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JD Edwards EnterpriseOne Operational Sourcing 8.12 Implementation Guide

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JD Edwards EnterpriseOne Operational Sourcing 8.12 Implementation Guide
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Contents

About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Ordering Printed Documentation

You can order printed, bound volumes of the complete line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guide CD-ROM. Oracle makes printed documentation available for each major release of JD Edwards EnterpriseOne shortly after the software is shipped. Customers and partners can order this printed documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of Oracle's PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners, the book print vendor, at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs) (JD Edwards EnterpriseOne only)	Implement, Optimize, and Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

Implementation guides contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

Implementation guides provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about implementation guides and other Oracle reference and training materials. Please send your suggestions to Documentation Manager, Oracle Corporation, 7604 Technology Way, Denver, CO, 80237. Or email us at documentation_us@oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Fields Used in Implementation Guides

Address Book Number — Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.

As If Currency Code Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to *E*.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

JD Edwards EnterpriseOne Operational Sourcing

This preface discusses:

- JD Edwards EnterpriseOne products.
- JD Edwards EnterpriseOne application fundamentals.

JD Edwards EnterpriseOne Products

This implementation guide refers to these JD Edwards EnterpriseOne products from Oracle:

- JD Edwards EnterpriseOne Procurement
- JD Edwards EnterpriseOne Foundation – Address Book
- JD Edwards EnterpriseOne Inventory Management
- JD Edwards EnterpriseOne General Accounting

JD Edwards EnterpriseOne Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *JD Edwards EnterpriseOne Financial Management Application Fundamentals 8.12 Implementation Guide.*

See Also

JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide, “Getting Started with JD Edwards EnterpriseOne Financial Management Application Fundamentals,” JD Edwards EnterpriseOne Financial Management Application Fundamentals Implementation

CHAPTER 1

Getting Started With JD Edwards EnterpriseOne Operational Sourcing

This chapter discusses:

- JD Edwards EnterpriseOne Operational Sourcing overview.
- JD Edwards EnterpriseOne Operational Sourcing business process.
- JD Edwards EnterpriseOne Operational Sourcing integrations.
- JD Edwards EnterpriseOne Operational Sourcing implementation.

JD Edwards EnterpriseOne Operational Sourcing Overview

Sourcing is the process of identifying a company's purchases (both historic and future) and then defining the optimum supplier mix for those purchases. Different activities can trigger a sourcing event, such as a new product introduction (NPI), the expiration of a contract for an item or commodity group, a cost savings effort by the company, or a buyer's decision to reduce the supply base of the company. The sourcing process includes analyzing historic spending patterns, future demand (planned requirements), and rationalizing suppliers for developing long-term agreements. Other tasks include evaluating supplier offerings, making comparisons, optimizing total cost and improving and establishing long-term relationships with suppliers. The result is finding the best deal, the right products and services, sufficient availability, and favorable prices.

Sourcing involves two types of events:

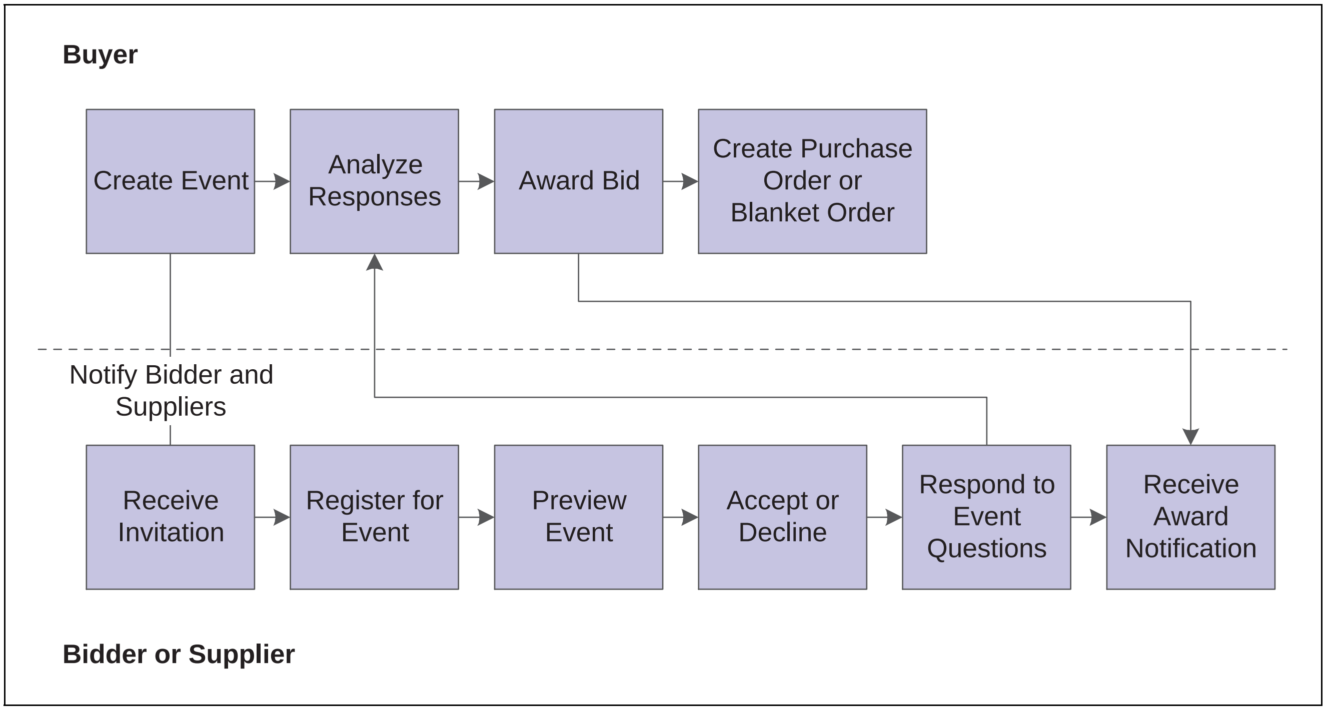
- Requests for information (RFI)
- Requests for quote (RFx)

Requests for information (RFIs) are used when seeking general information about suppliers' capabilities, products, services or the industry in general. Requests for quote (RFxs) are used when the buyer is seeking prices and supply attributes for identified materials or services. These RFx business processes enable buyers to aggregate total enterprise requirements for the purpose of negotiating long term partnership relations, thereby reducing material cost through volume pricing. The objectives of operational sourcing are to:

- Streamline manual tasks, interactions, and the sourcing process to drive down sourcing costs.
- Make better decisions based on quote evaluations that provide the lowest total cost alternative.
- Negotiate better prices and more favorable terms through volume pricing.
- Build a company knowledge base on market suppliers and commodities.
- Accelerate time to market for new products.

JD Edwards EnterpriseOne Operational Sourcing Business Process

This process flow illustrates the JD Edwards EnterpriseOne Operational Sourcing business processes:



Operational Sourcing process flow

We discuss these business processes in the business process chapters in this implementation guide.

JD Edwards EnterpriseOne Operational Sourcing Integrations

The JD Edwards EnterpriseOne Operational Sourcing system integrates with these JD Edwards EnterpriseOne systems from Oracle:

- JD Edwards EnterpriseOne Procurement.
- JD Edwards EnterpriseOne Address Book.
- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne General Accounting.

We discuss integration considerations in the implementation chapters in this implementation guide.

JD Edwards EnterpriseOne Procurement

The JD Edwards EnterpriseOne Procurement system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by creating purchase orders and blanket orders when a buyer posts an award for an event.

JD Edwards EnterpriseOne Address Book

The JD Edwards EnterpriseOne Address Book system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by providing mailing, contact, and supplier information for each supplier.

JD Edwards EnterpriseOne Inventory Management

The JD Edwards EnterpriseOne Inventory Management system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by providing item information for each item in an event.

JD Edwards EnterpriseOne General Accounting

The JD Edwards EnterpriseOne General Accounting system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by providing general ledger account numbers used in events that are created for services.

JD Edwards EnterpriseOne Operational Sourcing Implementation

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne Operational Sourcing system.

In the planning phase of your implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About This Documentation*, with information about where to find the most current version of each.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Operational Sourcing, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time required to search and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools 8.96 Software Update Guide*

See Also

About This Documentation, “About This Documentation Preface”“About This Documentation Preface,” page vii

Installation Steps for the JD Edwards EnterpriseOne Collaborative Portal

You can use the JD Edwards EnterpriseOne Collaborative Portal to implement JD Edwards EnterpriseOne Operational Sourcing. You can either use the Sourcing Portal program (P43Q01) or the Supplier Relationship Management portlet.

See Chapter 2, “Understanding the JD Edwards EnterpriseOne Operational Sourcing Portal,” page 7.

This guide does not describe in detail how to install and configure the Collaborative Portal. However, this section provides an overview of the general steps involved in installing and configuring the Collaborative Portal.

Use the following table as a guide to the installation and configuration process for the Collaborative Portal and the JD Edwards EnterpriseOne portlets. You should perform the steps in the order listed.

Step	Reference
1. Verify that you meet the minimum technical requirements (MTRs) to implement the JD Edwards EnterpriseOne Collaborative Portal.	*JD Edwards EnterpriseOne Tools 8.96 Hardware and Software Requirements Guide*
2. Install and configure the JD Edwards EnterpriseOne system. Apply the updates, service packs, or Electronic Software Updates (ESUs) specified in the MTRs.	See your JD Edwards EnterpriseOne installation documentation.
3. Install and configure the IBM WebSphere Portal.	Use one of these guides: • *WebSphere Portal 5.0 – Multiplatforms Installation and Configuration for iSeries* • *WebSphere Portal 5.0 – Multiplatforms Installation and Configuration for Unix* • *WebSphere Portal 5.0 – Multiplatforms Installation and Configuration for Windows* • *WebSphere Portal 5.1 – Multiplatforms Installation and Configuration for iSeries* • *WebSphere Portal 5.1.0.1 – Multiplatforms Installation and Configuration for Unix* • *WebSphere Portal 5.1.0.1 – Multiplatforms Installation and Configuration for Windows*
4. Install and configure the JD Edwards EnterpriseOne Collaborative Portal.	*JD Edwards EnterpriseOne Tools 8.96 Collaborative Portal Installation*
5. Generate JD Edwards EnterpriseOne portlets in the WebClient_Portal.war file.	Use both of these guides: • *JD Edwards EnterpriseOne Tools 8.96: Development Tools: Form Design Aid, Understanding Portlet Forms, Generating Portlets* • *JD Edwards EnterpriseOne Tools 8.96 HTML Web Server Installation, Appendix A: Generating JD Edwards EnterpriseOne Serialized Objects, Generating an FDA-Created Portlet*
6. Install the WebClient_Portal.war file in the Collaborative Portal.	WebSphere Portal for Multiplatforms: http://publib.boulder.ibm.com/infocenter/wpdoc/v510 /index.jsp?topic=/com.ibm.wp.ent.doc/wpf/welcome.html
7. Create pages and add portlets to pages in the Collaborative Portal.	WebSphere Portal for Multiplatforms: http://publib.boulder.ibm.com/infocenter/wpdoc/v510 /index.jsp?topic=/com.ibm.wp.ent.doc/wpf/welcome.html

Global Implementation Steps

This table lists the suggested implementation steps for the JD Edwards EnterpriseOne Operational Sourcing system.

Step	Reference
1. Set up fiscal date patterns, companies, and business units.	*JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Setting Up Organizations”
2. Create the chart of accounts and set up accounts and subledgers.	*JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 Implementation Guide*, “Creating the Chart of Accounts”
3. Set up multicurrency processing.	*JD Edwards EnterpriseOne Multicurrency Processing 8.12 Implementation Guide*, “Understanding Multicurrency Setup”
4. Set up inventory information, such as branch/plant constants, default locations and printers, manufacturing and distribution AAIs, and document types.	*JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide*, “Setting Up the Inventory Management System”
5. Set up order line types.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Defining Order Line Types
6. Set up order activity rules.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up Order Activity Rules
7. Set up Procurement constants.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up Procurement Constants
8. Define Procurement next numbers.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Understanding the Setup of Procurement Next Numbers
9. Set up AAIs.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up AAIs
10. Set up user defined codes.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up UDCs
11. Create tolerance rules.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Creating Tolerance Rules
12. Set up order hold information.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up Order Hold Information
13. Set up landed costs.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up Landed Costs
14. Set up nonstock items.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up Nonstock Items

Step	Reference
15. Define print messages.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Defining Print Messages
16. Set up templates for purchase orders.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Setting Up Templates for Purchase Orders
17. Create model logs.	*JD Edwards EnterpriseOne Procurement Management 8.12 Implementation Guide*, “Setting Up the Procurement System,” Creating Model Logs

JD Edwards EnterpriseOne Operational Sourcing Implementation Steps

This table lists the suggested application-specific implementation steps for JD Edwards EnterpriseOne Operational Sourcing.

Step	Reference
1. Set up roles.	Chapter 3, “Setting Up the Operational Sourcing System,” Understanding System Setup for Operational Sourcing, page 9
2. Set up user-defined codes.	Chapter 3, “Setting Up the Operational Sourcing System,” Setting Up User-Defined Codes for Operational Sourcing, page 10
3. Set up bid questions.	Chapter 3, “Setting Up the Operational Sourcing System,” Setting Up Bid Question Templates, page 16
4. Set up address book records for bidders and suppliers.	Chapter 3, “Setting Up the Operational Sourcing System,” Understanding System Setup for Operational Sourcing, page 9
5. Set up JD Edwards EnterpriseOne Operational Sourcing system constants.	Chapter 3, “Setting Up the Operational Sourcing System,” Setting Up System Constants for Operational Sourcing, page 20

Chapter 2

Understanding the JD Edwards EnterpriseOne Operational Sourcing Portal

The Sourcing Portal (P43Q01) is an application created in form design aid (FDA) using the portlet form type. The Sourcing Portal enables you to provide online access to the JD Edwards EnterpriseOne Operational Sourcing system for buyers and bidders. The page for buyers displays both the Event Workbench program (P43Q70) and the Bidder Workbench program (P43Q40). The page for bidders displays the Bidder Workbench and the RFx Bidder Registration (P43Q91) programs.

You can also use the Supplier Relationship Management (SRM) portlet with JD Edwards EnterpriseOne Operational Sourcing. The SRM portlet contains alerts for JD Edwards EnterpriseOne Operational Sourcing that you can configure to display events at each status. For example, you can set up an alert for the buyer that displays all events that are at a status of *Accepted*. When a buyer clicks on an alert link, the system accesses either the Event Workbench program or the Bidder Workbench program, depending on the type of alert. When a bidder clicks on an alert link, the system accesses the Bidder Workbench program.

See Also

JD Edwards EnterpriseOne Tools 8.96 Development Tools: Form Design Aid, Understanding Portlet Forms

Chapter 4, "Creating an Event," page 25

Chapter 6, "Using the Bidder Workbench," page 73

JD Edwards EnterpriseOne Supplier Relationship Management Collaboration 8.12 Implementation Guide, "Configuring the SRM Portlet Using the Configuration Wizard"

CHAPTER 3

Setting Up the Operational Sourcing System

This chapter provides an overview of the system setup for JD Edwards EnterpriseOne Operational Sourcing and discusses how to:

- Set up user-defined codes for JD Edwards EnterpriseOne Operational Sourcing.
- Set up bid question templates.
- Set up system constants for JD Edwards EnterpriseOne Operational Sourcing.

Understanding System Setup for Operational Sourcing

This table lists the required setup for the JD Edwards EnterpriseOne Operational Sourcing system:

Setup Feature	Explanation
Roles	You must set up user roles for your bidders and suppliers so that you can assign the roles in the Sourcing Constants program (P43Q90). See *JD Edwards EnterpriseOne Tools 8.96: Security Administration, Working With User and Role Profiles*
User-defined codes (UDCs)	You must set up several UDCs that are specific to the JD Edwards EnterpriseOne Operational Sourcing system.
Bid questions	You can set up templates for bid questions so that you can use the questions for multiple sourcing events. The system constants for JD Edwards EnterpriseOne Operational Sourcing require you to enter a default price question. You must create the default price question before you set up the system constants.

Setup Feature	Explanation
Address Book records for bidders, suppliers, and sourcing contacts	You must set up bidders and suppliers in the JD Edwards EnterpriseOne Address Book system. After you create Address Book records for your bidders and suppliers, you must then attach who's who records to them as follows: • The sourcing contact must have the Primary Contact option selected and the Contact Type must be the type that you set up for sourcing. • The sourcing contact must have an email address and a phone number or fax number. See *JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide*, "Entering Address Book Records," Adding an Address Book Record. See *JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide*, "Entering Address Book Records," Adding a Who's Who Record. See *JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide*, "Entering Address Book Records," Adding Phone Numbers to Who's Who Records. See *JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide*, "Entering Address Book Records," Adding Electronic Addresses Information to Who's Who Records.
System constants	You must set up the system constants for JD Edwards EnterpriseOne Operational Sourcing; which provide default processing information.

Setting Up User-Defined Codes for Operational Sourcing

The JD Edwards EnterpriseOne Operational Sourcing system includes several user-defined code (UDC) tables. Most of the UDC tables have hard-coded values that you cannot change; however, there are several tables for which you must set up the values to meet your business needs. For example, you can set up a UDC table that lists possible reasons for declining an event invitation. Set up the following UDC tables for JD Edwards EnterpriseOne Operational Sourcing:

- 43Q/DR

  This UDC table contains valid reasons for declining an event invitation. Examples include:

  - *01:* Unable to meet event terms.
  - *02:* Insufficient time to respond.
  - *03:* Other
- 43Q/PM

  This UDC table contains valid payment methods for events. Examples include:

  - *CA:* Cash

- *CC:* Credit card
- *CH:* Check
- *EF:* Electronic funds

• 43Q/RR

This UDC table contains valid revenue ranges for suppliers. Examples include:

- *H:* Over 1 billion
- *L:* 0-150 million
- *M:* 300 million to 600 million
- *MH:* 600 million to 1 billion
- *ML:* 150 million to 300 million

• 43Q/RS

This UDC table is reserved for future use.

• 43Q/RT

This UDC table is reserved for future use.

User-Defined Codes That are Required for Setting Up Constants

When you set up the system constants using the Sourcing Constants program (P43Q90), the system requires you to choose certain default values from UDC tables. Therefore, you must set up these UDCs before setting up the constants:

• 01/CT

UDC table 01/CT contains valid contact types for contacts that you set up for your suppliers and bidders using the Address Book Revision program (P01012). You must set up a contact type that is specifically for JD Edwards EnterpriseOne Operational Sourcing so that you can specify which of the contacts for the supplier or bidder is the sourcing contact. An example of a sourcing contact type is *SRM*: Sourcing primary contact.

• 00/DT

UDC table 00/DT contains valid document types for various documents in the JD Edwards EnterpriseOne system. You must set up document types for the following sourcing documents:

- Request for information (RFI).
- Request for quote (RFx).

• 40/PM

UDC table 40/PM contains codes and descriptions for print messages that the system sends to bidders and suppliers to notify them during the various stages of the sourcing process. When you set up the constants for JD Edwards EnterpriseOne Operational Sourcing, you must enter the code for each of the print messages. The system provides UDC values and descriptions for all 10 messages, but you can change the values and descriptions to meet your business needs. The system provides these UDC values:

- *BIDT&C:* Bidder terms and conditions
- *AWARDCONF:* Award confirmation
- *CANCELEVT:* Cancel event
- *ENDEVENT:* End event
- *EXTENDEVT:* Extend event

- *INVBIDDER:* Invite bidder
- *INVPASSWRD:* Invite password
- *NOTAWARDED:* Bid unsuccessful
- *PAUSEEVT:* Pause event
- *RESUMEEVT:* Resume event

In addition to setting up the UDC codes for print messages, you must also enter the text that the system sends. You use the Print Message Revisions program (P40162) in the JD Edwards EnterpriseOne Inventory Management system to set up the message text.

See *JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide*, “Setting Up the Inventory Management System,” Setting Up Messages.

