

# Oracle® Sourcing

Implementation and Administration Guide

Release 11i

October 2002

Part No. A97394-02

**ORACLE®**

Part No. A97394-02

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# Send Us Your Comments

**Oracle Sourcing Implementation and Administration Guide, Release 11i**

**Part No. A97394-02**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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- Are the examples correct? Do you need more examples?
- What features did you like most?

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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

This guide describes the tasks necessary to implement and administer Oracle Sourcing.

Oracle Sourcing is a module within Oracle E-Business Suite and fully leverages the consolidated data and integrated functionality provided by the E-Business Suite of applications. Therefore, implementing Oracle Sourcing includes performing setup tasks in several other E-Business Suite applications, including Oracle Purchasing, Oracle Payables, Oracle General Ledger, and Oracle HRMS, among others.

To implement Oracle Sourcing you, or others on the implementation team, must be assigned the responsibilities necessary to perform the setup tasks in all of the required E-Business Suite applications.

See ["Oracle Applications Implementation Steps for Oracle Sourcing"](#) in [Chapter 2, "Implementing Oracle Sourcing"](#) for information on implementing Oracle Applications.

Once the necessary implementation steps have been performed in Oracle Applications, you must sign on to Oracle Sourcing as a Sourcing Super User and perform the additional implementation steps within Oracle Sourcing itself. See ["Oracle Applications Implementation Steps for Oracle Sourcing"](#) in [Chapter 2, "Implementing Oracle Sourcing"](#) for details on how to perform these steps.

## Intended Audience

This guide is written for people who implement and administer Oracle Sourcing.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

## Structure

This manual describes the following:

### **Chapter 1, "Overview"**

This chapter provides an overview of Oracle Sourcing and features. It also describes the integration possible with Oracle Purchasing.

### **Chapter 2, "Implementing Oracle Sourcing"**

This chapter describes the Oracle Applications setup steps as well as the setup steps performed by the Oracle Sourcing Super User within the Oracle Sourcing application itself. This chapter also describes the registration process.

### **Chapter 3, "Maintaining and Administering Oracle Sourcing"**

This chapter provides a checklist of some of the typical maintenance and administration tasks.

### **Appendix A, "Oracle Sourcing Responsibilities and Functions"**

This appendix lists the responsibilities installed with Oracle Sourcing and the functions defined to each.

### **Appendix B, "Oracle Sourcing Notifications"**

This appendix identifies the e-mail notifications used by Oracle Sourcing and contains the notification text.

## Related Documents

Other documentation includes the following:

### **Oracle Sourcing Online Help (accessed by the Help button)**

Oracle Sourcing online help contains instructions on all functional, non-administrative tasks.

### **Oracle Applications System Administration Guide**

This guide contains information on system-wide implementation and administration tasks such as assigning responsibilities.

### **Oracle Applications Flexfields Guide**

This guide describes how to plan and implement flexfields used by Oracle Applications.

### **Oracle Workflow Guide**

This guide explains how to define new workflow business processes as well as customize existing workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

### **Oracle General Ledger User's Guide**

This manual explains how to plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. It also describes how to define journal entry sources and categories so you can create journal entries for your general ledger. If you use multiple currencies, use this manual to define additional rate types, and enter daily rates.

### **Multiple Organizations in Oracle Applications**

This guide describes how to set up and use various Oracle Applications products with Oracle Applications' Multiple Organization support feature so you can define and support different organization structures when running a single installation of a product.

### **Oracle Inventory User's Guide**

This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle and physical inventories, and set up Oracle Inventory.

## **Oracle Payables User's Guide**

This guide describes how accounts payable transactions are created and entered in Oracle Payables. It also contains detailed setup information for Oracle Payables.

## **Oracle Purchasing User's Guide**

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. It also describes how to manage your supply base through agreements, sourcing rules and approved supplier lists. In addition, it explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

## **Using Oracle HRMS - The Fundamentals**

This manual explains how to set up Oracle HRMS, including site locations and organizations.

## **Managing Your Workforce Using Oracle HRMS**

This manual explains how to enter and track employee information.

## **Conventions**

The following terms are commonly used in this setup guide:

### **System Administrator**

The System Administrator is responsible for implementation and administration of all the e-Business suite applications. For example, the System Administrator assigns responsibilities to users.

### **Purchasing Super User**

The Purchasing Super User is responsible for implementing and administering the Oracle Purchasing applications.

### **Sourcing Super User**

The Sourcing Super User is responsible for setting up and customizing Oracle Sourcing, registering and approving supplier users, and performing ongoing administrative tasks as needed. The Sourcing Super User functions as the administrator for the Sourcing application.

## **Buyers (Sourcing Buyers)**

Any user at a buying company who has the Sourcing Buyer responsibility. Sourcing Buyers can create negotiations and award business to suppliers.

## **Suppliers (Sourcing Suppliers)**

Any user at a supplier company who is registered with the buyer company and has been assigned the Sourcing Supplier responsibility. Supplier users can participate in sourcing negotiations by placing bids, quotes, or responding to offers.

## **Responsibilities**

Responsibilities are sets of functions that can be granted to a user. Responsibilities are installed when the system is implemented although the system administrator can customize existing responsibilities or create new ones if needed.

## **Functions**

A function is a task that users can perform. A set of default functions comes installed in the system. Functions are grouped to form responsibilities. The System Administrator assigns responsibilities to users as appropriate. See [Appendix A, "Oracle Sourcing Responsibilities and Functions"](#) for details on the seeded responsibilities and their functions.



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# Overview

This chapter provides an overview of Oracle Sourcing and the implementation process.

## About Oracle Sourcing

Oracle Sourcing is a complete and integrated global sourcing platform which allows you to optimize your supply base, reduce sourcing costs, improve your supplier relationships, and source for best value. Oracle Sourcing is part of the Oracle E-Business Suite, an integrated set of applications designed to increase operational efficiencies in your business.

Oracle Sourcing helps an enterprise streamline the sourcing process with end to end business automation. It is the starting point for the sourcing negotiation process and provides a web-based platform for both the buyer and the suppliers to conduct negotiations.

Enterprises have the options of deploying both Oracle Purchasing and Oracle Sourcing if they have both licenses. Or they can deploy only Oracle Sourcing if they have the Oracle Sourcing license only.

### Enterprises with Oracle Sourcing and Oracle Purchasing Licenses

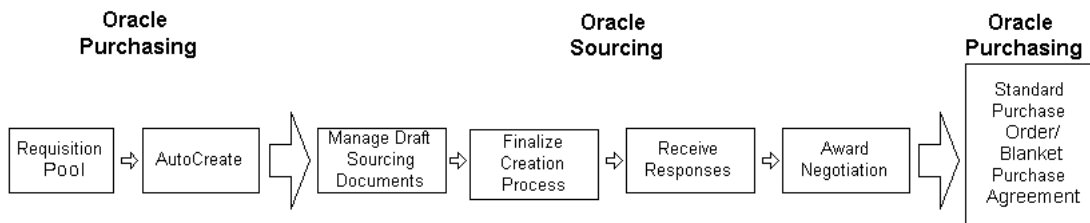
Oracle Sourcing is tightly integrated with the procurement modules of the E-Business Suite. Enterprises with both Oracle Sourcing and Oracle Purchasing licenses can fully leverage their investment in Oracle Purchasing while ensuring consistency and data integrity.

Buyers can aggregate requisition demand and create new sourcing documents directly from Oracle Purchasing. Once buyers have made their award decisions, they can create standard purchase orders or blanket purchase agreements directly in Oracle Purchasing, completing the sourcing cycle. Oracle Sourcing leverages

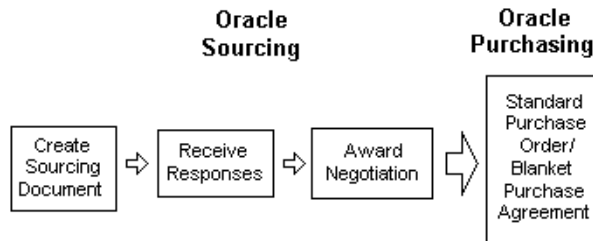
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reference data already maintained in Oracle Purchasing, including operating units, ship-to and bill-to locations, currencies and exchange rates, payment terms, and suppliers.

Buyers have visibility to information throughout the complete procurement process. Oracle Sourcing buyers can drill down from a sourcing document to the requisition lines that originated the sourcing event. Oracle Purchasing users can identify the negotiations that initiated the standard purchase order or the blanket purchase agreement. Likewise, requisitioners in Internet Procurement can track the negotiation in which their requisitions are being negotiated. Suppliers accessing Oracle iSupplier Portal can drill down from a purchase order to the backing sourcing document and quotation in Oracle Sourcing.



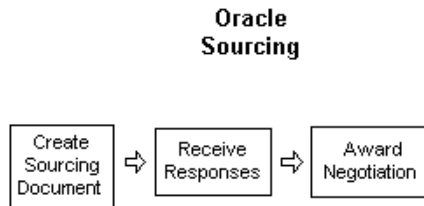
Buyers in Oracle Purchasing can select and aggregate approved requisition lines in the AutoCreate Buyer's Workbench to create draft Buyer's Auctions or Sourcing RFQs. Buyers can then automatically launch Oracle Sourcing to continue creating the sourcing document and conduct negotiations with suppliers. Upon completion of the sourcing event, Oracle Sourcing creates new standard purchase orders or blanket purchase agreements in Oracle Purchasing. The requisition lines that originated the negotiation are linked to the newly created purchasing document. Buyers in Oracle Sourcing can also create or update sourcing rules in Oracle Purchasing to automate future releases against agreements.



Alternatively, buyers can initiate negotiations in Oracle Sourcing. Buyers can enter the item information and modify default data from the operating unit, such as ship-to and bill-to locations, and currencies and exchange rates. After a negotiation is awarded, the buyer can decide to create a purchasing document in Oracle Purchasing.

### Enterprises with Oracle Sourcing License Only

Enterprises licensing only Oracle Sourcing can deploy Oracle Sourcing to streamline sourcing activities. You must fully install Oracle Purchasing to set up required data such as operating units, ship-to and bill-to locations, currencies and exchange rates. You are not allowed to use any feature not covered in the Oracle Sourcing license.



Buyers can create sourcing documents, conduct negotiations (auctions/RFQs/offers to buy) with suppliers, and award business in Oracle Sourcing. Buyers can enter item information and modify default data from the operating unit, such as ship-to and bill-to locations, currencies and exchange rates.

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## Sourcing Features

Oracle Sourcing provides a wide range of advanced features to support enterprise sourcing needs. Buyers can create several types of negotiations including auctions, RFQs, or offers.

The Sourcing online help system has step-by-step instructions on all features to assist users in mastering the application.

- If buyers are new to the product, they can navigate to the Getting Started section of the help system.
- If seeking help on a particular feature, buyers can easily navigate the help system to obtain instructions on that feature.

## How to Use This Manual

This manual details how to implement and maintain Oracle Sourcing.

### Implementing Oracle Sourcing

Since Oracle Sourcing is tightly integrated within the Oracle E-Business Suite of applications, there are many implementation tasks that must be performed in applications other than the Oracle Sourcing application in addition to implementation steps done within the Oracle Sourcing application itself.

You should consult "[Oracle Applications Implementation Steps for Oracle Sourcing](#)" in [Chapter 2, "Implementing Oracle Sourcing"](#) for a complete list of the implementation steps performed in applications other than Oracle Sourcing. Note that many of the steps may be optional if you already have Oracle Purchasing implemented, or not applicable depending on the products you are licensing.

Once you have identified the appropriate implementation steps (the required steps and any optional steps you choose to perform), you should consult the appropriate Oracle Application manuals for step by step information on how to complete the implementation tasks performed in other Oracle applications.

### Additional Sourcing Super User Implementation Tasks

Once you performed the Oracle Application setup tasks, you must perform additional setup tasks. These tasks are performed by the Sourcing Super User using the **Negotiations Administration** page available from the Administration tab within Oracle Sourcing (Sourcing Buyers and Sourcing Suppliers do not have access to this tab). See "[Additional Sourcing Super User Implementation Steps](#)" in [Chapter 2, "Implementing Oracle Sourcing"](#) for detailed instructions on how to perform these steps.





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## Implementing Oracle Sourcing

This chapter identifies the implementation steps that must be performed to implement Oracle Sourcing. Since Oracle Sourcing is an integrated module of the Oracle E-Business Suite, implementation steps must be performed in several applications besides Oracle Sourcing. These applications include:

- Oracle Payables
- Oracle Purchasing
- Oracle General Ledger
- Oracle HRMS
- Oracle Inventory
- Oracle System Administration
- Oracle Workflow

### Implementation/Licensing Options

Oracle Sourcing makes use of consolidated information stored and maintained by several E-Business Suite applications besides Oracle Sourcing, especially Oracle Purchasing. You must implement portions of these applications to use Oracle Sourcing. Which implementation steps you perform depends on which applications you plan to license:

- You can implement and license both Oracle Sourcing and Oracle Purchasing.
- You can implement and license Oracle Sourcing.

Consult the appropriate column in the table below to decide whether you need to perform a particular step. Some steps are required, some are optional, and some are not applicable to a particular licensing option.

For some steps, you need only the relevant documentation for that application. In other cases, you will need to use the application documentation in association with the additional Oracle Sourcing specific information contained in "[Oracle Sourcing Considerations for Oracle Applications Implementation Steps](#)" below.

Once you have completed the Oracle Applications implementation steps identified in the table below, sign on to Oracle Sourcing as a Sourcing Super User and complete the steps listed in "[Additional Sourcing Super User Implementation Steps](#)" below.

If you have already completed the required setup steps in the table below, see "[Oracle Sourcing Considerations for Oracle Applications Implementation Steps](#)" below for additional Oracle Sourcing specific instructions on Oracle Applications setup steps.

