this parameter is set as unchecked and cannot be changed. Default is unchecked. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Registration	Site Code Format	If Numeric, the site coding will follow an incrementing number sequence, starting at 1 for each supplier (with leading zeroes), such as, 0001 > 0002 ... 9999 > 10000 ... If Alpha, the site coding will follow an incrementing alpha code sequence, starting at AAAA for each supplier, such as, AAAA > AAAB ... AAAZ > AABA ... AZZZ > BAAA ... This parameter cannot be changed once the first site has been created. Default is Numeric. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Registration	Prefix Site Code with Supplier Code	If checked, the supplier code is automatically prepended to the site code when creating a Site account, with a hyphen, such as A0001-AAABD. This parameter cannot be changed once the first site has been created. Default is checked. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description								
Registration	Site Code Unique Across Portal	If checked, the system will continue incrementing the site code across the entire portal rather than just within the supplier, to ensure the uniqueness across the portal. For example: If site codes are not required to be unique across the portal, the coding may be:								
		<table><tr><td>Supplier</td><td>Site</td></tr><tr><td>A0001</td><td>0001 or AAAA</td></tr><tr><td>A0001</td><td>0002 or AAAB</td></tr><tr><td>B0001</td><td>0001 or AAAA</td></tr></table>	Supplier	Site	A0001	0001 or AAAA	A0001	0002 or AAAB	B0001	0001 or AAAA
		Supplier	Site							
		A0001	0001 or AAAA							
		A0001	0002 or AAAB							
B0001	0001 or AAAA									
If site codes are required to be unique across the portal, the coding would be:										
<table><tr><td>Supplier</td><td>Site</td></tr><tr><td>A0001</td><td>0001 or AAAA</td></tr><tr><td>A0001</td><td>0002 or AAAB</td></tr><tr><td>B0001</td><td>0003 or AAAC</td></tr></table>	Supplier	Site	A0001	0001 or AAAA	A0001	0002 or AAAB	B0001	0003 or AAAC		
Supplier	Site									
A0001	0001 or AAAA									
A0001	0002 or AAAB									
B0001	0003 or AAAC									
		This parameter cannot be changed once the first site has been created. Default is unchecked. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.								
Registration	Minimum Site Code Length	The minimum number of digits or characters in the site code. This parameter cannot be changed once the first site has been created. Default is 5. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.								
Registration	Registered Company Number Mandatory at Registration	Use this to control whether the Registered Company Number is mandatory or optional when the supplier completes the Registration wizard. Default is checked/Yes (mandatory).								
Registration	Generate Reference Due Emails	If checked, enables email notifications for Site References when they become due. Default is unchecked.								
Registration	Becomes due prior to expiry date (days)	Determines when a Site Reference becomes due based on its expiry date (the number of days prior to the expiry date). Default is blank.								
Registration	Re-send Reference Due email frequency (days)	Controls the frequency of the Reference Due email (the number of days since it was previously sent). Default is blank.								
Registration	Generate Reference Due Assignments	If checked, enables assignment task notifications for Site References when they become due. Default is unchecked.								

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description
Registration	Generate Reference Expired Emails	If checked, enables email notifications for Site References when they expire. Default is unchecked.
Registration	Re-send Reference Expired email frequency (days)	Controls the frequency of the Reference Expired email (the number of days since it was previously sent). Default is blank.
Registration	Generate Reference Expired Assignments	If checked, enables assignment task notifications for Site References when they expire. Default is unchecked.
Registration	Notify if Site Status	A multi-picklist of Site Statuses, this controls which statuses of site are to have Site Reference notifications. Default is Active and Awaiting Approval.
Registration	Notify Lead Technologist by Email	If checked, controls whether the site's Lead Technologist is to be a recipient of Site Reference email notifications. Default is unchecked.
Registration	Notify Lead Technologist by Assignment	If checked, used to control whether the site's Lead Technologist is to be a recipient of Site Reference assignment notifications. Default is unchecked.
Registration	Notify Supplier/Site Contacts by Email	A multi-picklist of mandatory Supplier and Site Contact Roles, this determines the recipients of Site Reference email notifications.
Registration	Notify Supplier/Site Contacts by Assignment	A multi-picklist of mandatory Supplier and Site Contact Roles, this determines the recipients of Site Reference assignment notifications.
Registration	Supplier & Site Local Address Validation	Select if any of the Address fields in the Supplier and Site records are to be mandatory when the supplier confirms their details are up to date. Options are: Country, Address Line 1, Address Line 2, Address Line 3, Address Line 4, Post Code, GPS.
Registration	Registration Supplier & Site Business Language Address Validation	Select if any of the Business Address fields in the Supplier and Site records are to be mandatory when the supplier confirms their details are up to date. Options are: Country, Address Line 1, Address Line 2, Address Line 3, Address Line 4, Post Code.
Registration	Registration Supplier & Site Phone Mandatory	If checked, the Phone field will be mandatory in the Supplier and Site records when the supplier confirms their details are up to date. Default is No.
Supplier Evaluation Scoring	SE Scoring Enabled	Controls whether SE Scoring is Enabled or Disabled. Default is Disabled.
Supplier Evaluation Scoring	Scores Snapshot Interval	Controls whether a snapshot of the scores is taken Daily, Weekly, or Monthly. Default is Monthly.
Supplier Evaluation Scoring	Day of Week	Sets the day of the week when the scores snapshot is taken. Mandatory when Average Scores Calculation Interval is Weekly.
Supplier Evaluation Scoring	Scores Last Snapshot	Date and time a snapshot of the scores was last taken.

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description
Supplier Evaluation Scoring	Full Score Re-Calculation Required	Determines if a full score recalculation is required. Default is No.
Supplier Evaluation Scoring	Average Scores Calculation Interval	Controls whether the average scores are calculated Weekly or Monthly. Default is Monthly.
Supplier Evaluation Scoring	Day of Week	Sets the day of the week when the average scores are calculated. Mandatory when Average Scores Calculation Interval is Weekly.
Supplier Evaluation Scoring	Average Scores Last Calculated	Date and time the average scores were last calculated.
Integration	Integration Enabled	This parameter overrides the individual Integration Enabled system parameters. For each type of integration to be enabled, the relevant individual Integration Enabled parameter must be set to Enabled AND this parameter must be set to Enabled. This overall parameter allows the integration to be disabled without having to change the settings of the individual parameters - for example to temporarily pause all integration. If set to Enabled, the individual parameters must each be manually enabled, as required (setting to Enabled does not automatically set the individual parameters to Enabled). When set to Disabled the individual Integration Enabled parameters are set to Disabled and cannot be enabled.
Integration	Integration Interval (mins)	Sets the integer number of minutes used to control how frequently the integration runs (if it is enabled). For example, a value of 1 will run every minute; 60 will run hourly; 1440 will run once daily. If not set, or zero, the integration will not run. Default is 90 minutes.
Integration	Do not run Integration before	Used to limit the times that the integration routine will execute the integration processing. Sets the time that the integration will not run before. The job will still run on interval, but will check whether it is within the available run window before commencing processing, otherwise it will stop and schedule again for the next interval.
Integration	Do not run Integration after	Used to limit the times that the integration routine will execute the integration processing. Sets the time that the integration will not run after. The job will still run on interval, but will check whether it is within the available run window before commencing processing, otherwise it will stop and schedule again for the next interval.
Integration	API URL	Set the URL to the Merch Supplier API called by the integration job.

Table 7-4 (Cont.) System Parameters to Support Supplier

Subtab	Parameter	Description
Supplier and Site Integration (Inbound)	Integration Enabled	Controls whether the integration process is active. This can be used to temporarily disable integration without having to change other parameters. If Enabled, other parameters must also be set for the integration to succeed. Default is Disabled. Is overridden by the overall Integration Enabled parameter
Supplier and Site Integration (Inbound)	Last Run	Date and time that the last integration was run.
Supplier and Site Integration (Inbound)	Messages per Call	Defines the maximum number of messages to be retrieved per call from Merchandising. The default is derived from the Messages per Call environment variable (Static Settings). Recommended setting is 100. Must be greater than zero. This parameter is mandatory.
Supplier and Site Integration (Inbound)	Invoicing System	Identifies the entry in the Supplier and Site records' Billing Details table that holds the fields relating to Merchandising integration. This parameter is mandatory for integration to be enabled, and cannot be changed once integration has occurred that is, at least one Site has a Merch key) in which case it becomes read only
Supplier and Site Integration (Inbound)	Supplier Administrator Role	Defines the role equates to the SUPPLIER ADMINISTRATOR role used when creating an initial supplier user.
Supplier and Site Integration (Inbound)	Default Technologist	Sets the default value for the Technologist role when creating a new Site record using the integration.
Supplier and Site Integration (Inbound)	Default Supplier Type	Sets the default value for the Supplier Type when creating a new Supplier record using the integration.
Supplier and Site Integration (Inbound)	Default Site Type	Sets the default value for the Site Type when creating a new Site record using the integration.
Supplier and Site Integration (Inbound)	Default Business Category	Sets the default value for the Business Category when creating a new Site record using the integration.
Supplier and Site Integration (Inbound)	MFCS Active Description	Holds the description of the Merchandising Active status shown in SE.
Supplier and Site Integration (Inbound)	MFCS Inactive Description	Holds the description of the Merchandising Inactive status shown in SE.

Table 7-4 System Parameters to Support Supplier

Subtab	Parameter	Description
Supplier and Site Integration (Inbound)	Auto Create for Active MFCS Status	If checked, sites with Active status in Merchandising are automatically created in SE.
Supplier and Site Integration (Inbound)	Auto Delist for Inactive MFCS Status	If checked, sites with Inactive status in Merchandising are automatically delisted in SE.
Supplier and Site Integration (Inbound)	Number of days to keep Inbound Message Queue data	Controls the auto-purging of the Inbound Message Queue. If blank, no purging occurs; a setting of zero indicates immediate purging. The default is 90 days.
Supplier and Site Integration (Outbound)	Integration Enabled	Controls whether the integration process is active. This can be used to temporarily disable integration without having to change other parameters. If Enabled, other parameters must also be set for the integration to succeed. Default is Disabled. Is overridden by the overall Integration Enabled parameter.
Supplier and Site Integration (Outbound)	Last Run	Date and time that the last integration was run.
Supplier and Site Integration (Outbound)	Messages per Call	Defines the number of messages to be sent per call to Merchandising. The default is derived from the Messages per Call environment variable (Static Settings). Recommended setting is 1. Must be greater than zero. This parameter is mandatory.
Supplier and Site Integration (Outbound)	External Primary Language	Defines the corresponding primary language of the Merchandising system.
Supplier and Site Integration (Outbound)	Evaluation Types	Sets the Evaluation Types that are to be included in the integration.
Supplier and Site Integration (Outbound)	Number of days to keep Outbound Message Queue data	Controls the auto-purging of the Outbound Message Queue. If blank, no purging occurs; a setting of zero indicates immediate purging. The default is 90 days.
Urgent Items	Show Alert Items	If set to Yes, Alert KPIs are shown in the UIM. Default is Yes.
Urgent Items	No. Days Before Alert Response is overdue	Number of days before this KPI is shown. Default is two days.
Urgent Items	Show assessments	If set to Yes, assessments are shown in the UIM. Default is Yes.
Urgent Items	Assessment Overdue Off-set days	Number of days before an overdue assessment is shown. Default is two days.

8

Product Administration

The following topics are covered in this chapter:

- [Item Assessments](#)
- [Item Evaluation Scoring](#)
- [Global Glossaries](#)
- [Business Category Configuration](#)
- [System Parameters](#)

Item Assessments

Select the Assessments option from the Admin drop-down list.

See the [Assessments](#) section in the [Supplier Administration](#) chapter for details of the following glossaries:

- Assessment Questions
- Assessment Templates
- Assessment Status
- Assessment Picklists
- Selection Status

Integration with Merchandising

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

Note

The framework for item evaluation data integration with Oracle Retail Merchandising Foundation Cloud Service (MFCS) exists in preparation for the actual integration process being introduced in a future release.

SE and Merchandising can hold corresponding item/product records. The items will originate in Merchandising, with new items and updates being fed to SE through the Merch Item API. The synchronization is one-way only: from Merchandising to SE. A corresponding Product Record is created in SE.

Item Integration

The following system parameters must be set in order to enable the inbound Item integration:

1. Check *Integration Enabled* is set to enabled/disabled accordingly.

2. Set the number of messages to be sent per call.
3. Set the Integration System, first ensuring the value is present in the glossary.
4. Set the MFCS Item Level to be retrieved (Style or SKU).
5. Set the default value for the Specification Type.
6. Set the *Number of days to keep Outbound Message Queue data* purging interval. The default is 90 days.
7. If it does not already exist, create a Retailer User with the name *TBC*. This is used as a default if a Technologist or other contact cannot be derived when creating a Product Record through integration.
8. Consider whether Product Records represent a single or multiple variants before enabling the integration. The recommended and default method is *single variant*, where the Allow Creation of Multiple Productssystem parameter is No. This means a Product Record represents a single variant of a product, and the item integration will create a separate Product Record for each item variant. The setting cannot be changed once the first Product Record has been created.
9. A prerequisite for the inbound item integration to succeed is that the MFCS Supplier & Site inbound integration is enable, in order to synchronize details of the suppliers of the items.

The inbound Item integration utilizes the **Inbound Message Queue**, as per the inbound Supplier and Site Integration, see [Supplier Administration](#).

Item Evaluation Data Integration

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

For more information, see the *Oracle Retail Supplier Evaluation Cloud Service Product User Guide*.

The following system parameters must be set in order to enable the Supplier and Site integration:

1. Check that *Integration Enabled* is set to enabled/disabled accordingly.
2. Configure the Merch API URL and credentials.
3. Set the number of messages to be sent per call. The default is 1.
4. Set the Evaluation Types that are to be included in the integration.
5. Set the External Primary Language to correspond with the primary language of the Merchandising system.
6. Set the purging interval. The default is 90 days.

Outbound Message Queue

The outbound messages are managed through the Outbound Message Queue, which is located in the Batch Jobs section of the Admin area.

If a message fails, the message's status will be set to Failure. The outbound message queue will automatically retry the original message. Messages at Failure status continue to be retried until they are successfully processed or are manually set to Permanent Failure. The purge routine automatically cleans up Permanent Failure messages, but not Failure messages.

Item Evaluation Scoring

This section provides information on the Integration and Scoring glossaries. For information on the system parameters used for scoring, see [System Parameters](#).

See the [Supplier Evaluation Scoring](#) section for details of the following glossaries:

- Evaluation Types
- Evaluation Scores
- Entity Scores
- Review Scores
- Evaluation Scoring Rules
- Evaluation Site Type Group
- Review Scores

Global Glossaries

The Global Glossaries define the keywords and order of those keywords in pick-lists available for selection throughout Product.

Simple keyword glossaries are maintained through a list of the single values, plus their translations. The more complex glossaries, that combine multiple fields are maintained as individual records presented in a list view. If translations are provided for a glossary, pick-list options are presented to the user in the user's language. If no translation is present for that language, the options are shown in the portal's base language.

To access Global Glossaries, select Products from the Admin drop-down list. The Admin - Products tab opens.

Business Category Configuration

This configuration controls the number of levels that can be maintained within the actual glossary of Business Categories. The glossary is maintained under the Suppliers & Sites Admin option. For more information on that option, see [Business Categories](#).

To configure the Business Categories used within Product, select the System Control option and then select Business Category Configuration in the left panel. The Business Category Configuration page opens.

Figure 8-1 Business Category Configuration Page

Site Selection Level	Depth	Label	Show level in myProduct views	Use level in Scorecards	Use level in Product Record
☐	1	Category	☒	☒	☒
☒	2	Sub Category	☒	☒	☒
☐	3	Sub-sub Category	☒	☐	☒

Add Row Remove Row

To change the configuration, select the Edit action. The page is changed to edit mode. The labels and the number of rows can be changed. To select a category level to be shown in the Product views, check the box for that level. The maximum number of levels is five.

The Use level in Product Record radio button controls the number of levels of business category used within the Product Record.

System Parameters

To maintain the parameters used to support Product, select the System Control option and then System Parameters.