Hard-Coded UDC Values

The following list includes the UDC tables used by the JD Edwards EnterpriseOne Operational Sourcing system that are hard-coded. You do not need to set up these UDC tables, but you should verify that they exist:

- 43Q/AA

  This UDC table contains valid award actions for bids. Values include:

  - *A:* Award Bid
  - *D:* Disallow Bid
  - *N:* No Action Taken
  - *R:* Reject Bid

- 43Q/AC

  This UDC table contains values that indicate whether a currency is the currency specified for an event or a currency specified in a bid. Values include:

  - *B:* Bid currency
  - *E:* Event currency

- 43Q/AI

  This UDC table contains values that specify whether the system adds an item to the JD Edwards EnterpriseOne Inventory Management tables. Values include:

  - *0:* Do not add.
  - *1:* Add item to system tables.

- 43Q/AT

  This UDC table contains values that specify whether the system creates a blanket order or a purchase order when an award is posted. Values include:

  - *B:* Blanket purchase order
  - *P:* Purchase order

- 43Q/BH

  This UDC table contains values that specify how the system sorts bids when viewing bid history by line. Values include:

  - *01:* Bid number

- *02:* Bidder number
- *03:* Bidder name
- *04:* Bid status
- *05:* Bid score
- *06:* Award status

• 43Q/BS

This UDC table contains valid bid statuses. Values include:

- *D:* Disqualified
- *P:* Posted
- *S:* Saved
- *W:* Disallowed
- *X:* Canceled

• 43Q/BT

This UDC table contains bid question types. Values include:

- *D:* Date
- *L:* List
- *M:* Monetary
- *N:* Numeric
- *P:* Price
- *T:* Text
- *Y:* Yes/No

• 43Q/CC

This UDC table contains valid commodity levels that the system uses when attaching bid questions to an event. Values include:

- *AL:* All levels
- *NL:* None
- *SL:* Single level

• 43Q/ED

This UDC table contains valid event dates. Values include:

- *01:* Preview start date
- *02:* Start date
- *03:* End date

• 43Q/EF

This UDC table contains valid event formats. Values include:

- *BY:* RFx
- *RF:* Request for information

- 43Q/ES

  This UDC table contains valid event statuses. Values include:

  - *A:* Awarded
  - *F:* RFI reviewed
  - *I:* Pending RFI review
  - *N:* Not awarded
  - *O:* Open
  - *P:* Posted
  - *Q:* Paused
  - *T:* Pending award
  - *X:* Canceled

- 43Q/IB

  This UDC table contains valid search types for bidders in the Invite Bidders program (P43Q30). Values include:

  - *B:* Bidder
  - *S:* Supplier

- 43Q/IS

  This UDC table contains valid invitation statuses. Values include:

  - *A:* Invite accepted
  - *D:* Invite declined
  - *O:* Registered
  - *P:* Response incomplete
  - *S:* Bid submitted

- 43Q/LS

  This UDC table contains valid statuses for event lines. Values include:

  - *C:* Closed
  - *O:* Open
  - *X:* Canceled

- 43Q/LT

  This UDC table contains valid types of event lines. Values include:

  - *IF:* Item on the fly
  - *SR:* Special request (service)
  - *ST:* Stocked item
  - *SV:* Service item

- 43Q/PB

  This UDC table contains valid values for whether price break information exists. Values include:

- *0:* No price breaks exist
- *1:* User/buyer defined price breaks

• 43Q/PC

This UDC table contains valid values for whether price component information exists. Values include:

- *0:* No price components exist
- *1:* Price components exist

• 43Q/QS

This UDC table contains valid statuses for bid questions. Values include:

- *A:* Active
- *I:* Inactive

• 43Q/S1

This UDC table contains valid methods by which to sort bidders when analyzing header information for events. Values include:

- *01:* Bidder name
- *02:* Total event score
- *03:* Header score
- *04:* Total bid amount

• 43Q/S2

This UDC table contains valid methods by which to sort bidders when analyzing line information for events. Values include:

- *01:* Bidder name
- *02:* Total event score
- *03:* Line score
- *04:* Line amount
- *05:* Award quantity

• 43Q/S3

This UDC table contains valid methods by which to sort bidders when analyzing RFI bids. Values include:

- *01:* Bidder name
- *02:* Header score

• 43Q/SB

This UDC table contains valid methods by which to sort bidders in the Invite Bidders program (P43Q30). Values include:

- *ALPH:* Alpha name
- *AN8:* Address number
- *AT1:* Search type

• 43Q/SO

This UDC table contains valid methods by which to sort bid questions. Values include:

- *BIDCODE:* Bid question code
- *DESC:* Description

• 43Q/TM

This UDC table contains valid measures of time that you use to specify default durations for events in the Sourcing Constants program (P43Q90). Values include:

- *D:* Days
- *H:* Hours
- *M:* Minutes

• 43Q/WB

This UDC table contains valid methods by which to sort events in the Event Workbench program. Values include:

- *EVFT:* Event format
- *EVNU:* Event number
- *EVST:* Event status
- *EVTN:* Event name
- *MCU:* Branch plant

• 43Q/WS

This UDC table contains valid methods by which to sort events in the Bidder Workbench program. Values include:

- *SBDHP:* Bid history
- *TM:* Event end date
- *FT:* Event type
- *NU:* Event number
- *ST:* Event status
- *SX:* Event start date
- *TN:* Event name
- *ST:* Bidder status

• 43Q/YN

This UDC table contains valid responses to yes/no questions. Values are:

- *N:* No
- *Y:* Yes

Setting Up Bid Question Templates

This section provides an overview of bid question templates and discusses how to set up bid question templates.

Understanding Bid Question Templates

Use the Bid Questions Template Setup program (P43Q60) to add bid question templates. Bid question templates provide your organization with a predefined list of bid questions that you can use for multiple sourcing events. You can create both header questions and line questions.

You set up header questions to ask information that is specific to companies. Examples include:

- How long has your company been in business?
- What is your company's annual revenue?
- Is your company ISO (International Organization for Standardization) certified?

You set up line questions to ask information that is specific to the item for which you have created the sourcing event. Examples include:

- What is the price of your item?
- What are the available colors of your item?
- What are the available sizes of your item?

Types of Bid Questions

You can create the following types of bid questions:

- Date
- List
- Monetary
- Numeric
- Price
- Text
- Yes/No

Date, monetary, and numeric questions all require you to use the Best Response and Worst Response fields to create a range of possible responses. You can specify whether bidders can enter a value that is outside of the range.

List questions require you to set up a list of possible responses and corresponding weights. You can specify whether bidders can select multiple values from the list. An example of a list question is: "What are the available sizes of your product?"

When you create price questions, you can create a list of components so that bidders must break out their price by components, such as shipping and handling. Each event line must have at least a price question attached to it, and each line can have only one price question. You must create a default price question so that the system can assign the default question if you do not assign one. You must also enter the default price question in the Sourcing Constants program.

See Chapter 3, "Setting Up the Operational Sourcing System," Setting Up System Constants for Operational Sourcing, page 20.

When you create text questions, you create open-ended questions and you specify an ideal response. An example of a text question is: "Please describe your quality control process."

You also create an ideal answer when you set up yes/no questions. You must specify whether the ideal response is yes or no. An example of a yes/no question is: "Is your company ISO certified?"

Bid Questions for Items and Commodities

You can assign an item number or a commodity to line questions. When you create an event for a specific item, the system displays all line questions attached to that item. Depending on how you set the Commodity Level Search option in the Sourcing Constants program (P43Q90), the system can also display either all questions based on the event line commodity, or all questions based on the event line commodity as well as all other commodities at a higher level in the commodity structure. You set up the commodity structure in the Requisition Self Service system.

See *JD Edwards EnterpriseOne Requisition Self Service 8.12 Implementation Guide*, “Setting Up the Commodity Structure”.

See Chapter 3, “Setting Up the Operational Sourcing System,” Setting Up System Constants for Operational Sourcing, page 20.

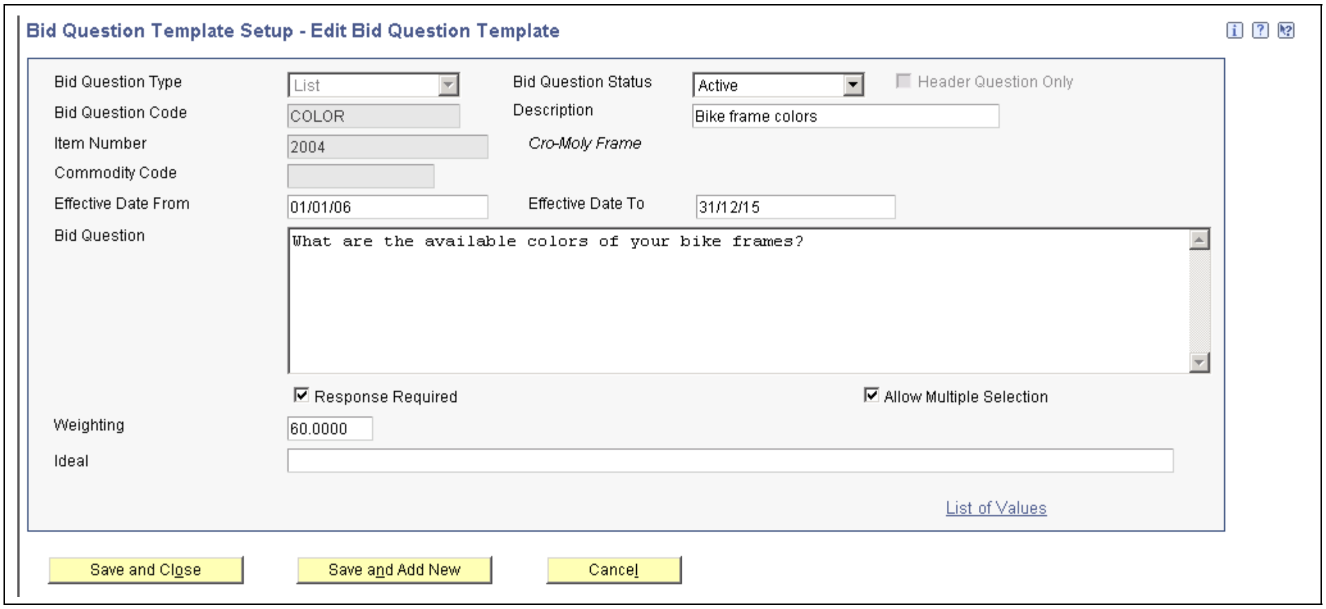
When the system displays the event line questions for the item or commodity of the event line, you can either use the questions as-is, or you can modify the questions to meet the needs of the specific event. You can also add new questions.

Forms Used to Set Up Bid Question Templates

Form Name	FormID	Navigation	Usage
Search for Bid Questions	W43Q60A	Select Setup (G43Q41), Bid Questions Setup	Review and search for existing bid question templates.
Add Bid Question Template	W43W60B	Click Add, Edit or Copy on the Search for Bid Questions form.	Add new bid question templates, and edit or copy existing templates.
List Question – List of Values	W43Q60D	Click List of Values on the Add Bid Question Template form when creating a list question.	Add values for a list question.
Price Question - Item Components	W43Q60C	Click List of Components on the Add Bid Question Template form.	Create a list of components for an item.

Adding Bid Question Templates

Access the Add Bid Question Template form.



Edit Bid Question Template form

Bid Question Type Select a type for the bid question, indicating the type of response that you expect to receive. These values are hard-coded in user-defined code table 43Q/BT and include: *Text*, *Price*, *Monetary*, *Date*, *Quantity*, *Yes/No*, or *List.*

Header Question Only Select this check box to indicate that this question is only a header question; it does not apply to individual event lines.

Bid Question Code Enter a code for this bid question. Enter up to 18 alphanumeric characters.

Description Enter a description for the bid question. Enter up to 30 alphanumeric characters.

Bid Question Status Specify whether the bid question is active or inactive. If you select *Inactive*, the system does not allow you to attach this question to a sourcing event.

Item Number Specify an item number for this question, if the question applies to a specific item. If you select the Header Question Only check box, the system disables this field.

Commodity Code Specify a commodity code for this question, if the question applies to a specific commodity code. If you select the Header Question Only check box, the system disables this field.

See *JD Edwards EnterpriseOne Requisition Self Service 8.12 Implementation Guide*, “Setting Up the Commodity Structure”.

Effective Date From and Effective Date To Specify a beginning and ending date to define a range in which the bid question is available to attach to a sourcing event. If you leave the Effective Date From field blank, the system uses the current date and time. If you leave the Effective Date To field blank, the system uses the date specified in the Bid Question End Effective Date field in the Sourcing Constants program (P43Q90).

Bid Question Enter text for the bid question.

Response Required Select this check box to indicate that the bidder must respond to this question.

Allow Out of Range	Select this check box to allow bidders to enter a date that does not fall within the range specified in the Best Response and Worst Response fields. This check box appears only when you create an *Amount*, *Numeric*, *Price*, or *Date* bid question.
Weighting	Specify a percentage to identify the level of importance of the bid question. The system uses this percentage when analyzing and scoring the bid responses.
Ideal	Enter text to indicate the ideal response to a text question. The system displays this field only when the question type is *Text*, *List*, or *Yes/No*.
List of Values	Click this link to create a list of values and the weights associated with the values. This link appears only when you create a *List* bid question.
Allow Multiple Selection	Select this check box to allow bidders to select more than one value in a list question. This check box appears only when you create a *List* bid question.
Best Response and Worst Response	Enter the best and worst response to the question. The system displays these fields only when the question type is *Date*, *Numeric*, *Monetary*, or *Price*.
List of Components	Enter the item components for which you want the bidder to enter prices. For example, enter *Shipping*, *Handling*, and so on. This field appears only when you select a *Price* question type.

Setting Up System Constants for Operational Sourcing

This section provides an overview of system constants for JD Edwards EnterpriseOne Operational Sourcing and discusses how to set up the system constants.

Understanding System Constants for Operational Sourcing

Use the Sourcing Constants program (P43Q90) to set up the constants for JD Edwards EnterpriseOne Operational Sourcing. The system constants for JD Edwards EnterpriseOne Operational Sourcing provide information for bidders and suppliers, such as search types, user roles and the sourcing contact type. You also use the constants to provide default settings for events, such as whether bids are required and whether manual extensions are allowed. When you create an event, the system populates the event properties with the values specified in the constants, but you can change them as needed.

Prerequisites

Before you complete the task in this section:

- Set up user roles.
- Set up user-defined codes for JD Edwards EnterpriseOne Operational Sourcing.
- Set up a default price bid question.

See Chapter 3, "Setting Up the Operational Sourcing System," Understanding System Setup for Operational Sourcing, page 9.

See Chapter 3, "Setting Up the Operational Sourcing System," Setting Up User-Defined Codes for Operational Sourcing, page 10.

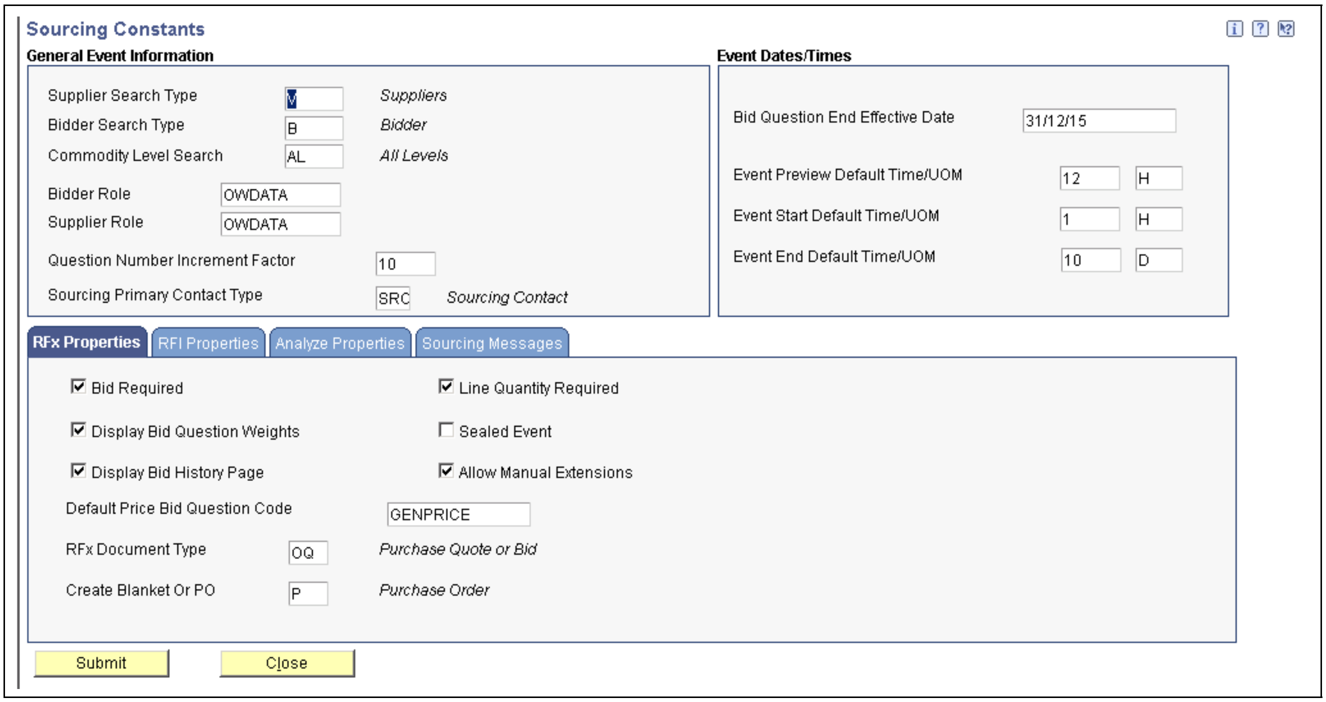
See Chapter 3, "Setting Up the Operational Sourcing System," Setting Up Bid Question Templates, page 16.

Form Used to Set Up System Constants for Operational Sourcing

Form Name	FormID	Navigation	Usage
Sourcing Constants	W43Q90A	Select Setup (G43Q41), Sourcing Constants	Set up system constants.

Setting Up Constants

Access the Sourcing Constants form.



Sourcing Constants form

General Event Information

Supplier Search Type Enter the default search type for the system to use to identify suppliers.

Bidder Search Type Enter the default search type for the system to identify bidders.

Commodity Level Search Specify the commodity code level for the system to use to automatically retrieve and attach bid questions when an event is created. Values are:

AL: The system retrieves and automatically attaches bid questions based on the event line commodity code as well as all other commodity codes higher in the hierarchy.

NL: The system does not retrieve and automatically attach bid questions based on the event line commodity code.

SL: The system retrieves and automatically attaches bid questions based on only the event line commodity code.

The system stores these values in user-defined code table 43Q/CC.

Bidder Role

Specify the security role for a bidder who is not yet an established supplier within the JD Edwards EnterpriseOne system. The system uses this value when the user signs in to the JD Edwards EnterpriseOne system. The role that you specify for the bidder must be different from the role that you specify for the supplier in the Supplier Role field. When a bidder is awarded a bid, the system changes their role to the role for a supplier.

See *JD Edwards EnterpriseOne Tools 8.96: Security Administration, Working With User and Role Profiles*

Supplier Role

Specify the security role for a supplier who is already established in the JD Edwards EnterpriseOne system. The system uses this value when the user signs in to the JD Edwards EnterpriseOne system.

See *JD Edwards EnterpriseOne Tools 8.96: Security Administration, Working With User and Role Profiles*

Question Number Increment Factor

Specify a number by which the system increments the system-generated bid numbers for a bid question associated with an event or event line. If you leave this field blank, the system uses a default factor of *1*.

Sourcing Primary Contact Type

Specify a primary contact type for the sourcing contact. Select a valid type from user-defined code table 01/CT. When you set up bidders and suppliers for sourcing, you must create a Who's Who record for the sourcing contact using the contact type that you specify in this field.

See *JD Edwards EnterpriseOne Address Book 8.12 Implementation Guide*, "Entering Address Book Records," Adding Who's Who Information to Address Book Records.