## Oracle Applications Implementation Steps for Oracle Sourcing

**Table 2-1 System Implementation Steps in Other Oracle Applications**

Step Number	Step Name	If Licensing both Oracle Sourcing and Oracle Purchasing	If Licensing Only Oracle Sourcing	Information Source
1	Set up System Administrator	Required	Required	Oracle Applications System Administrator's Guide
2	Defining Accounting Key Flexfield	Required	Not Applicable	Oracle Applications Flexfields Guide
3	Set Up Calendars, Currencies, and Set of Books	Required	Required	Oracle General Ledger User's Guide
4	Define Human Resources Key Flexfield	Required	Required	Oracle Applications Flexfields Guide
5	Define Locations	Required	Required	Using Oracle HRMS
6	Define Organizations and Organization Relationships	Required	Required	Using Oracle HRMS

**Table 2–1 System Implementation Steps in Other Oracle Applications**

<b>Step Number</b>	<b>Step Name</b>	<b>If Licensing both Oracle Sourcing and Oracle Purchasing</b>	<b>If Licensing Only Oracle Sourcing</b>	<b>Information Source</b>
7	Convert to a Multi-Org Architecture	Optional	Optional	Multiple Organizations in Oracle Applications using information in this chapter
8	Define Inventory Key Flexfield	Required	Required	Oracle Applications Flexfields Guide
9	Define Units of Measure	Required	Required	Oracle Inventory User's Guide
10	Define Freight Carriers	Optional	Optional	Oracle Inventory User's Guide
11	Define Item Attributes, Codes, and Templates	Required	Not Applicable	Oracle Inventory User's Guide
12	Define Categories	Required	Required	Oracle Inventory User's Guide
13	Define Category Groups	Required	Not Applicable	Oracle Inventory User's Guide
14	Set Up Personnel	Required	Required	Managing Your Workforce Using Oracle HRMS
15	Set Up Oracle Workflow	Required	Required	Oracle Workflow Guide
16	Decide How to Use the Account Generator	Required	Not Applicable	Oracle Workflow Guide
17	Open Inventory and Purchasing Accounting Periods	Required	Not Applicable	Oracle Inventory User's Guide Oracle Purchasing User's Guide
18	Define Subinventory Locations	Optional	Not Applicable	Oracle Inventory User's Guide

**Table 2–1 System Implementation Steps in Other Oracle Applications**

<b>Step Number</b>	<b>Step Name</b>	<b>If Licensing both Oracle Sourcing and Oracle Purchasing</b>	<b>If Licensing Only Oracle Sourcing</b>	<b>Information Source</b>
19	Define Cross-Reference Types	Optional	Not Applicable	Oracle Inventory User's Guide
20	Define Tax Codes	Optional	Not Applicable	Oracle Payables User's Guide
21	Define Payment Terms	Optional	Optional	Oracle Payables User's Guide
22	Set Up Approval Information	Required	Not Applicable	Oracle Purchasing User's Guide
23	Define Lookups and Classes	Required	Optional	Oracle Inventory User's Guide
24	Define Standard Attachments	Optional	Not Applicable	Oracle Applications Guide
25	Define Purchasing Options	Required	Not Applicable	Oracle Purchasing User's Guide
26	Define Buyers	Required	Not Applicable	Oracle Purchasing User's Guide
27	Define Items	Optional	Not Applicable	Oracle Inventory User's Guide
28	Define Line Types	Required	Required	Oracle Purchasing User's Guide
29	Start the Purchasing Database Administrator	Required	Not Applicable	Oracle Purchasing User's Guide
30	Define Financial Options	Required	Optional	Oracle Payables User's Guide using information in this chapter
31	Define Transaction Reasons	Optional	Not Applicable	Oracle Purchasing User's Guide
32	Define Receiving Options	Required	Not Applicable	Oracle Purchasing User's Guide

**Table 2–1 System Implementation Steps in Other Oracle Applications**

<b>Step Number</b>	<b>Step Name</b>	<b>If Licensing both Oracle Sourcing and Oracle Purchasing</b>	<b>If Licensing Only Oracle Sourcing</b>	<b>Information Source</b>
33	Set Up Transaction Managers and Resubmission Levels	Required	Not Applicable	Oracle Applications System Administrator's Guide
34	Define Suppliers	Required	Required	Oracle Payables User's Guide
35	Set Up Workflow Options	Required	Not Applicable	Oracle Workflow using information in this chapter
36	Submit Workflow-Related Processes	Required	Required	Oracle Payables User's Guide
37	Define Descriptive Flexfields	Optional	Not Applicable	Oracle Applications Flexfields Guide
38	Set Up Automatic Sourcing	Optional	Not Applicable	Oracle Purchasing User's Guide
39	Perform Additional System Administration Setup	Required	Required	Oracle Applications System Administrator's Guide
40	Define Manufacturing System and User Profile Options	Required	Optional	Oracle Purchasing User's Guide using information in this chapter
41	Assign Sourcing Responsibilities	Required	Required	Oracle Applications System Administrator's Guide using information in this chapter

**Table 2–1 System Implementation Steps in Other Oracle Applications**

Step Number	Step Name	If Licensing both Oracle Sourcing and Oracle Purchasing	If Licensing Only Oracle Sourcing	Information Source
42	Define Default Supplier User Responsibility	Required	Required	Oracle Applications System Administrator's Guide using information in this chapter
43	Customize Online Help Files	Optional	Optional	Oracle Applications System Administrator's Guide using information in this chapter

## Oracle Sourcing Considerations for Oracle Applications Implementation Steps

### Step 3: Set Up Calendars, Currencies and Sets of Books

If you are expecting responses to a negotiation to be in different currencies, you should define the exchange rate(s) that will be used.

### Step 7: Convert to a Multi-Org Architecture

Oracle Sourcing uses operating unit-specific information when creating a sourcing document based on the organization selected by the buyer. When creating a sourcing document in Oracle Sourcing, the buyer selects the operating unit from a list of values. This menu lists all the operating units defined to the system.

Many subsequent negotiation values (such as the default shipping address and default payment terms) will default based on the operating unit the buyer selected. Operating unit values are also used during the award process when creating a standard purchase order or blanket purchase agreement.

If the draft sourcing document was generated using AutoCreate, the operating unit defaults according to the operating unit of the backing requisitions.

### Step 35: Set Up Workflow Options

To enable automatic creation of purchase orders, you should run the Workflow Background Process with an item type of Sourcing Complete Auction. You may wish to schedule this job to run frequently.

### Step 40: Define Manufacturing System and User Profile Options

Profile options are one way to control system processing. They can control resource usage as well as enable or disable certain application features. There are two system profile options related to Oracle Sourcing

- The **Server Timezone** site-level profile option identifies the timezone where the Sourcing server is located.
- Setting the option "**PO: Allow Autocreation of Oracle Sourcing Documents**" to Yes enables buyers to use AutoCreate to generate draft auctions and Sourcing RFQs that can then be completed and awarded in Oracle Sourcing.
- Setting the option "**PO: Display the Autocreated Document**" to Yes allows buyers to launch Oracle Sourcing automatically from Oracle Purchasing once they have finished AutoCreating the draft sourcing document. Buyers must also have a responsibility containing the Edit Draft Negotiation function.

### Step 41: Assign Responsibilities

During this step, you assign your users the responsibilities they need to perform their jobs. Specifically, you assign all your buyers the Sourcing Buyer responsibility. Make sure that each buyer's profile contains a first name, last name, and e-mail address. Also make sure that no buyer is assigned any Sourcing Supplier functions. Also ensure that any Sourcing Suppliers are not given the Sourcing Buyer functionality. See [Appendix A, "Oracle Sourcing Responsibilities and Functions"](#) for details on Sourcing responsibilities.

The user(s) responsible for administering and maintaining the Oracle Sourcing system should be assigned the Sourcing Super User responsibility.

### Step 42: Define Supplier User Default Responsibility

Since you do not explicitly assign a responsibility to supplier users who are registered, you must select a default responsibility that will be assigned during the registration process.

You define the default supplier user responsibility by setting a system profile option called **Sourcing Default Responsibility for External User**. Set this option to Sourcing Supplier.

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**Note:** If any responsibilities have been customized, ensure that the Sourcing Supplier responsibility does not contain any functions which belong only to the Sourcing Buyer or the Sourcing Super User. See [Appendix A, "Oracle Sourcing Responsibilities and Functions"](#) for information on which functions are appropriate for the Sourcing Supplier responsibility.

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### **Step 43: Customize Online Help Files**

The instructions in the System Administration manual dealing with the customization of help files include two steps that you do not need to perform:

- Updating the search index
- Customizing the navigation tree

## **Additional Sourcing Super User Implementation Steps**

Once you have completed the Oracle Applications setup tasks, you complete your implementation by performing the Sourcing Super User setup tasks.

This section explains the role of the Sourcing Super User, describes the functional areas for which the Sourcing Super User is responsible, and also describes in detail the implementation steps a Sourcing Super User performs to set up Oracle Sourcing for a company. These steps fall into three areas:

- System Setup and Customization Steps
- Negotiations Setup
- Supplier Contact Management

## **Sourcing Super Users**

The Sourcing Super User is responsible for setting up and maintaining the Oracle Sourcing system. This includes many tasks such as initial system setup and customization, creating negotiation creation tools such as price element lists and attribute lists, and approving supplier registration requests.

The Sourcing Super User is also responsible for performing ongoing maintenance and administration.

The menu of setup and administration functions is available on the **Negotiations Administration** page. This page appears when you click the Administration tab.

## Negotiations Administration

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### Negotiations Tools

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[Reusable Attribute Lists](#)

[Price Elements](#)

[Reusable Price Element Lists](#)

[Reusable Invitation Lists](#)

[Cancel / Delete Negotiation](#)

### Negotiations Setup

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[System Setup](#)

[Customize Text](#)

[Customize Content](#)

[Setup Negotiation Terms and Conditions](#)

[Negotiations Configuration](#)

## Super User Functional Areas

As a Oracle Sourcing Super User, your responsibilities fall into three main areas.

### Setting Sourcing System Defaults and Customization

As a Sourcing Super User, you are responsible for setting default system values as well as customizing the system as necessary.

- Your Oracle Sourcing system may have been installed in multiple languages. If so, you can select the default language to be used by the system. Users can select any one of the languages and set it as their default language using the **General Preferences** page available by clicking the Preferences icon.
- You can specify the default time zone. The default time zone is applied to all users accessing the system. Users can change their default time zone.

- For branding purposes, you can customize much of the text in the application as well as graphics used on the **Welcome** pages. This includes creating different versions for any additional languages in which the system is installed.
- You can define terms and conditions that a supplier must accept before responding to a negotiation.

See "[System Setup and Customization Steps](#)" for information on customizing your system.

### Creating Negotiation Tools

There are several tools you can set up to streamline and standardize the creation of sourcing documents by your users. These are especially useful if you regularly create sourcing documents having similar types of items or suppliers. Buyers can apply these tools when they are creating sourcing documents to quickly enter information.

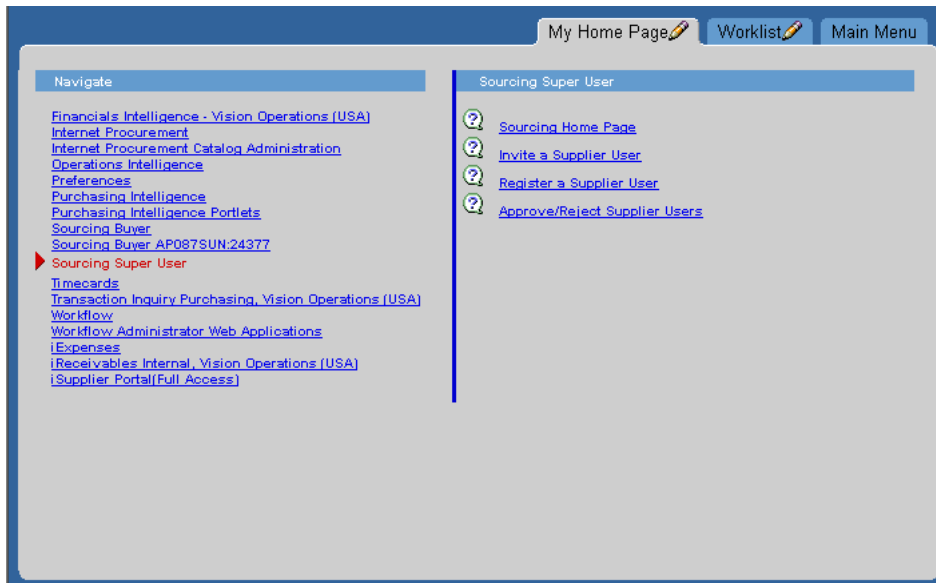
- You can create lists of sourcing attributes for use across all sourcing types. These attribute lists are useful if you have regularly or frequently occurring negotiations including items that have very detailed specifications. You can define the attribute list once and your buyers can apply it to appropriate sourcing documents.
- You can create price elements and price element lists to identify and negotiate on additional costs tied to an item. These could include costs such as custom duties, or additional services required such as consulting or training.
- If you regularly conduct business with a specific group of suppliers, you can define invitation lists that include contact information for all the suppliers. This allows your buyers to easily add the names and contacts of all appropriate suppliers for a particular negotiation.
- If many of your auctions, RFQs, or offers use the same attributes (bid controls, item attribute lists, or invitation lists), you can create public templates for your users. Using templates can streamline the creation of a sourcing document while standardizing the sourcing document your buyers create.

See "[Negotiations Setup Steps](#)" for details on creating negotiation tools.

### Managing Supplier Users

Suppliers must be registered with the system and approved before they can participate in any negotiations.