The following table shows the specific system parameters, by subtab on the System Parameters page, used to support Product

Subtab	Parameter	Description
Products	Notify Supplier on Product Creation	If Yes, generate an email for the supplier when a product is created. Default is Yes.
Products	Notify Retailer on Product Creation	If Yes, generate an email for the retailer when a product is created. Default is Yes.
Products	Show Codes in Product Record	If set to Yes, the EAN/Barcode and Shipping Case code fields are present in the Product Record. If set to No, they are hidden. Default is No.
Products	Allow Creation of multiple Products	Allows multiple products to be associated to a single Product Record. Default is off (single product per Product Record). This is locked once the first Product Record is created. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Products	Show Lead Business Category in Product Record	If set on, the system will show a Lead Business category field in the Product Record, and relabel the Business Category field to Other Business Category. This approach is also taken in the Site record. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Subtab	Parameter	Description
Products	Barcode Regular Expression Validation	Validation rule for Barcodes. The default is: <code>(^[0-9]{8})\$ (^([0-9]{13})\$)</code> Validation is applied to ensure the entered value is a valid regular expression. If a value is present, validation is applied to Barcodes in the Product Record. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Products	Validate Bar Code Check Digit	A checkbox which defaults to checked, that is, On.
Products	Validate Shipping Case Code Check Digit	A checkbox which defaults to checked, that is, On.
Products	Supplier Can Edit Benchmark	If No, only retailer users can edit the Benchmark fields on Product Records. If Yes, both retailer and supplier users can edit the Benchmark fields on Product Records. Default is No.
Products	Show Alt. Product No. in Product Record and Specification	If set to Yes, the Alt. Product No. field will be enabled within the Product Record, which is typically used to hold an alternative product identifier such as a GTIN code. Default is No. If enabled and subsequently disabled, any values previously saved in the fields are retained; if then re-enabled, the values will then reappear. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Products	Show Division in Product Record and Specification	If checked, the Division field will be enabled within the Product Record, which is typically used to provide an additional categorization of the product by selecting from a glossary of Division. Default is No. If enabled and subsequently disabled, any values previously saved in the fields are retained; if then re-enabled, the values will then reappear. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Subtab	Parameter	Description
Products	Use Product Codes Table	If set, the Product Codes table appears in the Product Record for maintenance of cross-reference codes of the product in external systems. Default is off. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Global	Show Business Language Fields	If set to Yes, the system does the following: • Adds Prod Title in Business Language to Product Record. • Adds Supplier and Site Name in Business Language to Registration Wizard. • Adds extra text to email templates. • Adds Name in Business Language to Supplier and Site records. • Shows two addresses in the address component. Default is No.
Global	Background Polling Interval (ms)	This is the time in milliseconds which the system will use to poll to the server to check for updates. May be set to greater than 500, however the default of 500 is the recommended setting. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Global	Portal Code	The portal's identifier. If the allocation of Supplier and Site account codes is configured to include a prefix, the portal code is used as the prefix. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Subtab	Parameter	Description
Global	Use Alternative Code for Product API	Use this to enable a facility that provides a means of cross-referencing supplier codes when creating or updating Product Records using the Product Inbound API. This feature is of use where the external system does not hold the ORBC supplier codes. Options are Yes and No. Default is Yes (enabled). If enabled, it allows alternative supplier codes to be added to the Invoicing Information table in the Supplier record; when transactions are submitted to the API, if the Supplier record cannot be located using the ORBC supplier code, a secondary lookup is performed to locate the Supplier record using the alternative codes. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Global	Allow Duplicate Product Codes for Product API	Use this to control whether multiple Product Records can have the same product identifier when submitted using the Product Inbound API. Options are Yes and No. Default is Yes (enabled). If enabled, when Product Records are created using the API, the same Retailer Product Number may be present on multiple Product Records (as long as the supplier is different); otherwise the API will validate that the Retailer Product Number is unique across all suppliers. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Global	Automatically Archive Products when Site set to end-of-life status/Specs de-listed	Enables a process to automatically archive Product Records when their Site is set to the <i>end of life</i> status (as defined by the Site End-of-life Status parameter). Default is off. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Subtab	Parameter	Description
Global	Automatically set Audits to Not Progressed when Site set to end-of-life status	Enables a process to automatically set Audits to Not Progressed status when their Site is set to the <i>end of life</i> status (as defined by the Site End-of-life Status parameter). Default is off. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Global	Automatically set Site(s) to end-of-life status when last Product/ Specification de-listed	Enables a process to automatically set Sites to the <i>end of life</i> status (as defined by the Preferred Site End-of-life Status parameter) when their last Product Record is de-listed or archived. Default is off. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Global	Site End-of-life Status	Defines the <i>end of life</i> status to be used by the processes which automatically set the status of associated records when the Site is set to this status. Multiple values can be selected. The options are: De-listed, Unapproved; Inactive. Default is De-listed. Changing the selection has no effect on any records that have already been processed by the automated processes. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.
Global	Preferred Site End-of-Life Status	Defines the <i>end of life</i> status to be used by the process which automatically sets the status of the Site to this status when the associated records have been de-listed or archived. A single value can be selected. The options are: De-listed, Unapproved; Inactive. Default is De-listed. Note: This parameter can only be seen and maintained by a user with the Oracle Authorized Administrator authority profile.

Subtab	Parameter	Description
Global	Process & Activity Brief Extract Limit	Can be used to override the 800 default of the number Processes that can be included in a single extract, up to maximum of 5000. The system parameter is applicable only to the Process & Activity Brief Extract, which is managed through the report schedule, and not the separate Process and Activity Brief extracts from list views.
Assessments	Grace period	Select if the assessment completion overdue grace period is in days or weeks.
Assessments	Email Agent run on	Controls which days of the week reminder emails are generated for overdue assessments. Specific days can be selected. Buttons are available to select or clear all days.
Assessments	Allow ad hoc (non glossary) questions	If checked, assessment templates have the option to have questions added that do not appear in the questions glossary.
Assessments	Allow removal of universal questions	If checked, whether universal questions may be removed from an assessment template (if not, all universal questions will appear on every assessment type).
Item Evaluation Scoring	IE Scoring Enabled	Controls whether Item Evaluation scoring is Enabled or Disabled. Default is Disabled.
Item Evaluation Scoring	Scores Snapshot Interval	Controls whether a snapshot of the scores is taken Daily, Weekly, or Monthly. Default is Monthly.
Item Evaluation Scoring	Day of Week	Sets the day of the week when the scores snapshot is taken. Mandatory when Scores Snapshot Interval is Weekly.
Item Evaluation Scoring	Full Score Re-Calculation	Shows if a full score recalculation is pending for each Evaluation Type. Click the Submit button to schedule a recalculation.
Review Scoring	Review Scoring Enabled	Controls whether Review scoring is Enabled or Disabled. Default is Disabled.
Review Scoring	Scores Snapshot Interval	Controls whether a snapshot of the scores is taken Daily, Weekly, or Monthly. Default is Monthly.
Review Scoring	Day of Week	Sets the day of the week when the scores snapshot is taken. Mandatory when Scores Snapshot Interval is Weekly.

Subtab	Parameter	Description
Review Scoring	Full Score Re-Calculation Pending	Shows if a full score recalculation is pending. Click the Submit button to schedule a recalculation.
Item Integration (Outbound)	Messages per Call	Defines the number of messages to be sent per call to Merchandising. The default is 1. Must be greater than zero. This parameter is mandatory.
Item Integration (Outbound)	External Primary Language	Defines the corresponding primary language of the Merchandising system.
Item Integration (Outbound)	Evaluation Types	Sets the Evaluation Types that are to be included in the integration.
Item Integration (Outbound)	Number of days to keep Outbound Message Queue data	Controls the auto-purging of the Outbound Message Queue. If blank, no purging occurs; a setting of zero indicates immediate purging. The default is 90 days.
Item Integration (Outbound)	Integration System	Identifies the entry in the Product Record's Product Codes table that holds the fields relating to Merchandising integration.

Retailer users with the Oracle Authorized Administrator authority profile will see a Settings parameters tab. This tab displays core parameters, what their purpose is, which area of the system they are used in, and what value they are set to.

Note

These parameters are read only; they cannot be edited.

Subtab	Parameter	Description
Products	Product Record Other User Roles	Enables additional user roles to be used within a Product Record. Default is Buyer, Product Development Manager.
Products	Product Record Technologist List Config	The List Configs used to show the names in the Technologist selector.
Supplier	Supplier Linking Enabled	If switched on, a Supplier Linking page will be shown in the Supplier record. Default is off.

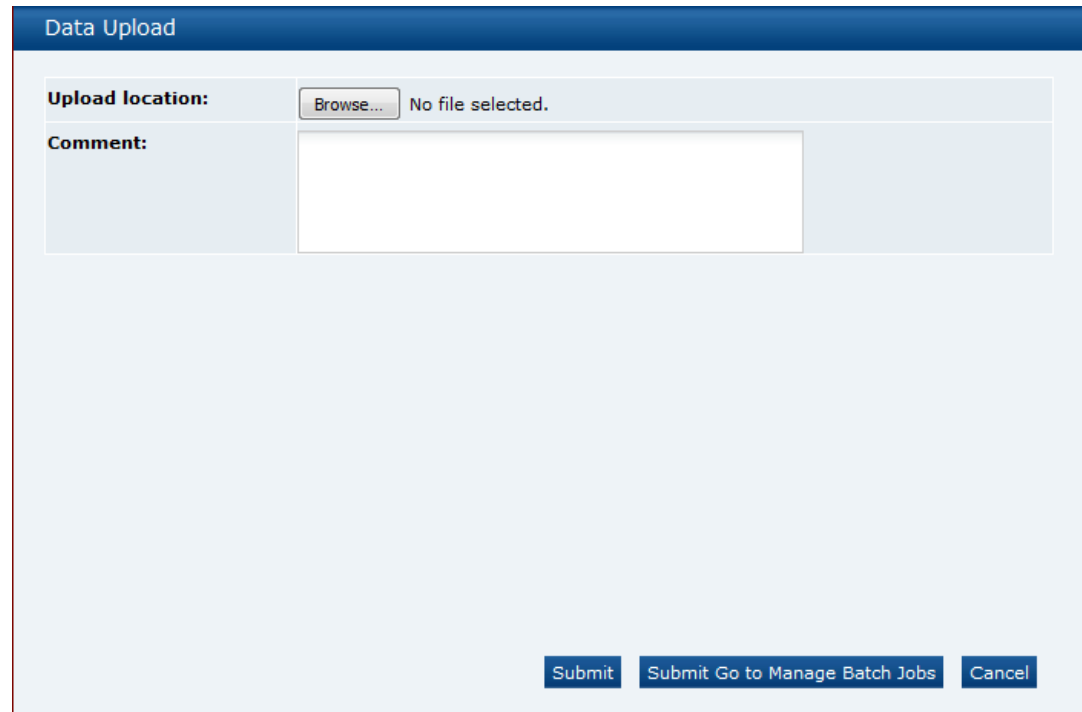
Upload Product Record Data

Retailer users with the Upload Administrator authority profile have access to the Import option in the Products list view Actions menu.

To upload new Product Records:

1. Select the Import option in the left hand pane. The Data Upload dialog box opens.

Figure 8-2 Data Upload Dialog Box



The screenshot shows a 'Data Upload' dialog box. It has a title bar with the text 'Data Upload'. Inside the dialog, there are two main sections. The first section is labeled 'Upload location:' and contains a 'Browse...' button and the text 'No file selected.'. The second section is labeled 'Comment:' and contains a large text area for entering comments. At the bottom right of the dialog, there are three buttons: 'Submit', 'Submit Go to Manage Batch Jobs', and 'Cancel'.

2. Click Browse to search for the upload file.
3. Enter any comments to describe the reason for the upload.
4. To upload the file, select either the **Submit** or **Submit Go to Manage Batch Jobs** action. At this point the system will create a background job to process the spreadsheet. The spreadsheet used to upload the data will be stored within the Attachments tab of the batch job.

Note

An email will be sent to the job submitter if the data within the upload file fails validation.

Download Product Record Upload Spreadsheet

Retailer users with the Upload Administrator authority profile also have access to the option to download a blank spreadsheet.

To download the latest version of the upload spreadsheet:

1. Select the Download Blank Spreadsheet action from the Product Records View actions menu. An operating system specific dialog box opens with the option to either open or save the file.

2. Select the save option to download the ZIP file to your desktop.

Note

The ZIP file contains a spreadsheet workbook with the first tab used to upload the data. The second tab contains guidance notes and the remaining tabs contain the valid glossary values.

The column heading text shown on the first tab is in the user's language. If translations are not present for the user's language, the system the portal's default language is substituted. An asterisk (*) is shown in a column heading if an entry is mandatory.

9

Process Administration

Administration activities are performed by the Process Administrator and Process Manager.

Process Administrator Authority Profile

This Authority Profile can be assigned to Retailer users who need to have the ability to configure Process, End Process, and Activity templates and the associated administration options:

- View what has been set up for Process, such as, templates, teams, and pick list values.
- Create, amend, or delete Processes, Activities, and Briefs.
- Schedule process.
- Unlink records from a process.
- Access and maintain the system calendar.
- Access the Global Changes option in order to reassign the process manager for a process. Mass changes to process managers and users can be made using the Change Process Manager and Change Process User Names Global Changes options.

Process Manager Authority Profile

This Authority Profile can be assigned to users who need to be able to create process and edit schedules:

- View what has been set up for Process, such as, templates, teams, and pick list values.
- Create, edit, or delete Process, Activities, and Briefs.
- Schedule process.
- Unlink records from a process.

To access the administration options for Process, select the Process Management Admin option. The Admin - Process Management tab opens. In the left pane, select an option and a page opens for that option. For more information on each option, see the following topics in this chapter:

- [Process Folders](#)
- [Activity Status](#)
- [Activity Sub-Status](#)
- [Activity Type](#)
- [Activity Template](#)
- [Brief Templates](#)
- [Process Status](#)
- [Process Type](#)
- [Process Template](#)
- [Team](#)

Process Folders

This list of folders is used in the Process and Activity templates to allow lists to be filtered when selecting templates to be used in Processes or templates. To edit the list of folders, select the Edit action. The page opens in edit mode. From this page, you can update the translations, add a folder, or delete an existing folder.

Figure 9-1 Process Folders Page

Actions		Process Folders					
Code	Folder name (Default)	Folder name (Australia and New Zealand)	Folder name (English (American))	Folder name (French)	Folder name (German)	Folder name (Italian)	Folder name (Spanish)
REVIEW	Review	-	-	-	-	-	-
MARKETING	Marketing	-	-	-	-	-	-
DEVELOPMENT	Development	-	-	-	-	-	-
SELECTION_&_LAUNCH	Selection & launch	-	-	-	-	-	-
TOP_LINE	Top line	-	-	-	-	-	-

Activity Status

The list of activity statuses is defined by the system. The Status ID and default status description cannot be changed. To edit any of the translated descriptions, select the Edit action. The page opens in edit mode.

Figure 9-2 Activity Status Page

Actions		Activity Status					
Status Id	Status (Default)	Status (Australia and New Zealand)	Status (English (American))	Status (French)	Status (German)	Status (Italian)	Status (Spanish)
NOT STARTED	Not Started	-	-	-	-	-	-
STARTED	Started	-	-	-	-	-	-
COMPLETED	Completed	-	-	-	-	-	-
APPROVAL REQUIRED	Approval Required	-	-	-	-	-	-

Activity Sub-Status

Activity Sub-Status is a configurable list of sub-status codes that may be used as a secondary, but separate field option, to the system workflow status. The Activity Sub Status page has the same format as the Activity Status page shown in [Figure 9-2](#).

To edit the sub-statuses, select the Edit action. The page opens in edit mode. From this page, you can update translations for the sub-status codes, add a new sub-status, or delete an existing sub-status.

Note

The general sub-statuses for COMPLETED, MESSAGE SENT, MESSAGE ACCEPTED, and MESSAGE FAILED must be configured. If these sub-statuses are not present, integration with the Artwork module will fail.

Activity Type

An activity is a defined task or link. Activities can be used to link to other elements within the system and can be auto-completed using the status changes of linked elements. Activity Type names appear in the Activity Type pick-list on the Activity Template record.

The Activity Type page lists the defined Activity Type names and record numbers. To edit an existing activity type, select the activity type and then select the Edit action. A tab opens in edit mode.