Event Dates/Times

The system stores the event preview, start, and end dates and times in universal time code (UTC) so that bidders will be able to view events at the correct time in their time zones.

Bid Question End Effective Date

Specify an ending date and time for all questions that are available to attach to an event. The system uses this date as the default end effective date when you leave the Effective Date To field blank when setting up bid question templates.

Event Preview Default Time/UOM (unit of measure)

Specify a default duration of time for event preview. The system adds this duration of time to the current system date and time to calculate the default time for event preview. Enter a number and then select a unit of measure. Valid units of measure are:

D: Days

H: Hours

M: Minutes

The system stores valid units of measure in UDC table 43Q/TM.

Event Start Default Time/UOM

Specify a duration of time for the system to add to the preview date and time to calculate the default start date and time.

Event End Default Time/UOM

Specify a duration of time for the system to add to the start date and time to calculate the default end date and time.

RFx Properties

When you create a request for quote, the system populates the event properties with the values and settings that you specify.

Bid Required

Select this check box to indicate that bidders must enter a bid amount for all event lines and a bid quantity for all quantity-based lines. If you leave this check box blank, bidders must enter bid amounts and quantities on only event lines that have the Bid Required check box selected on the line.

Display Bid Question Weights

Select this check box to allow bidders to view the weight associated with a bid question.

Display Bid History Page

Select this check box to allow bidders to view bid history.

Default Price Bid Question Code

Specify the code for the generic price bid question. The system updates the RFx detail lines with this code during the Create Event process. The system uses this Generic Price Bid Question only if you selected the Bid Required property or the RFx detail line and did not select any other price bid question.

RFx Document Type

Specify a document type for the system to assign to an RFx event. The system uses this document type for next numbers and as a key for the sourcing event tables.

Create Blanket or PO

Specify whether the system creates a blanket order or purchase order when awarding an event. Values are hard-coded in user-defined code table 43Q/BP and include:

B: Blanket order

P: Purchase order

Line Quantity Required

Select this check box to force the bidders' bid quantity to be equal to the line quantity that you enter on the sourcing event.

Sealed Event

Select this check box to specify that the event is sealed. If you select this check box, the event originator cannot view the bids until after the event has ended. If you do not select this check box, the event originator can view bids prior to the end of the event.

Allow Manual Extensions

Select this check box to allow users to change the event end date and time after the event has been posted.

RFI Properties

When you create a request for information (RFI), the system populates the event properties with the settings that you specify.

Bid Required

Select this check box to require bidders to respond to all lines of the RFI.

Display Bid Question Weights

Select this check box to allow bidders to see the weight associated with an RFI bid question.

Score RFI Event

Select this check box to specify that the system should score the RFI.

Allow Manual Extensions

Select this check box to allow users to change the event end date and time after the RFI event has been posted.

RFI Document Type	Enter a document type for the system to assign to an RFI event. The system uses this document type for next numbers and as a key for the sourcing event tables.

Analyze Properties

Display All Bids	Select this check box to allow bidders to see all bids in the bid history.
Show Award Details	Select this check box to allow bidders to see the award details in the bid history. The system assigns this value when you analyze the event.
Display Bid Scores	Select this check box to allow bidders to view the scores of all bidders when reviewing bid history. The system assigns this value when you analyze the event. If you do not select this check box, bidders can see only their bid score.
Display Total Bid Price	Select this check box to allow bidders to see the total bid price in the bid history. The system assigns this value when you analyze the event.
Display Bid Question	Select this check box to allow bidders to see the bid questions in the bid history. The system assigns this value when you analyze the event.

Sourcing Messages

You must enter a valid print message from user-defined code table 40/PM for each type of event message. You can send the print message using email, fax, or a printed document.

Event Invite Send Message	Specify the print message for the system to send to bidders when inviting them to an event.
Event Cancel Send Message	Specify the print message containing the text that is sent to bidders when a buyer cancels an event.
Event Pause Send Message	Specify the print message containing the text that is sent to bidders when a buyer pauses an event.
Event Resume Send Message	Specify the print message containing the text that is sent to bidders when a buyer resumes an event.
Event End Send Message	Specify the print message containing the text that is sent to bidders when a buyer ends an event before the original end date.
Event Extend Message	Specify the print message containing the text that is sent to bidders when you extend the end date of an event.
Event Award Send Message	Specify the print message containing the text that is sent to bidders when they are awarded an event or event lines.
Unsuccessful Bid Send Message	Specify the print message containing the text that is sent to bidders when they are not awarded an event or event lines.
Password Send Message	Specify the print message containing the text that is sent bidders with their passwords.
Invite Terms and Conditions	Specify the print message containing the terms and conditions that bidders must agree to accept before they can respond to an event.
Bidder URL	Enter the URL that bidders use to access the Bidder Workbench to respond to sourcing events.

CHAPTER 4

Creating an Event

This chapter provides overviews of events and the processing options for the Event Workbench program, lists prerequisites, and discusses how to:

- Create a request for information.
- Create a request for quote.
- Print an event.
- Manage an event.

Understanding Events

Use the Event Workbench program (P43Q70) to review and create sourcing events. This program enables you to create both a request for information (RFI) and a request for quote (RFx).

When you create a sourcing event, you enter information to define the event, such as the business unit and the event name. Using settings in the Sourcing Constants program (P43Q90), the system provides default values for the event properties, such as whether a bid is required and whether to display question weights. You can either use the default values or change them as needed for each event that you create.

After defining the event, you must attach bid questions to your event. For an RFI, you attach only header questions, which typically ask information about a company. For a request for quote, you attach header questions, which are optional, and detail questions, which ask specific information about the items for which you created the event. You can use existing bid questions, modify existing bid questions, or add new questions. The percentage for the header questions must equal 100, and the percentage for the line questions must also equal 100. You can either assign a percentage to the header questions and add that percentage into each event line, or you can add the percentage to the combined percentages of each line.

See Chapter 4, “Creating an Event,” Understanding Header and Line Question Weighting, page 38.

After defining the event and attaching questions, you must invite bidders. You can invite bidders and suppliers that already exist in the JD Edwards EnterpriseOne Address Book system, or you can add them on an ad hoc basis. When you add bidders on an ad hoc basis, the system prompts you enter a company name, a contact name and contact information, and then adds the bidder to the Address Book Master table (F0101). For ad hoc bidders, the system does not create a supplier master record unless they are awarded a bid. The system stores bidders that you have invited to the event in the Event Invited Bidders table (F43Q30).

If you invite bidders who do not already have a user identification (ID) and a password, the system prompts you to create a user ID and password for the bidder. The system stores user passwords in the Event Bidder Password Temp table (F43Q35).

When you finish creating the event, click Submit to post the event for bidders to view. When you click Submit, the system notifies invited bidders using the preferred contact method that is specified in the bidders’ address book record.

See Chapter 3, “Setting Up the Operational Sourcing System,” Understanding System Setup for Operational Sourcing, page 9.

Understanding the Processing Options for the Event Workbench Program

Before using the Event Workbench program (P43Q70), you must set up processing options for three separate programs in the following order:

1. Create Event Processing (P43Q0040)

   These processing options provide the default line type for event lines, specify how the system validates the branch/plant, and provide a version of the Sourcing Fax Event Message program (P43Q90).

2. Create Event (P43Q10)

   These processing options provide default versions of the Create Event Processing and Copy From Bill of Material programs and specify how the system displays the account number fields in the Event Workbench program.

3. Event Workbench (P43Q70)

   These processing options provide default versions of the Create Event, Analyze Event, and Bid History programs and provide a version of the Sourcing Fax Event Message program (P43Q90).

You can access the processing options for the Event Workbench program from the menu; but to access the processing options for the Create Event Processing and Create Event programs, you must use the Interactive Versions program.

See *JD Edwards EnterpriseOne Tools 8.96: Foundation*

Prerequisites

Before completing the tasks in this chapter:

- Set up the JD Edwards EnterpriseOne Operational Sourcing system constants.
- Set up bid question templates.
- Set up processing options for the Create Event Processing, Create Event, and the Event Workbench programs.

See Chapter 3, “Setting Up the Operational Sourcing System,” Setting Up System Constants for Operational Sourcing, page 20 and Chapter 3, “Setting Up the Operational Sourcing System,” Setting Up Bid Question Templates, page 16.

See Chapter 4, “Creating an Event,” Setting Processing Options for Create Event Processing (P43Q0040), page 28.

See Chapter 4, “Creating an Event,” Setting Processing Options for Create Event (P43Q10), page 29.

See Chapter 4, “Creating an Event,” Setting Processing Options for Event Workbench (P43Q70), page 29.

Creating a Request for Information

This section provides an overview of requests for information (RFIs) and discusses how to:

- Set processing options for Create Event Processing (P43Q0040).
- Set processing options for Create Event (P43Q10).
- Set processing options for Event Workbench (P43Q70).
- Add an RFI.
- Invite bidders.
- Add ad hoc bidders.
- Add bid questions to an event.
- Copy an RFI.

Understanding RFIs

You create RFIs to gather information about organizations. You can use an RFI to gather information about potential bidders such as:

- What is the company's annual revenue?
- How long has the company been in business?
- Is the company ISO (International Organization for Standardization) certified?

Because RFIs are used only for gathering information about companies, you attach only header bid questions to them. When you analyze the responses from the bidders for your RFI, you can efficiently eliminate companies that have unfavorable responses, therefore providing you with an idea of what bidders to invite to a request for quote event.

Forms Used to Create an RFI

Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Select Daily Processing (G43Q11), Event Workbench	View events and click Add RFI.
Add/Edit Event	W43W10A	Click Add RFI.	Add a new RFI event.
Search and Select Bidders	W43Q30A	Click the Invite Bidders button on the Add/Edit Event form.	Review and select bidders for the event.
Select Contacts	W43Q30C	Click Review Contacts on the Search and Select Bidders form.	Change the primary contact for the bidder.
Add Adhoc Bidder	W43Q30B	Click Add Adhoc Bidder on the Search and Select Bidders form	Add a bidder that does not already exist in the system.
Add New User	W43Q30D	• Click Save and Close or Save and Add New on the Add Adhoc Bidder form. • Click Change Contact on the Select Contacts form.	Add a user name and password for the new bidder.
Event Header Bid Questions	W43Q20D	Click Maintain RFI Event Questions on the Add/Edit Event form.	Add bid questions to the event.
Search for RFIs	W43Q201A	Click Copy From RFI on the Add/Edit Event form.	Create a new RFI by copying an existing one.

Setting Processing Options for Create Event Processing (P43Q0040)

These processing options provide default processing information.

Defaults

1. Line Type

Specify the default line type for the event lines that you create. The line type determines how the system processes lines on a transaction. The line type affects the systems with which the transaction interfaces (JD Edwards EnterpriseOne General Ledger, JD Edwards EnterpriseOne Job Cost, JD Edwards EnterpriseOne Accounts Payable, JD Edwards EnterpriseOne Accounts Receivable, and JD Edwards EnterpriseOne Inventory Management). The line type also specifies the conditions for including a line on reports and in calculations. Specify a valid line type from the Line Type Constants Revisions program (P40205). Examples include:

S: Stock item.

J: Job Cost, subcontracts, or purchasing to the General Ledger.

N: Non-stock item.

Interfaces

1. Business Unit Validation

Specify how the system validates the branch/plant. Values are:

Blank: The system validates the branch/plant against the Business Unit Master table (F0006). Typically, you use this processing option when you are performing services expenditure purchasing. When you leave this processing option blank, the Ship To address book number defaults from the address book number in the Business Unit Master table (F0006). You can access the Business Unit Master table through the Revise Single Business Unit program.

1: The system validates the branch/plant against the Inventory Constants table (F41001). If you are performing stock purchasing, enter *1* for this processing option. When you enter *1*, the system uses the address book number in the Inventory Constants table (F41001) as the default for the Ship To address book number.

Versions

1. Sourcing Event Fax Messaging Version

Specify a version of the Sourcing Fax Event Message program (R43Q90). If you leave this processing option blank, the system uses version ZJDE0001.

Setting Processing Options for Create Event (P43Q10)

These processing options provide default processing information for creating events.

Versions

1. Create Event Processing (P43Q0040)

Specify a version of the Create Event Processing program for the system to use. If you leave this processing option blank, the system uses version ZJDE0001.

2. Copy from Bill of Material (P43Q101)

Specify a version of the Copy from Bill of Material program for the system to use. If you leave this processing option blank, the system uses version ZJDE0001.

Display

1. Account Display

Specify how the system should display the Account Number field on the Add/Edit event form. Values are:

Blank: The system displays the Account Number field and you enter the account in the standard format of business unit.object account.subsidiary.

1: The system displays the fields Business Unit, Obj Acct and Sub and you enter each segment of the account number into the separate fields.

2: The system displays both the Account Number field and also the Business Unit, Obj Acct and Sub fields.

Setting Processing Options for Event Workbench (P43Q70)

These processing options provide default processing information for creating events.

Versions

1. Create Event
Specify a version for the system to use when accessing the Create Event program (P43Q10). If you leave this processing option blank, the system uses version ZJDE0001.

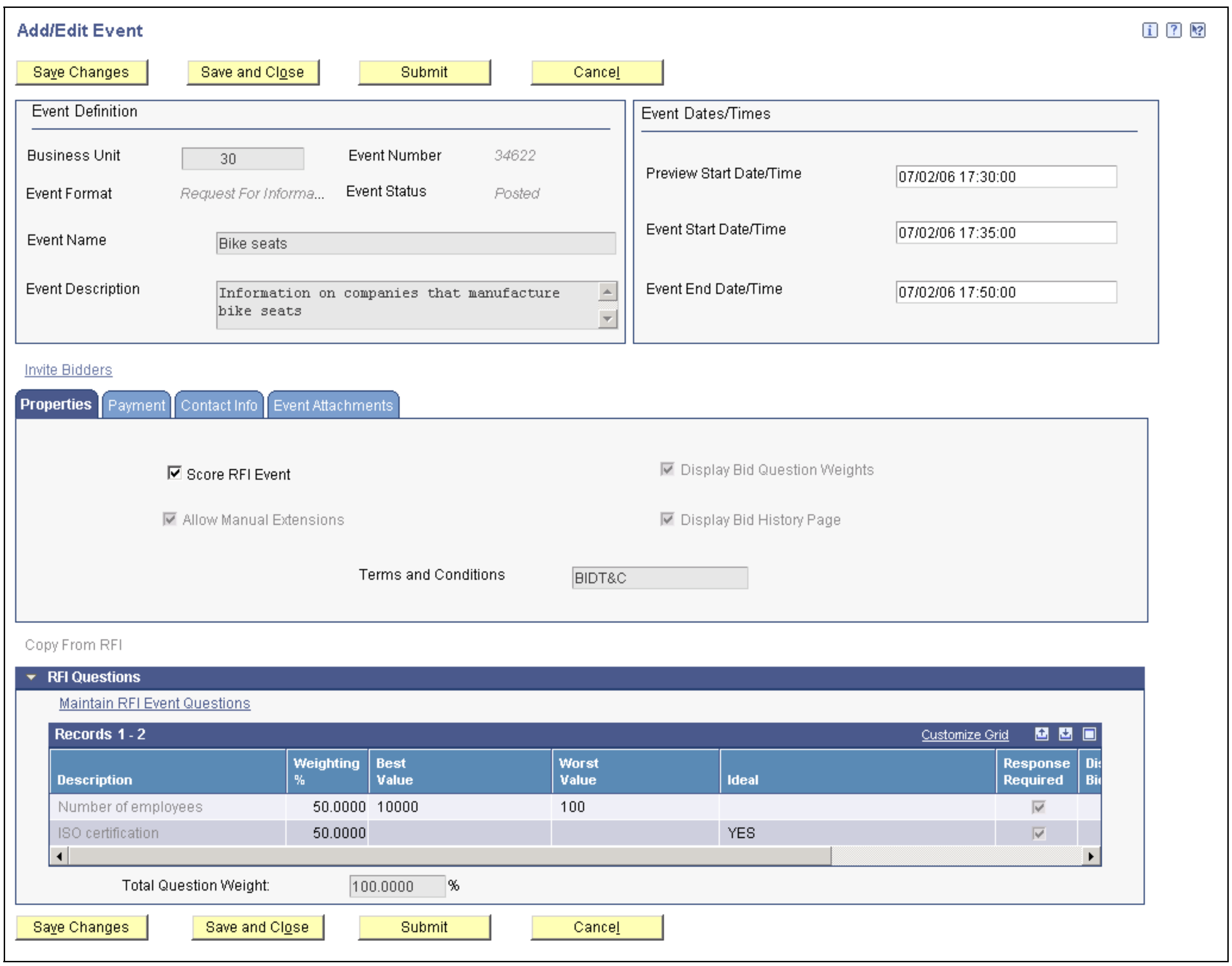
2. Analyze Event
Specify a version for the system to use when accessing the Analyze Event program (P43Q50). If you leave this processing option blank, the system uses version ZJDE0001.

3. Bid History
Specify a version for the system to use when accessing the Bid History program (P43Q41). If you leave this processing option blank, the system uses version ZJDE0001.

4. Fax Event Message
Specify a version of the Sourcing Fax Message program (R43Q90).

Adding an RFI

Access the Add/Edit Event form.



Add/Edit Event form

1. Complete the following fields:

Business Unit	Enter the business unit for which you are creating the sourcing event.
Event Name	Enter a name for the sourcing event.
Event Description	Enter a description for the sourcing event.
Preview Start Date/Time	The system populates this field with the date and time specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
Event Start Date/Time	The system populates this field with the date and time specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
Event End Date/Time	The system populates this field with the date and time specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default end date and time.

2. Complete the following fields on the Properties tab:

Score RFI Event	Select this option to score the RFI event.
Allow Manual Extensions	Select this option to allow users to change the Event End Date/Time after the event has been posted.
Display Bid Question Weights	Select this option to display the question weights for the bidder.
Display Bid History Page	Select this option to enable bidders to view bid history. If you select this option, bidders will be able to review their responses to their questions after submitting a response for an event.
Terms and Conditions	Specify the terms and conditions that the bidder must agree to accept before they can respond to an event. Select a valid code from user-defined code table 40/PM.

3. Complete the following fields on the Payment tab:

Event Currency Code	The system uses the currency code of the business unit as the default currency.
Multiple Currencies Event	Select this option to allow bids in foreign currencies. If you do not select this option, the system accepts bids in your company's domestic currency only.
Currencies Allowed	Click this button to access the Edit Allowed Currencies for Event form, where you can specify the currencies that bidders can use for the event. The system displays this link only when you select the Multiple Currencies Event button. You must specify all currencies that you plan to allow for the event, even the domestic currency of your company.

4. Complete the following fields on the Contact Info tab:

Buyer	Enter the address book number of the buyer for the event. After you enter the address book number, the system populates the Contact Name, E-Mail, and Phone Number fields with the information associated with the address book number.