Supplier users are registered using the **Supplier User Management** pages. These pages are accessible using links on the **Portal** page.



See "[Managing Supplier Contacts](#)" for information on maintaining supplier users.

## System Setup and Customization Steps

This section consists of the following steps:

1. Setup System Parameters (Required)
2. Customize Text (Optional)
3. Customize Content (Optional)

## Step 1: Setup System Parameters (Required)

The system parameter values were most likely set when Oracle Sourcing was implemented, and there is typically no reason to change them. However, you should check and supply any missing values.

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click "System Setup."

The screenshot shows the Oracle Sourcing Administration interface. At the top left is the Oracle Sourcing logo. On the right, there are navigation links: Return to Portal, Logout, Preferences, and Help. Below these are tabs for Welcome, Negotiations, Intelligence, and Administration. The Administration tab is selected. The breadcrumb trail reads: Negotiations Administration > System Setup. The main heading is "System Setup". The form contains four fields:

- \* Enterprise Name:
- \* Character Set:   
(Examples: iso-8859-1, UTF-8)
- \* Default Language:
- \* Default Timezone:

At the bottom right of the form are two buttons: "Apply Changes" and "Clear Changes".

3. On the **System Setup** page, enter any missing values.
  - The Enterprise Name is the name used in notifications sent to suppliers.
  - The character set determines which languages you can support. European languages can use UTF-8. Multi-byte languages will use a different character set.
  - The default language is seen by all users who have not selected a different language using the Preferences icon.
  - The default timezone is seen by all users who have not selected a different timezone using the My Profile link.

4. Once you have entered any necessary information, click **Apply Changes**.

### **Step 2: Customize Text (Optional)**

Sometimes there may be words or phrases that you need to modify throughout the system. For example, you can change the word *Auction* everywhere to *Trade Transaction*. Or you may wish to change the label on a tab or button and have that change show up everywhere on the system. The **Customize Text** page provides you the capability to globally update text strings. You can modify a text string online, or if you have substantial modifications to make, you can download the text strings, modify the text offline, and then upload the modified text back to the system. The modifications are seen immediately. If you later decide to reverse the customization you have made, you can undo a customization.

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**Tip:** When you upgrade, the system preserves your text changes; however, if the upgrade comes with new text, or the text that you customized previously is now controlled by a different message name, you may need to customize the new text. To find new text strings, follow the steps below for customizing text offline. In the Text Value field, enter a wild card (%) to find and download all text. Do the same for the previous release and compare the two downloaded files.

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**Note:** Create backup copies of your terminology text files. You can download your customizations into spreadsheet for easy storage. The system can revert to the original, system version of text strings in case you need to undo a change, but not to a previous version of a customization you made.

---

---

#### **To customize text strings online:**

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click "Customize Text."



## Customize Text

Please choose a language, a text type, and optionally, specify a text value to search specific text or leave the field blank to retrieve all texts.

If you have already downloaded a file and want to upload it back, click [here](#).

\* Language

\* Text Type

Text Value

3. On the **Customize Text** page, select the Language.

Text customizations apply only to a particular language. People using other language versions of the system do not see the customized text. For example, a modification to the French language version of the system is not seen by people using other languages. If you have installed the system in more than one language, customize the text in each language. Changes to the language version selected as the Default Language on the **System Setup** page are seen by people using that language and by anyone who does not otherwise select an available language version.

4. Select the Text Type to search for text strings among existing customizations, the default text, or both.
5. Enter a search value in the Text Value field.

You do not have to enclose the string in quotes. You can enter a partial value, and you can use a wild card character (%). Searches are not case sensitive.

6. Click Go.

## Text Search Result

Select texts and ... <span style="float: right;">Customize</span>			
<a href="#">Select All</a> <a href="#">Clear All</a>		< Previous 1 - 25 shown of 81 Next >	
Select	Default Text	Customization	Name
<input type="checkbox"/>	a named grouping of related item characteristics, can be referenced by auctioneers when creating auction templates and auctions to streamline data entry.		PON_AUC_ALLATTRIBUTELISTS_1_B
<input type="checkbox"/>	An auctioneer will typically disqualify a bid if it contains inaccurate or incomplete information. Disqualified bids are considered null and void.		PON_AUC_WF_DISQUALIFY_EXP_B
<input type="checkbox"/>	Auction <b>&AUCION_HEADER_ID</b> has been unlocked. Now only the auctioneer can view the bids.		PON_AUC_CONFSEALED_2_B
<input type="checkbox"/>	Auction <b>&AUCION_HEADER_ID</b> has been unlocked. Now only the auctioneer can view the bids.		PON_AUC_CONFSEALED_2
<input type="checkbox"/>	Auction <b>&AUCION_HEADER_ID</b> has been unsealed. Now both the auctioneer and the bidders can view the bids.		PON_AUC_CONFSEALED_3_B

The **Text Search Result** table displays the following:

- **Default Text:** The text string that the system provides.
  - **Customization:** Customizations performed on that text, if any.
7. Select the string you wish to change, or click the "Select All" link for each page of strings you are selecting.
  8. Click Customize.

## Enter New Text

Enter your customization in the input fields and click **Submit** when you are done.

Default Text	Customization	New Text
a named grouping of related item characteristics, can be referenced by auctioneers when creating auction templates and auctions to streamline data entry.		a named grouping of related item characteristics, can be referenced by auctioneers when cr

9. Enter your change in the New Text field.
10. Click Submit.

A **Confirmation** page appears indicating that you have successfully modified the text string. The modification is seen immediately by anyone using the specified language version.

### To customize text offline:

1. Follow steps 1 through 6 above to search for the target text strings.
2. Click Download All Search Results.
3. When prompted, save the .zip file to a convenient directory. You do not need to preserve the original file name. Note that the .zip file includes a *readme* file and a text file that can be opened as a tab-delimited file in a spreadsheet program such as Excel. You will enter all of your string modifications in the spreadsheet text file.
4. Extract and print the *readme* file and follow the instructions to make your text changes.
5. To upload your text customizations, return to the **Customize Text** page.
6. Click the word "here" in the sentence "If you have already downloaded a file and want to upload it back, click here."

7. Select the Language in which you want the customizations to appear.

This should be the same language you chose when downloading the customizations.

8. Use the Browse button to navigate to the .txt file containing your customizations.
9. Click Start Load Now.

---

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**Note:** A typical use for text customization is to modify the text in the e-mail notifications generated by Workflow and sent to Suppliers. [Appendix B, "Oracle Sourcing Notifications"](#) contains a list of all the installed notifications along with their default text. You can use this list to identify notifications you wish to change.

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### **Step 3: Customize Content (Required)**

You can customize the **Welcome** page to add your own company specific information. Since you can customize both the Buying **Welcome** page (the page seen by your own users) as well as the Selling **Welcome** page (the page seen by your suppliers), you can customize the content accordingly.

The following graphic shows the Sourcing Buyer **Welcome** page. Only the text in the right side of the page can be customized. The links on the left cannot be modified.

**ORACLE**  
Sourcing

[Return to Portal](#) [Logout](#) [Preferences](#) [Help](#)

[Welcome](#) [Negotiations](#) [Intelligence](#)

**To Do List**  
[View Notifications](#)

**Quick Access Links**

**RFQs**  
[Create RFQ](#)  
[View Open RFQs](#)  
[Monitor Quote Activity](#)

**Auctions**  
[Create Buyer's Auction](#)  
[View Open Auctions](#)  
[Monitor Bidding Activity](#)

**Offers**  
[Create Offer to Buy](#)  
[View Offer Activity History](#)

### Welcome to Oracle Sourcing

Oracle Sourcing is a complete and integrated global sourcing platform, which allows you to optimize your supply base, reduce sourcing costs, improve your supplier relationships, and source for best value.

### Negotiation Types at a Glance

- **RFQs** - Request quotes from suppliers for complex items and services
- **Auctions** - Solicit bids from suppliers for items and services that are clearly defined
- **Offers** - Negotiate commodity items or services simultaneously with multiple suppliers

**Need help?** Our [Online Help](#) includes step-by-step instructions.

Instructions to customize this page are contained in the Oracle Sourcing Implementation and Administration Guide.

### To download and customize content:

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click "Customize Content."

## Customize Content

If you want to undo any customization, please click [here](#).

\* Indicates a required field

### Step 1: Download Files

Select a content type, language, and template or customization and press the **Download Now** button to save a zip file to your system including a template, examples and instructions

\* Content Type

\* Language

\* Template or Customization

3. On the **Customize Content** page, select
  - the content type (Buying **Welcome** or Selling **Welcome** page),
  - the language version, and
  - either template or customization. You can use the template when you first create a customization.
4. Click Download Now.
5. Extract the .zip file to a convenient directory, and open the .htm file in Notepad or another HTML editor.
6. When you are finished updating the file, save it, and rezip it. Do not change the name of the .htm file.
7. Return to the **Customize Content** page.
8. Scroll to Step 2: Load Files.
9. Select the correct content type, language, and character set.
10. Browse for your updated zip file.
11. Click Start Load Now.

## Negotiations Setup Steps

This section consists of the following steps:

1. Define Negotiations Teams and Conditions (Optional)
2. Define Reusable Attribute Lists (Optional)
3. Define Price Elements and Price Element Lists (Optional)
4. Define Reusable Invitation Lists (Optional)
5. Define Negotiation Templates (Optional)
6. Select Rank Indicator and Define Visibility (Optional)
7. Define a Default Unit of Measure for Amount Based Lines (Required)

Anyone assigned the Sourcing Super User responsibility can perform these tasks although Sourcing Buyers also can define reusable attributes lists, price element lists, negotiation templates and reusable invitation lists although these are available only for their private use.

### **Step 1: Define Negotiation Terms and Conditions (Optional)**

Negotiation terms and conditions are presented to suppliers before they respond to a negotiation for the first time. When responding to a negotiation created by a buyer in your company, suppliers must agree to accept the terms and conditions before submitting a response. These terms and conditions are presented to the first user from any company that responds to the negotiation; subsequent responses from that supplier, or other users from that supplier's company, will not require acceptance of the terms and conditions again.

#### **To define negotiation terms and conditions:**

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click the "Set Up Negotiation Terms and Conditions" link.

## Setup Negotiation Terms and Conditions

Enter your negotiation terms and conditions that will be presented to users before they respond to a negotiation for the first time. Check the **Disable terms and conditions for all languages** checkbox if you do not want to display the text to users. Press the **Apply Changes** button below when you are done.

Disable terms and conditions for all languages

The language of your terms and conditions is American English ▼

this is a test terms and condition.By checking the check box, you're accepting the terms and conditions

### Quick Tip

#### Setting up Terms and Conditions in other languages ?

- Complete initial setup in your language and submit
- Select new language from the list of values
- Enter your text and submit by pressing the **Apply Changes** button

3. Use the **Setup Negotiations Terms and Conditions** page to define the terms and conditions that you want to display on negotiations.

If the system supports multiple languages, select a Language and translate the terms and conditions for each language if your suppliers speak other languages.

4. Click **Apply Changes**.

## Step 2: Define Reusable Attribute Lists (Optional)

You can create negotiation attribute lists to include on your auction, RFQ, or offer templates, or to use when creating any new auction, RFQ, or offer. Attribute lists are named groups of item attributes (item characteristics) that apply to items in a negotiation. Attributes define the details that a supplier should provide when responding to an item in a negotiation. For example, when an auctioneer adds an item to an auction for vehicles, the auctioneer can add an attribute called *mileage* to specify that the bid item must have fewer than 12,000 miles on the odometer.

If you or your buyers repeatedly include the same item attributes with your negotiation items, attribute lists can streamline negotiation creation and standardize your negotiation items.

If you include an attribute list on a sourcing document template, the attributes on the list will apply to all items added to the sourcing documents created with that template (though the person using the template can edit and remove attributes as appropriate). Any changes you make to an attribute list are automatically reflected in any templates using that attribute list.

Except for the attribute list name, you can edit attribute lists after you have created them.

### To create or edit a new attribute list:

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click "Reusable Attribute Lists."

### Reusable Attribute Lists

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Reusable Attribute Lists, a named grouping of related item characteristics, can be referenced by negotiators when creating negotiation templates and negotiations to streamline data entry. [Learn More ...](#)

- [Create New List](#)

#### Search for Lists

---

To view or edit existing lists, enter search criteria and press the **Go** button.

List Name	<input type="text"/>
Description	<input type="text"/>
List Status	<input type="text" value="Any"/>
Attribute	<input type="text"/>
	<input type="button" value="Go"/> <a href="#">Search Tips</a>

3. On the **Reusable Attribute Lists** page, click "Create New List."

### Create Attribute List

Enter attribute list information and press the **Submit** button below when you are done.

\* Indicates a required field

\* List Name

\* Description

\* Status

#### Attributes

A list must have at least one attribute

[Add Attributes](#)

Submit

4. On the **Create Attribute List** page, enter a List Name and brief Description for your attribute list. Choose the Status (Active or Inactive). An Active list can be used immediately; an Inactive list will be stored in the system, but will not be available for use unless you edit the list and change its status to Active.
5. To add attributes to your attribute list, click the "Add Attributes" link. An attribute list must include at least one attribute.

### Add Item Attributes

Attributes let you define discrete characteristics of the goods and services you want to negotiate. Attributes can allow or require a corresponding response, or they can be display-only. [Learn More ...](#)

Enter attribute information and press the **OK** button below when you are done. **Need Help?** Review the examples below.