To create a new activity type:

1. Select the New action. The New Activity Type tab opens.

Figure 9-3 New Activity Type Page

2. Enter the Activity Type name in the default language. This field is mandatory. Enter any translations.
3. In the Status Change Details section, select the record type from the drop-down list.
4. In the Status Change Details section, select the states that trigger the activity to be set to Started or Completed. Whenever the status of a record that has been linked to the activity changes, the system checks for the selected states. If there is a match, it changes the

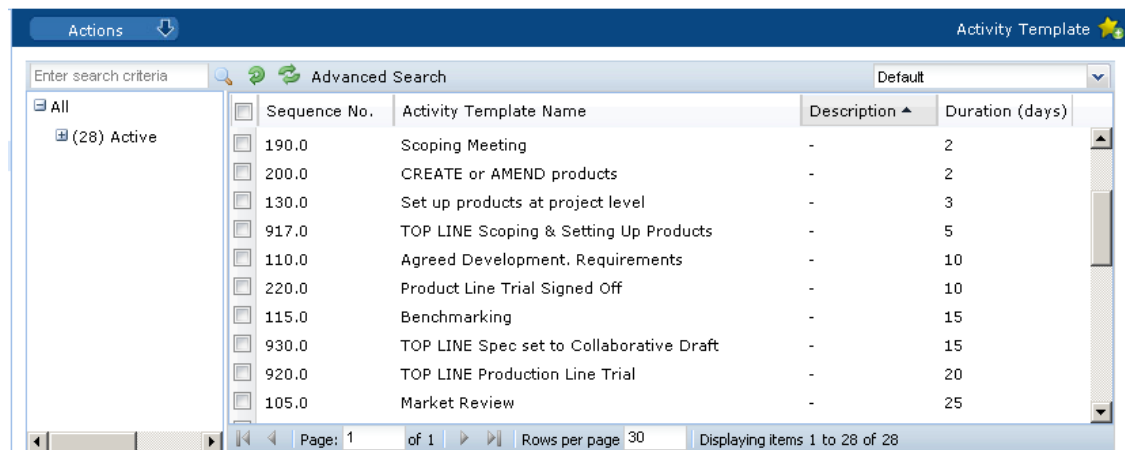
activity's status. Where the status selected in both fields matches the record's state, the system changes the Activities status to Completed. These fields are mandatory:

- To select the triggers for Started status, click the icon. The Select Started Statuses dialog box appears. Select the statuses and then click **Ok**.
 - To select the triggers for Completed status, click the icon. The Select Completed Statuses dialog box appears. Select the statuses and then click **Ok**.
5. Enter a code and comments. These fields are not mandatory.
 6. In the Attachments tab, add attachments to the activity type.
 7. Select the Save action.

Activity Template

Templates for activities can be created and then assigned to Process Templates. These are single elements which can form part of the critical path or run in parallel to the main time-line. The Activity Template page shows the list of defined activity templates. For each activity, the sequence number, name, description, and duration in days are shown.

Figure 9-4 Activity Template Page



Sequence No.	Activity Template Name	Description	Duration (days)
190.0	Scoping Meeting	-	2
200.0	CREATE or AMEND products	-	2
130.0	Set up products at project level	-	3
917.0	TOP LINE Scoping & Setting Up Products	-	5
110.0	Agreed Development. Requirements	-	10
220.0	Product Line Trial Signed Off	-	10
115.0	Benchmarking	-	15
930.0	TOP LINE Spec set to Collaborative Draft	-	15
920.0	TOP LINE Production Line Trial	-	20
105.0	Market Review	-	25

To edit an existing template, select the template and then select the Edit action. A tab opens in edit mode.

To create a new Activity Template:

1. Select the New action. The New Activity Template page opens.

Figure 9-5 New Activity Template Page

New Activity Template

Activity Template Details | Email Rules | Attachments

Details

Activity Template Name (Default): *

Activity Template Name (Australia and New Zealand):

Activity Template Name (English (American)):

Activity Template Name (French):

Activity Template Name (German):

Activity Template Name (Italian):

Activity Template Name (Spanish):

Status: Draft Sub Status: -

Sequence No.: *

Folder: -

Checkpoint Only: ☐ Yes ☐ No Critical Path?: ☐ Yes ☐ No *

Duration (days): *

Is this a Key: ☐ Yes ☐ No Is this a Gate: ☐ Yes ☐ No

Activity Type: v

Brief Template: -

Use myArtwork: ☐ Yes ☒ No

Roles

Owner: -

Responsible: - *

Viewer: -

External Role: v

2. In the Details section:

- Activity Template Name: Enter the template name for the default language. This is a mandatory field. Enter any translations.
- Status: The status is set to Draft.
- Sub Status: Select the icon. Select the allowed sub-status in the Select Allowable Sub-Statuses dialog box and click **Ok**.
- Sequence No: Enter a sequence number. This field is mandatory.
- Folder: Select the icon. Select the folder in the Select Folder dialog box and click **Ok**. This field is mandatory.
- Checkpoint Only: Check whether this template is only for checkpoint activities.
- Critical Path: Check whether this template is for critical path activities. This field is mandatory.
- Duration (days): Enter the duration in number of days. This field is mandatory.
- Is this a Key: Check if this is a key activity.
- Is this a Gate: Check if this is a gate activity. If Yes is selected, the Gate Type field appears. Select whether the gate type is Auto Complete or Approval Required.

- Activity Type: Select the activity type associated with this template from the drop-down list.
 - Brief Template: Select the icon. Select the Brief Template that provides the questions for this activity in the Select Brief Template dialog box and click **Ok**.
 - Use Artwork: Select whether the Artwork module is used.
3. In the Roles section, select the Owner, Responsible, and Viewer roles from the list of portal owner roles. Responsible is a mandatory field. The options for External Role are Supplier Responsible and Supplier Viewer.
 4. In the Email Rules subtab, the rules used to trigger email are listed.
 5. In the Attachments tab, add attachments to the template.
 6. Select the Save action.

Brief Templates

A Brief is a questionnaire which is completed as part of an activity by either the portal owner or the supplier. A Brief Template pulls together the sections, questions, and answers and defines the order in which these appear on the screen. To edit an existing template, select the template and then select the Edit action. A tab opens in edit mode.

To create a new template:

1. Select the New action. The New Brief Template tab opens.

Figure 9-6 New Brief Template Page

The screenshot shows the 'New Brief Template' page with the 'Details' subtab selected. The page has a top navigation bar with 'Actions' and a dropdown arrow. Below this are three tabs: 'Brief Template Details', 'Sections', and 'Questions'. The 'Details' subtab is expanded, showing a form with the following fields:

- Brief Template Name (Default):** A text input field with a red asterisk indicating it is mandatory.
- Brief Template Name (Australia and New Zealand):** A text input field.
- Brief Template Name (English (American)):** A text input field.
- Brief Template Name (French):** A text input field.
- Brief Template Name (German):** A text input field.
- Brief Template Name (Italian):** A text input field.
- Brief Template Name (Spanish):** A text input field.
- Status:** A dropdown menu currently set to 'Draft'.
- Description:** A large text area for entering a description.

2. In the Brief Template Details subtab:
 - Enter the template name for the default language. This is a mandatory field. Enter any translations.
 - The status of the template is set to Draft.

- Enter a description. This is not a mandatory field.
- 3. In the Sections subtab, to add a section to the Brief, select **Add** and enter the description and any translations. You can define multiple sections.
- 4. In the Questions subtab, you can define questions for each section:
 - a. Select the type of answer from the drop-down list.
 - b. To select the possible answers, click the icon in the Answers column. The Select Allowable Answers dialog box opens. Enter the answers and click **Ok**.
 - c. Enter the question in the default language. This is a mandatory field. Enter any translations.
 - d. To see what the questions will look like on a screen, select **Preview**. This displays a preview of the questions for that section.

Figure 9-7 New Brief Template Questions Page

The screenshot displays the 'Questions' subtab for 'Section A'. At the top, there are tabs for 'Brief Template Details', 'Sections', and 'Questions'. Below the tabs, a toolbar contains buttons: 'Reorder', 'Add' (with a count of 1), 'Delete', 'Insert', 'Move Up', 'Move Down', 'Copy Row', 'Copy Table', 'Paste', and 'Preview'. The main table has the following structure:

	Move to	Type	Answers	Question (Default)	Question (Aus)
☐	1	CheckBox		What quantities can you produce?	

Below the table, the 'Preview' section shows the rendered question: '1. What quantities can you produce?' with three radio button options: 'Small', 'Medium', and 'Large'.

5. Select the Save action.

Process Status

The list of process statuses is defined by the system. The Process Status page has the same format as the Activity Status page shown in [Figure 9-2](#). The Status ID and default status description cannot be changed. To edit any of the translated descriptions, select the Edit action. The page opens in edit mode.

Process Type

Process Type is a configurable list of process type codes. The Process Type page has the same format as the Activity Status page shown in [Figure 9-2](#).

To edit the process types, select the Edit action. The page opens in edit mode. From this page, you can update translations for the codes, add a new process type, or delete an existing process type.

Process Template

A Process Template is used to define a set of activities and associated roles so that different processes and process schedules can be configured. It contains general process information, process details, key personnel involved, and activities. The Process Template page lists the available templates and the folder for each. To edit an existing template, select the template and then select the Edit action. A tab opens in edit mode.

To create a new process template:

1. Select the New action. The New Process Template opens.

Figure 9-8 New Process Template Page

The screenshot shows the 'New Process Template' page. At the top, there is a blue bar with the 'Actions' menu. Below this, there are four tabs: 'Process Template Details', 'Activities', 'Briefs', and 'Attachments'. The 'Process Template Details' tab is selected, and within it, the 'Details' subtab is active. The form contains the following fields:

- Process Template Name:** A text field with a default value and a red asterisk indicating it is mandatory.
- Process Template Name (Australia and New Zealand):** A text field.
- Process Template Name (English (American)):** A text field.
- Process Template Name (French):** A text field.
- Process Template Name (German):** A text field.
- Process Template Name (Italian):** A text field.
- Process Template Name (Spanish):** A text field.
- Status:** A dropdown menu set to 'Draft'.
- Folder:** A dropdown menu set to '-' with a red asterisk indicating it is mandatory.
- Description:** A large text area.
- Template Type:** Radio buttons for 'Process' and 'End Process', with a red asterisk indicating it is mandatory.
- Master Process:** Radio buttons for 'Yes' and 'No'.
- Comments:** A large text area.

2. In the Process Template Details subtab:
 - **Process Template Name:** Enter the name of the process template in the default language. This field is mandatory. Enter the translations for any supported languages.
 - **Status:** The status of the template is set to Draft.
 - **Folder:** Select the icon. Select the folder in the Select Folder dialog box and click **Ok**. This field is mandatory.
 - **Description:** Enter a description. This field is not mandatory.
 - **Template Type:** Select the template type. This field is mandatory.

- Master Process: Select whether this template is for a master process. If set to Yes, these template can be used to identify processes in the following records of the system:
 - The initial or the start process in a hierarchy.
 - As an indicator to export to third-party systems, for example, Artwork.
 - The initial process which can be the top level process for reports.
 - Comments: Enter any comments. This fields is not mandatory.
3. In the Activities subtab, add the activities to the template. Select the Add action. The Select Activity dialog box opens. Choose the activities and click **Ok**.
 4. In the Briefs subtab, select the Brief templates to be added to this Process Template.
 5. In the Attachments tab, add attachments to the template.
 6. Select the Save action.

Team

Team administration can help a Process Manager by populating and adding users to roles which then populate the roles listed in an activity. On the Team page, the list of teams and roles associated with each team are shown. To edit an existing team, select the team and then select the Edit action. To create a new team:

1. Select the New action. The New Team tab opens.

Figure 9-9 New Team Page

Team Details	
Details	
Team Name (Default):	
Team Name (Australia and New Zealand):	
Team Name (English (American)):	
Team Name (French):	
Team Name (German):	
Team Name (Italian):	
Team Name (Spanish):	

Add Delete Insert Move Up Move Down

User Roles	Users
☐ System Administrator	-
☐ Product Technologist	-

2. Team Name: Enter the team name for the default language. This is a mandatory field. You can also define the translated team names.
3. User Roles: This field is mandatory. To add a role to the team:

- a. Select **Add**. The Select User Role dialog box appears.
 - b. Select the roles and click **Ok**.
 - c. To add users for a role, select the icon. The Select Users dialog box. Select the specific users for the team and click **Ok**.
4. Select the Save action.

System Parameters

To maintain the parameters used to support Process, select the System Control option and then System Parameters.

[Table 9-1](#) shows the specific system parameters, by subtab on the System Parameters page, used to support Process.

Table 9-1 System Parameters to Support Process

Subtab	Parameter	Description
Urgent Items	Show Process Activities	If set to Yes, Process activities are shown in the UIM. Default is Yes.
Process	Hide Activities Already Linked option when linking records to Processes	Use this to set the default value of this field when linking records to Processes. Default is unchecked.
Global	Process & Activity Brief Extract Limit	Can be used to override the 800 default of the number Processes that can be included in a single extract, up to maximum of 5000. The system parameter is applicable only to the Process & Activity Brief Extract, which is managed through the report schedule, and not the separate Process and Activity Brief extracts from list views.

Email Templates

The email templates used to notify users as processes and activities they are associated with progress through their workflow stages are:

- Activity Status Change email template (PROJECT1)
- Activity Notification email (PROJECT2)

The contents of the emails can be amended by the administrator in the Notifications / Email Templates page in Admin area.

The following parameters are also available for use in the Process email templates:

- \$supplier_name - The name of the supplier, in the business language.
- \$supplier_local_name - The name of the supplier, in the local language.
- \$site_names - The names of the sites, in the business language.
- \$site_local_names - The names of the sites, in the local language.
- \$showInternationalNames - Whether international names are used.
- \$project_id - The id of the process.
- \$recipients - The list of recipients.

- \$recipients.personName - The names of the recipients.
- \$recipients.email - The email addresses of the recipients.

[Table 9-2](#) shows an example of the parameters being used in the email template.

Table 9-2 Usage of Parameters in Process Emails

Example Use in Template	Example Output in Email
Status: \$activity_status	Status: Started
Use international names: \$showInternationalNames	Use international names: true
Supplier Name: \$supplier_name	Supplier Name: ABC Supplies Ltd.
Supplier Name Local: \$supplier_local_name	Supplier Name Local: ABC Supplies Ltd.
Site Names: \$site_names	Site Names: ABC Nottingham, ABC Leicester
Site Names Local: \$site_local_names	Site Names Local: ABC Nottingham, ABC Leicester
Process ID: \$project_id	Process ID: PR000009
Recipients: #foreach(\$recipient in \$recipients) \$recipient.personName (\$recipient.email) #end	Recipients: John Smith (john.smith@example.com) Joe Bloggs (joe.bloggs@example.com) Joan Doe (joan.doe@example.com)

10

Library Administration

Users with the Library Administration authority profile use Library to manage the library structure and publish documents to the user base. Access to documents can be managed based on internal retailer users and external supplier users. The logging and tracking of user readership is also available.

To access Library, select Library on the main navigation bar. The list of published documents that can be accessed by the user is shown. [Figure 10-1](#) shows an example of this page.

Figure 10-1 Library Tab

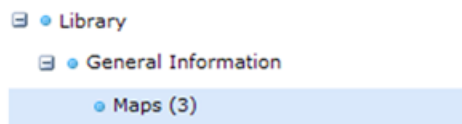


Document Folder Pane

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

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

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



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

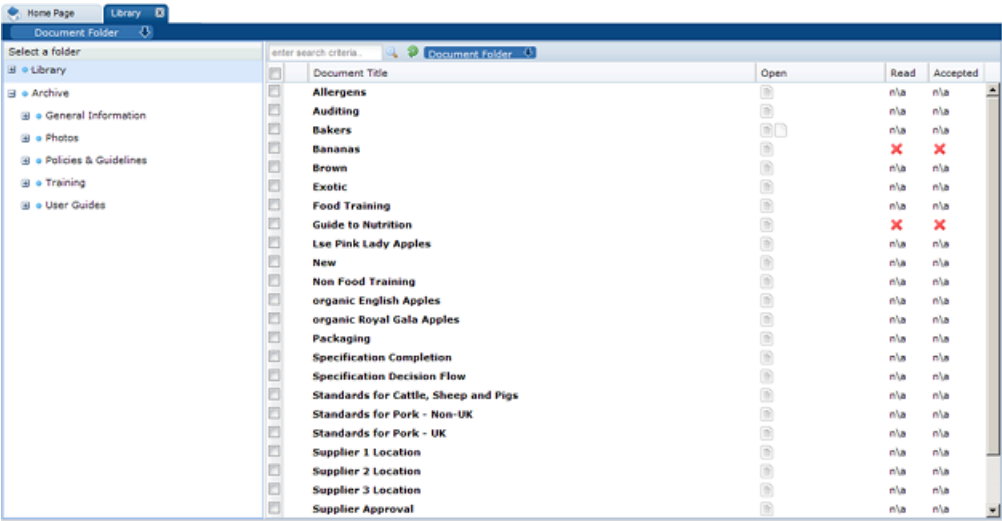
Permissions

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

Locating a Document

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

Figure 10-2 Folder Content Display



[Table 10-1](#) describes the columns displayed for the selected folder.