5. Enter text as an attachment to the event on the Event Attachments tab.

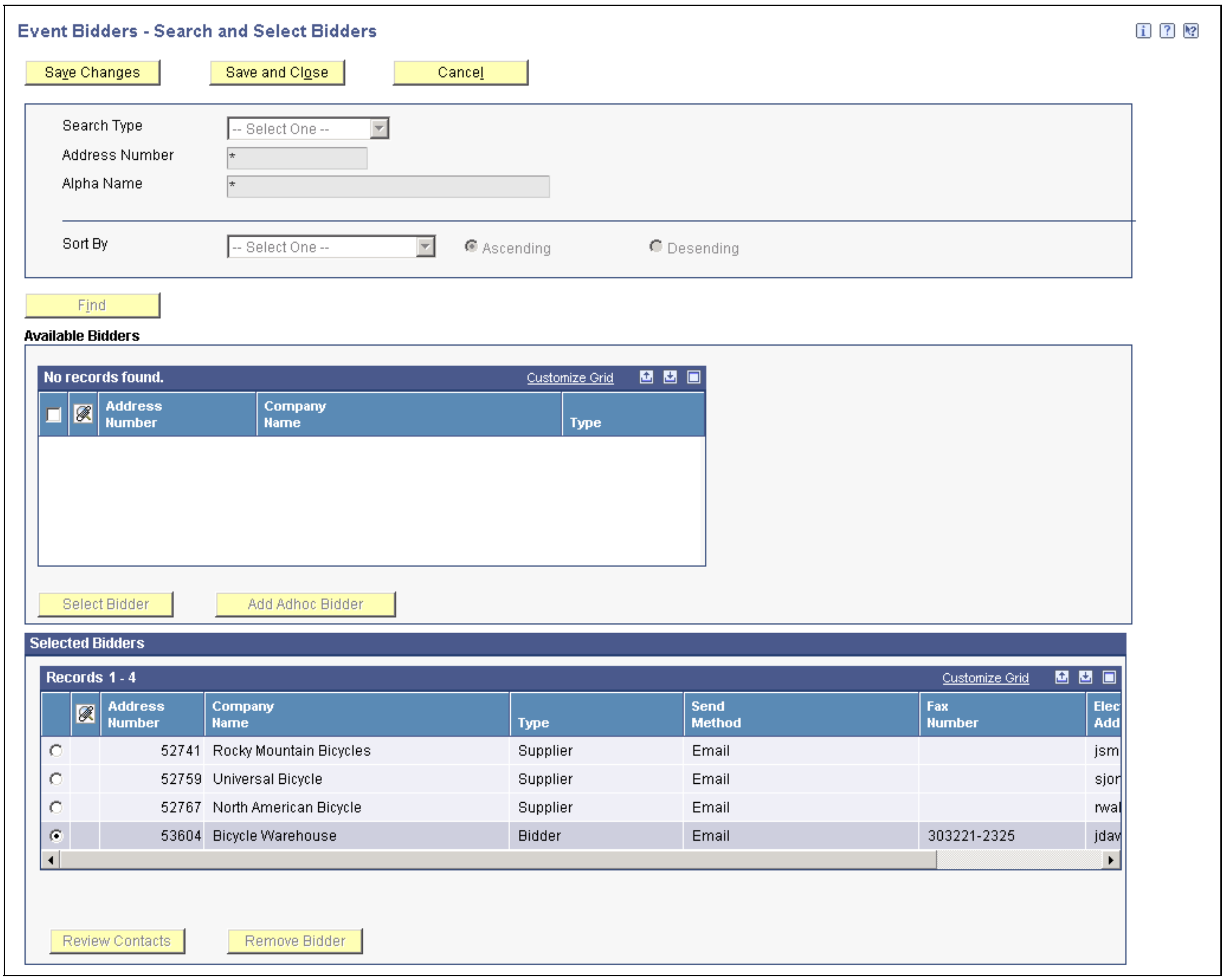
6. Click Allow Bidder to View Attachment if you want the bidder to be able to view the text that you entered on the Event Attachment tab.
7. Click Invite Bidders to select bidders for the event.

   See Chapter 4, “Creating an Event,” Inviting Bidders, page 32.
8. Click Maintain RFI Event Questions to add header questions to the event.

   See Chapter 4, “Creating an Event,” Adding Bid Questions to an Event, page 34.
9. When you are finished creating the event, click Submit.

Inviting Bidders

Access the Search and Select Bidders form.



Search and Select Bidders

1. To filter your search for bidders, complete one or more of the following fields:
   - Search Type
   - Address Number

- Alpha Name

2. To sort bidders, select a value in the Sort By field and then click either the Ascending or Descending option.
3. Click Find.

   The system displays the applicable bidders in the Available Bidders form.
4. Choose the bidders whom you want to participate in the event by selecting one or more bidders, and then clicking the Select Bidders button.

   The system displays the bidders that you selected in the Selected Bidders subform.

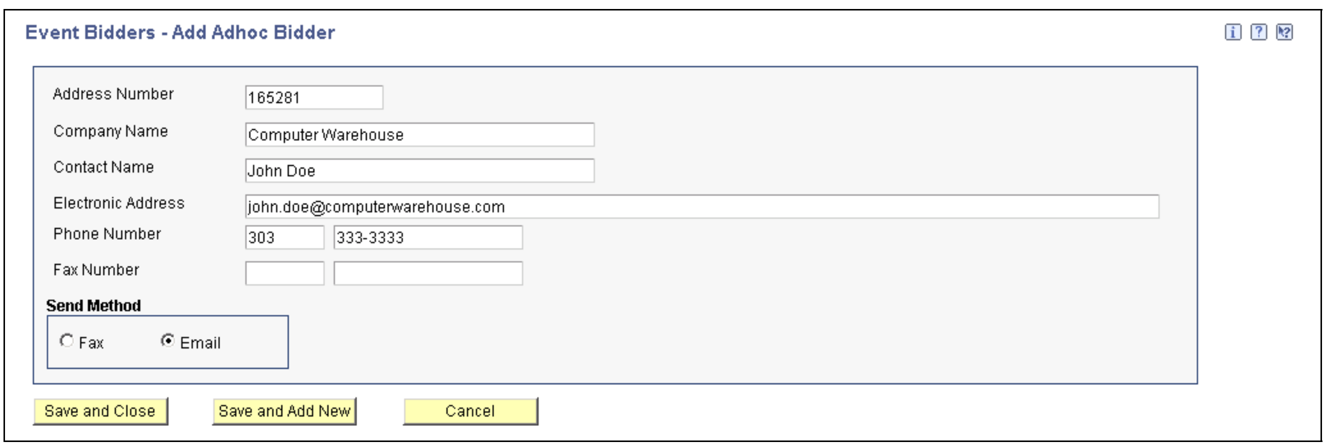
   Note. You can select only bidders that have a primary contact set up in the Who's Who program (P0111), with the same contact type that is specified in the Sourcing Constants program (P43Q90). The primary contact must also have a preferred contact method. If the bidder does not have the correct contact information set up, you can add it by clicking on the link for the supplier or bidder's address book number.

   See Chapter 3, "Setting Up the Operational Sourcing System," Setting Up Constants, page 21.
5. To add bidders that do not already exist in your system, click the Add Adhoc Bidder button.

   See Chapter 4, "Creating an Event," Adding Ad Hoc Bidders, page 33.
6. Click the Review Contacts button to review and, if necessary, change contacts for the bidder.
7. Click the Remove Bidder From List button to remove bidders.
8. Click Close to save the list of bidders that you want to participate in the event.

Adding Ad Hoc Bidders

Access the Add Adhoc Bidder form.



Add Adhoc Bidder form

Address Number	The system provides the next available address book number.
Company Name	Enter the company name of the bidder. The system uses the name that you enter as the alpha name for the address book record that it creates.
Contact Name	Enter the name of the contact person for the bidder. The system adds this name as the primary contact for the bidder, and assigns the contact type that you specified in the Sourcing Constants. The system updates the Address Book - Who's Who table (F0111) with the primary contact and contact type that you specify.

Electronic Address Enter the email address for the primary contact. The system updates the Electronic Address table (F01151) with the email address that you specify.

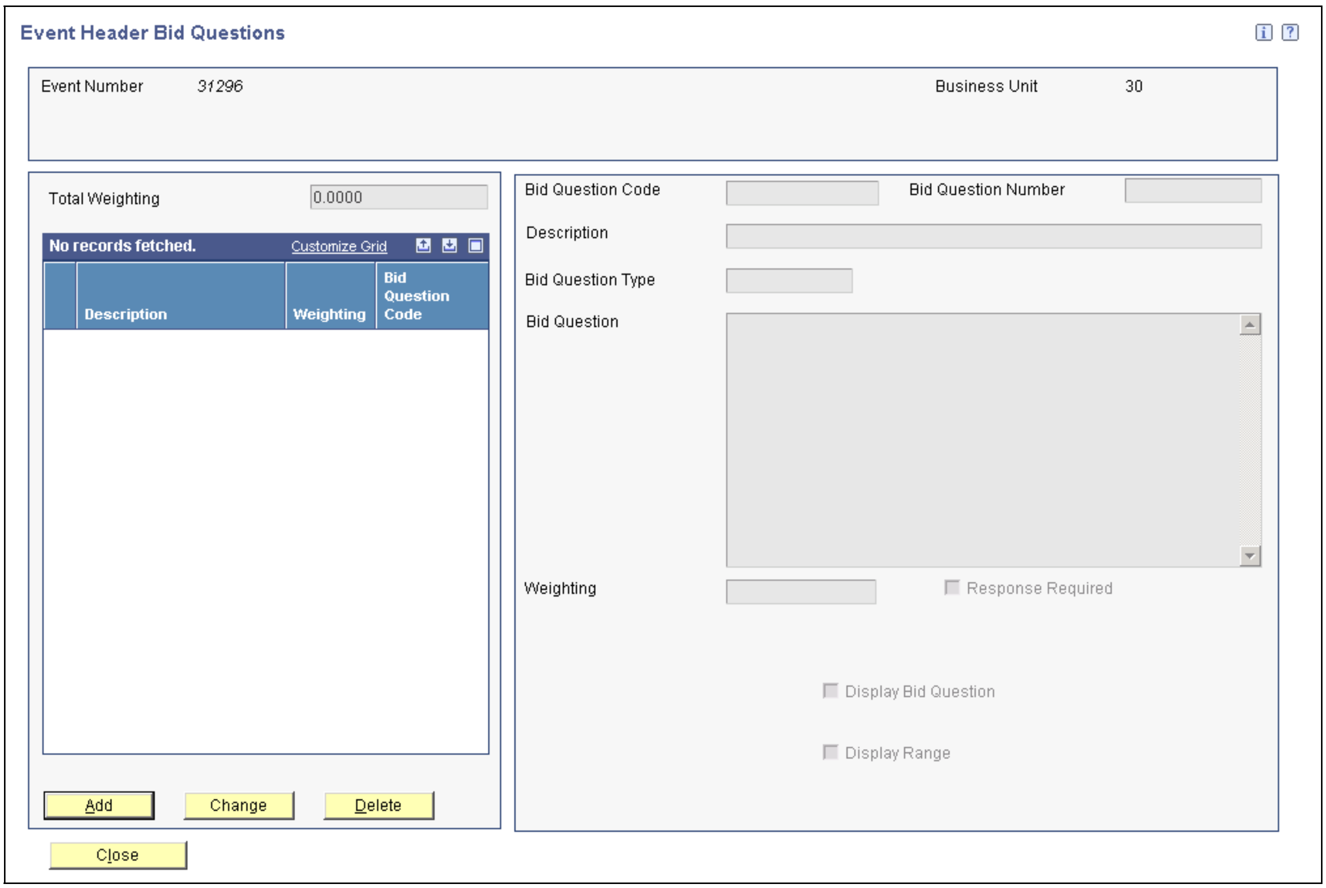
Phone Number Enter the phone number for the primary contact. The system updates the Address Book - Phone Numbers table (F0115) with the phone number that you specify.

Fax Number Enter the fax number for the primary contact. The system updates the Address Book - Phone Numbers table (F0115) with the phone number that you specify.

Send Method Specify whether to send communication to the bidder using fax or email. The system updates the Preferred Contact Method field in the Address Book - Who's Who table with the value that you specify.

Adding Bid Questions to an Event

Access the Event Header Bid Questions form.



Event Header Bid Questions form

1. Click Add on the Event Header Bid Questions form.
2. To use an existing header question, click Search Template on the Create Event Question form.

   To create a new header bid question, proceed to Step 5.
3. Choose questions on the Search for Bid Questions form and click Select.
4. Click Save and Close on the Create Event Question form, or make any necessary changes to the question and then click Save and Close.

Note. Click Add to Template if you want to save your changes as a new question template.

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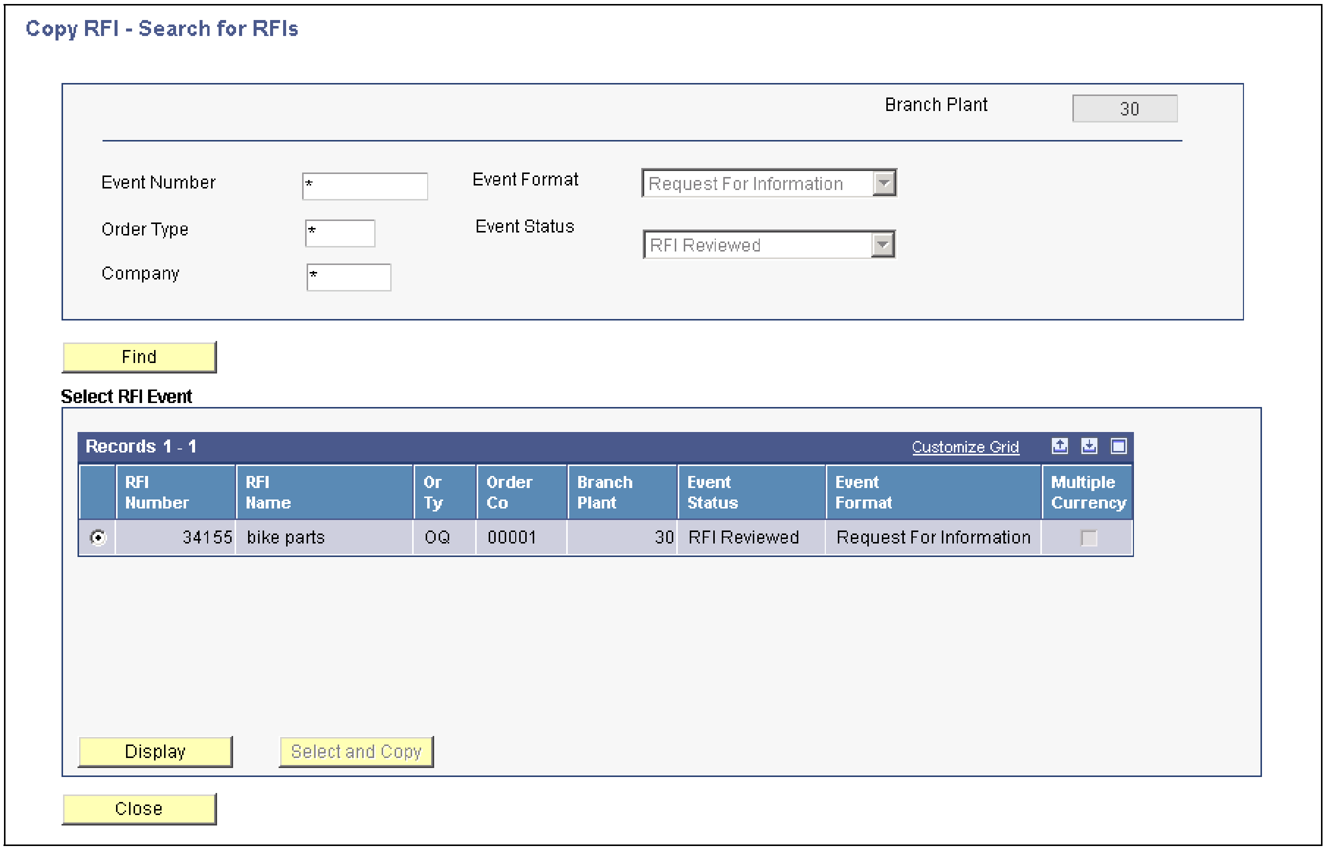
5. To create a new header question, complete the following fields on the Create Event Question form:
   - Bid Question Type
   - Bid Question Number
   - Bid Question Code
   - Description
   - Weighting
   - Response Required
   - Allow Out of Range
   - Allow Multiple Selection
   - Ideal
   - Add to Template

     Select this option to add this header question as a template.
   - Display Bid Question

See Chapter 3, "Setting Up the Operational Sourcing System," Adding Bid Question Templates, page 18.

Copying an RFI

Access the Search for RFIs form.



Search for RFIs form

1. Select the event that you want to copy on the Search for RFIs form and click Display.

   The system displays the header questions and bidders associated with the event.

2. Select the header questions and bidders that you want to copy and click Select and Copy.
3. Make changes as needed on the Add/Edit Event form and click Submit.

Creating a Request for Quote

This section provides overviews of requests for quotes and header and line question weighting and discusses how to:

- Add a request for quote.
- Add additional line information.
- Add ad hoc items.
- Copy from an RFI.
- Copy from an RFx.
- Copy from a bill of materials (BOM).

Understanding Requests for Quotes

Use the Event Workbench program (P43Q70) to create a request for quote (RFx). In addition to creating a new request for quote, you can also use one of the following methods:

- Copying an existing RFI.

  You can copy from RFI events at a status of *RFI Reviewed* only. The system copies the invited bidders and the header questions to create the new RFx. The system does not copy any invited bidders for which there is value of *D* (disallow) or *R* (rejected) in the Award Action field for the RFI.

- Copying an existing request for quote (RFx).

  You can copy from RFx events at a status of *Awarded* only. The system copies the invited bidders, header questions, selected event lines, and line questions to create the new RFx. The system does not copy any invited bidders for which there is value of *D* (disallow) or *R* (rejected) in the Award Action field for the RFI.

- Copying a bill of material (BOM).

  The system copies the selected item components to create the event lines for the RFx.

Creating a request for quote is similar to creating a request for information; you define the event, invite bidders, and attach questions. However, a request for quote has the additional task of adding lines to the event. You can create lines for services, inventory items, and for items that you add on an ad hoc basis.

For service lines, you enter the account number for the service. Using the processing options for the Create Event program (P43Q10), you can specify the format in which you enter the account number. You must use line type *J* when entering a service line.

When you create event lines for items, you specify information such as item number, quantity, unit of measure, and whether a bid is required on the event line. Using the Edit link in the Additional Line Info field, you can add attachments to the line and you can specify whether bidders must bid on the quantity specified on the line. If you allow bidders to bid on a quantity other than that specified in the line, you can define a minimum and maximum quantity.

You can also create event lines for ad hoc items, which are items that do not already exist in your inventory. When you create ad hoc items, the system enables you to specify a new number for the item, but it does not add the item to the JD Edwards EnterpriseOne Inventory Management system until you create the purchase order or blanket order.

While header questions are optional for a request for quote, you must attach at least a price question to each line of the event. If you do not attach a price question to a line, the system searches for an associated price question to assign using the following hierarchy:

1. Using the item number that you specified in the event line, the system searches the Bid Questions table (F43Q60) for a price question that is attached to the item number.
2. If unsuccessful, the system determines whether the item in the event line has a commodity code attached to it, and, if so, searches the Bid Questions table (F43Q60) for a price question that is attached to the commodity code.

If the system does not locate a price question attached to the item number or commodity, it attaches the default price question that you set up in the Sourcing Constants program (P43Q90).

See Chapter 3, "Setting Up the Operational Sourcing System," Setting Up System Constants for Operational Sourcing, page 20.

When attaching price questions, you can add price component and price break detail. Price component detail enables you to list out each component of the item, such as material, shipping, and packaging, so that bidders can respond to the question by entering the price for each component. Price break detail enables you to list out quantity ranges so that bidders can respond to the question by entering possible price breaks for each quantity range.

If you do not enter price break detail, bidders will have the opportunity to enter their own quantity ranges and price breaks for your review.

After you finish creating event lines and attaching questions to the lines, you can submit the RFx. The system sends an email or fax to each invited supplier and bidder, depending on their preference, and changes the status of the event to *Posted - Pending*. After the event has been posted, you can pause, end, extend, or cancel the event, and the system sends the corresponding message to the invited suppliers and bidders.

See Chapter 4, “Creating an Event,” Managing an Event, page 49.

Understanding Header and Line Question Weighting

When you set up an event, you can choose from two methods of weighting the header question score:

- Assign header weighting

  You assign a percentage for the header score and the system adds it to the total percentages from all of the event lines added together. The combined total of the header percentage and the percentages in the Line Weighting fields for each line must be 100.

- Factor header score into line

  You assign a percentage for the header score and the system adds it to each individual line of the event. The total percentage of each line must be 100.

Example: Assign Header Weighting

Buyer A creates an event with two lines and would like to assign a weight of 20 percent to the header questions. Buyer A would like the header weight to be added to the sum of the two event lines.