\* Indicates a required field

* Attribute	Response	Value Type	Negotiation Value	Display Value to Respondents	Score	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Optional	Text		No	Score	
<p>Add Another</p>						

6. On the **Add Item Attributes** page, enter your attribute information in the appropriate fields. Required fields are marked with an asterisk (\*):
  - **\*Attribute:** Enter a name for your attribute (for example, Mileage, PPM Defect Rate; Grade).
  - **Response:** If you want all suppliers to enter a value for this attribute when responding, select Required. If you don't want to require suppliers to enter a value for this attribute when responding, select Optional. If you want this attribute to be displayed to the supplier without allowing any response, select Display Only.
  - **Value Type:** Select the type of value that suppliers should enter for this attribute when responding. They may enter *text* (letters, words, digits, and so on), *number* (digits with decimals allowed), *date* (numbers in the default date format or the format you or the supplier select as your date preference), or *URL* (Web site addresses that begin with a valid URL protocol for example, <http://>, <https://>, and <ftp://>. Values with a URL type display as links; for example a Web site address entered as a *Text* type will display simply as text). The value type you select also governs the value you can enter in the Negotiation Value field.
  - **Negotiation Value:** If desired, set your item specifications by entering a target value for the item in the Value field (for example: "Fewer than twelve thousand miles per vehicle"; "Fewer than eight defects per million parts manufactured"; and so on).
  - **Display Value to Respondents:** If you want suppliers to see the Negotiation Value, select Yes. If you do not want suppliers to see the value, select No.
  - **Score:** Weighted attributes are used in Multi-Attribute Weighted Scoring negotiations. Weighted attributes allow you to include attributes in addition to price when calculating and ranking bids. To weight an attribute, the attribute must be required. When you click Score, the **Enter Scoring Criteria** page allows you to define acceptable values or ranges of values for this item and give each value/range of values a score. When a supplier enters a value, that value is evaluated and its score, relative to competing responses, is used when ranking the responses. See the online help for more information about weighted attributes and how Multi-Attribute Weighted Scoring negotiations work.
7. When you have finished entering your attribute information, click Add Another to add another new attribute, or click OK to add your current attribute to your attribute list and return to the **Create Attribute List** page.

8. On the **Create Attribute List** page, review your attribute list name, description, status, and attributes. When you are satisfied with your attribute list, click **Submit**.

---

---

**Note:** You and your Sourcing Buyers can also create reusable attribute lists by using the "Reusable Attribute Lists" link available from the Auctions, RFQs, or Offers subtabs of the **Negotiations** page.

The process of creating attribute lists is similar to that described above, but some field labels differ according to negotiation type.

---

---

### **Step 3: Define Price Elements and Price Element Lists (Optional)**

Price elements allow you to identify and negotiate on additional costs related to an item. You can use price elements to obtain a more realistic idea of the total cost of an item by factoring in any additional costs beyond just the item price. Such costs could include services such as consulting or training services, or fixed costs such as import/export duties.

Once you create price elements for your commonly occurring additional costs, you can create lists of price elements that commonly occur together. Buyers can then apply these price element lists to negotiations to quickly identify the secondary costs that also need to be negotiated.

#### **To define a price element:**

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click "Price Elements."

### Price Elements

Choose a language and click the **Create Price Element** link below to create a price element.

\* Indicates a required field

Language \*

### Price Elements

Select and press the **Edit** button to edit a price element.

■ [Create Price Element](#)

Select Price Element and ...

Sort by   Ascending   Descending

⏪ Previous 1 - 25 shown of 148 Next ⏩

Select	Code	Price Element Name	Description	Pricing Basis	Status
--------	------	--------------------	-------------	---------------	--------

3. On the **Price Elements** page, select a language version for this price element.
4. Click "Create Price Element."

### Create Price Element

Enter Price element information and press the **Done** button when you are done.

\* Indicates a required field

Language **American English**

\* Code

\* Price Element Name

\* Description

\* Pricing Basis

\* Status

5. On the **Create Price Element** page, enter the following information:
  - A unique code (the same code can be shared between different language versions of the same price element).
  - The name of the new price element.
  - A short text description for the price element.
  - A pricing basis value to determine how this price element is calculated. See the online help for details on pricing basis.
  - The status for this price element. Active price elements are immediately available for use. Inactive price elements cannot be used.
6. Once you have entered your information, click Done. The information you entered is validated. If your code is not unique, you are prompted to enter a different one.

**To create a different language version of an existing price element:**

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click "Price Elements."
3. Select a language version for this price element.
4. Identify the price element for which you will create the new version.
5. Click Edit.
6. On the **Edit Price Element** page, enter the new information.
7. Click Done.

**To define a price element list:**

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click "Reusable Price Element Lists."

### Reusable Price Element Lists

---

Reusable Price Element Lists, a named grouping of related item price elements, can be referenced by negotiators when creating negotiation templates and negotiations to streamline data entry. [Learn More ...](#)

- [Create New List](#)

#### Search for Lists

---

To view or edit existing lists, enter search criteria and press the **Go** button.

List Name

Description

List Status

Price Element Name

[Search Tips](#)

### 3. On the **Reusable Price Element Lists** page, click "Create New List."

### Create Reusable Price Element List

---

Enter price element list information and press the **Done** button below when you are done.

- \* Indicates a required field

\* List Name

\* Description

\* Status

#### Price Elements

---

A list must have at least one price element. To add another price element to the list, press the **Add Another** button.

1 - 1 shown of 1

Select	Price Element Name	Description	Pricing Basis
<input type="checkbox"/>	<input type="text"/>		

Select price element and...

4. On the **Create Reusable Price Element List** page, enter the following information:
  - Name of the new list.
  - A short text description of the new list.
  - The status of the new list. Active lists can be used immediately. Inactive lists cannot be used.
5. From the Price Element Name menu, select the price elements for this list. To add a second price element, click Add Another.
6. When you are finished adding price elements, click Done.

#### **Step 4: Define Reusable Invitation Lists (Optional)**

If you typically invite the same core group of suppliers to many (or all) of your negotiations, you can add these suppliers to a reusable invitation list to use with your negotiations. Using an invitation list can help standardize your business practice by ensuring that all appropriate people are invited to targeted negotiations and can help streamline the negotiation process. Buyers can add invitation list(s) when creating a new negotiation. Invitation lists can also be attached to a negotiation template.

#### **To create a new invitation list:**

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click the "Reusable Invitation Lists" link.

### Reusable Invitation Lists

---

Invitation List can be referenced during negotiation and negotiation template creation to streamline data entry. [Learn more...](#)

- [Create New Invitation List](#)

#### Search for Invitation Lists

---

To view or edit existing lists, enter search criteria and press the **Go** button.

List Name	<input type="text"/>
Description	<input type="text"/>
Status	Any <input type="button" value="v"/>
Participant	<input type="text"/>

[Search Tips](#)

3. On the **Reusable Invitation Lists** page, click "Create New Invitation List."

### Create Invitation List

---

Enter invitation list information and press the **Submit** button below when you are done.

- \* Indicates a required field

* List Name	<input type="text"/>
* Description	<input type="text"/>
* Access	Public <input type="button" value="v"/>
Status	<b>Active</b>

#### Participants

---

An invitation list must have at least one participant

- [Add Suppliers](#)

4. On the **Create Invitation List** page, enter a list name, description, and select an Access. All Buyers can view and use Public lists. The lists you create are immediately available for use. If, at some time in the future, you no longer need a list, you can deactivate it.

5. Click the "Add Suppliers" link to search for and select suppliers to add to your invitation list.

## Invite Suppliers by Name

### Search

Enter search criteria and press the **Go** button to find the suppliers you want to invite, or browse the supplier index.

[Show All](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Supplier Name

[Search Tips](#)

[Return to Create Invitation List](#)

6. On the **Invite Suppliers by Name** page, select the supplier you want to add to the list.
7. When you have finished adding suppliers, click Submit.

## Step 5: Define Negotiation Templates (Optional)

If many of your negotiations use many of the same criteria (bid/quote controls, item attribute lists, or invitation lists), you can create templates for each negotiation type (auction, RFQ, offer to buy). Sourcing Super Users can create public templates that are available for use by all Sourcing Buyers. (Sourcing Super Users and Sourcing Buyers can both create their own private templates that only they can use.)

Using negotiation templates can streamline the creation process and standardize your business practices.

### To create a negotiation template:

1. On the Sourcing **Welcome** page, click the Negotiations tab.
2. Select the negotiation type for which you wish to create the template by clicking Auctions, RFQs, or Offers in the task bar.
3. In the Tools section, click the templates link.
4. On the **Manage Templates** page, click the "Create New Template" link.
5. On the **Step 1: Describe Your Template** page, give your template a name and optionally a description. Be sure to accept the default Access value of Public.

6. Continue by using the instructions in the online help describing how to define templates.

### Step 6: Select Rank Indicator and Define Visibility (Optional)

The system can display the ranking of responses to suppliers participating in an auction or RFQ. You can choose which type of indicator is used to display rankings. You can also choose whether ranking information is visible during blind auctions or RFQs. For sealed auctions/RFQs, the ranking cannot be viewed until the auction/RFQ is unsealed (assuming the buyer allows the rank to be seen at all).

#### To choose a ranking indicator:

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click the "Negotiations Configuration" link.

### Negotiations Configuration

---

Configure the following which is applicable to your company and press **OK** when you are done.

#### Rank Indicator

---

Select the default rank indicator which is displayed to negotiation creators and respondents throughout the negotiation process. Select the checkbox if you want the negotiation creators to be able to override this indicator when creating a negotiation. [Learn More ...](#)

- Indicator
- Win/Lose  
Word Win or Lose is displayed.
  - 1,2,3...  
Rank order is displayed.
  - None  
No indicator is displayed.
  - Allow negotiation creators to override indicator

#### Should Rank be Visible in Blind Auctions/RFQs?

---

**Note:** Changes to the rank visibility setup affect all your existing and future blind auctions/RFQs.

- Yes, rank is visible to respondents.
- No, rank is not visible to respondents.

#### Unit Of Measure for Amount Based Line Items

---

Select the unit of measure for items of amount based line type.

Unit of Measure

3. In the Rank Indicator section of the **Negotiations Configuration** page, select a default rank indicator. This indicator is then used to display the rank of responses for negotiations created by your company.
4. If you want to allow negotiation creators to select a rank indicator other than the default when creating a negotiation, click the override checkbox.

#### **To define a ranking visibility for blind auctions and RFQs:**

Competing suppliers' bid/quote information in blind auctions and RFQs is typically not revealed while the negotiation is taking place. However, if you choose a rank indicator (by choosing a rank indicator other than "None"), you can choose to display a bid/quote's ranking by selecting the appropriate radio button under **Should Rank be Visible in Blind Auctions/RFQs**. This means suppliers will be able to view the rank of their responses in a blind negotiation.

#### **Step 7: Define Default Unit Of Measure for Amount Based Line Items (Required)**

Amount based line items typically are not negotiated by unit. Normally, amount based line item types refer to services such as training or consulting. As such, there is no unit of measure associated with them. However, Unit of Measure is a required field when defining a negotiation. To simplify creating line based items, you can select a default value to be used when negotiating for amount based line items.

#### **To define a default unit of measurement:**

1. On the Sourcing **Welcome** page, click the Administration tab.
2. Click the "Negotiations Configuration" link.

### Negotiations Configuration

---

Configure the following which is applicable to your company and press **OK** when you are done.

#### Rank Indicator

---

Select the default rank indicator which is displayed to negotiation creators and respondents throughout the negotiation process. Select the checkbox if you want the negotiation creators to be able to override this indicator when creating a negotiation. [Learn More ...](#)

- Indicator
- Win/Lose  
Word Win or Lose is displayed.
  - 1,2,3...  
Rank order is displayed.
  - None  
No indicator is displayed.
  - Allow negotiation creators to override indicator

#### Should Rank be Visible in Blind Auctions/RFQs?

---

**Note:** Changes to the rank visibility setup affect all your existing and future blind auctions/RFQs.

- Yes, rank is visible to respondents.
- No, rank is not visible to respondents.

#### Unit Of Measure for Amount Based Line Items

---

Select the unit of measure for items of amount based line type.

Unit of Measure

3. In the Unit of Measure for Amount Based Line Items section, select the default value from the menu. The entries in this menu can be defined in Oracle Purchasing.
4. Click OK.

## Managing Supplier Contacts

Managing supplier contacts is not performed using the Administration functions or Oracle Sourcing as were the previous implementation tasks. Sourcing Suppliers who have no valid supplier contacts do not appear when you query a list of suppliers. Therefore, supplier contacts must be registered and approved before buyers can invite them to a negotiations and before they can participate. Since this is a common task that the Super User performs, the information is contained in this chapter.

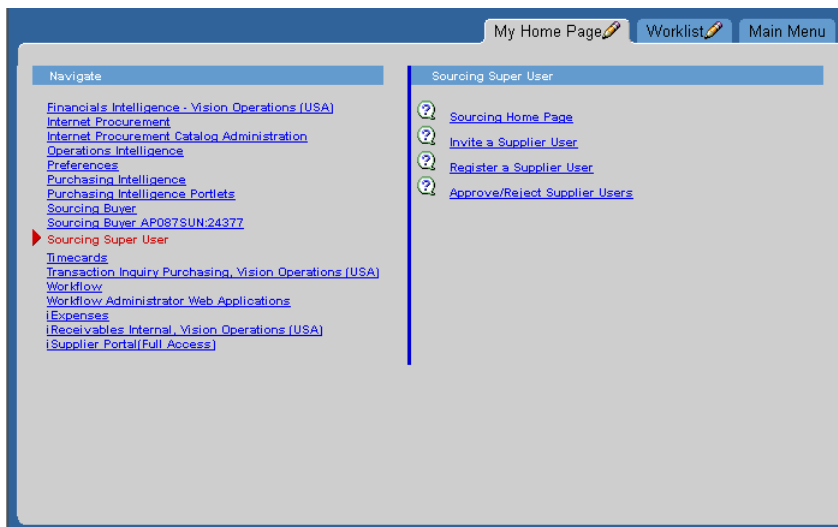
The Sourcing Super User and any Sourcing Buyers with the appropriate function can invite supplier users to register. Note that while the Sourcing Super User can approve all registration requests, Sourcing Buyers can only approve the registrations for which they initiated the invitations.