Table 10-1 Columns Displayed for a Selected Folder

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

Table 10-1 (Cont.) Columns Displayed for a Selected Folder

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

The following actions are available in this pane:

- Mark as read
- Mark as accepted

Managing Folders

The actions for managing folders are available to users with the Library Administrator authority profile. A hierarchy of folders can be formed by selecting an existing folder and creating a new folder beneath it.

This section covers the following actions available to manage folders:

- [Creating a Folder](#)
- [Editing a Folder](#)
- [Deleting a Folder](#)
- [Managing Archive Folders](#)

Creating a Folder

To create a new folder:

1. Select a folder in the left pane and select the New Folder action. A dialog box appears for entering the folder names.

Figure 10-3 New Folder Dialog Box


The dialog box has a title bar that says "Please enter a folder name". On the left, there is a help icon (a question mark in a circle). The main area contains a list of language options, each with a corresponding text input field to its right. The languages listed are: Default, Australia and New Zealand, English (American), French, German, Italian, and Spanish. Each input field has a small vertical scrollbar on its right side. At the bottom right of the dialog box are two buttons: "Ok" and "Cancel".

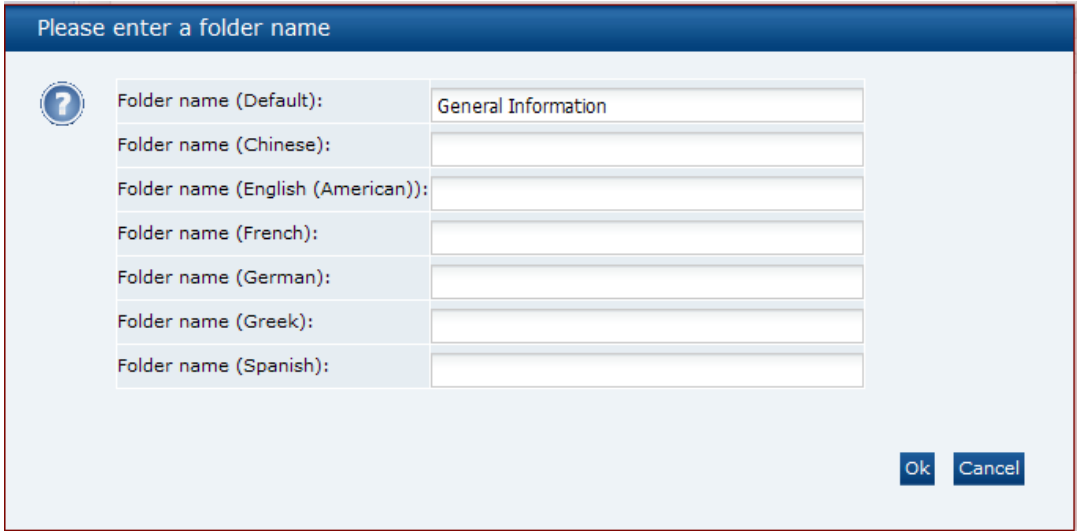
Language	Folder name input field
Folder name (Default):	
Folder name (Australia and New Zealand):	
Folder name (English (American)):	
Folder name (French):	
Folder name (German):	
Folder name (Italian):	
Folder name (Spanish):	

2. Enter a folder name in any of the languages as needed. Select **Ok**.
If there are no errors, the folder is created in the Archive area.
3. If a folder name is entered for the Default language and that folder name is not unique, the Cannot Save Folder dialog box appears. Select **Ok** in the dialog box and reenter the folder name for the Default language.
If there are no errors, the folder is created in the Archive area.

Editing a Folder

To edit a folder:

1. Select a folder in the left pane and select the Edit Folder action. A dialog box appears for changing the folder names.

Figure 10-4 Edit Folder Dialog Box


The dialog box has a title bar that says "Please enter a folder name". On the left, there is a help icon (a question mark in a circle). The main area contains a list of language options, each with a corresponding text input field to its right. The languages listed are: Default, Chinese, English (American), French, German, Greek, and Spanish. The "Default" language's input field contains the text "General Information". Each input field has a small vertical scrollbar on its right side. At the bottom right of the dialog box are two buttons: "Ok" and "Cancel".

Language	Folder name input field
Folder name (Default):	General Information
Folder name (Chinese):	
Folder name (English (American)):	
Folder name (French):	
Folder name (German):	
Folder name (Greek):	
Folder name (Spanish):	

2. Enter any changes. Select **Ok**.

If there are no errors, the folder names are updated.

3. If a folder name is not unique, the Cannot Save Folder dialog box appears. Select **Ok** in the dialog box and reenter the folder name.

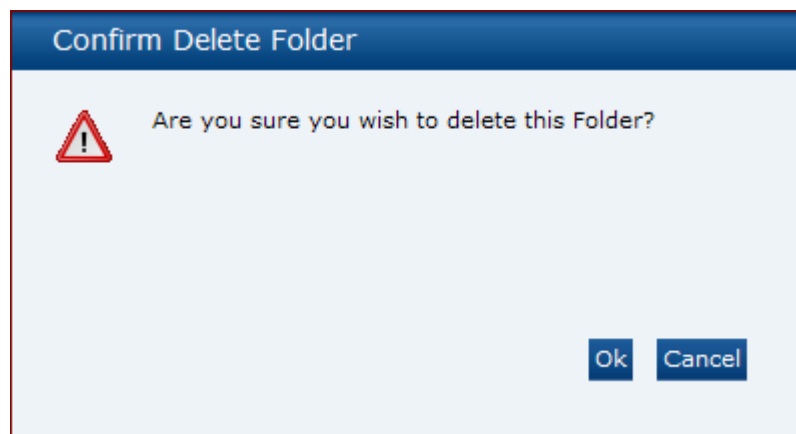
If there are no errors, the folder names are updated.

Deleting a Folder

A folder can only be deleted if it does not contain any documents. To delete a folder:

1. Select the folder in the left pane and select the Delete Folder action. The Confirm Delete Folder dialog box appears.

Figure 10-5 Delete Folder Dialog Box

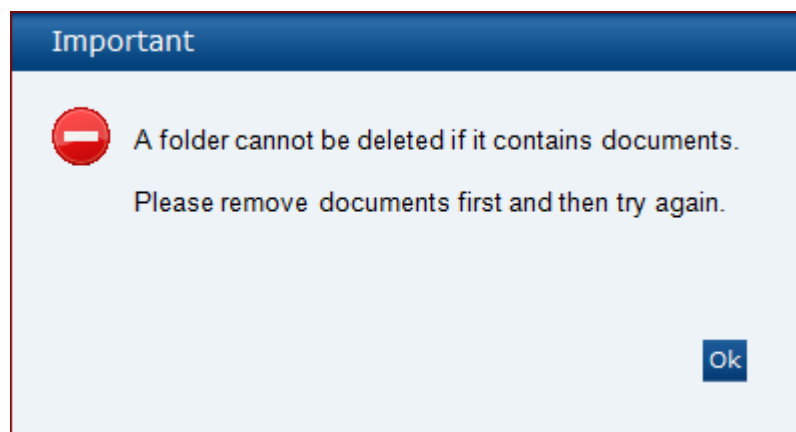


2. To delete the folder, select **Ok**.

If there are no errors, the folder is deleted.

3. If the folder contains documents, the following dialog box appears. Select **Ok** in the dialog box. Remove the documents and then try to delete the folder again.

Figure 10-6 Cannot Delete Folder Dialog Box



Managing Archive Folders

The archive area is only visible to Library Administrators. It is shown at the same level, but beneath the root node. For an example, see [Figure 10-1](#).

The folder structure of the Archive area mirrors that of the Library area above it. Documents that have been set as archived are no longer visible to the general user, but remain accessible through this area. If an archived document is then un-archived, it reappears in the Library area within its original file structure.

The Read and Accept document actions are not available from this area. The option to delete a folder in the archive area is only available if the folder contains no documents.

Managing Documents

This section covers the following operations available to manage documents:

- [Creating a New Document](#)
- [Copying a Document](#)
- [Deleting a Document](#)
- [Archiving a Document](#)

Creating a New Document

To create a new document, select a folder in the archive area and select the New Document action. The New Document tab opens.

Figure 10-7 New Document Tab

Home Page Library New Document

Actions

Document Details More Details Attachments

Details

Title (Default):

Title (Spanish):

Summary (Default):

Summary (Spanish):

Document Folders: Training

Published: ☐

Date Published: -

Available to Suppliers: ☐

Archived: ☐

Code: 8e1bcbec-95d1-41a4-b4c8-3b39d0e180c2

Evaluation Type:

Logging Details

Document Mandatory: ☐

Log readership?: ☐

Log acceptance?: ☐

Internal readers

Choose to restrict to particular job roles or individual - if none selected then all internal users with access to the library can read the document.

User Role(s): -

[Table 10-2](#) describes the fields for this tab.

Table 10-2 Fields in the New Document Tab

Field	Description
Title	The completion of the Title in the default language is mandatory in order to save the document. The document title can be added for the other supported languages so that users logged in with an alternative language can see documents in their own language.
Document Folders	This shows where this document is to appear and is used to assign the document to one or more folders within the library.
Published	This controls if the document can be seen by non-administration users.
Date Published	The date the document was published.
Available to Suppliers	This controls if the document can be seen by supplier (External) users. This field is only available to users with the Library Administrator profile authority. For more information, see Available to Suppliers Field .
Archived	This is used to archive the document when required. If this is checked, the document moves to the archive area and vice versa.
Code	A unique system-generated code to identify the document.
Evaluation Type	This is used to determine the type of documents that are scored and potentially included in the integration with Merchandising.

Table 10-2 (Cont.) Fields in the New Document Tab

Field	Description
Logging Details	If Document Mandatory is checked: - Log Readership is checked and greyed out. - A Read By field becomes visible to enable the user to enter a date by which the document is to be read. If required, this is used by the Urgent Items Manager (UIM). For information on the UIM, see <i>Oracle Retail Supplier Evaluation Cloud Service User Guide</i>. If Document Mandatory is not checked: - Log Readership will not be greyed out and remains checked. - The Read By field is no longer visible. To log that users are to read this document, check Log Readership. To log that users are to accept this document, check Log Acceptance. Documents are only shown as mandatory for external users. Documents can be set as mandatory for specific external users by assigning contact roles. This field is only available to users with the Library Administrator profile authority.
Internal Readers	This controls if all internal readers can see and read this document. This field is only available to users with the Library Administrator profile authority. For more information, see Internal Readers Field.

Available to Suppliers Field

If this field is checked, the following field becomes available:

Figure 10-8 External Readers Field

External readers

Choose to restrict to particular sites - if none selected then all external users with access to the library can read the document. Only documents flagged for 'Available to Suppliers' are accessible to external readers.

Sites: - ...

The Sites field is used to target the visibility of the document to specific sites. This is done using the Select Sites dialog box.

Figure 10-9 Select Sites Dialog Box

Select Sites

Search

Category

Business categories

- ☒ Ambient
 - Bakery
 - Biscuits Cereal & Cake
 - BWS**
 - Canned Goods/Preservatives
 - Confectionery
 - Crisps & Snacks
 - Frozen
 - Hot Beverages
- ☒ Non Food
 - Uncategorised

Available

☐ Site name	Code	Supplier name
☐ C3-0014	Bread Company	Bread Company
☐ C3-0053	Roll Company	Roll Company
☐ C3-0054	Green Company	Green Company

Selected

☒ Site name	Code	Supplier name
---	------	---------------

Ok Cancel

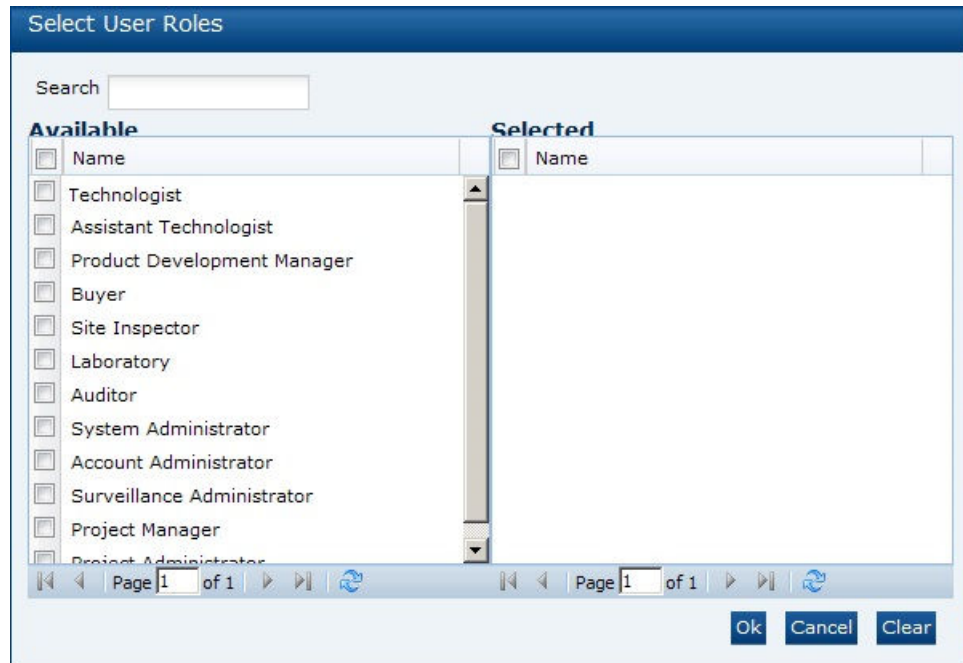
Any sites that have not been assigned a Business Category can be found by selecting Uncategorised shown at the bottom of the Category pane. Sites can be identified using the business categories shown in that pane. If there are no sites selected, all sites have visibility to the document.

Internal Readers Field

Internal readers can be assigned based on user roles or users.