The following table describes how Buyer A would set up the event:

Field	Field Value or Setting
Assign Header Weighting	Selected
Factor Header Score Into Line	*20*
Line Weighting for Line 1	*45*
Line Weightingfor Line 2	*35*

In this example, the amount in the Total Question Weight field must be 100 for each line in the event, which means that the question weights for each line must total 100.

Example: Factor Header Score Into Line

Buyer B creates an event with two lines and would like to assign a weight of 30 percent to the header questions. Buyer B would like the header weight to be added to each individual event line.

The following table describes how Buyer B would set up the event:

Field	Field Value or Setting
Factor Header Score Into Line	Selected
Header Score Into Line Score	*30*
Line Weighting for Line 1	*45*
Line Weighting for Line 2	55

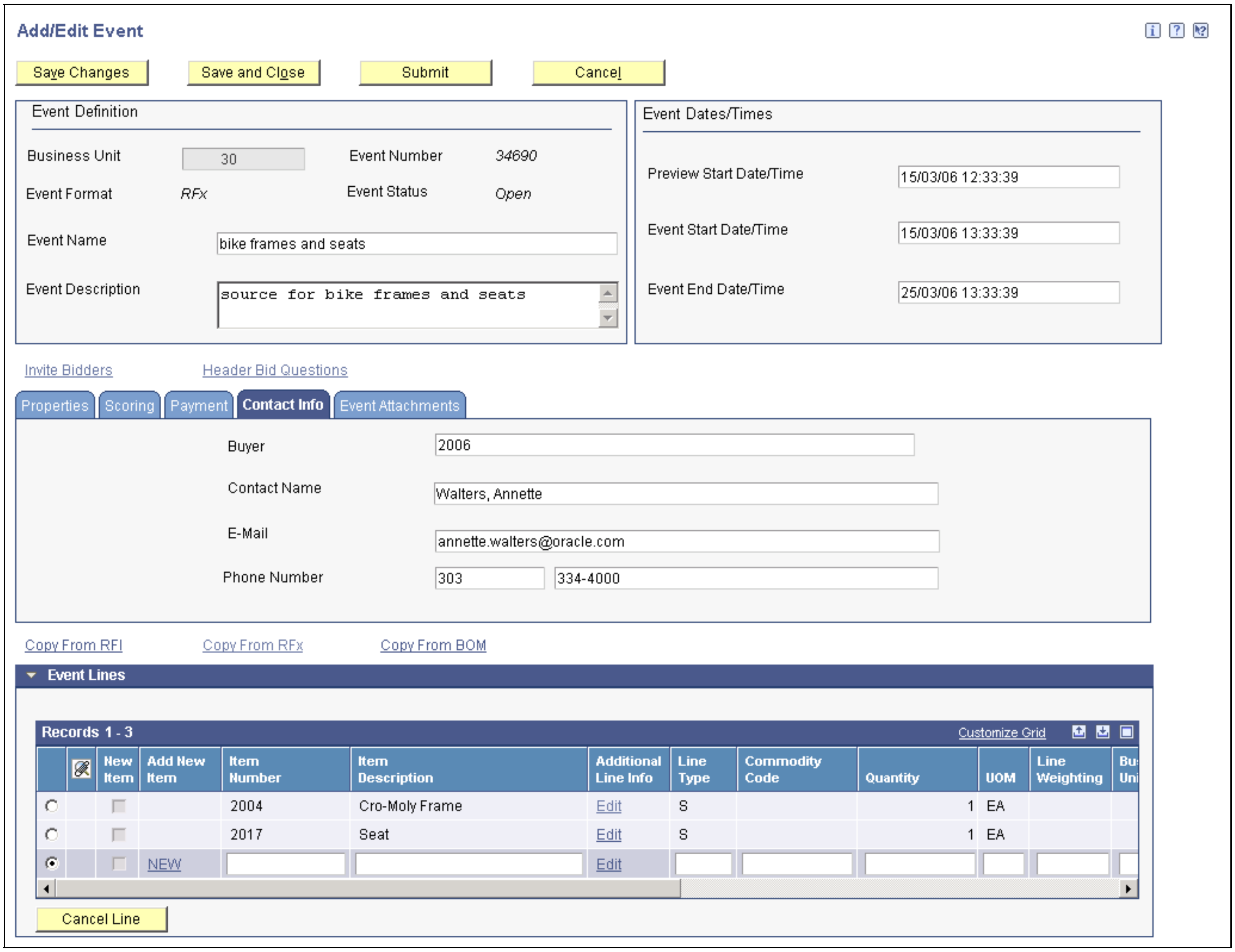
In this example, when Buyer B adds questions to each line, he notices that the system automatically adds a question with a description of *FactorHeaderScoreIntoLine* and a weight of *30* to the list of questions for the line. Buyer B can then choose questions that total to the remaining 70 percent, creating a total of 100 percent for the line.

Forms Used to Create a Request for Quote

Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Select Daily Processing (G43Q11), Event Workbench	View events and click Add RFx.
Add/Edit Event	W43Q10A	Click Add RFx on the Search for Events form.	Add a request for proposal or request for quote.
Edit Allowed Currencies For Event	W43Q10C	Click Currencies Allowed on the Add/Edit Event form.	Specify the currencies in which bidders can submit a bid.
Enter Additional Line Information	W43Q10D	Click Edit on the line that you want to revise.	Enter line information, such as item reporting and measurement information, and shipment information.
Add New Item	W43Q10E	Click New on a detail line.	Add an inventory item that does not already exist in your system.
Search for Parent Items	W43Q101A	Click Copy from BOM on the Add/Edit Event form.	Find and select a BOM from which to copy.
Select BOM Components	W43Q101B	Select a BOM from which to copy and click Select.	Select BOM components to copy into the event.
Search for RFXs	W43Q202A	Click Copy From RFx on the Add/Edit Event form.	Search for an RFx from which to copy.

Adding a Request for Quote

Access the Add/Edit Event form.



Add/Edit Event form

1. Complete the following fields:

Business Unit	Enter the business unit for which you are creating the sourcing event.
Event Name	Enter a name for the sourcing event.
Event Description	Enter a description for the sourcing event.
Preview Start Date/Time	The system populates this field with the date and time specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
Event Start Date/Time	The system populates this field with the date and time specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
Event End Date/Time	The system populates this field with the date and time specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default end date and time.

2. Complete the following fields on the Properties tab:

Bid Required	Select this option to specify that bidders must enter a bid amount for all event lines and a bid quantity for all quantity-based lines.
Display Bid Question Weights	Select this option to display the question weights for the bidder.
Display Bid History Page	Select this option to enable bidders to view bid history. If you select this option, bidders will be able to review their responses to an event after submitting their bid.
Line Quantity Required	Select this option to specify that bidders must bid on the exact quantity specified for the line.
Sealed Event	Select this option to indicate that the event is sealed, which means that the buyer cannot view bids until after the event has ended.
Allow Manual Extensions	Select this option to allow users to change the Event End Date/Time after the event has been posted.
Award Type	Specify whether the winning bidder shall be awarded a blanket order or purchase order upon completion of the event.
Terms and Conditions	Specify the terms and conditions that the bidder must agree to accept before they can respond to an event. Select a valid code from user-defined code table 40/PM.

3. Complete the following fields on the Scoring tab:

Assign Header Weighting	Select this option to specify that the weighting of the header questions should be added to the total score.
Header Weighting	Specify a percentage for the header score weight. This percentage will be added to the total of the percentages in the Line Weighting fields, the total of which must be 100%.
Factor Header Into Score	Select this option to specify that the header score should be added to the total percentage of each event line.
Header Score into Line Score	Specify a percentage for the header score weight. This percentage will be added into the total question percentage for each event line.

4. Complete the following fields on the Payment tab:

Event Currency Code	The system uses the currency code of the business unit as the default currency.
Multiple Currency Event	Select this check box to allow bids in foreign currencies. If you do not select this check box, the system accepts bids in your company's domestic currency only.
Currencies Allowed	Click this link to access the Edit Allowed Currencies for Event form, where you can specify the currencies that bidders can use for the event. The system displays this link only when you select the Multiple Currency Event check box.
Event Payment Method	Select the form of payment that you will use upon completion of the event.
Payment Terms	Select payment terms for the event. You set up payment terms in the Payment Terms Revisions program.

Tax Exempt	Select this option to indicate to the supplier that you are a tax exempt company.
Tax Exempt ID	Enter your tax exemption identification number.

5. Complete the following fields on the Contact Info tab:

Buyer	Enter the address book number of the buyer for the event. After you enter the address book number, the system populates the Contact Name, E-Mail, and Phone Number fields with the information associated with the address book number.

6. Enter text as an attachment to the event on the Event Attachments tab.
7. Click Allow Bidder to View Attachment if you want the bidder to be able to view the text that you entered on the Event Attachment tab.
8. Click Invite Bidders to select bidders for the event.

   See Chapter 4, "Creating an Event," Inviting Bidders, page 32.
9. Click Header Bid Questions if you want to attach header questions to the event. Header questions are not required for RFx events.

   See Chapter 4, "Creating an Event," Adding Bid Questions to an Event, page 34.
10. Click Copy from RFI to create an RFx from an existing RFI.

    When you copy from an RFI, the system creates header questions based on the header questions assigned to the RFI from which you copy.

    See Chapter 4, "Creating an Event," Copying an RFI, page 35.
11. Click Copy from RFx to create an RFx from an existing RFx.

    See Chapter 4, "Creating an Event," Copying From an RFx, page 47.
12. Click Copy from BOM to create an RFx from a BOM.

    When you copy from a BOM, the system creates event lines from the components of the BOM.

    See Chapter 4, "Creating an Event," Copying From a Bill of Material (BOM), page 48.
13. To create a detail line for a new item that does not already exist in your inventory, click New in the Event Lines subform.

    See Chapter 4, "Creating an Event," Adding Ad Hoc Items, page 45.
14. To create a detail line for an inventory item, complete the following fields in the Event Lines subform:

Item Number	Specify the number of the item for which you are creating the sourcing event. When you enter an item number, the system populates the Item Description, Line Type, and Commodity Code fields, based on the setup for that item. Leave this field blank if you are entering a line for a service.
Quantity	Specify the quantity for the item for which you are creating the sourcing event.
UOM(unit of measure)	Specify a unit of measure for the quantity.
Additional Line Info	Click the Edit link in this field to add additional information for the detail line.

See Chapter 4, "Creating an Event," Adding Additional Line Information, page 43.

Event Line Bid Questions

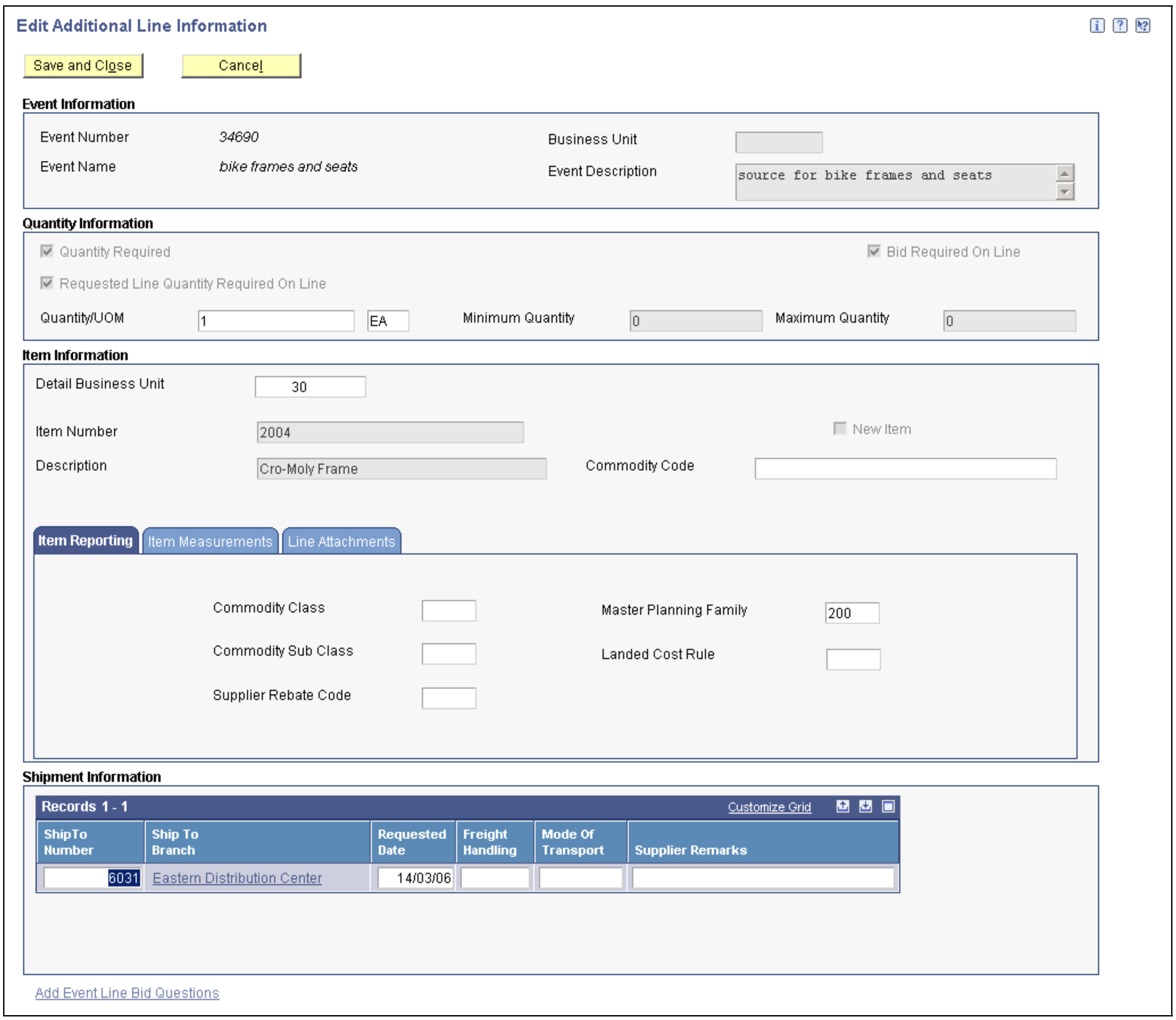
When you enter an item number, the system attaches all bid questions for that item number or commodity. If you do not have any questions attached to that item number or commodity, the system attaches the default price question. To edit bid questions for the line, or to add new bid questions, click the Edit link in this field.

See Chapter 4, "Creating an Event," Adding Bid Questions to an Event, page 34.

15. When you are finished creating the event, click Submit.

Adding Additional Line Information

Access the Edit Additional Line Information form.



Edit Additional Line Information

Quantity Required	This field is selected if you have entered a quantity for the line. If you have entered a service line, for which no quantity is required, the system clears this field.
Bid Required On Line	Select this option to indicate that for this line, bidders are required to enter a bid. The system does not enable this option if you have already selected the Bid Required option on the Properties tab on the Add/Edit Event form.
Requested Line Quantity Required On Line	Select this option to indicate that for this line, the quantity that the bidder enters must match the line quantity. The system does not enable this option if you have already selected this option on the Properties tab on the Add/Edit Event form.
Quantity/UOM(Quantity /unit of measure)	Specify the quantity and the corresponding unit of measure for the item.
Minimum Quantity	Specify a minimum quantity that the bidder can enter for their response. The system enables this field only when you do not select the Requested Line Quantity Required On Line option.
Maximum Quantity	Specify a maximum quantity that the bidder can enter for their response. The system enables this field only when you do not select the Requested Line Quantity Required On Line option.
Detail Business Unit	Use this field if the business unit for which this item is tracked is different than the business unit for the event.
Commodity Code	Enter a commodity code for the item.

Item Reporting

The system populates these fields using the information that you have set up for each item. Use these fields to change the default item information or to add information for an ad hoc item.

Commodity Class	Enter a code from user-defined code table 41/P1 to represent an item property type or classification, such as commodity type, planning family, or so forth. The system uses this code to sort and process like items. This field is one of six classification categories available primarily for purchasing purposes.
Commodity Sub Class	Enter a code from user-defined code table 41/P2 to represent an item property type or classification, such as commodity type, planning family, or so forth. The system uses this code to sort and process like items. This field is one of six classification categories available primarily for purchasing purposes
Supplier Rebate Code	Enter a code from user-defined code table 41/P3 to represent an item property type or classification, such as commodity type, planning family, or so forth. The system uses this code to sort and process like items. This field is one of six classification categories available primarily for purchasing purposes
Master Planning Family	Enter a code from user-defined code table 41/P4 to represent an item property type or classification, such as commodity type or planning family. The system uses this code to sort and process like items. This field is one of six classification categories available primarily for purchasing purposes.
Landed Cost Rule	Enter a code from user-defined code table 41/P5 to indicate the landed cost rule for an item. The landed cost rule determines purchasing costs that exceed

the actual price of an item, such as broker fees or commissions. You set up landed cost rules on the Landed Cost Revisions form.

Item Measurements

The system populates these fields using the information that you have set up for each item. Use these fields to change the default item information or to add information for an ad hoc item.

Weight Enter the weight of one unit of the item. This value is expressed in the primary unit of measure.

Volume Enter the cubic units occupied by the item. The definition of the unit itself (cubic feet, yards, meters, and so on) is defined in the volume unit of measure.

Line Attachments

Enter additional information for the line. Select the Allow Bidder To View Attachment option if you want bidders to view the additional information that you enter.

Shipment Information

The system populates these fields using the information that you have set up for each item. Use these fields to change the default item information or to add information for an ad hoc item.

Ship To Number Enter the address number of the location to which you want to ship this order. The address book provides default values for customer address, including street, city, state, zip code, and country.

Requested Date The system uses the current date as the default date.

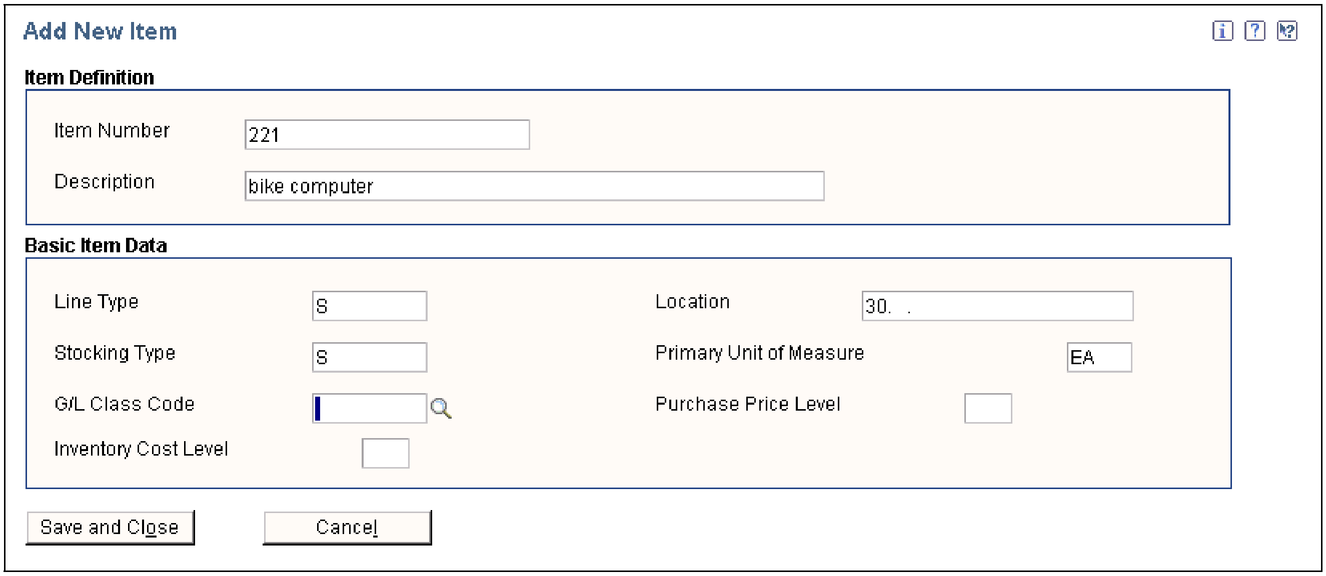
Freight Handling Specify the method by which supplier shipments are delivered. For example, the supplier could deliver to your dock, or you could pick up the shipment at the supplier’s dock. You can also use these codes to indicate who has responsibility for freight charges. For example, you can have a code indicating that the customer legally takes possession of goods as soon as they leave the supplier warehouse and is responsible for transportation charges to the destination. Select a valid value from user-defined code table 42/FR.