## Registering and Approving Users

Once a supplier has been added to the Supplier Master in Oracle Purchasing, you can begin inviting users at that supplier to register with the system.

First you send a notification inviting the prospective user to register and enclosing the URL where this can be done. The user accesses the URL and fills out and submits the registration form. Once the user has completed the registration, you receive a notification. You must then approve the user for participation.

To invite a prospective user:



1. On the portal page, click the "Invite a Supplier User" link.

### Invite a Supplier User

\* Indicates required field

#### Supplier Details

Select the appropriate supplier.

\* Supplier Name

If you cannot find the desired supplier in the list, use the Create Supplier form in Purchasing to create the new supplier.

Supplier Number

#### User Information

Enter the new user's details. You may enter additional comments to be included in the invitation notification.

\* Email Address

Email address will be used as the Username for the system.

Note

#### User Access

Select the application(s) that should be accessible by the user.

[Select All](#) | [Select None](#)

Select	Applications
<input checked="" type="checkbox"/>	Sourcing
<input checked="" type="checkbox"/>	Internet Supplier Portal
<input checked="" type="checkbox"/>	Collaborative Planning

2. On the **Invite a Supplier User** page, enter or search for the name of the supplier company.
3. Enter the prospective user's email address.
4. Include any additional information in the Note text area.
5. Select the application(s) user can access (these access decisions can be changed during approval). For details about the available applications, see the online help.
6. Click Invite.

The user receives a notification that includes the URL of the registration page. Once the user has completed and submitted the registration form, you receive a notification that the user has registered. Once the user has registered, you must approve the registration.

**To approve a user's registration:**

1. On the portal page, click the "Approve/Reject Supplier Users" link.
2. Select a user and click View Details to review the user's registration information. You can update the application access if appropriate.
3. Click Approve to approve the request. The user receives a notification containing the URL of the Sourcing system and a generated password to use when first accessing the system.

Click Reject to refuse the registration request.

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---

**Note:** A Sourcing Super User can invite any supplier contact and approve all registration requests. A Sourcing Buyer can invite unregistered supplier users while creating a negotiation. Sourcing Buyers can only approve registration requests from supplier users they have invited.

---

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**One Step Registration**

If you know all the necessary information for the user you wish to add, you can register and approve the user without requiring any interaction on the user's part.

**To register/approve a user**

1. On the **Portal** page, click "Register a Supplier User."
2. On the **Register a Supplier User** page, enter all the required information.
3. Click Register. The user is automatically approved, and a notification is sent to inform the user.



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# Maintaining and Administering Oracle Sourcing

This chapter contains the following maintenance topics:

- Registration on page 3-1
- Administration on page 3-1
- Applications Setup on page 3-9

The following sections are not an exhaustive list of ongoing activities you should perform, and your company may have its own list that better suits your business practices. This chapter simply gives you an idea of typical ongoing activities.

## Registration

You may want to invite new supplier users to register. As new supplier users are added to the system, you must approve those users' registration requests before they can participate in your negotiations.

See instructions in the previous chapter for details on registering and approving supplier users.

## Administration

There are several administrative tasks you may need to perform regularly:

- Merging suppliers
- Deactivating a supplier contact
- Deactivating a supplier site

- Putting a supplier's purchase order on hold
- Canceling or deleting a negotiation
- Creating and managing sourcing events
- Unlocking a draft negotiation

## Performing a Supplier Merge

Oracle Payables allows a buyer to merge one supplier site into another. For details, see the Oracle Payables User's Guide.

When suppliers are merged, Oracle Sourcing updates all its information so that all negotiations that involved the merged supplier are updated to refer to the new supplier as discussed in the following:

### Invitees

Oracle Sourcing updates the invitation list of existing negotiations that included the merged supplier. The new supplier becomes the company invited to participate in the negotiation and any user in that company then has access to the negotiation. Note that although the invited company is updated, the supplier contacts selected during the sourcing document creation remain the same. The negotiation does not change; it is assumed that the new supplier inherits the users of the merged company. All inquiries reflect the change immediately after the merge process concludes. This is applicable for negotiations that are closed, in progress, or scheduled to open in the future.

### Bids, Quotes, Counteroffers, Commitments

Oracle Sourcing updates the responses submitted by the merged supplier with the new supplier name and ID. The name of the contacts that placed the response remain the same. Purchase orders created after the merge apply to the new supplier.

### Templates and Resusable Lists

Reusable invitation lists and the invitation list of sourcing document templates is updated with the name of the new supplier.

### Invitations, Pending Registrations and Supplier Users

Invitations, pending registrations, and existing supplier users of the old supplier are merged to the new supplier only when the last site is merged. Until then, they will remain with the old supplier.

## Deactivating a Supplier Contact

There may be times when you or a Purchasing Manager needs to deactivate a supplier contact. See the Oracle Purchasing User's Guide for instructions.

- When buyers create sourcing documents, inactive suppliers are not displayed when searching for suppliers to invite. Only active contacts are available for inviting.
- Inactive suppliers can sign on to and navigate the system, but they receive an Inactive message if they attempt to access Oracle Sourcing.



## Deactivating a Supplier Site

If a supplier has no active sites, buyers can still invite contacts for this supplier and award business to the supplier.

- If the supplier has multiple sites, any deactivated sites are not available from the Supplier Site menu when the buyer creates a purchase order. The buyer has to select another supplier site or reactivate this supplier site to create a purchase order for this site.
- If a supplier has one or multiple sites and all are deactivated, the buyer cannot create a purchase order for this supplier. The buyer receives an error message when attempting to create a purchase order for one of this supplier's sites. At least one of the supplier's sites must be reactivated before a purchase order can be created.

## Putting a Supplier Purchase Order on Hold

There may be occasions when you or a Purchasing Manager need to prevent purchasing from a particular supplier. You can accomplish this by assigning the supplier a status of Purchase Order Hold. See the Oracle Purchasing User's Guide for instructions on performing this task.

- A buyer can invite a supplier with Purchase Order Hold status to participate in a negotiation.
- The supplier can log on, and the buyer can award the supplier business but the buyer will receive a warning message.
- A purchase order will be created but cannot be approved, if approval is needed.

## Canceling or Deleting a Negotiation

There may be times when you need to terminate a negotiation in progress. You can cancel a negotiation while it is still open. You might need to do this if your business requirements change and you no longer need the items in the negotiation.

You can also delete negotiations that have been closed. You might need to do this for negotiations created during training sessions, mock auctions/RFQs/offers, as well as negotiations created before a specific date/time.

### To cancel a negotiation in progress:

1. From the Sourcing **Welcome** page, click the Administration tab.
2. On the **Administration** page, click "Cancel / Delete Negotiation."

### Cancel / Delete Negotiation

Cancel or delete negotiation(s). Press the **Cancel** button to return to the previous page.

\* Indicates a required field

#### Search Negotiation

Enter exact negotiation number and press the **Go** button to display the negotiation details.

\* **Negotiation Number**    
 (Example : 123456)

3. On the **Cancel / Delete Negotiation** page, enter the number of the negotiation you wish to cancel, and click Go.

### Cancel / Delete Negotiation

Cancel or delete negotiation(s). Press the **Cancel** button to return to the previous page.

\* Indicates a required field

#### Search Negotiation

Enter exact negotiation number and press the **Go** button to display the negotiation details.

\* **Negotiation Number**    
 (Example : 123456)

#### Search Results

Negotiation Number **4935**  
 Negotiation Title **Freddy's Widget RFQ**  
 Company **Default Enterprise Name**

4. Click **Cancel Negotiation** to end the negotiation. Click **Cancel** to stop the cancelation process.
5. Click **Done**.

### To delete a negotiation:

1. From the Sourcing **Welcome** page, click the Administration tab.
2. On the Administration home page, click "Cancel / Delete Negotiation."
3. On the **Cancel / Delete Negotiation** page, enter the number of the negotiation you wish to delete, and click Go.
4. Click Delete Negotiation.
5. Click Done.

## Using Sourcing Events

A sourcing event is group of auctions or RFQs with related items. Buyers may want to create a sourcing event to monitor several related auctions/RFQs as a group rather than individually. Buyers may also want to create an event to encourage suppliers to participate in multiple, similar auctions/RFQs.

Both Sourcing Buyers and the Sourcing Super User can create events. Events are always public. All auctions/RFQs included in a sourcing event must open on or after the scheduled open date/time.

When you create a new auction or RFQ, you can create a new sourcing event containing the auction/RFQ or associate the auction/RFQ with an existing event. You can also monitor your sourcing events from the Auctions or RFQs home page.

Sourcing events can be in one of three statuses:

- Active - an event is active as soon as it is created
- Completed - an event is completed once its associated negotiations have been completed
- Canceled - an event can be canceled by the Sourcing Super User or a Sourcing Buyer with a responsibility containing the Cancel Events function

### To create a sourcing event:

1. Click the Negotiations tab, then click Auctions in the task bar directly below the tabs to create an auction event, or click the RFQs to create an RFQ event.
2. Click the "Create New Event" link.
3. On the **Create New Event** page, enter a title, description, and start date and time (which must be later than the current date and time). All auctions/RFQs associated with this sourcing event must open on or after the event start date

and time. After the event start date and time has passed, you will not be able to associate new auctions with this event.

4. Click OK.

**To cancel a sourcing event:**

1. From the Sourcing **Welcome** page, click the Negotiations tab, then click Auctions in the task bar directly below the tabs to create an auction event, or click the RFQs to create an RFQ event.
2. Click View All Events.
3. On the **All Events** page, search for and select the event you wish to cancel.
4. Click Cancel.

### Cancel Event (Freddy's Widget Event)

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Enter cancellation information and press the **OK** button below when you're done.

\* Indicates a required field

#### Cancel associated negotiations?

---

You can cancel just the event, or the event and all associated negotiations.

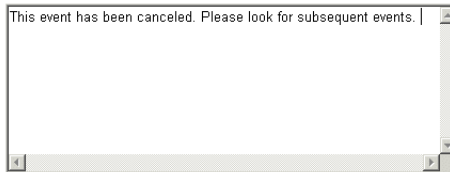
- No** - just cancel the event
- Yes** - cancel both the event and its associated negotiations

#### What is your reason for cancelling the event?

---

We will send a Cancel notification to invited bidders plus anyone else who has already bid in an associated negotiation. What explanation do you want to include in the email?

\* Note to Respondents

A text area with a scroll bar containing the text: "This event has been canceled. Please look for subsequent events. |".

---

5. On the **Cancel Event** page, you can choose to cancel all the negotiations associated with this event, or just cancel the event itself.
6. If you chose to cancel both the event and its associated negotiations in the previous step, supply an explanation of why the event is being cancelled. This explanation is sent to all invitees and anyone else who may have responded to one of the event notifications.
7. Click **OK**.

## Unlocking Draft Negotiations

There may be times when buyers cannot finish creating an auction or RFQ in a single session, or the creation process involves collaboration between several

buyers. Or possibly a buyer needs to create a negotiation but not actually submit it until sometime in the future. In each of these cases, buyers can create a draft of the auction/RFQ and save it for later editing or submission.

Buyers creating drafts have the option of locking the draft so that no one else within their company can access and modify the draft. On occasion, you may need to unlock a draft so that you or others can work on it. For example, a buyer may have locked a draft before going on a business trip. A Sourcing Super User can unlock and edit, delete, or submit any draft sourcing document. Also, you can unlock a draft and allow anyone with the Manage Draft Sourcing Document to work on it.

#### To unlock a draft:

1. From the Sourcing **Welcome** page, click the Negotiations tab, then click Auctions, or RFQs.
2. Click "Manage Draft Auctions"/"Manage Draft RFQs."
3. Search for and select the locked draft.
4. Click the padlock icon to unlock the draft.

## Applications Setup

Periodically review other setup options that you initially performed. For example:

- Update your exchange rates
- Update your item categories
- Review your negotiation invitation lists to reflect the changes in your business
- Check or update your negotiation attributes lists, price elements, and price element lists to streamline the negotiation creation process

See instructions in previous chapters for how to perform these tasks.



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# Oracle Sourcing Responsibilities and Functions

This appendix provides information on the responsibilities and functions that are initially provided by the system. This includes tables showing which functions are assigned to each Oracle Sourcing responsibility.

## Oracle Sourcing Responsibilities

The following responsibilities come installed with the system.

**Table A-1** *Responsibilities Installed with Oracle Sourcing*

<b>Responsibility Name</b>	<b>Description</b>
Sourcing Super User	Allows users to perform negotiations administration, create and award negotiations, view negotiation intelligence report. Sourcing Super Users should not have any Sourcing Supplier functionality.
Sourcing Buyer	Allows users to create and award buyer's negotiations, and view buyer intelligence reports. Sourcing Buyers should not have any Sourcing Supplier functionality.
Sourcing Supplier	Allows users to view and respond to buyer's negotiations. Sourcing suppliers should only have the Sourcing Supplier responsibility or a customized responsibility containing only functions from the Sourcing Supplier responsibility.

## Responsibility/Function Cross-Reference

The following tables show which functions are initially defined to which responsibilities. Note, however, that since users with the System Administration responsibility can customize a responsibility, the exact responsibility definitions you see may be different.