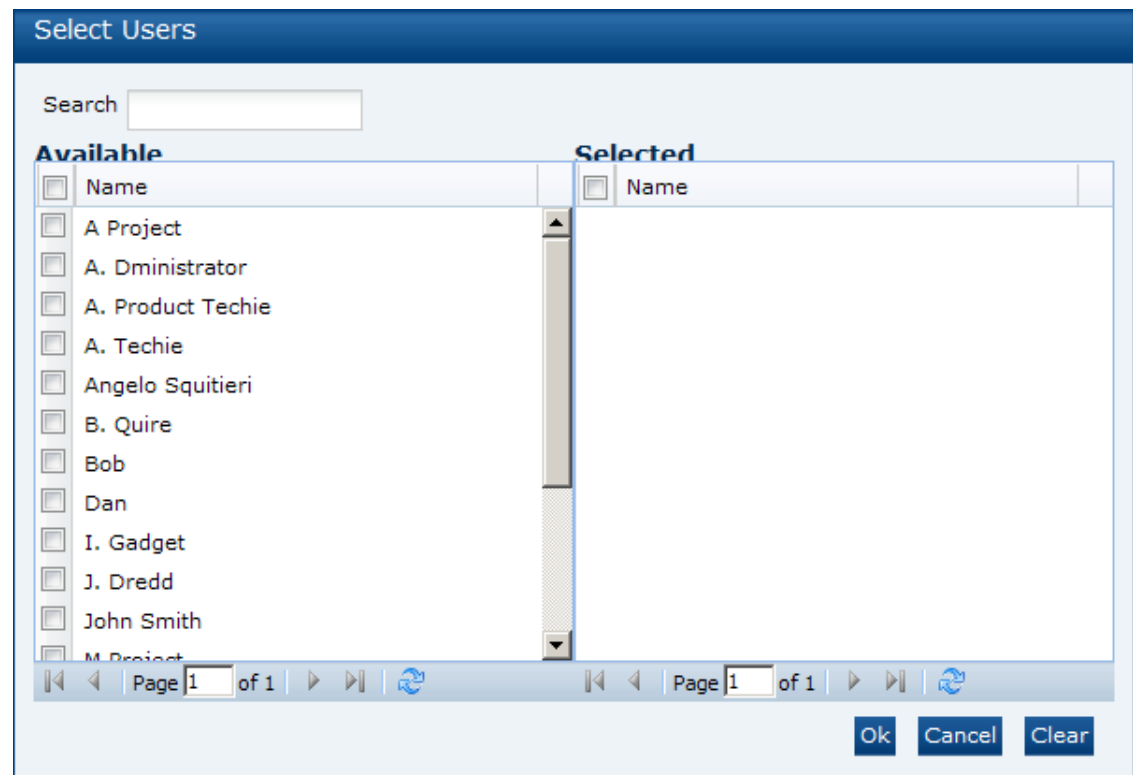
User Roles can be specified if the document is targeted to users with a particular user role. If none are selected, all internal users are able to read and see the document. The Select User Roles dialog box is used.

Figure 10-10 Select User Roles Dialog Box



Users can be specified if the document is targeted to specific internal users. If none are selected, all internal users are able to read and see the document. The Select Users dialog box is used.

Figure 10-11 Select Users Dialog Box



Attachments

The Attachment Manager component is used to upload the actual documents as file attachments.

Figure 10-12 Attachments



Copying a Document

To create a copy of a document in the selected folder, select the Copy action. The Copy Document dialog box appears. Select **Ok**. A copy of the document is created:

- The whole record is copied, except attachments and readership logs.
- The words, Copy of, are added to the document title.
- The copied document appears in the same folder.

Deleting a Document

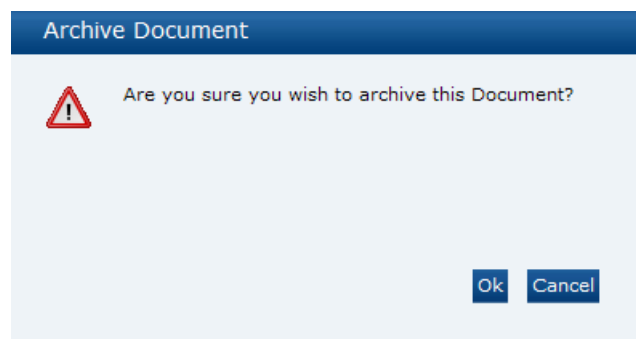
A document can be deleted if it does not contain any readership log details, other than the record of which users have opened it, or has been archived. To delete a document, select the Delete action. The Delete Document dialog box appears. Select **Ok**. The document is deleted:

- The document is physically deleted.
- If there are no more documents left in the folder, the folder is no longer visible within the main library for non-Library Administrator users.

Archiving a Document

To archive a document, select the Archive action. The Archive Document dialog box appears.

Figure 10-13 Archive Document Dialog Box



Select **Ok**. The document is archived:

- The document is no longer be visible in the main library.
- The document is visible in the same folder location within the archive area.
- If there are no more documents left in the folder, the folder is no longer visible within the main library for non-Library Administrator users.

Translating Folders and Documents

The Document Administrator has the ability to create translations for folders and documents in the document library to the supported languages.

Translating Folders

The folder title and subject fields can be translated. Translations can be added when creating or editing a folder. For more information, see [Creating a Folder](#) and [Editing a Folder](#).

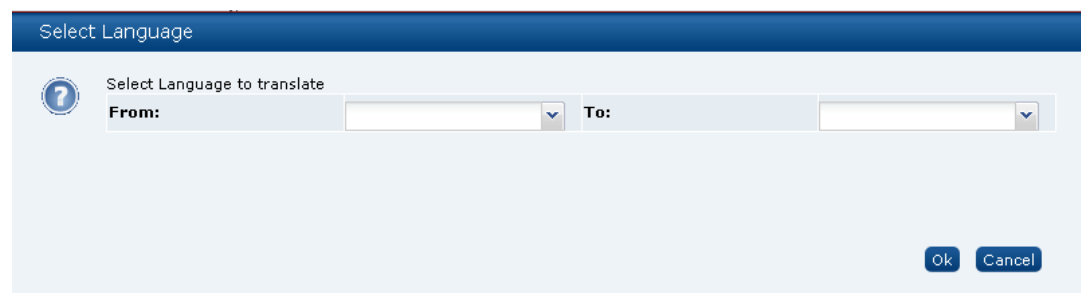
Translations for folders and documents can also be entered directly when the record is being edited.

Translating Documents

Users with the Library Administrator authority profile can add translations for documents. To add a translation to a document:

1. Open the document in Read mode. Select the Translate action. The Select Language dialog box appears.

Figure 10-14 Select Language Dialog Box



The screenshot shows a dialog box titled "Select Language". Inside the dialog, there is a question mark icon and the text "Select Language to translate". Below this, there are two dropdown menus labeled "From:" and "To:". At the bottom right of the dialog, there are two buttons: "Ok" and "Cancel".

2. Select the languages from the drop-down list and select **Ok**. The document details appear. The file is open in Edit mode. The fields for Title and Summary appear for each selected language.

Figure 10-15 Document Details for Translation

Home Page | Admin - System Con... | Library | Non Food Training

Actions | Document Header

Document Details | Change History | Attachments

Details

Title (Default):	Non Food Training	Summary (Default):
Title (French):		Summary (French):
Title (German):		Summary (German):

Document Folders:

Published: ☒

Training / Non Food

3. Enter the translations for the Title and Summary fields. Select **Ok** when completed.

Viewing Translations

The View Translations action is used to see all the translations for a document. This action is available to all users.

To see the available translations for a document, open the document in Read mode and select the View Translation action. The translation details appear.

Figure 10-16 View Translations

Home Page | Company Users | Library | Guide to Nutrition

Actions | Document Header

Details | Reader log | Accept Log | Change History

Details

Document title (Default):	Guide to Nutrition
Document title (Chinese):	-
Document title (English (American)):	-
Document title (French):	-
Document title (German):	-
Document title (Greek):	-
Document title (Spanish):	-
Summary (Default):	-
Summary (Chinese):	-
Summary (English (American)):	-
Summary (French):	-
Summary (German):	-
Summary (Greek):	-
Summary (Spanish):	-
Folders:	Policies & Guidelines \ Nutrition
Date Updated:	31/10/11 14:44
Published:	Yes

System Parameters

To maintain the parameters used to support Library, select the System Control option and then System Parameters.

[Table 10-3](#) shows the specific system parameters, by subtab on the System Parameters page, used to support Library.

Table 10-3 System Parameters to Support Library

Subtab	Parameter	Description
Urgent Items	No Days Before Read By Date	Used to populated the UIM with items that are near to the expiration date that have not yet been read by the user.
Urgent Items	Show Documents	If set to Yes, document items are shown in the UIM. If set to No, document items are not shown.

11

Glossary Administration

The chapter deals with the administration of glossaries used within the system. The following topics are covered in this chapter:

- [Bulk Glossary Export](#)
- [Single Glossary Export](#)
- [Bulk Glossary Import](#)
- [Single Glossary Import](#)
- [Using Glossary Import/Export to Populate a Clean System](#)

Bulk Glossary Export

Retailer users with the Glossary Administrator authority profile have access to the Import/Export option within the Admin menu.

To export all glossaries:

1. Select any glossary and then select the Export action from the actions menu. The Glossary Export dialog box opens.

Figure 11-1 Glossary Export Dialog Box

Confirm	
Please use the following options to begin an export	
Export Selection:	☒ This Glossary Only ☐ Bulk Glossary Export
Export Type:	☒ Base Only ☐ Base and Translations ☐ Translations Only
Output to include Translations that are:	N/A
Languages to Export:	N/A
Ok Cancel	

2. Set the Export Selection option to Bulk Glossary Export.
3. Set the following filters as required:
 - Using the *Export Type* filter:

This defaults to Base Only which means that all base files will be exported, and the following filters are set and locked to N/A:

- Output to include Translations that are
- Limit Languages to Export

If set to Translations Only, this will export all translations files for any of the selected languages.

- Using the *Output to include Translations that are* filter:

This defaults to Populated and Blank, which exports all glossaries that have a value for any of the selected languages.

If set to Populated, the system will export all glossaries that have a value for any of the selected languages.

If set to Blank, the system will export all glossaries that have no value for any of the selected languages.

- Using the *Languages to Export* filter:

This always begins with no languages shown as it is assumed the export will be for all languages.

Selecting one or more languages will limit the export to only those languages.

Note

Selecting more than five languages will result in an error.

4. Click **Submit** or **Submit Go to Manage Batch Jobs**. A batch job is submitted to export glossaries using the filters set. All the relevant glossaries will be exported as xls orxlsx files, which are compressed into a ZIP file and stored as an attachment on the job.

Single Glossary Export

To export a single glossary:

1. Select the required glossary and then select the Export action from the actions menu. The Glossary Export dialog box opens.

Figure 11-2 Glossary Export Dialog Box

Confirm

Please use the following options to begin an export

Export Selection:

- ☒ This Glossary Only
- ☐ Bulk Glossary Export

Export Type:

- ☒ Base Only
- ☐ Base and Translations
- ☐ Translations Only

Output to include Translations that are: N/A

Languages to Export: N/A

Ok Cancel

2. Set the following filters as required:

- Using the *Export Type* filter:

This defaults to Base Only which means that all base files will be exported, and the following filters are set and locked to N/A:

- Output to include Translations that are
- Limit Languages to Export

If set to Base and Translations, this will export all base and translations files for any of the selected languages.

If set to Translations Only, this will export all translations files for any of the selected languages.

- Using the *Output to include Translations that are* filter:

This defaults to Populated and Blank, which exports all glossaries that have a value for any of the selected languages.

If set to Populated, the system will export all glossaries that have a value for any of the selected languages.

If set to Blank, the system will export all glossaries that have no value for any of the selected languages.

- Using the *Languages to Export* filter:

This always begins with no languages shown as it is assumed the export will be for all languages.

Selecting one or more languages will limit the export to only those languages.

Note

Selecting more than five languages will result in an error.

3. Click **Ok**. This will initiate the download of a ZIP file containing files according to the filters set.

Bulk Glossary Import

Retailer users with the Glossary Administrator authority profile have access to the Import/Export option within the Admin menu.

To import glossaries:

1. Select any glossary and then select the Import action from the actions menu. The Glossary Import dialog box opens.

Figure 11-3 Glossary Import Dialog Box

Confirm

Please use the following options to initiate the import of a glossary
Note: Versioned glossaries can only create new glossary records.

Upload location: No file selected.

Import Selection:

☒ This Glossary Only
☐ Bulk Glossary Import

Import Type:

☒ Base Only
☐ Base and Translations
☐ Translations Only

Languages to Import: N/A

Comment:

Note

As the upload of files is limited to 10 MB, this may not be sufficient if you are attempting to upload all the glossaries for the system. An Administrator may therefore need to temporarily increase the *File attachment size limit* parameter.

2. Click **Browse** to locate and attached the file containing the glossary files.

Note

The file being imported may be a single base file or a ZIP file containing one or more base and translation files. The system accepts CSV, XLS, or XLXS file formats.

3. Set the Import Selection option to Bulk Glossary Import.
4. Set the following filters as required:
 - Using the *Import Type* filter:

This defaults to Base Only which means that all base files will be imported, and the following filter will be set and locked to N/A:

 - Limit Languages to Import

If set to Base and Translations, this will import all base and translation files for any of the selected languages.

If set to Translations Only, this will import all translations files for any of the selected languages.
 - Using the *Languages to Import* filter:

This always begins with no languages shown as it is assumed the import will be for all languages.

Selecting one or more languages will limit the import to only those languages.
5. Enter a suitable comment into the comment field.
6. Click **Submit** or **Submit Go to Manage Batch Jobs**. A batch job is submitted to import glossaries using the filters set. All the relevant glossaries will be imported which will be stored within a ZIP file and as an attachment on the job.

Single Glossary Import

Retailer users with the Glossary Administrator authority profile have access to the Import option within the actions menu of any glossary list view.

To import a single glossary:

1. Select the glossary in the Admin area and then select the Import action from the actions menu. The Glossary Import dialog box opens.

Figure 11-4 Glossary Import Dialog Box

2. Click **Browse** to locate and attached the file containing the glossary files.

Note

The file being imported may be a single base file or a ZIP file containing one or more base and translation files. The system accepts CSV, XLS, or XLXS file formats.

3. Set the Import Selection option to This Glossary Only.
4. Set the following filters as required:
 - Using the *Import Type* filter:

This defaults to Base Only which means that only the base file will be imported, and the following filter will be set and locked to N/A:

 - Limit Languages to Import

If set to Base and Translations, this will import a base file and translation files for any of the selected languages.

If set to Translations Only, this will import all translations files for any of the selected languages.
 - Using the *Languages to Import* filter:

This always begins with no languages shown as it is assumed the import will be for all languages.

Selecting one or more languages will limit the import to only those languages.
5. Enter a suitable comment into the comment field.

- Click **Submit** or **Submit Go to Manage Batch Jobs**. A batch job is submitted to import a glossary using the filters set. All the relevant files will be imported which will be stored within a ZIP file and as an attachment on the job.

Using Glossary Import/Export to Populate a Clean System

The bulk import/export facility can be used to populate a new system with the glossary entries and their translations from another system, for example to load a UAT test system with data from the Live system.

Note

Remember to set system parameters as required prior to loading glossaries into a new system.

Single Language Glossaries

The following steps and typical timings are for exporting, amending, and importing a single language glossary:

- Log in as a user that has the Oracle Authorized User authority profile.
- Open the glossary list view.
- Select the Export action.
Set the selection as Bulk Glossary Export and Base Only.
- Click **Submit**.
- Go to Batch Jobs / Manage Batch Jobs to check for completion of the export.
The export should complete within a few minutes.
- Save the ZIP file to your local drive and extract the glossary CSV file.
- Make any updates, additions, or deletions to the glossary contents within the CSV file, then save, and optionally compress to a ZIP file.
- Select the Import action within the glossary's list view.
- Click **Browse...** and select the CSV or ZIP file to import.
Set the selection as Bulk Glossary Import and Base Only.
- Click **Submit**.
- Go to Batch Jobs / Manage Batch Jobs to check for completion of the import.
The job may take around 10 to 20 minutes, depending on volume of glossary data.
Fix any errors and resubmit before moving on to import translations.
- Refresh the glossary list view to see the new entries listed.

Multi-Language Glossaries

The following steps and typical timings are for exporting, amending, and importing a multi-language glossary:

- Log in as a user that has the Oracle Authorized User authority profile.

2. Open the glossary list view.
3. Select the Export action.
Set the selection as Bulk Glossary Export, Translations Only, and Populated.
Select the desired languages. A maximum of five languages can be selected for each Export. If more than five are required, run the export again to export the languages in batches of five.
4. Click **Submit**.
5. Go to Batch Jobs / Manage Batch Jobs to check for completion of the export.
The job may take around 10 to 20 minutes, depending on volume of glossary data.
6. Save the ZIP file to your local drive and extract the glossary CSV file.
7. Select the Import action within the glossary's list view.
8. Click **Browse...** and select the CSV or ZIP file to import.
Set the selection as Bulk Glossary Import and Base Only.
9. Click **Submit**.
10. Go to Batch Jobs / Manage Batch Jobs to check for completion of the import.
The job may take around 10 to 20 minutes, depending on volume of glossary data.
Fix any errors and resubmit before moving on to import translations.
11. Repeat the process to import the translations by setting the selection as Translations Only.
Each set of five language translations should import in around 10 to 30 minutes depending on the volume of glossary data.

12

Supply Chain

This section include the configurations of Supply Chain Hub for each module.