Mode of Transport Specify the method used to transport goods. For example, by rail, by road, and so on. Select a valid value from user-defined code table 00/TM.

Supplier Remarks Enter additional text applicable to the supplier.

Adding Ad Hoc Items

Access the Add New Item form.



Add New Item form

Item Number
Enter a number for the item.

Description
Enter a description for the item.

Line Type
Enter a valid line type for the item. The line type controls how the system processes lines on a transaction and controls the systems with which the transaction interfaces, such as General Accounting, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management. It also specifies the conditions under which a line prints on reports, and it is included in calculations. Examples are:

S: Stock Item

J: Job Cost

N: Nonstock item

Stocking Type
Enter a valid stocking type from user-defined code table 41/I. The stocking type indicates how you stock an item, for example, as finished goods or as raw materials.

G/L Class Code
Enter a code from user-defined code table 41/9. The G/L class code controls which general ledger accounts receive the dollar amount of inventory transactions for this item.

Inventory Cost Level
A code that indicates whether the system maintains one overall inventory cost for the item, a different cost for each branch/plant, or a different cost for each location an lot within a branch/plant. Values are:

1: Item level

2: Item/Branch level

3: Item/Branch/Location level

Location
Enter the storage location in which goods will be received.

Primary Unit of Measure
Enter a value from user-defined code table (00/UM) to indicate the primary unit of measure for the item. The primary unit of measure must be the smallest

unit of measure in which you handle the item. This is the primary stock accounting unit (PSAU) of measure that the system uses to store all inventory. If you change the primary unit of measure, the conversion factors in the item-level conversion table are no longer valid. The default value for this field is the unit of measure that you specify for the item on Item Master Information.

Purchase Price Level

Specify a code to indicate where to retrieve the purchase price for an item when you enter a purchase order. Values are:

1: Use the supplier/item price from the Purchase Price table (F41061).

2: Use the supplier/item/branch price from the Purchase Price table (F41061).

3: Use the inventory cost from the Inventory Cost table (F4105). This cost is based on the inventory cost level and the purchasing cost method you specify for the item.

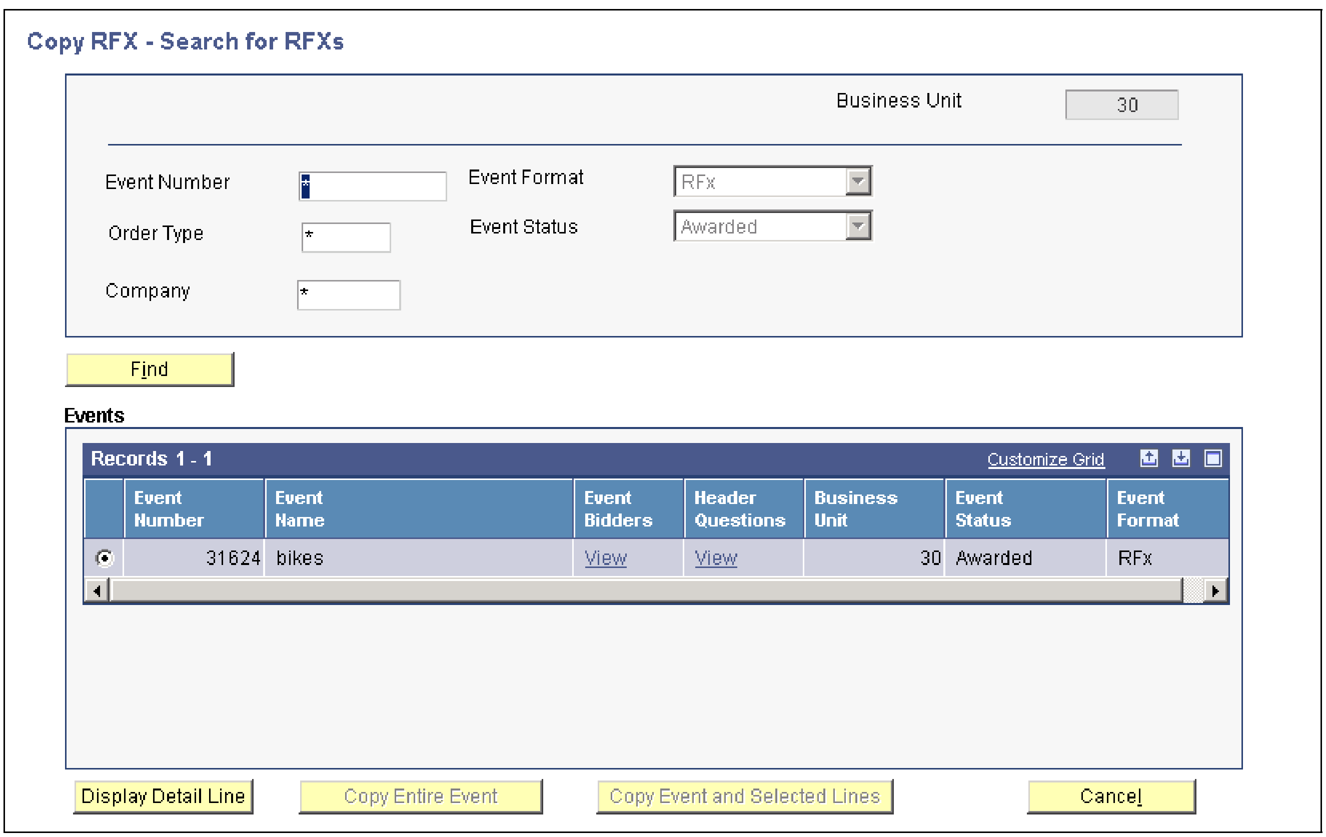
The first two codes are applicable only if you set up supplier costs in the JD Edwards EnterpriseOne Procurement system. If you do not set up supplier costs, the system uses the inventory cost as the default for the purchase order.

See Also

JD Edwards EnterpriseOne Inventory Management 8.12 Implementation Guide, "Entering Item Inventory Information," Entering Item Identification and Processing Information

Copying From an RFx

Access the Search for RFx form.

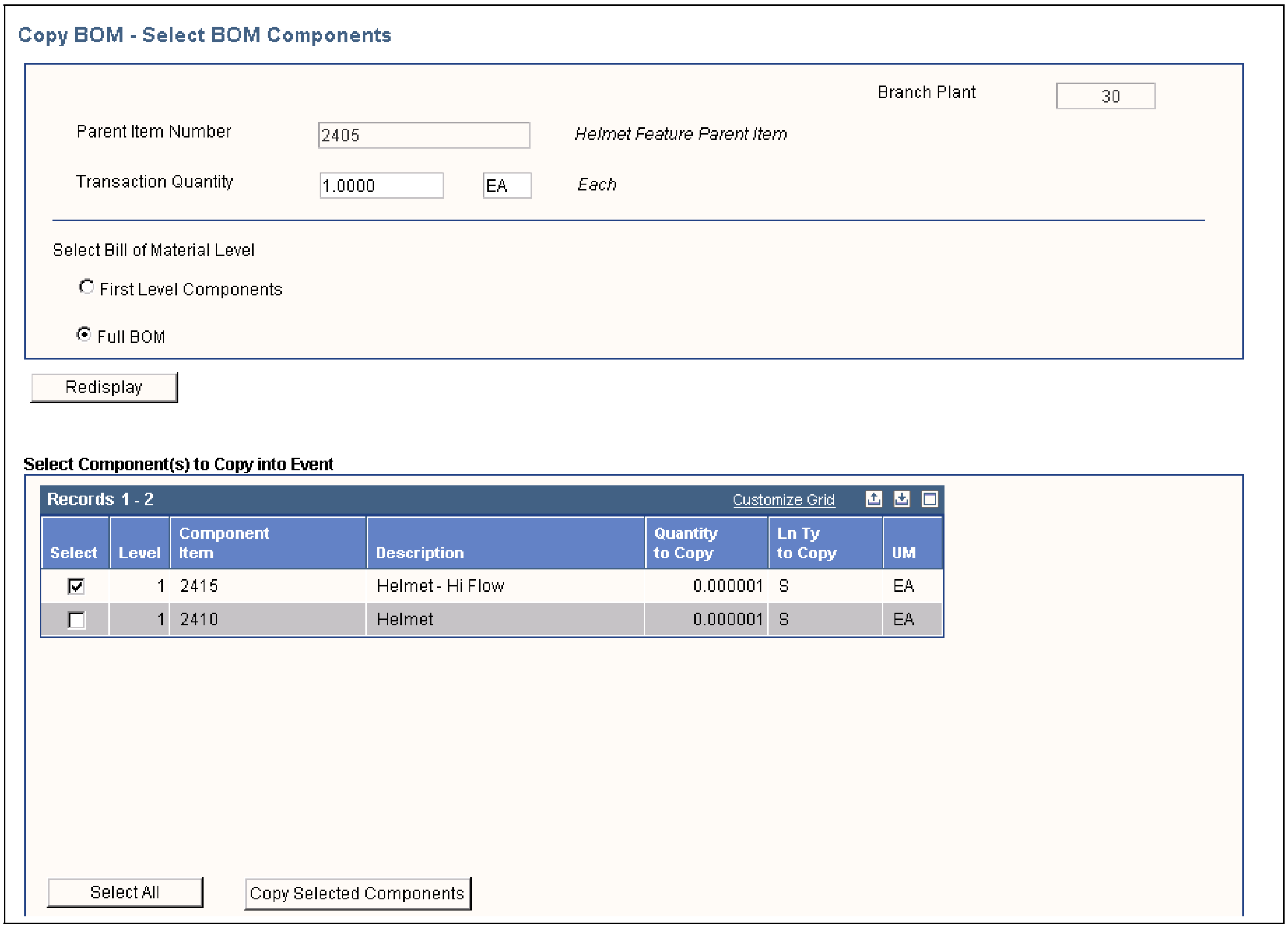


Search for RFXs form

1. Click Find to display the RFxs from which you can copy.
2. Select an RFx.
3. Click Display Detail Line on the Search for RFXs form to display the lines that are included in the RFx that you selected.
4. Click Copy Entire Event to copy the event and all attached lines, or select individual lines and click Copy Event and Selected Lines.

Copying From a Bill of Material (BOM)

Access the Select BOM Components form.



Select BOM Components form

1. To display the full BOM, select Full BOM and then click Redisplay.
2. Click Copy Selected Components.

The system copies the selected components into the event.

See Also

JD Edwards EnterpriseOne Product Data Management 8.12 Implementation Guide, “Setting Up Bills of Material”

Printing an Event

This section provides an overview of the RFx Print report and discusses how to:

- Run the RFx Print report.
- Set processing options for RFx Print.

Understanding the RFx Print Report

If you want to expand your sourcing event to bidders that do not have access to the internet, you can print the event and then fax it to those bidders. The RFx Print report (R43Q110) prints the details of the event, the questions associated with the event, and the event terms and conditions. The RFx Print report also provides space in which bidders can enter their responses to the questions.

After bidders fill out the RFx Print report, they can fax the form back to the buyer, and the buyer can enter the bidders' responses for them.

Running the RFx Print Report

Select Daily Processing (G43Q11), RFx Print.

Setting Processing Options for RFx Print (R43Q110)

These processing options specify default processing information for the report.

Event Header

1. Print Invited Bidder List Specify whether to print a list of all bidders invited to the event on the report. You would typically select this option if the buyer wants a printed copy of the event.

Header Question

1. Weight Allowed Specify whether to print the weight associated with each header question.

2. Range Allowed Specify whether to print the range associated with each header question.

Detail Line Question

1. Weight Allowed Specify whether to print the weight associated with each detail line question.

2. Range Allowed Specify whether to print the range associated with each detail line question.

Managing an Event

This section provides an overview of event management and discusses how to:

- Pause, resume, end or cancel an event.
- Extend an event.

Understanding Event Management

Use the Event Workbench program (P43Q70) to manage sourcing events. The Event Workbench enables you to perform the following actions for the event:

- Pause and resume the event.
- Cancel the event.
- Extend the event.
- End the event.

The current status of the event determines the actions that you can perform for the event. For example, you cannot extend events that have already reached their end time. When you select an event on the Search for Events form, the system enables the corresponding buttons for the actions that you can take for that event.

For each action that you perform for an event, the system sends an email message or fax to the suppliers, depending on their preferences, notifying them of the change in event status. The system uses the print messages that you specify in the Sourcing Constants program (P43Q90) when determining which message to send.

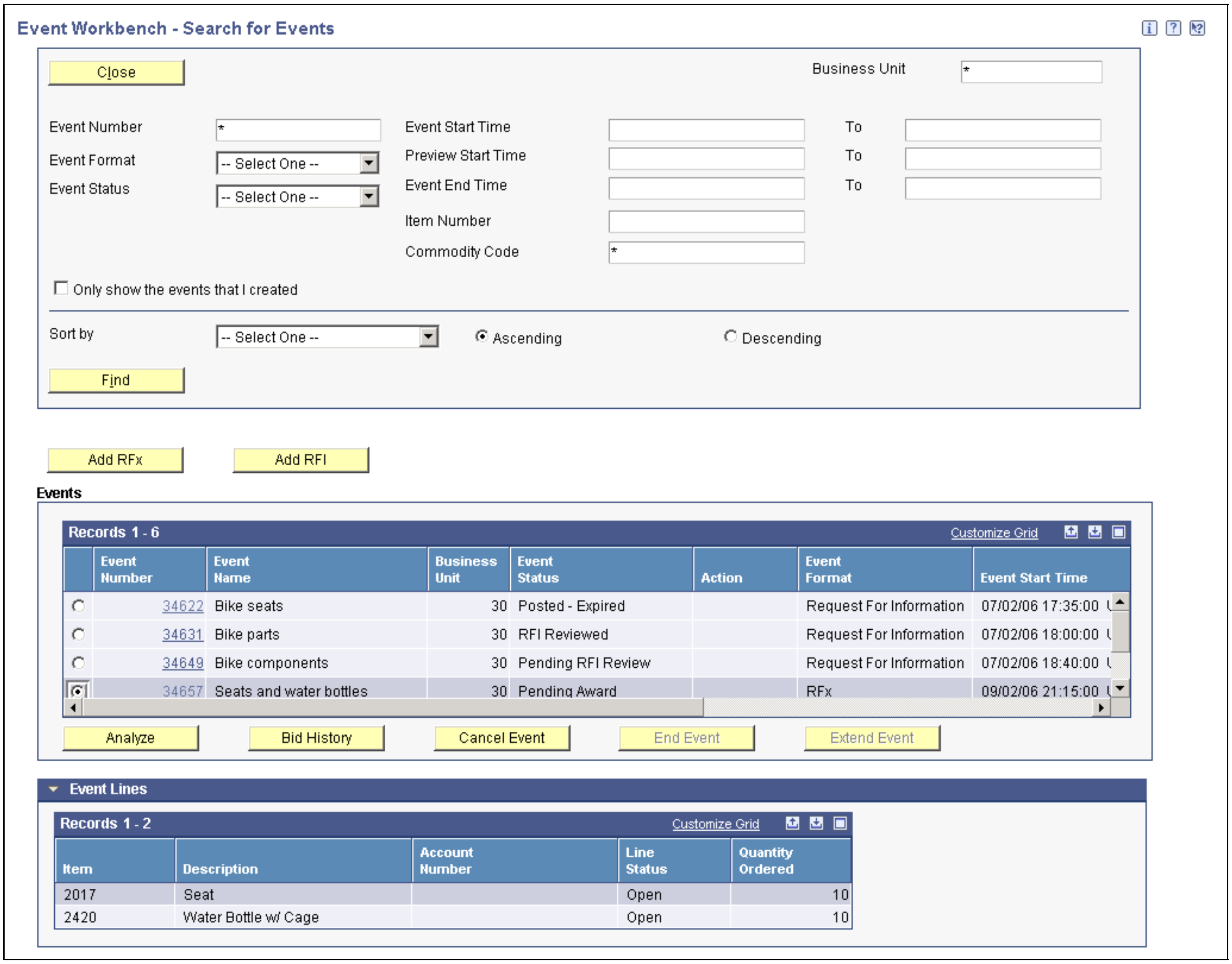
See Chapter 3, "Setting Up the Operational Sourcing System," Understanding System Setup for Operational Sourcing, page 9.

Forms Used to Manage Events

Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Select Daily Processing (G43Q11), Event Workbench.	Review, pause, resume, cancel, extend, and end events.
Extend Event Time	W43Q70C	Click Extend Event on the Search for Events form.	Extend the event to a later date or time.

Pausing, Resuming, Canceling, or Ending an Event

Access the Search for Events form.



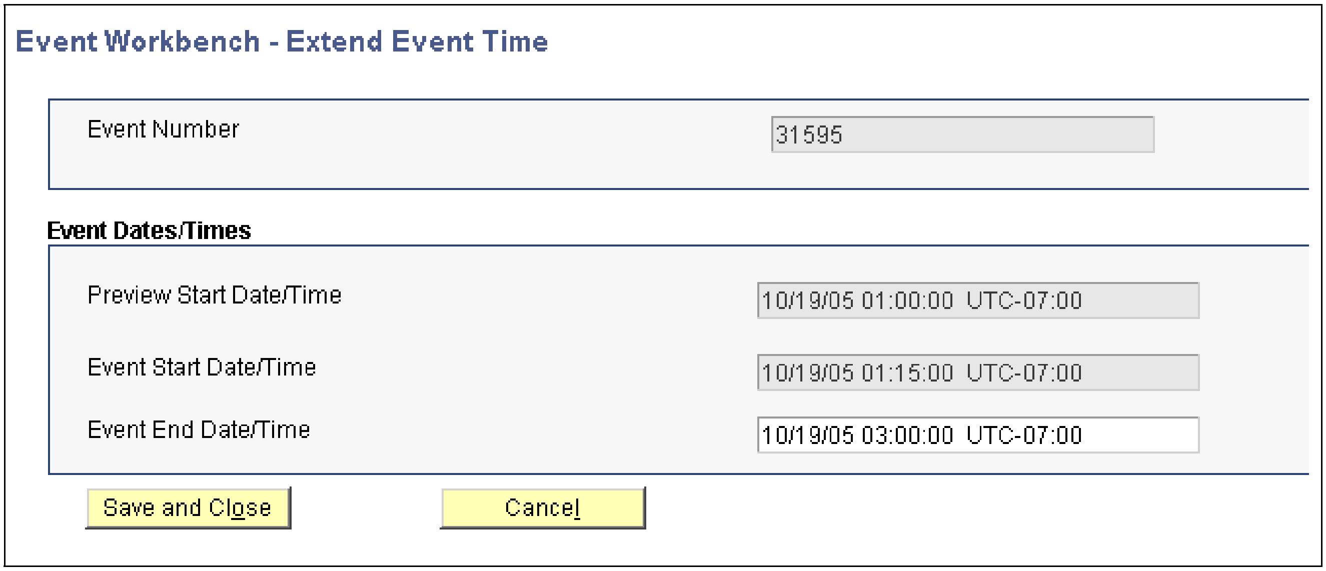
Search for Events form

Perform one of the following actions on the Search for Events form:

- Click Pause in the Action field.
- Click Resume in the Action field.
- Click Cancel Event.
- Click End Event.

Extending an Event

Access the Extend Event Time form.



Extend Event Time form

1. Enter a new date or time in the Event End Date/Time field.
2. Click Save and Close.

CHAPTER 5

Analyzing Events and Awarding Bids

This chapter discusses how to:

- Analyze events
- Award bids

Analyzing Events

This section provides overviews of event analysis for requests for information, even analysis for requests for quote, and discusses how to:

- Analyze a request for information.
- Analyze event summary information.
- Analyze responses to header questions.
- Analyze responses to line questions.
- View price components and price breaks.
- Add bid questions.
- Modify ideal responses.
- Modify responses.
- Score text questions.