**Table A-2 Oracle Sourcing Super User Functions and Menus**

<b>Function/Menu</b>	<b>Descriptions</b>
Access Threaded Discussions	Users can access threaded discussions.
Add Invitees to In-Progress Negotiations	Users can add invitees to any in-progress negotiations.
Advanced Workflow Worklist	Advanced workflow worklist incorporating the new look and feel.
Approve or Reject Supplier User Registration Menu	User can approve or reject a supplier user's registration request.
Award Negotiations	Users can make award decisions for any negotiations.
Cancel Events	Users can cancel any negotiation events.
Cancel Negotiations	Users can cancel any negotiations.
Change Negotiation Close Date	Users can change the close date of any negotiations.
Create Buyer's Negotiations	Users can create, edit, copy, unlock, unseal, cancel, and award their negotiations. Users can create private templates and invitation lists.
Create Events	Users can create negotiation events.
Create Price Elements	Users can create and edit price elements. Users can manage the Pricing Basis of price elements.
Create Reusable Price Element Lists	Users can create and edit price element lists. Users can add or delete price elements from any price element lists.
Customize Content	Users can customize content.
Customize Text	Users can customize the text of messages and notifications.
Delete Negotiations	Users can delete negotiations.
Disqualify Responses	Users can disqualify responses submitted to any negotiations.

**Table A-2 Oracle Sourcing Super User Functions and Menus**

<b>Function/Menu</b>	<b>Descriptions</b>
Edit Draft Sourcing Documents	Users can directly edit the AutoCreated draft sourcing documents in Oracle Sourcing.
General Preferences	Set personal information including password and language.
Invite Supplier User to Register Menu	Users can invite external supplier users to register with the system.
Manage Attribute Lists	Users can create, edit, and manage any attribute lists.
Manage Draft Sourcing Documents	Users can edit, delete, and publish any draft sourcing documents.
Manage Invitation Lists	Users can create, edit, and manage both public and private invitation lists.
Register Supplier User Menu	Users can register an external supplier user.
Manage Sourcing Document Templates	Users can create, edit, and manage both public and private sourcing document templates.
Set Up Negotiation Terms and Conditions	Users can set up negotiation terms and conditions.
Set Up Negotiations Configurations	Users can access the Negotiations Configurations page.
Supplier User Administration Menu	Users can access the menu containing supplier registration tasks.
Set Up System	Users can set up the system: name, default language, and timezone.
Unlock Draft Sourcing Documents	Users can unlock any draft sourcing documents.
Unlock Sealed Negotiations	Users can unlock any sealed negotiations.
Unseal Sealed Negotiations	Users can unseal any sealed negotiations.
View Administration Tab	Users can view the Administration tab. (Separate tasks control the users' access to functions within the tab.)
View Buyer's Negotiation Intelligence Reports	Users can view negotiation intelligence reports for buying activity.
View Buying Home Page	Users can view buying welcome home page.

**Table A–2 Oracle Sourcing Super User Functions and Menus**

<b>Function/Menu</b>	<b>Descriptions</b>
View Contact Information	Users can view the Contact Information page.
View Edit Profile Options Page	Users can access the Edit Profile Options page for buyers.
View Events	Users can view details of any events.
View Intelligence Tab	Users can view the Intelligence tab. (Separate tasks control the users' access to functions within the tab.)
View My Company Negotiations	Users can view details of any negotiations.
View Negotiations Tab	Users can view the Negotiations tab. (Separate tasks control the users' access to functions within the tab.)
View Other Company Responses	"Users can view bids, quotes, commitments, and counteroffers created by other companies."
View Welcome Tab	Users can view the Welcome tab. (Separate tasks control the users' access to functions within the tab.)

**Table A–3 Oracle Sourcing Buyer Functions and Menus**

<b>Function/Menu</b>	<b>Description</b>
Approve or Reject Supplier User Registration Menu	Users can approve or reject supplier user's registration requests.
Access Threaded Discussions	Users can access threaded discussions.
Advanced Workflow Worklist	Advanced workflow worklist incorporating the new look and feel.
Create Buyer's Negotiations	Users can create, edit, copy, unlock, unseal, cancel, and award their negotiations. Users can create private templates and invitation lists.
Create Events	Users can create negotiation events.
Sourcing Buyer Registration Menu	Users can access the menu containing the supplier registration tasks.
Edit Draft Sourcing Documents	Users can directly edit the AutoCreated draft sourcing documents in Oracle Sourcing.

**Table A–3 Oracle Sourcing Buyer Functions and Menus**

<b>Function/Menu</b>	<b>Description</b>
View Buyer's Negotiation Intelligence Reports	Users can view negotiation intelligence reports for buying activity.
View Buying Home Page	Users can view buying welcome home page.
View Contact Information	Users can view the Contact Information page.
View Edit Profile Options Page	Users can access the Edit Profile Options page for buyers.
View Events	Users can view details of any events.
View Intelligence Tab	Users can view the Intelligence tab. (Separate tasks control the users' access to functions within the tab.)
View My Company Negotiations	Users can view details of any negotiations.
View Negotiations Tab	Users can view the Negotiations tab. (Separate tasks control the users' access to functions within the tab.)
View Other Company Responses	Users can view bids, quotes, commitments, and counteroffers created by other companies.
View Welcome Tab	Users can view the Welcome tab. (Separate tasks control the users' access to functions within the tab.)
General Preferences	Set personal information including password and language.
Sourcing Buyer Registration Menu	Users can access the menu containing supplier registration tasks
Approve or Reject Supplier User Registration	Users can approve or reject supplier user registration.

**Table A–4 Oracle Sourcing Supplier Functions**

<b>Function</b>	<b>Description</b>
Access Threaded Discussions	Users can access threaded discussions.
Advanced Workflow Worklist	Advanced workflow worklist incorporating the new look and feel.
Respond to Buyer's Negotiations	Users can respond to buyer's negotiations.

**Table A-4 Oracle Sourcing Supplier Functions**

<b>Function</b>	<b>Description</b>
View Contact Information	Users can view the Contact Information page
View My Company Responses	Users can view bids, quotes, commitments, and counteroffers created by their company.
View Negotiations Tab	Users can view the Negotiations tab. (Separate tasks control the users' access to functions within the tab.)
View Other Company Negotiations	Users can view details of buyer's negotiations.
View Selling Home Page	Users can view selling welcome home page.
View Welcome Tab	Users can view the Welcome tab. (Separate tasks control the users' access to functions within the tab.)
General Preferences	Set personal information including password and language.
View Edit Personal Information Page	Users can access the Edit Personal Information page for supplier users.

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## Oracle Sourcing Notifications

### Introduction

This appendix lists the notifications generated by Oracle Sourcing. Related notifications sent by other modules, such as the registration and purchasing related notifications (if these applications are installed) are not covered.

For each notification, the following details are covered:

- The recipient
- The triggering event
- Appropriate action by the recipient
- Any subsequent action
- Sample text

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**Note:** The sample text in this appendix reflects the text used for auctions notifications. The text for RFQ notifications is similar.

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### Modifying Notifications Text

Companies commonly wish to customize the notification text for branding purposes or to modify the actions they wish their suppliers to take. You can use this appendix to identify any notifications whose text you wish to modify. Then see [Chapter 2, "Implementing Oracle Sourcing"](#) for instructions on customizing text.

## Summary of Negotiation Notifications

**Table B–1 Buyer's Auctions' and RFQs' Notifications**

<b>Event</b>	<b>Recipient</b>	<b>Action</b>
Creation Confirmation	Auctioneer (Buyer)	For information
Invitation to Participate	Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
Invitation to Participate	Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate
Early Close	All invitees and respondents	For information
Extend	All invitees and respondents	For information
Bid/Quote Disqualification	Respondent with disqualified response	For information
Bid/Quote Disqualification	All invitees and Respondents	For information
Cancellation	All invitees and respondents	For information
Award	All invitees and respondents	For information
Additional Round	Invitee/Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
Additional Round	Invitee/Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate
Additional Round	Non-invitees	For information
Acknowledgement Reminder	Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
Acknowledgement Reminder	Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate

**Table B-2 Offers Notifications**

<b>Event</b>	<b>Recipient</b>	<b>Action</b>
Creation Confirmation	Buyer	For information
Invitation to Participate	Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
Invitation to Participate	Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate
Cancellation	All invitees and respondents	For information
Counteroffer Confirmation	Buyer	Counter or commit
Counteroffer	Supplier	Counter or commit
Commitment	Buyer	Approve, reject, or for information
Commitment	Supplier	For information
Commitment Approval	Supplier	For information
Commitment Rejection	Supplier	For information
Offer Update	All invitees and respondents	For information
Acknowledgement Reminder	Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
Acknowledgement Reminder	Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate.

## Buyer's Auctions and RFQs Notifications

### Auction/RFQ Creation Confirmation

#### Summary of E-mail notification

- Recipient: auctioneer (buyer)
- When: at the time of auction ready for preview/bidding or quoting after a buyer has submit an auction or RFQ. It is sent out, either at the time of auction

opening for preview or at the time of auction or RFQ opening for bidding/quoting if the preview date is not specified.

- Possible Action: none (for information only)
- Next Steps: none (for information only).

### **E-mail text**

Date: Tue., 7 Aug, 200x 15:58:37 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Subject: Buyer's Auction 1262238(Buyer's Auction 001) is open for preview

Pat Stock:

This auction is now available.

Auctioneer: Pat Stock

Auction Title: test auction 5

Auction Number: 11472

Auction Open: May 30, 200x 07:17 pm Europe/Oslo

Auction Close: July 23, 200x 04:00 am Europe/Oslo

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To view the details or bidding history for this auction, please go to [http://system.enterprise.com:5555/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=11472&app=buying](http://system.enterprise.com:5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11472&app=buying)

## **Auction/RFQ Invitation - Supplier Contact**

### **Summary of E-mail notification**

- Recipient: potential bidders/suppliers
- When: a buyer creates a Buyer's Auction/RFQ and invites suppliers to participate.

- Possible Action: reply to e-mail with intent to participate or if the negotiation is available online, enter Oracle Sourcing and acknowledge intent before the time specified in the notification.
- Next Steps: preview or submit bid(s)/quote(s) within Oracle Sourcing for the specified auction (if preview/opening time is immediate; otherwise await preview/opening time)

### E-mail text

Date: Mon., 26 Nov. 200x 10:47:59 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Subject: Odyssey Corp invites you to participate in Buyer's Auction "Buyer's Auction" on Oracle Sourcing

Supplier:

Odyssey Corp invites Supplier to participate in an Auction.

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction

Auction Number: 10732

Auction Open: May 23, 200x 01:40 pm America/Los\_Angeles

Auction Close: July 22, 200x 05:00 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction\\_id=10732&app=selling](http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction_id=10732&app=selling)

To view auction details and place a bid on this auction, please go to

[http://system.enterprise.com:5555/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=10688&app=selling](http://system.enterprise.com:5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=10688&app=selling)

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.

Does your company intend to participate?: Yes No

## Auction/RFQ Invitation - Supplier Additional Contact

### Summary of E-mail notification

- Recipient: potential bidders/suppliers (additional contacts)
- When: a buyer creates a Buyer's Auction or RFQ and invites suppliers to participate.
- Possible Action: enter Oracle Sourcing to acknowledge participation if the negotiation is available on the system. If not previously registered, enter application to register.
- Next Steps: preview or submit bid(s)/quote(s) within Oracle Sourcing for the specified auction/RFQ (if preview/opening time is immediate; otherwise await preview/opening time)

### E-mail text

Subject: Odyssey Corp invites you to participate in Buyer's Auction "Buyer's Auction"

Date: Mon., 26 Nov. 200x 10:47:59 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

#### Supplier:

Odyssey Corp invites Supplier to participate in an Auction.

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction 001

Auction Number: 10732

Auction Open: May 23, 200x 03:28 pm America/Los\_Angeles

Auction Close: July 22, 200x 04:00 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction\\_id=10732&app=selling](http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction_id=10732&app=selling)

To view auction details and place a bid on this auction, please go to

[http://system.enterprise.com:5555/auctions/bidViewAuction.jsp?auction\\_id=10732&app=selling](http://system.enterprise.com:5555/auctions/bidViewAuction.jsp?auction_id=10732&app=selling)

If this is your first time using the system, then we need to create a user for you. Please go to

<http://system.enterprise.com/5555/html/jsp/pos/registration/RegistrationReply.jsp?registrationKey=ABA7F1F5>

## Auction/RFQ Early Close

### Summary of E-mail notification

- Recipient: all invitees and respondents
- When: buyer closes the auction/RFQ earlier than the intended date and time.
- Possible Action: none (for information only)
- Next Steps: none.

### E-mail text

Date: Thus, 9 Aug. 200x 17:41:16 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Reply-to: name@sourcing.oracle.com

Subject: Auction 10732 has been closed early.

Auctioneer has closed this auction for bidding. The auction was closed at August 09, 200x 03:48 pm PST

## Auction/RFQ Extend

### Summary of E-mail notification

- Recipient: all invitees and respondents
- When: buyer has extended the auction
- Possible Action: none (for information only)
- Next Steps: bidders/suppliers may decide to (re-)submit bids or place quotes.

### E-mail text

Subject: The close date and time have been extended for Auction 10732.

Date: Fri., 3 Aug. 200x 07:06:55 -0700 (PDT)

From: "Enterprise Purchasing Department"

To: user@company.com

Auctioneer has extended the close date and time for this auction. The new close date and time is August 07, 200x 09:30 am PST.

## Auction/RFQ Bid/Quote Disqualification - Respondent with Bid/Quote Disqualified

### Summary of E-mail notification

- Recipient: respondent with disqualified bid/quote
- When: the buyer has disqualified the respondent's bid/quote.
- Possible Action: bidder/supplier may decide to (re-) submit bid/quote.
- Next Steps: none

### E-mail text

Subject: Quote 4512 for Buyer's Auction "Goods" is disqualified.

Date: Thus, 7 Jun. 200x 18:23:41 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Your bid 4512, for Buyer's Auction "Goods" has been disqualified by Odyssey Corp. An auctioneer will typically disqualify a bid if it contains inaccurate or incomplete information. Disqualified bids are considered null and void.