Supply Chain Hub

The hub has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them it is imperative to validate the core functionality of the framework that will use them in the Implementation Guide - Supply Chain Hub Frameworks section.

System Parameters

Listed below is the list of configurations at system level that are used by this application. Those configurations include configurations specific for the module and purge parameters used by Purge Framework detailed in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

The parameters are defined in table ORCV_SYSTEM_PARAMETERS.

Table 12-1 System Parameters - Supply Chain Hub

AREA	PARAMETER	DESCRIPTION	VALUE 1
PURGE	PURGE_DAYS	Number of days post expiration Operational News data is purged	30

Application Options

Application Options core functionality is detailed in Implementation Guide - Supply Chain Hub Frameworks section Profile, Supply Chain Hub has the following Application Options defined:

The application options are defined in table ORCV_PRFL_CFG_APP_OPTIONS.

Table 12-2 Application Options - Supply Chain Hub

APP ALIASES	ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	DEFAULT VALUE	CONFIGURATION LEVEL
SPCH	FAQ_LINK	Homepage FAQ Link.	NULL	Global
SPCH	OP_NEWS_EXPIRE_DAYS	Defines the number of days after expire date the operational news is not shown in dashboard badge.	6	Global
SPCH	TRBL_LINK	Homepage Troubleshooting Link.	NULL	Global

Codes

Certain operations require codes to define the options available at system level. Below you can find the list of code types and the codes available, the sequence and their description.

The codes are defined in tables ORCV_CODE_HEAD and RCV_CODE_DETAIL

Table 12-3 Codes

CODE TYPE	CODE TYPE DESCRIPTION
CFGL	Configuration Level
MDID	Modules
ONNT	News Type
ONTA	Target Audience
ONTT	Target Type

Procure to Pay – Purchase Orders

This application has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide* , - Supply Chain Hub Frameworks section .

System Parameters

Listed below are the system level configurations used by this application. These configurations include purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-4 System Parameters - Purchase Orders

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ORDHEAD_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ORDHEAD_ITEMS_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ORDLOC_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ORD_ITEMS_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ORD_NEW_ITEMS_TMP	2

Application Configuration

Table 12-5 Application Configuration - Purchase Orders

ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	DEFAULT VALUE	CONFIGURATION LEVEL
DELIVERY_NBD_NAD	Indicates which dates should be considered. Valid values are: (1)-Delivery Date (2)- Not before date/Not after date	1	Global
ACK_REQUIRED	Indicates if the supplier is required to acknowledge the PO. Valid values Y-Yes/N-No	Y	Supplier Default
CUSTOMER_ORDER_IND	Indicates if Customer Orders should be available in Procure to Pay. Values Y-Yes/N-No	Y	Supplier Default
MULTI_DELIVERY_PO	Indicator to define if POs created and managed by supplier support multiple deliveries. Valid values Y-Yes/N-No	Y	Supplier Default
VMI_ORDERS	Indicator to define if supplier can create orders. Valid values Y-Yes/N-No	Y	Supplier Default

Procure to Pay – Shipments

This application has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them it is imperative to validate the core functionality of the framework that will use them in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Below is a list of configurations at system level used by this application. These configurations include purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-6 System Parameters - Shipments

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ASN_ORD_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ASN_ORD_ITEM_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ASN_ADD_ITEM_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_ASN_CTN_TMP	2

Application Configuration

Table 12-7 Application Configuration - Shipments

ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	DEFAULT VALUE	CONFIGURATION LEVEL
ASN_QTY_TOLERANCE	Value in percentage of how many units can be shipped in each ASN above the PO quantity. If set to NULL, no limit is applied to the quantity that can be shipped in excess.	0	Supplier Default
ASN_BEFORE_DAYS	Number of days allowed for the shipment date before the maximum Not Before Date.	10	Supplier Default
ASN_AFTER_DAYS	Number of days allowed for the shipment date after the minimum Not After Date.	10	Supplier Default

Procure to Pay – Finance Documents

This application has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them it is imperative to validate the core functionality of the framework that will use them in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Below is a list of configurations at system level used by this application. These configurations include purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-8 System Parameters - Finance Documents

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	DOCS_LOV_CREATE	Code Head associated to LOV for creation mode on DOCS screen	DOCC	NA
CONFIG	DOCS_LOV_VIEW	Code Head associated to LOV for view mode on DOCS screen	DOCV	NA
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_DOC_ADD_ITEM_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_DOC_HEAD_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_DOC_ITEM_TAX_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_DOC_ITEM_TMP	2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPPP_DOC_ORDRTV_TMP	2

Other System Parameters

In the table below are the System Parameters of Finance module that need to be updated accordingly.

Table 12-9 Other System Parameters - Finance Documents

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
GTS	TAX_BASIS_TYPE	Used in GTS calculation taxes. Valid values are B for Both, C for cost, R for retail, or N for non-merchandise	C	NA
PURGE	PURGE_DAYS	Default purge period.	ORCV_FIN_INT_DOC_XREF	30

Return to Vendor

This application has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below is a list of system level configurations used by this application. Those configurations include configurations specific to the module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-10 System Parameters - Return to Vendor

AREA	PARAMETER	DESCRIPTION	VALUE 1	Value 2
CONFIG	CANCEL_S9T_DEFAULT_REASON	Default S9T Reason code when a RTV is canceled	C9	NA
CONFIG	REJECT_S9T_DEFAULT_REASON	Default S9T Reason code when a RTV is rejected	R9	NA
CONFIG	UNAVAILABLE_DISP_CODE	MFCS Disposition Code for the U (Unavailable) reason code.	ATS	NA
PURGE	PURGE_DAYS	Default purge period for hist tables.	ORCV_SPRV_RTV_HEAD_HIST	60
PURGE	PURGE_DAYS	Default purge period for stg tables.	ORCV_SPRV_RTV_HEAD_STG	30
PURGE	PURGE_DAYS	Default purge period for tmp tables.	ORCV_SPRV_RTV_HEAD_TMP	2

Inventory and Sales

This application has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Below is a list of configurations at system level used by this application. Those configurations include configurations specific to the module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-11 System Parameters - Inventory and Sales

AREA	PARAMETER	DESCRIPTION	VALUE 1	Value 2
CONFIG	NUMBER_WEEKS_SALES_FORECAST	Number of weeks for item forecast. VALUE_1 - Number of weeks to determine the weeks start, VALUE_2 (optional) - Number of weeks to determine the weeks end	2	3
CONFIG	NUMBER_WEEKS_SALES_HIST	Number of weeks to display in Sales Details screen of Inventory and Sales	5	NA

Application Configuration

Listed below are the configurations at global level that are used by this application.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS and ORCV_PRFL_CFG_APP_SUPP_OPTIONS tables.

Table 12-12 Application Configuration - Inventory and Sales

ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	DEFAULT VALUE
LOW_STOCK_THRESHOLD	Limit value to use as a reference to determine low stock of an item	10

Items Management

This Module has multiple configurations to support its functionalities and, in the subsections, below, those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are configurations at system level used by this application. Those configurations include configurations specific to the module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section.

The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below. The values for the UDA's are examples and can be modified according to project implementation.

Table 12-13 System Parameters - Item Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	ADD_DIFFS_OPTIO N	Option to add new diffs. Y-Active, N-Inactive	N	NA
CONFIG	BARCODE_TYPES_G RANTED	List of valid Barcode types that can be assigned to items.	EAN13	NA
CONFIG	BARCODE_TYPES_G RANTED	List of valid Barcode types that can be assigned to items.	ITEM	NA
CONFIG	BARCODE_TYPES_G RANTED	List of valid Barcode types that can be assigned to items.	MANL	NA
CONFIG	BARCODE_TYPES_G RANTED	List of valid Barcode types that can be assigned to items.	UPC-A	NA
CONFIG	DIFFS_QUEUE_NAM E	This will hold the diffs default queue name for Items Management	ORCV_SPIM_DIFF_AQ	NA
CONFIG	DIFF_AGGREGATE_I ND	Default value for Diff_Aggregate_Ind. Valid values: Y, N(Default)	N	NA
CONFIG	DIFF_CRE_SINGLE_ SKU	Default differentiator group/id for create single SKU option.	DIFF_GRP_ID	DIFF_ID
CONFIG	EXCLUDED_UDA	UDAs that should be excluded from the user assigning to an item.	OFF_SALE_DATE	9003
CONFIG	EXCLUDED_UDA	UDAs that should be excluded from the user assigning to an item.	ON_SALE_DATE	9002
CONFIG	EXCLUDED_UDA	UDAs that should be excluded from the user assigning to an item.	STOCK_AVAIL	9004
CONFIG	EXPLD_ALL_SKUS	Flag indicating whether all Style entities are exploded to child SKUs.	Y	NA
CONFIG	GENERATE_EAN	Defines if the Generate EAN functionality is enabled.	Y	NA
CONFIG	IMAGE_TYPE	Default type of image	M	NA

Table 12-13 (Cont.) System Parameters - Item Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	ITEM_S9T_REASON_CODE	Default reason code for S9T Update Details	S	NA
CONFIG	ITEM_STANDARD_UOM	Default Items Management Standard UOM.	EA	NA
CONFIG	ITEM_STORE_ORD_MULT	Default Items Management Store Ord Mult.	E	NA
CONFIG	LOCATION_STATUS_GRANTED	List of valid Location statuses that can be assigned to locations.	A	NA
CONFIG	LOCATION_STATUS_GRANTED	List of valid Location statuses that can be assigned to locations.	C	NA
CONFIG	MAX_JOBS_RUNNING	Maximum jobs to run in parallel to process items.	16	NA
CONFIG	PRICE_CALC_AUTO	Controls if price calculation should auto run on Approval if configuration is not MFCS. Possible values are Y and N.	N	NA
CONFIG	PRICE_CALC_CONFIG	Controls what method is being used for price calculation. Possible values are MFCS and STRAT.	MFCS	NA
CONFIG	PRICE_CALC_REQ	Controls if price calculation is mandatory. Possible values are Y and N.	N	NA
CONFIG	PRICE_CALC_TRIGGER	Controls what service is being used for price calculation. Use ids from ORCV_PRICE_CALC_CONFIG.	-1	NA
CONFIG	PURCHASE_TYPE	Default purchase type	0	NA
CONFIG	QUEUE_NAME	This will hold the default queue name for Items Management	ORCV_SPIM_ITEM_AQ	NA
CONFIG	REFS	Flag indicating whether all refs should be displayed or not	N	NA
CONFIG	REF_ATTR	Flag indicating whether modal with reference attributes should be displayed or not	Y	NA

Table 12-13 (Cont.) System Parameters - Item Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	REF_ATTR_RETAILER	Flag indicating whether modal with reference attributes should be displayed if user is a retailer or not	N	NA
CONFIG	ROUND_LVL	Defines how order quantities will be rounded to Case, Layer and Pallet.	C	NA
CONFIG	ROUND_TO_CASE_PCT	This will hold the case Rounding Threshold value.	50.0000	NA
CONFIG	ROUND_TO_INNER_PCT	This will hold the Inner Rounding Threshold value.	50.0000	NA
CONFIG	ROUND_TO_LAYER_PCT	This will hold the layer Rounding Threshold value.	50.0000	NA
CONFIG	ROUND_TO_PALLET_PCT	This will hold the pallet Rounding Threshold value.	50.0000	NA
NOTIF_CONFIG	ITEMS_PENDING_ACTION_DAYS	Number of days to generate alerts for items with pending actions.	1	NA
PURGE	PURGE_DAYS	Default purge period for error tables.	ORCV_SPIM_ITEM_ERRORS_DETAIL	30
PURGE	PURGE_DAYS	Default purge period for staging tables.	ORCV_SPIM_ITEM_HEADER	30
PURGE	PURGE_DAYS	Default purge period for temporary tables.	ORCV_SPIM_ITEM_HEADER_TMP	30

Data purging for Items Management is defined based on the main table ORCV_SPIM_ITEM_HEADER and temporary tables based on ORCV_SPIM_ITEM_HEADER_TMP.

Other System Parameters

In the table below are the System Parameters of Items module that need to be updated accordingly.

Table 12-14 Other System Parameters - Items Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	ITEM_CONSIGNMENT_PRICING_IND	Check if pricing consignment is enable or disable.	N	NA

Table 12-14 (Cont.) Other System Parameters - Items Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	ITEM_INT_REVISION_UDA	UDA that must be used exclusively in the integration process.	9001	NA
CONFIG	RESERVE_ITEM_MAX_AMOUNT	Maximum number of items that can be reserved via the item reserve web service.	10	NA
CONFIG	RESERVE_ITEM_MAX_EXPIRY	Maximum days until the item reservation expires.	1	NA
INTEGRATION	INDUCTION_TEMPLATE	Template key.	ORCV_S9T_MFCS_ITEMS_INDUCTION_V24	NA
PURGE	PURGE_DAYS	Default purge Period.	ORCV_ITEM_INT_ILTRT	30
PURGE	PURGE_DAYS	Default purge Period.	ORCV_ITEM_INT_MASTER	30

Data purging for Items Integration is defined based on the main table ORCV_ITEM_INT_MASTER.

Application Configuration

Listed below are configurations at supplier/global level that are used by this application.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS and ORCV_PRFL_CFG_APP_SUPP_OPTIONS tables.

Table 12-15 Application Configurations - Items Management

ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE
ADD_NEW_DIFF	App option to define if the supplier as permission to add new diffs.	N
BUYER_PACK_ORDER_AS_TYPE	Default Order as Type value for Buyer packs.	E
CASE_NAME	Code referencing the name used by supplier to refer to the case.	CS
COMPLEX_PACK_TYPE	Default Type for Complex Packs.	V
COST_UOM	Default cost UOM. This is held to allow costs to be managed in a separate UOM than the standard UOM.	EA
COST_ZONE_GROUP	Default Cost Zone Group for the item.	1000
DEFAULT_UOP	Default unit of purchase for the item/supplier/country.	EA
DIM_OBJECT	Default Units of an item contained in an inner pack supplied by the supplier for item dimensions definition.	EA
DIRECT_SHIP_IND	Indicates if this supplier is eligible for a direct shipment from the supplier to the customer.	N
HANDLING_SENSITIVITY	This will hold the default the default handling sensitivity.	NA

Table 12-15 (Cont.) Application Configurations - Items Management

ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE
HANDLING_TEMPERATURE	This will hold the default the default handling temperature.	NA
HI	Default number of tiers that make up a complete pallet (height).	1
INNER_NAME	Code referencing the name used by supplier to refer to the inner.	INR
INNER_PACK_SIZE	This will hold the default the default inner pack size	1
PALLET_NAME	Code referencing the name used by supplier to refer to the pallet.	PAL
SIMPLE_PACK_TYPE	Default Type for Simple Packs.	V
STORE_ORD_MULT	This will hold the default the default store ord mult.	I
SUPP_PACK_SIZE	This will hold the default Supplier Pack Size.	1
TI	Default number of shipping units (cases) that make up one tier of a pallet.	1

Cost Changes Management

This application has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are configurations at system level used by this application. Those configurations include configurations specific to the module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-16 System Parameters - Cost Changes Management

Area	Parameter	Description	Value 1	Value 2	Value 3
CONFIG	COST_PRIOR_BLOCK_DAYS	Number of days to block Cost Change until RMS integration.	1	NA	NA
CONFIG	COST_PRIOR_DEADLINE_DAYS	Number of deadline days.	1	NA	NA
CONFIG	DEFAULT_COST_CHANGE_LVL	Supplier default Cost Change Level (Valid Values: UNIT, INNER, CASE).	UNIT	NA	NA
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPCC_COSTC_HG_HEAD	30	NA
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPCC_COSTC_HG_HEAD_TMP	2	NA

Table 12-16 (Cont.) System Parameters - Cost Changes Management

Area	Parameter	Description	Value 1	Value 2	Value 3
REASON_CODES	AUTO	Reason Code Code (VALUE_3) to be used in automation of Action (VALUE_2) for Entity (VALUE_1).	COSTCHG	APPROVE	APRVCC
REASON_CODES	AUTO	Reason Code Code (VALUE_3) to be used in automation of Action (VALUE_2) for Entity (VALUE_1).	COSTCHG	REJECT	RJCTCC
REASON_CODES	CODES	Reason Codes Code Type (VALUE_2) for Entity (VALUE_1).	COSTCHG	CCRC	NA
REASON_CODES	HIDE_CODES	Reason Codes Hide Code Type (VALUE_3) to hide from the CODES (Parameter) code type (VALUE_2).	COSTCHG	REJECT	CCHR
REASON_CODES	HIDE_CODES	Reason Codes Hide Code Type (VALUE_3) to hide from the CODES (Parameter) code type (VALUE_2).	COSTCHG	UPDATE	CCHU
CONFIG	COST_PRIOR_BLOCK_DAYS	Number of days to block Cost Change until RMS integration.	1	NA	NA
CONFIG	COST_PRIOR_DEADLINE_DAYS	Number of deadline days.	1	NA	NA

Data purging for Cost Changes Management is defined based on the main table ORCV_SPCC_COSTCHG_HEAD and temporary tables based on ORCV_SPCC_COSTCHG_HEAD_TMP.