Understanding Event Analysis for Requests for Information

Use the Analyze Event form, which you access from the Event Workbench program (P43Q70), to analyze both requests for information (RFIs) and requests for quotes (RFxs).

The event analysis process for a request for information (RFI) involves reviewing and comparing the responses from bidders to the header questions attached to the event to determine the bidders with which you want to conduct business. For each question, you can toggle between viewing bidders' scores and responses. You can also change the weights associated with each question and then review how the score for each bidder changes.

The Analyze Event form provides further options for event analysis by enabling you to add new questions to the event and enter responses on behalf of the bidders. You can also change bidders' responses to existing questions and change ideal responses. You can either save the new responses and resulting scores or discard the changes to preserve the original responses.

If an event includes text questions, you can assign scores to the responses of each bidder. As you assign scores to each response, the system adds them to the total scores for each bidder.

Understanding Event Analysis for Requests for Quotes

The event analysis process for a request for quote (RFx) involves reviewing and comparing responses to determine the bidder or bidders from whom you want to purchase the items in your event. You can begin reviewing the responses from bidders as soon as they submit their bids. However, if the event is sealed, you cannot review responses until the event has ended.

When you analyze an RFx, the Analyze Event form provides several different views of event information, including:

- Event summary information

  This view displays the total bid amount, the total score, total score and weight for each line, and the header score. The system displays this information for each bidder.

- Event header information

  This view displays the header questions for the event and the responses from each bidder. This view also displays the weight for each header question. You can switch between viewing the bid amounts and the bid scores. You can view responses to header questions from only three bidders at a time, but you can select a single question and view the responses from all bidders for that question by clicking the View All Responses button.

- Event line information

  This view displays each line for the event and the questions associated with each line. The system displays only one line at once, and displays the responses for each question. If the price question associated with the line contains price breaks or price components, the system displays the break and component information and the bidders' responses to that information. You can view responses to line questions from only three bidders at a time, but you can select a single question and view the responses from all bidders for that question by clicking the View All Responses button.

When analyzing an RFx, you have the same analysis options that you do when analyzing an RFI; you can change question weights, add new questions and respond to the new questions on behalf of bidders, modify ideal responses, and modify bidders' responses to existing questions. You can perform all of these actions for both header and line questions.

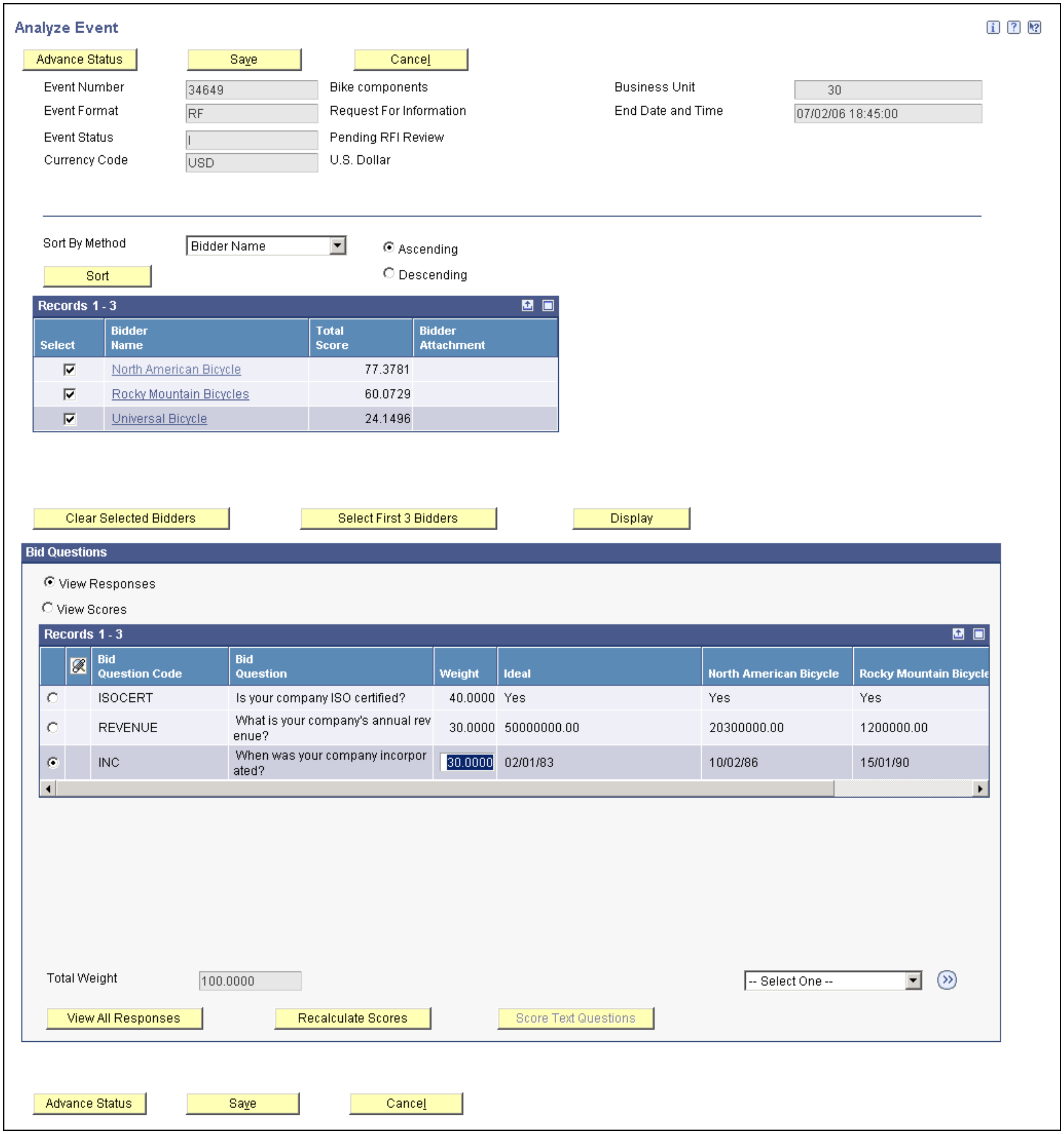
Forms Used to Analyze Events

Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Select Daily Processing (G43Q11), Event Workbench	Search for the event that you want to analyze.
Analyze Event	W43Q50B	Select the event that you want to analyze and click Analyze on the Search for Events form.	Perform event analysis.
Analyze Bidder Info	W43Q50C	Click the link for the bidder in the Bidder Name field on the Analyze Event form.	Review bidder information, such as mailing address, phone number, and email address.
Analyze Item/Service Inquiry	W43Q50D	Click RFx Line on the Analyze Event form and then click the link for the item next to the Description field.	View item information, such as Item Number (Short), Item Line Type, and Stocking Type.

Page Name	Object Name	Navigation	Usage
Create Event Question	W43Q20E	Select either the RFx Header or RFx Line link on the Analyze Event form and then select either Add Questions or Modify Ideal.	Add questions to the event or modify the ideal answer for an event question.
Edit/View Text Responses	W43Q52C	Select either the RFx Header or RFx Line link on the Analyze Event form and then select Modify Responses.	Enter or modify bidders' responses to a text question.
View/Edit Price Responses	W43Q52D	Select either the RFx Header or RFx Line link on the Analyze Event form and then select Modify Responses.	Enter or modify bidders' responses to a price question.
View/Edit Monetary Responses	W43Q52E	Select either the RFx Header or RFx Line link on the Analyze Event form and then select Modify Responses.	Enter or modify bidders' responses to a monetary question.
View/Edit Date Responses	W43Q52F	Select either the RFx Header or RFx Line link on the Analyze Event form and then select Modify Responses.	Enter or modify bidders' responses to a date question.
View/Edit Numeric Responses	W43Q52G	Select either the RFx Header or RFx Line link on the Analyze Event form and then select Modify Responses.	Enter or modify bidders' responses to a numeric question.
View/Edit Yes or No Responses	W43Q52H	Select either the RFx Header or RFx Line link on the Analyze Event form and then select Modify Responses.	Enter or modify bidders' responses to a yes/no question.
View/Edit List Responses	W43Q52I	Select either the RFx Header or RFx Line link on the Analyze Event form and then select Modify Responses.	Review bidders' responses to a list question and access the List of Values form.
List of Values	W43Q52J	Click Edit on the View/Edit List Responses form.	Enter or modify bidders' responses to a list question.
Score Text Question Revision	W43Q51A	Click Score Text Questions on the Analyze Event form.	Assign scores to responses to text questions.

Analyzing a Request for Information

Access the Analyze Event form.



Analyze Event form

Sort by Method
Select a value in this field to specify the method by which the system sorts the bidders who have responded to the event.

Ascending and Descending
Click one of these options to specify the order in which the system sorts the bidders.

Sort
Click this button after selecting a value in the Sort by Method field and either the Ascending or Descending option to change how the system displays the bidders.

Bidder Name

Click the link in this field to view the address information for the bidder or supplier.

Clear Selected Bidders

Click this button to clear the bidders that you have selected. After you select new bidders, you must click Display for the system to update the Bid Line Information subform with the information for the selected bidders.

Select First 3 Bidders

Click this button to have the system select the first three bidders. After clicking this button, you must click Display for the system to update the Bid Line Information subform with the information for the first 3 bidders.

Weight

Specify a percentage to evaluate event lines by different weights.

Recalculate Scores

Click this button after entering a value in the Weight field to recalculate the bidders' scores based on new question weights.

View All Responses

Click this button to view the responses of all invited bidders for a particular question.

Score Text Questions

Click this button to assign scores to the answers of header text questions.

Select Add Questions to add additional header questions to the RFI.

See Chapter 5, "Analyzing Events and Awarding Bids," Adding Bid Questions, page 63.

Select Modify Ideal to change the ideal response for a header question.

See Chapter 5, "Analyzing Events and Awarding Bids," Modifying Ideal Responses, page 64.

Select Modify Responses to change bidders' responses to the header questions, or to enter responses on behalf of bidders for questions that you added to the event during analysis.

Click this button after you have selected Add Questions, Modify Ideal, or Modify Responses.

Save

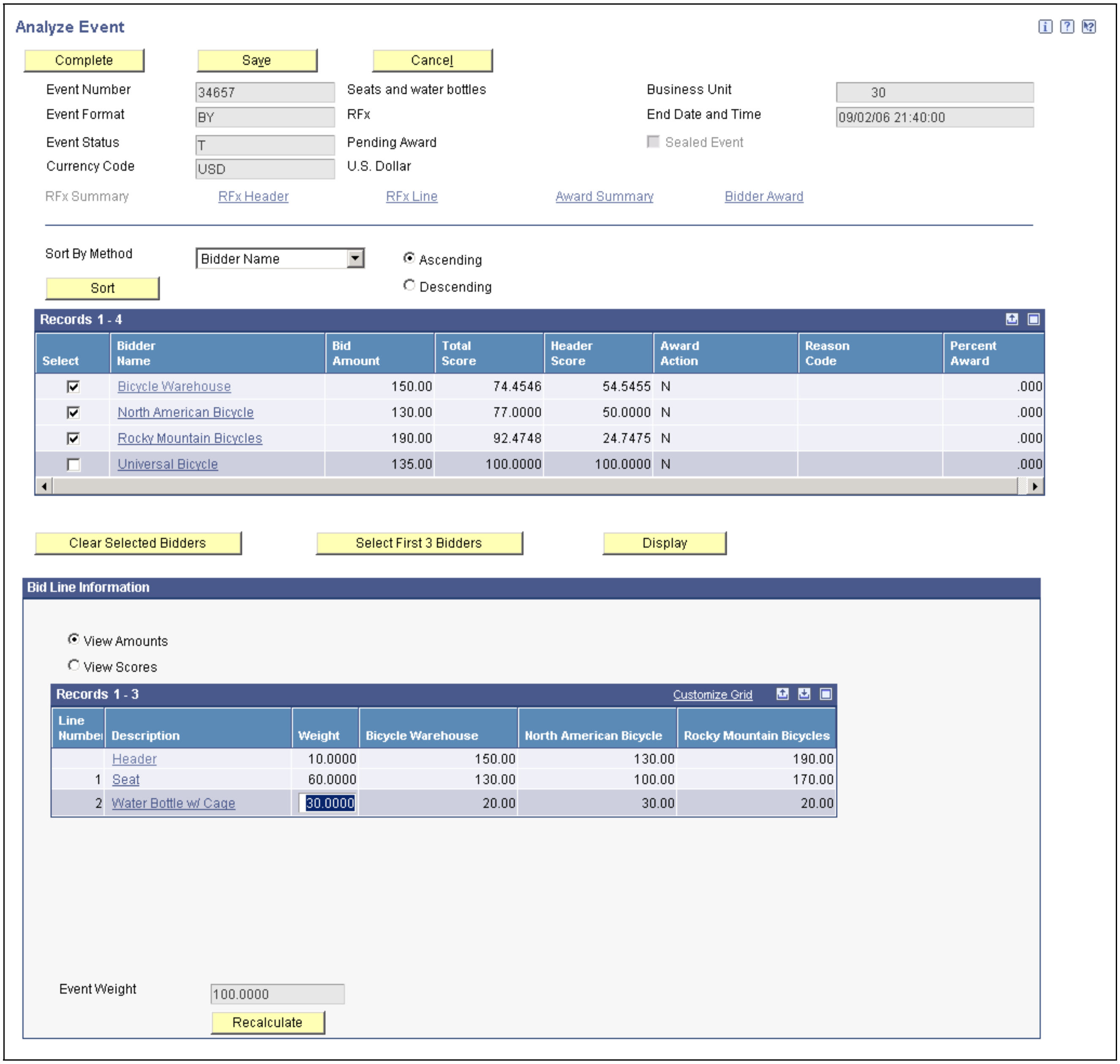
Click this button to save the results created by changing question weights, adding questions, and modifying responses.

Advance Status

Click this button after you have completed your analysis of the RFI. The system advances the status of the RFI to *RFI Reviewed*.

Analyzing Event Summary Information

Access the Analyze Event form and click the RFx Summary link.



Analyze Event form

Use the RFx Summary form to review the bidders that responded to your event and their total scores and bid amounts.

Sort by Method
Select a value in this field to specify the method by which the system sorts the bidders who have responded to the event.

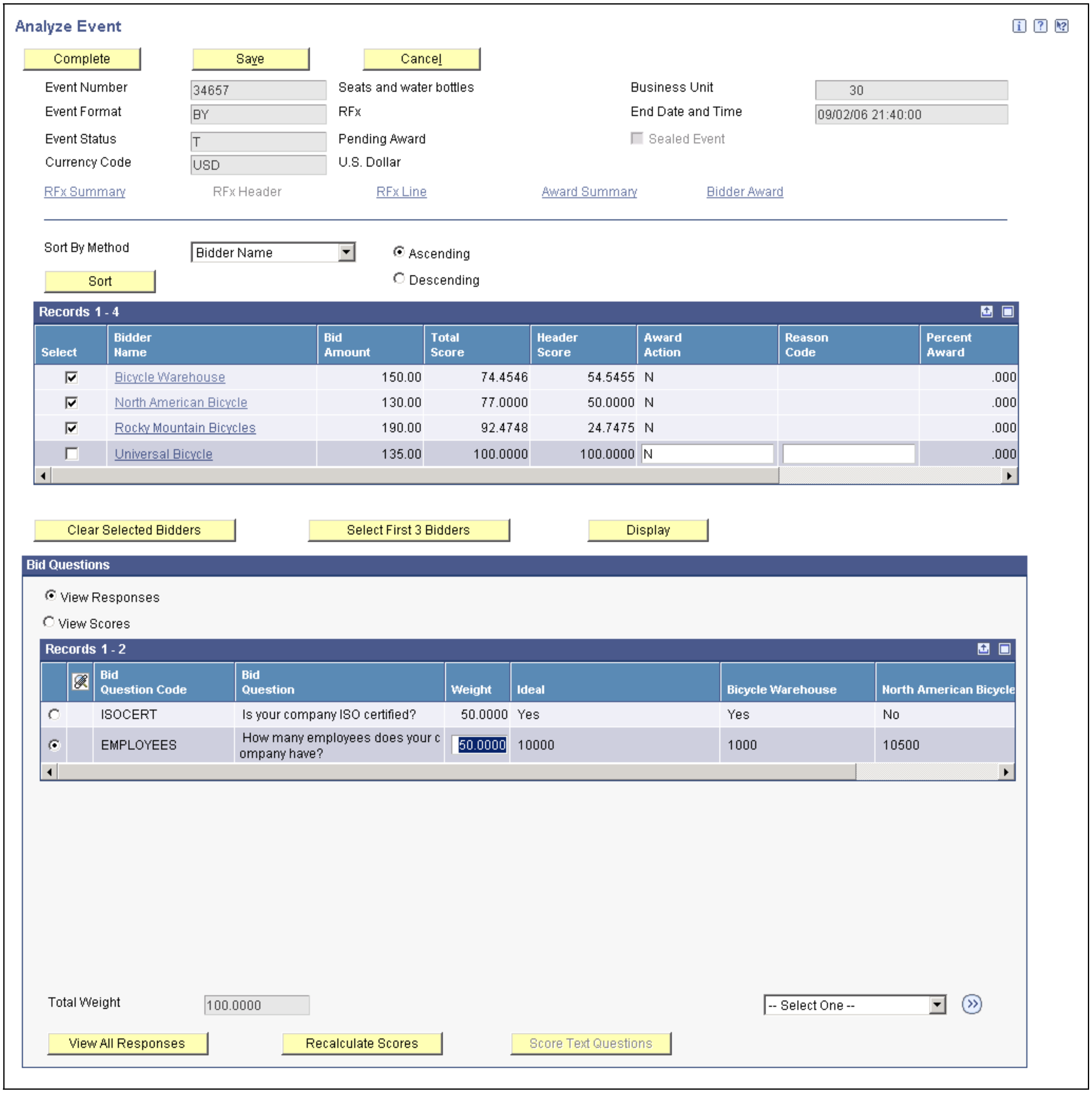
Ascending and Descending
Click one of these options to specify the order in which the system sorts the bidders.

Sort
Click this button after selecting a value in the Sort by Method field and either the Ascending or Descending option to change how the system displays the bidders.

Bidder Name	Click the link in this field to view the address information for the bidder or supplier.
Clear Selected Bidders	Click this button to clear the bidders that you have selected. After you select new bidders, you must click Display for the system to update the Bid Line Information subform with the information for the selected bidders.
Select First 3 Bidders	Click this button to have the system select the first three bidders. After clicking this button, you must click Display for the system to update the Bid Line Information subform with the information for the first 3 bidders.
Weight	Specify a percentage to evaluate event lines by different weights.
Recalculate	Click this button after entering a value in the Weight field to recalculate the bidders' scores based on new line weights.

Analyzing Responses to Header Questions

Access the Analyze Event form and click the RFx Header link.