Auctioneer: Odyssey Corp

Auction Title: Goods

Auction Number: 9589

Auction Open: May 20, 200x 12:40 pm America/Los\_Angeles

Auction Close: July 22, 200x 08:00 pm America/Los\_Angeles

Disqualified Bid Number: 4512

Reason for Disqualification: Your price is too high.

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To submit a new bid before the close of this Buyer's Auction, please go to [http://system.enterprise.com:4710/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=9589&app=selling](http://system.enterprise.com:4710/jsp/pon/auctions/bidViewAuction.jsp?auction_id=9589&app=selling)

## Auction/RFQ Bid Disqualification - All Invitees and Respondents

### Summary of E-mail notification

- Recipient: all invitees and respondents in the auction.
- When: the buyer has disqualified a bid/quote.
- Possible Action: bidders/suppliers may decide to (re-) submit bid/quote.
- Next Steps: none

### E-mail text

Subject: Bid 38157 for Buyer's Auction "Buyer's Auction 001" is disqualified

Date: Tue., 7 Aug. 200x 18:23:41 -0700 (PDT)

From: "Enterprise Purchasing Department" [workflow@enterprise.com](mailto:workflow@enterprise.com)

To: [user@company.com](mailto:user@company.com)

You have received this notification because you are an active participant in Buyer's Auction 23652. A bid for Buyer's Auction 23652 has been disqualified by Odyssey Corp.

Auction Summary:

Auction Title: Buyer's Auction 001

Auctioneer: Odyssey Corp

Disqualify Time: May 24, 200x 12:36 am America/Los\_Angeles

Disqualified bids are considered null and void. The supplier who was disqualified may submit a new bid before the close of the auction.

To view your active bids, proceed to and click on the 'Auctions tab', then click on 'View All Active Bids'.

## Auction/RFQ Cancellation

### Summary of E-mail notification

- Recipient: all invitees and respondents
- When: an auction/RFQ is cancelled
- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: Buyer's Auction 23652 "Buyer's Auction 001" canceled

Date: Tue., 7 Aug. 200x 16:22:52 -0700 (PDT)

From: "Enterprise Purchasing Department" <name@sourcing.oracle.com

To: user@company.com

You earlier received the notification shown below. That notification is now canceled, and no longer requires your response. You may simply delete it along with this message.

ABC Corporation:

This e-mail is to remind you to acknowledge participation for the following auction.

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction 001

Auction Number: 23652

Auction Open: May 21, 200x 01:24 pm America/Managua

Auction Close: May 21, 200x 03:00 pm America/Managua

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to  
[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=23652&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=23652&app=selling)

To view auction details and place a bid on this auction, please go to  
[http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=23652&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=23652&app=selling)

## Auction/RFQ Award

### Summary of E-mail notification

- Recipient: all invitees and suppliers
- When: the buyer decides on the winner(s) of the auction/RFQ.
- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: An award decision has been made for Odyssey Corp Buyer's Auction 'Buyer's Auction 001'

Date: Fri., 17 Aug. 200x 11:31:36 -0700 (PDT)

From: "Enterprise Purchasing Department" [workflow@enterprise.com](mailto:workflow@enterprise.com)

To: [user@company.com](mailto:user@company.com)

Supplier Contact:

This e-mail is notifying you and all other bidders on this auction that the auctioneer has made an award decision:

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction

Auction Number: 10732

Auction Open: May 24, 200x 10:28 am Pacific/Caracoling

Auction Close: June 01, 200x 02:52 am Pacific/Caracoling

Your Bid Number: 3443

Items awarded on or rejected from your bid

Number of item(s) Awarded: 1

Number of item(s) Rejected: 1

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

You may look for bid 3443 at

<http://system.enterprise.com/5555/jsp/pon/auctions/myWonBids.jsp?app=selling&docTypeId=2> to see which items you won, and at

<http://system.enterprise.com/5555/jsp/pon/auctions/myLostBids.jsp?app=selling&docTypeId=2> to see which items you lost.

Important Note: This award decision is preliminary and subject to internal approval before the generation of a purchase order.

## **Auction/RFQ Additional Round Invitation - Only Invitees/Supplier Contact**

### **Summary of E-mail notification**

- Recipient: invited bidders/suppliers
- When: a new round of bidding/quoting is started on an auction/RFQ.
- Possible Action: acknowledge intent to participate by e-mail or online, if negotiation is available on the system, before the time specified in the notification.

- Next Steps: enter Oracle Sourcing to participate in the next round of bidding/quoting.

### E-mail text

Subject: Odyssey Corp invites you to participate in an additional round of Auction "Buyer's Auction 001"

Date: Wed, 19 Dec. 200x 15:18:23 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company

Supplier:

Odyssey Corp invites Supplier to participate in an additional round of negotiating.

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction

Auction Number: 11699-2

Auction Open: June 01, 200x 03:24 am Pacific/Kwajalein

Auction Close: July 23, 200x 10:30 am Pacific/Kwajalein

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=11700&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=11700&app=selling)

To place a bid on this Auction, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=11700&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11700&app=selling).

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.

Does your company intend to participate?: Yes No

## Auction/RFQ Additional Round Invitation - Only Invitees/Additional Contact

### Summary of E-mail notification

- Recipient: invited bidders/suppliers
- When: a new round of bidding/quoting is started on an auction/RFQ.
- Possible Action: acknowledge intent to participate online if negotiation is available on the system.
- Next Steps: enter Oracle Sourcing to participate in the next round of bidding/quoting.

### E-mail text

Subject: Odyssey Corp invites you to participate in an additional round of Buyer's Auction " Buyer's Auction 001"

Date: Fri., 21 Dec. 200x 11:13:00 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Odyssey Corp invites Supplier to participate in an additional round of negotiating

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction 001

Auction Number: 11699-2

Auction Open: June 01, 200x 03:24 am Pacific/Kwajalein

Auction Close: July 23, 200x 10:30 am Pacific/Kwajalein

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=11700&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=11700&app=selling)

To place a bid on this Auction, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=11700&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11700&app=selling).

If this is your first time using the system, then we need to create a user for you. Please go to

<http://system.enterprise.com/5555/html/jsp/pos/registration/RegistrationReply.jsp?registrationKey=DB9585783D4>

## Auction/RFQ Additional Round Invitation - Non-Invitees

### Summary of E-mail notification

- Recipient: respondents not invited to next round
- When: an auction/RFQ is extended to another round
- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: Odyssey Corp invites you to participate in an additional round of Buyer's Auction 'Buyer's Auction 001'

Date: Fri., 17 Aug. 200x 16:40:38 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Thank you for participating in auction "Buyer's Auction 001". Odyssey Corp has not invited you (Supplier) to participate in an additional round of negotiating.

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction 001

Auction Number: 11699-2

## Auction/RFQ Acknowledgement Reminder - Supplier Contact

### Summary of E-mail notification

- Recipient: respondents who have not acknowledged intent to participate
- When: auction/RFQ is in progress and the company has not acknowledged their intent to participate; could be 1 hour, 1 day or 3 days after the open or preview date and time.
- Possible Action: acknowledge online or reply by e-mail to acknowledge intent to participate by the time specified in the notification.
- Next Steps: none

### E-mail text

Subject: Auctioneer requests your acknowledgement to participate in buyer's auction 1274668

Date: Sun, 9 Dec. 200x 10:37:10 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

This e-mail is to remind you to acknowledge participation for the following auction.

Auctioneer: Pat Stock

Auction Title: Buyer's Auction

Auction Number: 10762

Auction Open: May 23, 200x 4:49 pm America/Los\_Angeles

Auction Close: July 22, 200x 03:30 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=10762&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=10762&app=buying)

To view auction details and place a bid on this auction, please go to

[http://system.enterprise.com/5555jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=10762&app=buying](http://system.enterprise.com/5555jsp/pon/auctions/bidViewAuction.jsp?auction_id=10762&app=buying)

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.

Does your company intend to participate?: Yes No

## Auction/RFQ Acknowledgement Reminder - Additional Contact

### Summary of E-mail notification

- Recipient: respondents who have not acknowledged intent to participate
- When: auction/RFQ is in progress and the company has not acknowledged their intent to participate; could be 1 hour, 1 day or 3 days from the open date and time
- Possible Action: enter Oracle Sourcing and acknowledge intent to participate by the time specified in the notification. If not previously registered, enter application to register.
- Next Steps: none

### E-mail text

Subject: Auctioneer requests your acknowledgement to participate in buyer's auction 1269136

Date: Mon., 26 Nov. 200x 10:20:25 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

This e-mail is to remind you to acknowledge participation for the following auction.

Auctioneer: Pat Stock

Auction Title: Buyer's Auction 001

Auction Number: 10762

Auction Open: May 23, 200x 04:49 pm America/Los\_Angeles

Auction Close: July 22, 200x 03:30 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=10762&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=10762&app=buying)

To view auction details and place a bid on this auction, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=10762&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=10762&app=buying)

If this is your first time using the system, then we need to create a user for you. Please go to

<http://system.enterprise.com/5555/html/jsp/pos/registration/RegistrationReply.jsp?registrationKey=B9BAF14FB>

## Auction/RFQ PO Creation Notification

### Summary of E-mail notification

- Recipient: user who completes the negotiation
- When: after purchase orders have been created (or attempted to be created) for all bids/quotes
- Possible Action: none, or resubmit failed purchase order creation from e-mail notifications
- Next Steps: none

### E-mail text

Mr. Kareem Benjamin,

This e-mail is notifying you that the purchase order creation process has completed.

Auction Title: Spare Parts Auction

Auction Number: 6050

Organization: Headquarters

Number of purchase order(s) created: 2

Bid: 66961

Supplier: Rohn Metals, Inc.

Supplier Site: New York

Buyer: Ronda Wider

Purchase Order: 234-A

Bid: 66892

Supplier: Schmidt, GmbH

Supplier Site: Berlin Warehouse

Buyer: Richard Burg

Purchase Order: 235-A

Details of up to 10 created purchase orders will be displayed. To view the details of all created purchase orders, please go to link: [awardeditems.jsp](#).

-----  
Number of purchase order(s) not created: 2

Bid: 66971

Supplier: PWX Corp.

Supplier Site: San Francisco

Buyer: Mary Jones

Error: Purchase Order 234-A: duplicate PO Number

Bid: 66996

Supplier: Wiley Bros.

Supplier Site: SD

Buyer: Jim Frantic

Error: System Error

If any purchase orders were not created, please contact your system administrator to correct any errors. The option to restart purchase order creation for purchase orders that were not created will only be available for 30 days via this e-mail notification.

Would you like to restart purchase order creation? - Yes

## Offer to Buy Notifications

Oracle Sourcing sends the following notifications to recipients associated with offers created and managed within Oracle Sourcing.

### Offer Creation Confirmation

#### Summary of E-mail notification

- Recipient: buyer
- When: a buyer creates an Offer to Buy and invites suppliers to participate.
- Possible Action: none (for information only)
- Next Steps: the buyer enters Oracle Sourcing to check for responses to the created offer.

#### E-mail text

Subject: Offer to Buy 1270236 "Offer 001" is open for responses

Date: Sat, 11 Aug, 200x 13:58:08 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Pat Stock:

This Offer to Buy is now available.

Buyer: Pat Stock

Offer to Buy Title: Offer 001

Offer to Buy Number: 11704

Open Date: May 31, 200x 05:52 pm Europe/Oslo

Close Date: July 03, 200x 12:00 am Europe/Oslo

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To view the details and activity history for this offer, please go to [http://system.enterprise.com/5555/jsp/pon/auctions/viewOffer.jsp?doc\\_id=11704&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/viewOffer.jsp?doc_id=11704&app=buying)

## Offer Invitation - Supplier Contact

### Summary of E-mail notification

- Recipient: potential respondents
- When: a buyer creates an offer and invites suppliers to participate.
- Possible Action: reply to e-mail with acknowledgement of intent to participate or if the negotiation is available online, enter Oracle Sourcing and acknowledge intent.
- Next Steps: enter Oracle Sourcing to preview or respond to the specified offer (if preview/opening time is immediate; otherwise await preview/opening time)

### E-mail text

Subject: Odyssey Corp invites you to participate in Offer to Buy " Offer One"

Date: Tue., 27 Nov. 200x 12:30:29 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Odyssey Corp invites Supplier to participate in an Offer.

Buyer: Odyssey Corp

Offer to Buy Title: Offer 001

Offer to Buy Number: 11704

Open Date: June 01, 200x 03:52 am Pacific/Kwajalein

Close Date: July 03, 200x 10:00 am Pacific/Kwajalein

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to  
[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=11704&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=11704&app=selling)

To view offer details and respond to this offer, please go to  
[http://system.enterprise.com/5555/jsp/pon/auctions/viewOffer.jsp?doc\\_id=11704&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/viewOffer.jsp?doc_id=11704&app=selling)

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.

Does your company intend to participate?: Yes No

## Offer Invitation - Supplier Additional Contact

### Summary of E-mail notification

- Recipient: potential respondents
- When: a buyer creates an Offer to Buy and invites suppliers to participate.
- Possible Action: enter Oracle Sourcing and acknowledge intent if negotiation is available on the system. If not registered previously, enter application and register.
- Next Steps: enter Oracle Sourcing to preview or respond to the specified offer (if preview/opening time is immediate; otherwise await preview/opening time)

### E-mail text

Subject: Odyssey Corp invites you to participate in Offer to Buy " Offer One"

Date: Tue, 27 Nov. 200x 12:30:23 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Odyssey Corp invites Supplier to participate in an offer.