Other System Parameters

In the table below are the System Parameters of Costs module that need to be updated accordingly.

Table 12-17 Cost Changes Management - Other System Parameters

Area	Parameter	Description	Value 1	Value 2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_COSTS_INT_CC_HEAD_PUBINFO	30

Application Configuration

Listed below are configurations defined at Global Level for the Module or Supplier Level for supplier specific configuration in the Module.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS once specific suppliers are configured the details will be stored in ORCV_PRFL_CFG_APP_SUPP_OPTIONS.

Table 12-18 Application Configuration - Cost Changes Management

ATTRIBUTE ID	DESCRIPTION	VALUE	CONFIGURATION LEVEL
COST_CHANGE_TOLERANCE	Percentage value to determine when cost change is significant	10	Supplier

Supplier Performance

This Module has multiple configurations to support its functionalities and, in the subsections, below, those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are configurations at the system level used by this application. Those configurations include configurations specific to the module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section.

The parameters are defined in table ORCV_SYSTEM_PARAMETER. The default values are listed below.

Table 12-19 System Parameters - Supplier Performance

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	COMP_ERROR	Minimum Compliance Error Level	3	NA
CONFIG	DEFECT_REASON	Adj Reason Code	5	NA
CONFIG	DEFECT_REASON	Adj Reason Code	60	NA
CONFIG	DEFECT_REASON	Adj Reason Code	93	NA
CONFIG	EARLY_LATE_DAYS	Number of days to be considered as Early/Late receipt	3	NA
CONFIG	METRIC_DAYS_WINDOW	Maximum window to be used for ASN and Invoices Metrics	30	NA

Table 12-19 (Cont.) System Parameters - Supplier Performance

AREA	PARAMETER	DESCRIPTI ON	VALUE 1	VALU E 2
CONFIG	QUEST_MIN_FREQ	Questionnai re Minimum Frequency (in days)	365	NA
CONFIG	RECEIVE_WAIT_DAYS	Time to wait for receipt to finish (in days)	7	NA
CONFIG	RTV_REASON	RTV Reason Code	U	NA
CONFIG	RTV_REASON	RTV Reason Code	W	NA
CONFIG	SCORE_AVG_DAYS	Score Moving Average Days	365	NA
PURGE	PURGE_DAYS	Default purge period for questionnai re revision tables	ORCV_SPPF_QUESTN_HEAD_ REV	730
PURGE	PURGE_DAYS	Default purge period for reply tables	ORCV_SPPF_QUESTN_REPLY_ HEAD	730
PURGE	PURGE_DAYS	Default purge period for supplier score tables	ORCV_SPPF_SUPP_SCORE_HIS T	730

Application Configuration

Listed below are configurations at supplier/global level that are used by this application.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS and ORCV_PRFL_CFG_APP_SUPP_OPTIONS tables.

Table 12-20 Application Configuration - Supplier Performance

ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE	CONFIGURATION LEVEL
PF_TEMPLATE_ID	Default Template ID	1	Supplier

Quality Control

This Module has multiple configurations to support its functionalities and, in the subsections, below, those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are the system level configurations in this Module. Those configurations include specific configurations for the Module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-21 System Parameters - Quality Control

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONF IG	COMPLETE_INSPECTI ON	Flag to define if all items checks must be done to complete Job.	Y	NA
CONF IG	UNAVAILABLE_DISP_ CODE	MFCS Disposition Code for the U (Unavailable) reason code.	ATS	NA
PURG E	PURGE_DAYS	Default purge period for stg tables.	ORCV_QLCT_JOB_HEAD	60
PURG E	PURGE_DAYS	Default purge period for tmp tables.	ORCV_QLCT_JOB_HEAD_TMP	2
PURG E	PURGE_DAYS	Default purge period for tmp tables.	ORCV_QLCT_JOB_CHECK_TMP	2
PURG E	PURGE_DAYS	Default purge period for tmp tables.	ORCV_QLCT_JOB_ITEM_TMP	2
PURG E	PURGE_DAYS	Default purge period for tmp tables.	ORCV_QLCT_JOB_ITEM_CHECK_T MP	2
PURG E	PURGE_DAYS	Default purge period for tmp tables.	ORCV_QLCT_JOB_RESULT_TMP	2
PURG E	PURGE_DAYS	Default purge period for tmp tables.	ORCV_QLCT_JOB_ITEM_RESULT_ TMP	2

Other System Parameters

In the table below are the System Parameters of Shipments module that need to be updated accordingly.

Table 12-22 Other System Parameters - Quality Control

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONF IG	CLOSE_SHIP_WAIT_TIME	Wait time in Hours for WMS to close Shipment	24	NA

Deals Management

This Module has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are the system level configurations in this Module. Those configurations include specific configurations for the Module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-23 System Parameters - Deals Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONF IG	ASSOCIATE_PROMO	Determines if for a VPF Deal the system should allow associate a promotion. Button available - 'Y' or disabled - 'N'	Y	NA
CONF IG	DEAL_CLASS	Calculation class of the deal component. Valid values are: CU for cumulative, CS for cascade and EX for exclusive.	CU	NA
CONF IG	DISPLAY_CLOSED_DEALS_DAYS	Number of days closed deals in MFCS will continue to be displayed in SCH Deals management dashboards/screens.	0	NA
CONF IG	EXPLODE_MERCH_HIER_IND	Flag indicating whether the merch hierarchy should be exploded upon publishing.	N	NA
CONF IG	INCLUDE_CLOSED_DEALS_INCOME	If closed deals income (under the DISPLAY_CLOSED_DEALS_DAYS) will be included on the income dashboards or not.	N	NA
CONF IG	INT_DAYS_BEFORE_START	Minimum number of days prior to the start date for deal to be processed.	2	NA

Table 12-23 (Cont.) System Parameters - Deals Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONF IG	RECALCULATE_OPEN_PO	Determines if open PO's will be recalculated for new Off-Invoice Deals.	N	NA
CONF IG	RECOGNIZE_WH_AS_LOCATIONS	Determines if the warehouses should be considered as locations. Valid values are: 1 - Yes, 0 - No.	1	NA
CONF IG	SUPPORTED_BILLING_TYPE	Supported Billing types, currently only supports Bill-Back, Bill-Back Rebate and Vendor Funded Promotions.	BB	NA
CONF IG	SUPPORTED_BILLING_TYPE	Supported Billing types, currently only supports Bill-Back, Bill-Back Rebate and Vendor Funded Promotions.	BBR	NA
CONF IG	SUPPORTED_BILLING_TYPE	Supported Billing types, currently only supports Bill-Back, Bill-Back Rebate and Vendor Funded Promotions.	VFP	NA
PURGE	PRG_NEW_SUB_DAYS	Number of days after which new and submitted deals will be purged.	28	NA
PURGE	PRG_REJ_DAYS	Number of days after which rejected deals will be purged.	7	NA
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPDM_DEAL_HEAD_TMP	2

Application Configuration

Listed below are configurations defined at Global Level for the Module or Supplier Level for supplier specific configuration and the defaults in the Module.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS once specific suppliers are configured the details will be stored in ORCV_PRFL_CFG_APP_SUPP_OPTIONS.

Table 20-3 Application Configuration - Deals Management

Table 12-24 Application Configuration - Deals Management

ATTRIBUTE ID	DESCRIPTION	VALUE	CONFIGURATION LEVEL
ASSOCIATE_PROMO	Yes or No value. It determines if for a specific supplier and for a Deal of type VFP, if the system should allow associate a promotion (Promotion button available -'Y') or not (Promotion button disable - 'N').	Y	Supplier
BILL_BACK_METHOD	Credit Note ('C'), Debit Note ('D').	D	Supplier
BILL_BACK_PERIOD	Week, Month, Quarter, Half Year, Annual. Bill Back Period must be greater than or equal to Deal Reporting Level.	W	Supplier
CALC_TO_ZERO_IND	This indicator is used in cases where the vendor has specified that a minimum threshold needs to be reached before a discount applies and when that threshold is reached, the discount applies against the entire threshold, including the level below.	N	Supplier
COST_APPLY_IND	The 'Cost Apply Type' field indicates whether the deal component impacts the Net Cost ('N'), Net-Net Cost ('NN') or Dead Net Cost ('DNN') on the FUTURE_COST table.	NN	Supplier
DEAL_APPLICATION_TIMING	'O' for PO approval, 'R' for receiving for BB/BBR. Is null for VFP	O	Supplier
DEAL_CLASS	Valid values are 'CU' for cumulative, 'CS' for cascade and 'EX' for exclusive.	CU	Supplier

Table 12-24 (Cont.) Application Configuration - Deals Management

ATTRIBUTE ID	DESCRIPTION	VALUE	CONFIGURATION LEVEL
DEAL_COMP_TYPE	This field is for informational purpose only as a way to describe the component.	TBB	Supplier
DEAL_INCOME_CALCULATION	Actuals Earned to date ('A'), Pro-rated using forecast('P')	A	Supplier
DEAL_REPORTING_LEVEL	Week, Month, Quarter.	W	Supplier
GROWTH_REBATE_IND	The Growth Rebate information is available only for Bill Back Rebate deals and is for informational/reporting purposes.	N	Supplier
INVOICE_PROCESSING_LOGIC	Valid values in the case of BB and BBR type of deals: Automatic All Values ('AA'), Manual All Values ('MA'), Automatic Positive Values Only ('AP'), Manual Positive Values Only ('MP'), No Invoice Processing ('NO')	AA	Supplier
PRICE_COST_APPL_IND	This indicator defines whether the deal is to be used in the pricing cost calculation used by Pricing to determine the margin on the items linked with the deal(future_cost).	Y	Supplier
REBATE_CALC_TYPE	This field is defaulted to 'Linear' and disabled for a BB deal, while for a BBR, the user can set it to 'Linear' or 'Scalar'	L	Supplier

Table 12-24 (Cont.) Application Configuration - Deals Management

ATTRIBUTE ID	DESCRIPTION	VALUE	CONFIGURATION LEVEL
SECURITY_IND	This indicator can be used to implement user-based security for the deal that is currently being created. When set, the deal details can be viewed or edited only by users who have the same or higher privileges compared to the deal creator.	N	Supplier
STOCK_LEDGER_IND	This checkbox indicates whether the deal income is posted to the Stock Ledger in addition to the General Ledger.	Y	Supplier
SUPPLIER_APPROVE_NEEDED	This configuration shows if supplied also needs to approve deals. The default is yes.	Y	Supplier
THRESHOLD_LIMIT_UOM	Default to 'EA'. If units are selected (Threshold Limit Type), the user also has to define the Unit of Measure (UOM) that the threshold tracks.	EA	Supplier
TRAN_DISCOUNT_IND	Yes ('Y'), No ('N')	N	Supplier

Supplier Penalties

This Module has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Framework section.

System Parameters

Listed below are the system level configurations in this application. Those configurations include specific configurations for the Module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 21-2 System Parameters - Supplier Penalties

Table 12-25 System Parameters - Supplier Penalties

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	REQ_SUPP_APPROVE	Indicates if the Penalty Rules approval for all suppliers is needed(Y-Yes/N-No).	N	NA
PURGE	PURGE_DAYS	Default purge period for stg tables.	ORCV_SPPY_PENALTY_HEAD	60
PURGE	PURGE_DAYS	Default purge period for tmp tables.	ORCV_SPPY_PENALTY_ITEM_TMP	2
PURGE	PURGE_DAYS	Default purge period for tmp tables.	ORCV_SPPY_PENALTY_HEAD_TMP	2
PURGE	PURGE_DAYS	Default purge period for rule engine tmp tables.	ORCV_SPPY_RLEG_SHIP_STG	7
PURGE	PURGE_DAYS	Default purge period for rule engine tmp tables.	ORCV_SPPY_RLEG_PO_STG	7
PURGE	PURGE_DAYS	Default purge period for rule engine tmp tables.	ORCV_SPPY_RLEG_QA_STG	7

Application Configuration

Listed below are configurations defined at Global Level for the Module or Supplier Level for supplier specific configuration and the defaults in the Module.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS once specific suppliers are configured the details will be stored in ORCV_PRFL_CFG_APP_SUPP_OPTIONS.

Table 12-26 Application Configuration - Supplier Penalties

ATTRIBUTE ID	DESCRIPTION	VALUE	CONFIGURATION LEVEL
DOCUMENT_TYPE	Indicates what document should be generated for supplier (C-Credit Note, D-Debit Memo).	NULL	Supplier
REQ_SUPP_APPROVE	Indicates if the Penalty Rules approval for a specific supplier is needed(Y-Yes/N-No).	N	Supplier

Retail Price

This Module has multiple configurations to support its functionalities and, in the subsections, below, those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are the system level configurations in this Module. Those configurations include specific configurations for the Module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-27 System Parameters - Retail Price

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	PRICE_EVENT_DUE_DAYS	Number of days prior to a price event to trigger the e-mail alert notification before approval.	7	NA
CONFIG	PRICE_PRIOR_DEADLINE_DAYS	Number of Deadline days.	1	NA
CONFIG	PROMO_END_TIME	Promotion default end time.	23:59	NA
CONFIG	PROMO_START_TIME	Promotion default start time.	00:00	NA
CONFIG	S9T_REASON_CODE	Default reason code used by S9T. Corresponding code type is PERR.	6	NA
CONFIG	SEARCH_MAX_RANGE	Dashboard Past Window (in days)	30	NA
PURGE	PURGE_DAYS	Default purge period.	ORCV_SPPM_PRICE_EVENT	30

Other System Parameters

In the table below are the System Parameters of Items module that need to be updated accordingly.

Table 12-28 Other System Parameters - Retail Price

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	ITEM_CONSIGNMENT_PRICING_IND	Check if pricing consignment is enable or disable.	N	NA

Application Configuration

Listed below are configurations defined at Global Level for the Module or Supplier Level for supplier specific configuration in the Module.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS once specific suppliers are configured the details will be stored in ORCV_PRFL_CFG_APP_SUPP_OPTIONS.