Auctioneer: Odyssey Corp

Auction Title: Offer 001

Auction Number: 10732

Auction Open: May 23, 200x 03:28 pm America/Los\_Angeles

Auction Close: July 22, 200x 04:00 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction\\_id=10732&app](http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction_id=10732&app)

=selling

To view auction details and place a bid on this auction, please go to

[http://system.enterprise.com:5555/auctions/bidViewAuction.jsp?auction\\_id=10732&app=selling](http://system.enterprise.com:5555/auctions/bidViewAuction.jsp?auction_id=10732&app=selling)

If this is your first time using the system, then we need to create a user for you. Please go to

<http://system.enterprise.com/5555/html/jsp/pos/registration/RegistrationReply.jsp?registrationKey=ABA7F1F5>

## Supplier's Counteroffer - Buyer

### Summary of E-mail notification

- Recipient: buyer
- When: the responding supplier counteroffers to an offer to buy.
- Possible Action: none (for information only)
- Next Steps: choose to commit/respond to counteroffer

### **E-mail text**

**Subject:** Counteroffer received for Offer to Buy 1270236 "Offer 001"

**Date:** Sat, 11 Aug. 200x 14:01:42 -0700 (PDT)

**From:** "Enterprise Purchasing Department" workflow@enterprise.com

**To:** user@company.com

**Pat Stock:**

Counteroffer 3826-1 has been submitted by Supplier.

**Buyer:** Odyssey Corp

**Offer to Buy Title:** Offer 001

**Offer to Buy Number:** 11704

**Open Date:** May 31, 200x 05:52 pm Europe/Oslo

**Close Date:** July 03, 200x 12:00 am Europe/Oslo

**Supplier:** Supplier

**Counteroffer Number:** 3826 -1

Details for this counteroffer and all other commitments and counteroffers for Offer to Buy 11704 can be found at the following URL:

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

[http://system.enterprise.com/5555/jsp/pon/auctions/commitments.jsp?doc\\_id=11704&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/commitments.jsp?doc_id=11704&app=buying)

## **Buyer's Counter to Counteroffer - Supplier**

### **Summary of E-mail notification**

- **Recipient:** responding supplier
- **When:** the buyer counters to an earlier counteroffer.
- **Possible Action:** none (for information only)
- **Next Steps:** choose to commit/respond to counteroffer

**E-mail text**

Subject: Counteroffer received for Offer to Buy 11704 "Offer 001"

Date: Sat, 11 Aug, 200x 15:02:53 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier Contact:

Counteroffer 3827-1 has been submitted by Odyssey Corp.

Buyer: Odyssey Corp

Offer to Buy Title: Offer One

Offer to Buy Number: 11704

Open Date: June 01, 200x 03:52 am Pacific/Kwajalein

Close Date: July 03, 200x 10:00 am Pacific/Kwajalein

Buyer: Odyssey Corp

Counteroffer Number: 3827 -1

Details for this counteroffer and all other commitments and counteroffers for Offer to Buy 11704 can be found at the following URL:

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

[http://system.enterprise.com/5555/jsp/pon/auctions/commitments.jsp?doc\\_id=11704&app=selling](http://system.enterprise.com/5555/jsp/pon/auctions/commitments.jsp?doc_id=11704&app=selling)

**Commitment by Supplier - Buyer****Summary of E-mail notification**

- Recipient: buyer
- When: the creator receives a commitment from the supplier
- Possible Action: none (for information only)
- Next Steps: none or buyer approves/rejects Offer according to requirement.

### **E-mail text**

**Subject:** Commitment received for Offer to Buy "Offer 001"

**Date:** Sat, 11 Aug. 200x 15:34:00 -0700 (PDT)

**From:** "Enterprise Purchasing Department" workflow@enterprise.com

**To:** user@company.com

**Pat Stock:**

Congratulations! You have received a commitment for one of your offers or counteroffers. The offer details are as follows:

**Buyer:** Odyssey Corp

**Offer to Buy Title:** Offer 001

**Offer to Buy Number:** 11704

**Open Date:** May 23, 200x 04:49 pm America/Los\_Angeles

**Close Date:** July 22, 200x 03:30 pm America/Los\_Angeles

**Supplier:** Supplier

**Commitment Number:** 3402

Because your Offer to Buy indicated that commitments require approval, commitment 3402 requires your approval before it is considered binding.

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

Details for this commitment and all other commitments and counteroffers for Offer to Buy 11704 can be found at the following URL:

[http://system.enterprise.com:5555/auctions/commitments.jsp?doc\\_id=11704&app=buying](http://system.enterprise.com:5555/auctions/commitments.jsp?doc_id=11704&app=buying)

## **Commitment by Buyer - Supplier**

### **Summary of E-mail notification**

- Recipient: responding supplier
- When: buyer commits to supplier's counteroffer

- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: Commitment received for Offer to Buy "Offer 001"

Date: Sat, 11 Aug. 200x 15:34:00 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

#### Supplier:

Congratulations! You have received a commitment for one of your offers or counteroffers. The offer details are as follows:

Buyer: Odyssey Corp

Offer to Buy Title: Offer 001

Offer to Buy Number: 11704

Open Date: May 23, 200x 04:49 pm America/Los\_Angeles

Close Date: July 22, 200x 03:30 pm America/Los\_Angeles

Buyer: Odyssey Corp

Commitment Number: 4401

Because the Offer to Buy indicated that commitments do not require approval, commitment 4401 has been automatically approved and is considered binding.

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

Details for this commitment and all other commitments and counteroffers for Offer to Buy 11704 can be found at the following URL:

[http://system.enterprise.com:5555/auctions/commitments.jsp?doc\\_id=11704&app=selling](http://system.enterprise.com:5555/auctions/commitments.jsp?doc_id=11704&app=selling)

## Commitment Approved by Buyer - Supplier

### Summary of E-mail notification

- Recipient: offer respondent
- When: buyer approves supplier's commitment
- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: A decision has been made on your commitment for Odyssey Corp  
Offer to Buy "Offer 001"

Date: Sat, 11 Aug, 200x 15:29:59 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Congratulations! Odyssey Corp has approved your commitment 3401 to  
Offer

to Buy 11704. The Offer to Buy details are as follows:

Buyer: Odyssey Corp

Offer to Buy Title: Offer 001

Offer to Buy Number: 11704

Open Date: May 23, 200x 04:49 pm America/Los\_Angeles

Close Date: July 22, 200x 03:30 pm America/Los\_Angeles

Supplier: Supplier Company

Commitment Number: 3401

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

Details for this commitment and all other commitments and counteroffers for Offer to Buy 11704 can be found at the following URL:

[http://system.enterprise.com:5555/auctions/commitments.jsp?doc\\_id=11704&app=selling](http://system.enterprise.com:5555/auctions/commitments.jsp?doc_id=11704&app=selling)

## Commitment Rejected by Buyer - Supplier

### Summary of E-mail notification

- Recipient: responding supplier
- When: buyer rejects a supplier's commitment to an Offer to Buy,
- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: A decision has been made on your commitment for Odyssey Corp Offer to Buy "Offer 001"

Date: Sat, 11 Aug, 200x 15:29:59 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Odyssey Corp has rejected your commitment 5681 to Offer to Buy 11708. The Offer to Buy details are as follows:

Buyer: Odyssey Corp

Offer to Buy Title: Offer 001

Offer to Buy Number: 11708

Open Date: May 23, 200x 04:49 pm America/Los\_Angeles

Close Date: July 22, 200x 03:30 pm America/Los\_Angeles

Supplier: Supplier

Commitment Number: 5681

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

Details for all other commitments and counteroffers for Offer to Buy 1285461 can be found at the following URL:  
[http://system.enterprise.com:5555/auctions/commitments.jsp?doc\\_id=1285461&app=selling](http://system.enterprise.com:5555/auctions/commitments.jsp?doc_id=1285461&app=selling)

## Offer Cancellation

### Summary of E-mail notification

- Recipient: all invitees and respondents
- When: an offer is cancelled
- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: Offer to Buy 1272634 "Offer One" cancelled

Date: Sat, 18 Aug. 200x 02:58:21 -0700 (PDT)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Offer to Buy 11706 has been cancelled by Odyssey Corp. All approved commitments are still considered binding. All pending commitments and counteroffers are rendered null and void and no new responses are being accepted for this offer.

The owner of this Offer to Buy, Odyssey Corp, has offered the following explanation for its cancellation.

Offer to Buy Title: Offer 001

Offer to Buy Owner: Odyssey Corp

Open Date: May 23, 200x 04:49 pm America/Los\_Angeles

Close Date: July 22, 200x 03:30 pm America/Los\_Angeles

Cancellation Reason: This is the cancellation reason offered by the buyer.

## Offer Update Summary of E-mail Notification

- Recipient: all invitees and respondents

- When: an offer is updated
- Possible Action: none (for information only)
- Next Steps: none

### E-mail text

Subject: Offer 11704 "Offer 001" has been updated

Date: Sat, 11 Aug. 200x 19:01:20 -0700 (PDT)

From "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

Offer 11704 has been updated

Buyer: Odyssey Corp

Offer to Buy Title: Offer 001

Offer to Buy Number: 11704

Open Date: May 23, 200x 04:49 pm America/Los\_Angeles

Close Date: July 22, 200x 03:30 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

Details for this offer can be found at the following URL:

[http://system.enterprise.com:5555/auctions/viewOffer.jsp?doc\\_id=1270261&app=selling](http://system.enterprise.com:5555/auctions/viewOffer.jsp?doc_id=1270261&app=selling)

## Offer Acknowledgement Reminder - Supplier Contact

### Summary of E-mail notification

- Recipient: respondents who have not acknowledged intent to participate
- When: auction is in progress and the company has not acknowledged their intent to participate; could be 1 hour, 1 day or 3 days after open or preview date and time.

- Possible Action: Participate, or acknowledge online or by e-mail the intent to participate
- Next Steps: none

### E-mail text

Subject: Buyer requests your acknowledgement to participate in Offer to Buy 11704

Date: Wed, 28 Nov. 200x 15:06:24 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

This e-mail is to remind you to acknowledge participation for the following auction.

Offer to Buy Owner: Pat Stock

Offer Title: Offer 001

Offer Number: 10762

Open Date: May 23, 200x 04:49 pm America/Los\_Angeles

Close Date: July 22, 200x 03:30 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=11704&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=11704&app=buying)

To view auction details and place a bid on this auction, please go to

[http://system.enterprise.com/5555jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=11704&app=buying](http://system.enterprise.com/5555jsp/pon/auctions/bidViewAuction.jsp?auction_id=11704&app=buying)

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.

Does your company intend to participate?: Yes No

## Offer Acknowledgement Reminder - Supplier Additional Contact

### Summary of E-mail notification

- Recipient: respondents who have not acknowledged intent to participate
- When: auction is in progress and the company has not acknowledged their intent to participate; could be 1 hour, 1 day or 3 days after open or preview date and time.
- Possible Action: participate if the offer is open, or enter Oracle Sourcing and acknowledge the intent to participate.
- Next Steps: none

### E-mail text

Subject: Buyer requests your acknowledgement to participate in Offer to Buy 1270465

Date: Wed, 28 Nov. 200x 15:07:37 -0800 (PST)

From: "Enterprise Purchasing Department" workflow@enterprise.com

To: user@company.com

Supplier:

This e-mail is to remind you to acknowledge participation for the following auction.

Offer to Buy Owner: Pat Stock

Offer Title: Offer 001

Offer Number: 11704

Open Date: May 23, 200x 04:49 pm America/Los\_Angeles

Close Date: July 22, 200x 03:30 pm America/Los\_Angeles

Go to the appropriate URL below. You will be asked for your user name and password. Once you have logged in, navigate to the Sourcing Home Page (choose your Sourcing Responsibility, then select the Sourcing Home Page). Access the URL below to go directly to the appropriate page.

To acknowledge your intent to participate, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction\\_id=11704&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=11704&app=buying)

To view auction details and place a bid on this auction, please go to

[http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction\\_id=11704&app=buying](http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11704&app=buying)

If this is your first time using the system, then we need to create a user for you. Please go to

<http://system.enterprise.com/5555/html/jsp/pos/registration/RegistrationReply.jsp?registrationKey=B9BAF14F>

## Reminder Notifications

Suppliers receive notifications reminding them to acknowledge their intent to participate in the negotiation. Only those suppliers who have been invited by the buyer receive these reminders. The e-mail recipients can conduct the acknowledgement online via the URL included in the e-mail and/or directly from the e-mail notification.

Acknowledgement by respondents enables buyers to identify early in the negotiation process the companies that plan on participating and the ones that do not. Based on such responses, buyers can better manage the negotiation process by inviting additional companies, manually extending the negotiation, or increase communications with the invited companies.

## Timing of Reminder Notifications

The time at which the invited suppliers receive acknowledgment reminders depends on the available time in a negotiation. The available time in a negotiation is the difference between Preview Date and Close Date. If the Buyer does not specify a Preview Date, then available time is the difference between the Open Date and Close Date.

**Table B-3** *Reminder Notification*

Available Time	Reminder e-mail
Equal or less than 24 hours.	Preview/Open Date + 1 hour
More than 24 hours & less than week	Preview/Open Date + 1 day

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**Table B-3 Reminder Notification**

<b>Available Time</b>	<b>Reminder e-mail</b>
Equal or longer than 1 week	Preview/Open Date + 3 days

- If additional suppliers are added before the original reminder time, these new invitees receive reminders at the original time. However, if they are added after the original reminder time, they do not receive reminders.
- If the buyer starts another round of negotiations before the reminder time, the reminder is not sent. The new round of negotiations is treated as a regular new negotiation and invited contacts in the new round should acknowledge their intent again.
- If the negotiation is closed, cancelled or deleted before the reminder time, invitees do not receive any notifications.
- Invitees do not receive notifications if someone at their company has submitted a response or if the open quantity of an offer is zero.



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