Table 12-29 Application Configuration - Retail Price

ATTRIBUTE ID	DESCRIPTION	VALUE	CONFIGURATION LEVEL
ALLOW_PRICE_CHANGES	Allow Supplier Price Changes.	Y	Supplier
ALLOW_RET_USER_EMER_EVENTS	Allow Retailer Users to create emergency events.	Y	Supplier
ALLOW_SIMPLE_PROMO	Allow Supplier Simple Promotions.	Y	Supplier

Table 12-29 (Cont.) Application Configuration - Retail Price

ATTRIBUTE ID	DESCRIPTION	VALUE	CONFIGURATION LEVEL
ALLOW_SUP_USER_EMER_EVENTS	Allow Suppliers Users to create emergency events.	N	Supplier
ALLOW_ZONE_LEVEL_EVENTS	Allow Zone Level Events.	N	Supplier
PRICE_EVENT_TOLERANCE	Change % Tolerance to classify the New Price as Substantial Change.	20	Supplier
SUP_PRM_END_DATE_REQ	Promotion End Date Required.	Y	Supplier
SUP_ZONE_GROUP_PRC	Zone Group Display ID to be used by Price Changes.	1	Supplier
SUP_ZONE_GROUP_PRM	Zone Group Display ID to be used by Simple Promotions.	1	Supplier

Financial Summary

This Module has multiple configurations to support its functionalities and, in the subsections, below, those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are the system level configurations in this Module. Those configurations include specific configurations for the Module and purge parameters used by Purge

Chapter 23

Other Cloud Services Configuration

Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-30 System Parameters - Financial Summary

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONF IG	SPFS_DOCT_T YPE	Doc Type used at Financial Summary MV.	CRDNT	NA
CONF IG	SPFS_DOCT_T YPE	Doc Type used at Financial Summary MV.	MRCHI	NA
CONF IG	YTD	Year To Date used in Financial Summary Dashboard. Value_1 YTD start month, Value_2 YTD start day.	1	1
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPFS_SUB_PAYMENT_DO C	7
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPFS_SUB_PAYMENT_HE AD	7

Table 12-30 (Cont.) System Parameters - Financial Summary

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
PURGE	PURGE_DAYS	Default purge Period.	ORCV_SPFS_SUB_PAYMENT_HE AD_ERR	7

Appointments Management

This Module has multiple configurations to support its functionalities and, in the subsections, below, those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below are the system level configurations in this Module. Those configurations include specific configurations for the Module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Table 12-31 System Parameters - Appointments Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	APPT_APPR_REASON_CODE	The Reason Code Value for Appointments Approve.	ARCA	NA
CONFIG	APPT_APPR_REASON_CODE_S9T	The Reason Code Value for Appointments Approve via Upload.	ARAU	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	CD	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	CPO	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	CRTV	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	DD	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	SLUV	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	UD	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	UPO	NA
CONFIG	APPT_CANC_REASON_CODES	The Reason Codes Values for Appointments Cancel.	URTV	NA
CONFIG	APPT_CANC_REASON_CODE_S9T	The Reason Code Value for Appointments Cancel via Upload.	ACUP	NA
CONFIG	APPT_CHK_IN_REASON_CODE	The Reason Code Value for Appointments Check-In.	ARCI	NA

Table 12-31 (Cont.) System Parameters - Appointments Management

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONFIG	APPT_CHK_IN_REASON_CODE_S9T	The Reason Code Value for Appointments Check-In via Upload.	ACIU	NA
CONFIG	APPT_MAX_DAYS_RANGE	Maximum number of days in advance to book appointments.	90	NA
CONFIG	APPT_RCV_REASON_CODE	The Reason Code Value for Appointments Receive.	ARCR	NA
CONFIG	APPT_RCV_REASON_CODE_S9T	The Reason Code Value for Appointments Receive via Upload.	ARRU	NA
CONFIG	AVL_EXCEPTION_MAX_DAYS_RANGE	Maximum number of days in advance to create availability exceptions.	90	NA
PURGE	PURGE_DAYS_APPT_STATUS_NEW	Default purge days period for appointment in status NEW.	ORCV_SPAP_APPOINTMENT	30
PURGE	PURGE_DAYS_APPT_STATUS_OTHER	Default purge days period for appointment in status other status than NEW.	ORCV_SPAP_APPOINTMENT	365
PURGE	PURGE_DAYS_SLOT_AVL_EXCEPT	Default purge days period for slot availability exceptions.	ORCV_SPAP_SLOTS_AVL_EXCEPT	30

Application Configuration

The list below is the list of configurations at a global level that are used by this application.

The parameters are defined in the ORCV_PRFL_CFG_APP_OPTIONS table.

Table 12-32 Application Configurations - Appointments Management

ATTRIBUTE ID	ATTRIBUTE DESCRIPTION	ATTRIBUTE VALUE	CFG LEVEL
APPT_EXPIRE_DEADLINE_DAYS	The number of days after an unclosed appointment will be marked as Expired status.	1	Supplier

Customer Order Fulfillment

This application has multiple configurations to support its functionalities and in the subsections below those configurations are highlighted. For some of them, it is imperative to validate the functionality of common frameworks in the *Oracle Retail Supply Chain Collaboration Implementation Guide*, Supply Chain Hub Frameworks section.

System Parameters

Listed below is the list of configurations at the system level used by this application. Those configurations include configurations specific to the module and purge parameters used by Purge Framework detailed in Implementation Guide - Supply Chain Hub Frameworks section. The parameters are defined in table ORCV_SYSTEM_PARAMETERS and below are listed the default values.

Table 12-33 System Parameters - Customer Order Fulfillment

AREA	PARAMETER	DESCRIPTION	VALUE 1	VALUE 2
CONF G	CUSTOMER_ORDER_MASTER	Value to determine the system that manages Customer Order. Valid values: SPCO, MFCS.	MFCS	NA
CONF IG	DISPATCH_NOT_INVOICED_DAYS	Number of days since Customer Order was dispatched and not invoiced to trigger Event Alert.	7	NA
CONF IG	SPCO_REPORT_BI	Value to determine the Report ID to generate the Customer Order Bi Publisher report.	REPORT_PDF_SPCO_COF	NA
CONF IG	SPCO_SUPPORT_CANCEL	Value to determine if OMS is capable of receiving FO cancellation from Supplier or SCH.COF module. Valid values: Y/N.	Y	NA
PURGE	PURGE_DAYS	Default purge Period for Control tables.	ORCV_SPCO_ORDCUST_CONTROL	30
PURGE	PURGE_DAYS	Default temporary table purge Period.	ORCV_SPCO_ORDCUST_DETAIL_TMP	2
PURGE	PURGE_DAYS	Default purge Period for DOC table.	ORCV_SPCO_ORDCUST_FDOC	30
PURGE	PURGE_DAYS	Default purge Period for Completed/Cancelled Customer Orders Header table.	ORCV_SPCO_ORDCUST_HEADER	30
PURGE	PURGE_DAYS	Default purge Period for History tables.	ORCV_SPCO_ORDCUST_HEADER_HIST	30
PURGE	PURGE_DAYS	Default temporary table purge Period.	ORCV_SPCO_ORDCUST_HEADER_TMP	2

Custom Validations Framework

System Parameters

Listed below are the system level configurations used by this application. These configurations include purge parameters used by Purge Framework. The parameters are defined in table ORCV_SYSTEM_PARAMETERS. The default values are listed below.

Area	Parameter	Description	Value 1	Value 2
PURGE	PURGE_DAYS	Default purge period.	ORCV_CVAL_PROCESS_ATT RIBUTES	30
PURGE	PURGE_DAYS	Default purge period.	ORCV_CVAL_PROCESS_CON TROL	30
PURGE	PURGE_DAYS	Default purge period.	ORCV_CVAL_RESULT	30

Internationalization

Internationalization is the process of creating software that can be translated easily. Changes to the code are not specific to any particular market.

The Oracle Retail Supplier Evaluation Cloud Service modules have been internationalized to support multiple languages.

Translation

Translation is the process of interpreting and adapting text from one language into another. Although the code itself is not translated, components of the module that are translated may include the following, among others:

- Graphical user interface (GUI)
- Error messages

The following components are not translated:

- Documentation (online help, release notes, installation guide, user guide, operations guide)
- Batch programs and messages
- Log files
- Configuration tools
- Demonstration data
- Training materials

Supplier Evaluation

The user interface for the Oracle Retail Supplier Evaluation Cloud Service modules have been translated into the following languages:

 Note

The languages below function as designed in the Classic user interface.

- Chinese-Simplified
- Chinese-Traditional
- Croatian
- Dutch
- French
- German
- Greek

- Hungarian
- Italian
- Japanese
- Korean
- Polish
- Portuguese-Brazilian
- Russian
- Spanish-Worldwide
- Swedish
- Turkish

There is a provision for some specific overrides to the base language (English (British)) for English (American) and English (Australia and New Zealand). Any number of additional languages can be configured as required in a portal, subject to the client supplying the necessary translations. The translations apply to system text (User Interface field labels, buttons, menu options, error messages, and so on) plus glossary pick-list entries.

Supply Chain Hub

The user interface for the Oracle Retail Supply Chain Hub modules have been translated into the following languages:

- English
- French
- German
- Spanish-Worldwide

Artwork

The Artwork add-on module provides a digital asset management solution for managing the design of product label artwork.

Enabling Artwork with SSO

Artwork is not a core Supplier Evaluation module, but a third-party add-on application. This process enables the integration with the third-party Artwork application, where it is used.

1. The Customer or Partner creates the MYARTWORK external system in the PROD and STAGE environments.
2. The Customer or Partner raises a service request, requesting the following:
Create the Artwork application for PROD and STAGE.
 - a. Specify the PROD IDCS or OCI IAM URL.
Specify the PROD Artwork Call Back URL.
 - b. Specify the STAGE IDCS or OCI IAM URL.
Specify the STAGE Artwork Call Back URL.
3. Oracle Support raises a Collab SR service request for AMS.
4. AMS completes the Artwork application creation per their SOP and closes the Collab SR service request.
5. Oracle Support notifies the Customer or Partner that the Artwork application has been created.
6. Once a new External System record has been created, it is then necessary to setup access into the IDCS or OCI IAM tenant. See the API Overview and Architecture chapter in the *Implementation Guide*. Note that access to the portal's APIs is by OAuth, utilising a Bearer Token.
7. Any further issues that the Customer or Partner has should then be raised as a new service request.

Post Release Tasks

When preparing to implement Supplier Evaluation Cloud Service, the following system configuration tasks must be taken into account.

System Parameters

Configure all system parameters according to the requirements for your installation of Supplier Evaluation.

The following system parameters are specifically concerned with the Evaluation Scoring and Merchandising Integration features:

- Inbound (Supplier & Site) integration with Merchandising. If enabling the feature, also set:
 - An appropriate interval/time for the interface process to run (the initial default is to run every 90 minutes).
 - The *Merchandising Invoicing System*, first ensuring the value is present in the glossary.
 - The account coding rules for the allocation of Supplier and Site codes. For details of the available options, see [Integration with Merchandising](#).

If the Merchandising supplier and site codes are to also be used as the Supplier Evaluation codes, a prerequisite for the integration to succeed is that the Supplier Evaluation supplier and site code minimum length rules be configured in a way that allows for the Merchandising codes being in the range 1 to 9999999999.

 - The default value for the Technologist. This is the user to be notified of new Merchandising sites requiring activation. It is recommended this be a user with permissions that permit them to reassign the sites to the appropriate individual Technologists, using the Global Change facility.
 - The default values for Business Category, Business Unit, Supplier Type, and Site Type. These are the default values to be used when creating a Site.
 - The Supplier Administrator user role, used when creating the initial supplier user.
 - The rules for whether Merchandising accounts at Active status are created in Supplier Evaluation, and if those set to Inactive status in Merchandising are to be automatically delisted in Supplier Evaluation.
 - The purging interval (the default is 90 days).
 - Any credentials or URLs necessary to access the Merchandising API.
 - GLN coding rules.

A prerequisite for the integration to succeed will be that the portal be configured so that GLN codes are non-mandatory for suppliers and sites, as the codes are not included in the Merchandising data. Validation will reject the creation of a new supplier or site if GLN codes are configured to be mandatory.
- Inbound (Item) integration with Merchandising. If enabling the feature, also set:
 - The Integration System, first ensuring the value is present in the glossary.

- The default value for the Specification Type. Selection is from the Spec Types glossary; it is possible to configure a *TBC* specification type for use as placeholder if there is not a suitable default specification type.

Once the Product Record has been created the specification type may then be manually edited to assign the appropriate specification type if necessary.

- The MFCS Item Level to be retrieved (Style or SKU).
- Consider whether Product Records represent a single or multiple variants before enabling the integration. The recommended and default method is *single variant*, where the **Allow Creation of Multiple Products** system parameter is No. This means a Product Record represents a single variant of a product, thus multiple Product Records can be linked to a Specification in order to cover multiple product variants - meaning the item integration will create a separate Product Record for each item variant. The setting cannot be changed once the first Product Record has been created.
- The purging interval (the default is 90 days).

A Retailer User is created with the name *TBC* as part of a new installation. This is used as a default if a Technologist or other contact cannot be derived when creating a Product Record through integration.

A prerequisite for the inbound item integration to succeed is that the MFCS Supplier & Site inbound integration is enable, in order to synchronize details of the suppliers of the items.

- Supplier Evaluation Scoring (for automated scoring). If enabling the feature, also set an appropriate interval/time for the scoring processes to run (the initial default is for the Scoring routine to run daily - every 1440 minutes).
- Item Evaluation Scoring (for automated scoring)
- Review Scoring (for automated scoring)

Glossaries

Populate all glossaries according to the requirements for your installation of Supplier Evaluation.

The following glossaries are specifically concerned with the Supplier Evaluation and Scoring features:

- Evaluation Types. †
- Evaluation Scores.
- Photo Album images.
- Evaluation Scoring Rules. †
- Entity Scoring Rules.
- Review Scoring Rules.
- Evaluation Site Type Groups.
- Assessment Questions and Templates. †
- Assessment Picklists.
- Summary Attributes.
- Accredited Bodies.

- Selection Statuses.
- Audit & Visit Templates. †
- Assign the relevant Evaluation Types to Assessment Templates, Audits/Visit Templates, and Documents.
- Review the configuration of the Countries glossary. The two character ISO country code is used to map the country when integrating addresses with Merchandising. Corresponding codes for Regions will be present for UK counties, US states, and China provinces; configure additional Regions, as required.

†Pre-defined glossaries, templates, and scoring rules, based on industry standards, are available to download from MOS and/or the Branding area of the portal.

System Text

Add any custom overrides to the core default system text or language translations.

Permissions

Review the core default roles and create any custom roles.

Assign roles and authority profiles to users, to suit their required level of access to the portal.

Email Templates

Review the core default email templates and make any required changes.

Add any additional text to the REG2 site approval notification email, to advise the nominated default Technologist to reassign the site to the appropriate user.

A

Appendix: SSL Certificate Management

This appendix contains additional information related to the configuration of ORSeC environments, such as the process for setting up SSL certificates for Production and UAT environments.

All Oracle Cloud Services must be securely accessed by using SSL Certificates. Oracle will accept individual Web Server Certificates or SAN Certificates. The use of wildcard certificates is not permitted.

Domain (URL) Management

The Oracle Retail Supplier Evaluation service (ORSE) typically requires four internet domains (URLs) to be registered in order to access the service:

- **Production**

Domain 1: URL to access the primary ORSE web portal.

Domain 2: URL to access the ORSE Reporting portal (this portal is only accessed from within the ORSE web portal).

- **UAT**

Domain 3: URL to access the UAT primary ORSE web portal.

Domain 4: URL to access the UAT ORSE Reporting portal (this portal is only accessed from within the ORSE web portal).

The above domains are registered and managed by you, the customer.

Domain Mapping Example

Below is an example of how each domain is mapped in a DNS configuration.

There is a Common Name, which will be the primary domain name, such as orse-customerdomain.com and then sub-domains. Each domain is then mapped to point to the Oracle CNAME record for each of the ORSE web portals.

Domain Mapping Overview for orse-customerdomain.com

- **Production**

Customer External Domain
www.orse-customerdomain.com
rep.orse-customerdomain.com

Oracle Domain - CNAME Record
cou1-orse-prod.retail.oracleindustry.com
cou1-orse-prod-rep.retail.oracleindustry.com

- **UAT**

External Domain
uat.orse-customerdomain.com
uatrep.orse-customerdomain.com

Domain - CNAME Record
cou1-orse-uat.retail.oracleindustry.com
cou1-orse-uat-rep.retail.oracleindustry.com

The above is for guidance purposes only; you are free to choose the naming of your domains and the associated configuration.

Procedure Summary

This procedure assumes the use of SAN based SSL certificates.

1. Ensure your DNS configuration is configured and propagated to the internet.
2. Provide Oracle with your domain registrant information and the Common Domain name to Oracle. See the required information format below.
3. Oracle will generate a Certificate Signing Request (CSR) file and will issue it to you, based on the information you provided in Step 2.
4. You will need to procure the SSL Certificate with your preferred SSL Certificate Authority (CA) vendor.
5. Ensure you request a SAN SSL Certificate and include all the required subdomains you have registered for the ORSE service to the certificate.
6. Once you have the CA signed SSL certificate, send the signed SAN Certificate (including any intermediate key chain certs) or URL web address (recommended) to retrieve the SSL, to Oracle.
7. Oracle will publish the SSL certificate and will inform you when completed.

SSL Information Format Example

Organization Name: Acme UK Ltd.

Organization Unit: Logistics

State: Leicestershire

Locality: Leicester

Country Code: GB

Common Name: orse-acme-logistics.com

The above information must be completely identical to the registrant information you have registered with your SSL Certificate Authority vendor.