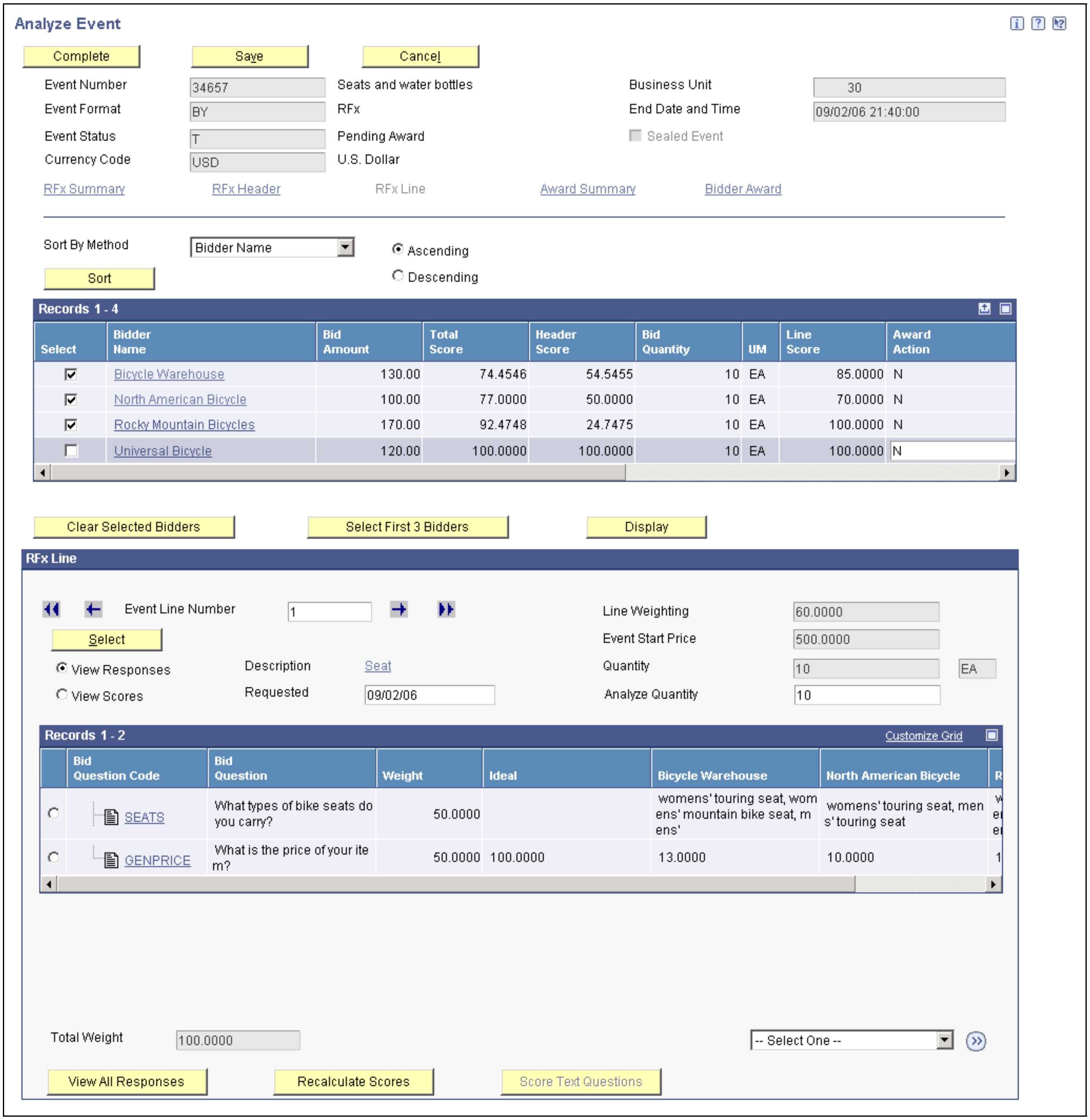
Analyze Event form

Use the RFx Header view to review total scores, total header scores, and responses to header questions.

View All Responses	Click this button to view the responses of all invited bidders for a particular question.
Score Text Questions	Click this button to assign scores to the answers of header text questions.
Add Questions	Select this option to add a header question to the event.
Modify Ideal	Select this option to change the ideal response for a header question.
Modify Responses	Select this option to change bidders’ responses to header questions

Analyzing Responses to Line Questions

Access the Analyze Event form and click the RFx Line link.



Analyze Event form

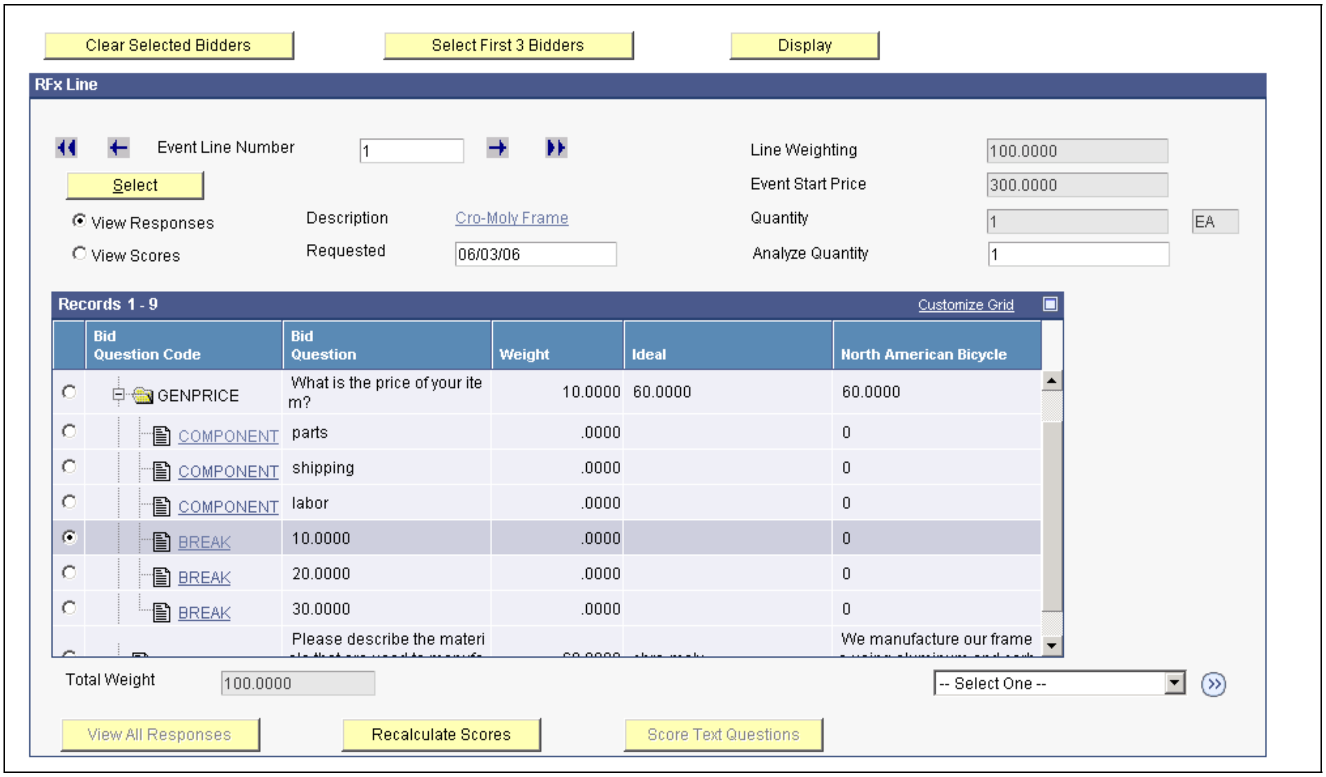
Use the RFx Line view to review total bid amounts, total scores, total line scores, and responses to line questions.

Event Line Number Enter the number of the event line that you want the system to display. After you enter a line number, you must click Select.

Description	Click the link next to this field to view information for the item, such as the Item Number (Short), Primary UOM, Item Line Type, and Stocking Type.
Requested	Change this date to a date that is after the current system date. The system prevents you from posting an award when the Requested date is before the system date.
Analyze Quantity	Change the quantity for the event line to analyze bidder scores and amounts using a different quantity.
View All Responses	Click this button to view the responses of all invited bidders.
Score Text Questions	Click this button to assign scores to the answers of line text questions.
Add Questions	Select this option to add a line question to the event. See Chapter 5, "Analyzing Events and Awarding Bids," Adding Bid Questions, page 63.
Modify Ideal	Select this option to change the ideal response for a line question. See Chapter 5, "Analyzing Events and Awarding Bids," Modifying Ideal Responses, page 64.
Modify Responses	Select this option to change bidders' responses to bid questions. See Chapter 5, "Analyzing Events and Awarding Bids," Modifying Responses, page 65.

Viewing Price Components and Price Breaks

Access the Analyze Event form.



Analyze Event form

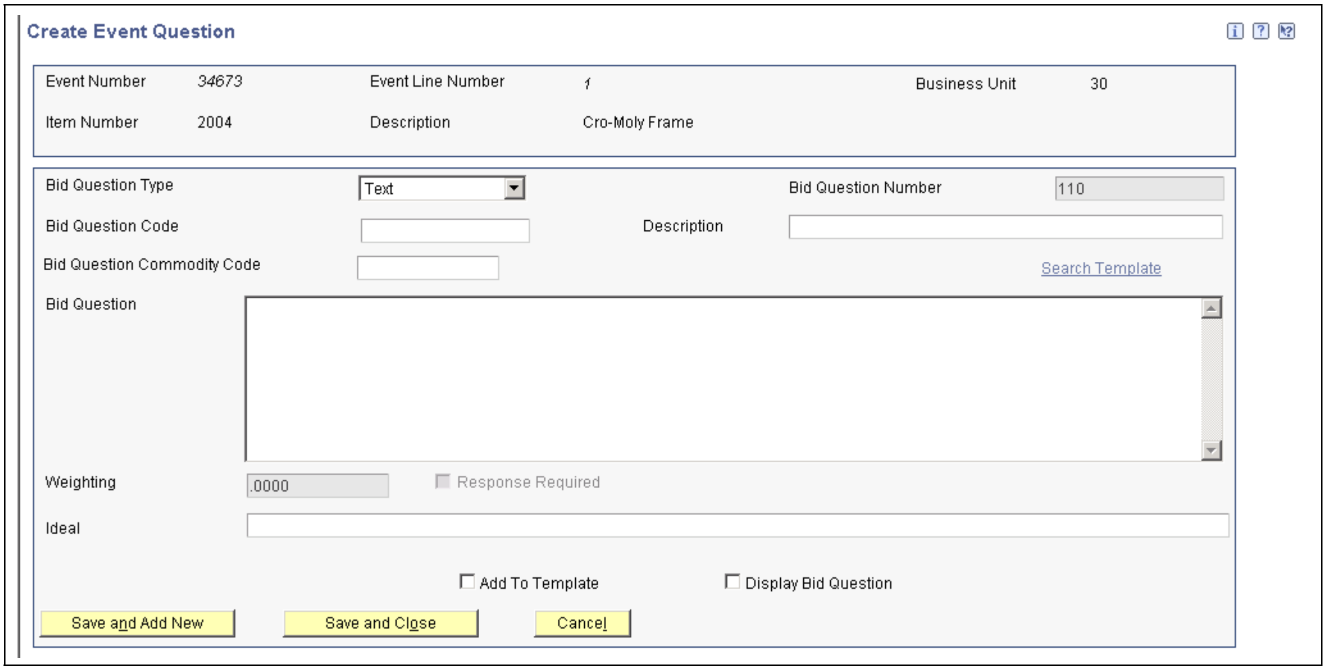
Expand the node for the price question to view responses to price breaks and components.

Adding Bid Questions

Access the Analyze event form and click either the RFx Header or RFx Line link.

Scroll down to the lower right corner of the Analyze Event form and select Add Questions from this menu.

Click this button after selecting Add Questions to display the Create Event Question form.



Create Event Question form

1. Add a bid question, and then click Save and Close.

   See Chapter 3, “Setting Up the Operational Sourcing System,” Adding Bid Question Templates, page 18.

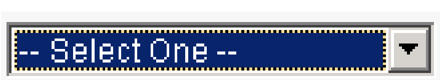
2. Enter responses to the question on behalf of the bidders.

   See Chapter 5, “Analyzing Events and Awarding Bids,” Modifying Responses, page 65.

3. After you enter responses on behalf of the bidders, click Recalculate Scores on the Analyze Event form

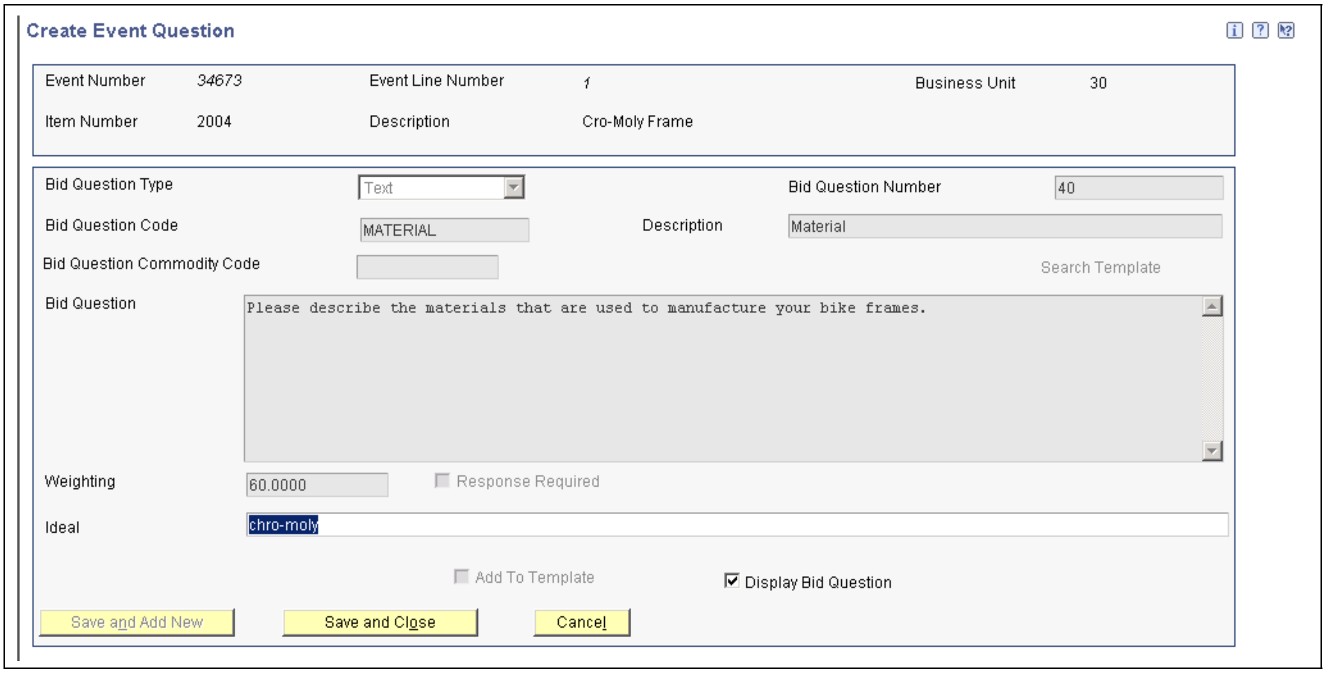
Modifying Ideal Responses

Access the Analyze Event form.



Scroll down to the lower right corner of the Analyze Event form and select Modify Ideal from this menu.

Click this button after selecting Modify Ideal to display the Create Event Question form.



Create Event Question form

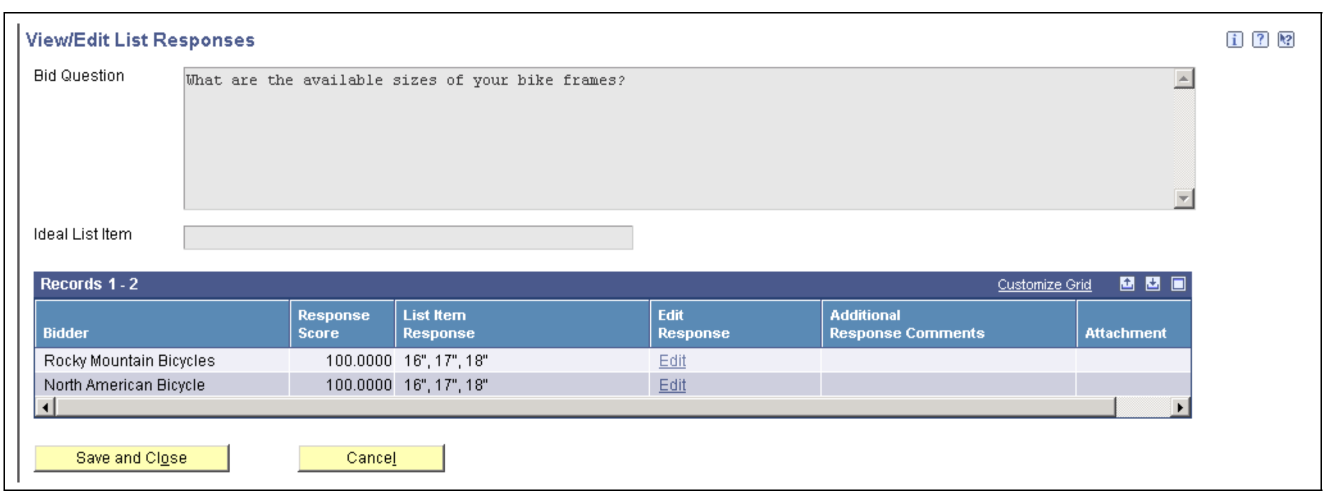
1. Modify the ideal answer and then click Save and Close.
2. On the Analyze Event form, click Recalculate Scores.

Modifying Responses

Access the Analyze Event form.

Scroll down to the lower right corner of the Analyze Event form and select Modify Ideal from this menu.

Click this button after selecting Modify Ideal to display the Create Event Question form.



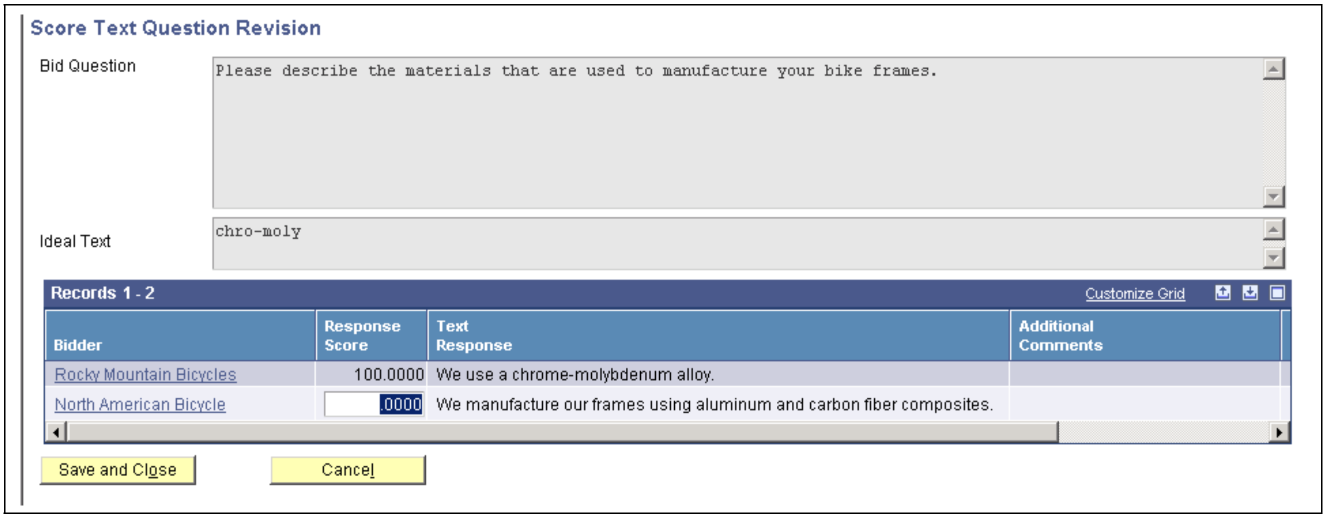
View/Edit List Responses

Depending on the type of question for which you want to modify responses, the system displays one of seven forms. This screen displays when you modify responses to a list question.

1. Modify responses to the question and then click Save and Close to save the new responses and scores, or click Cancel if you want to preserve the original responses.
2. Click Recalculate Scores on the Analyze Event form.

Scoring Text Questions

Access the Score Text Question Revision form.



Score Text Question Revision

Bid Question: Please describe the materials that are used to manufacture your bike frames.

Ideal Text: chro-moly

Records 1 - 2 Customize Grid

Bidder	Response Score	Text Response	Additional Comments
Rocky Mountain Bicycles	100.0000	We use a chrome-molybdenum alloy.	
North American Bicycle	.0000	We manufacture our frames using aluminum and carbon fiber composites.	

Save and Close Cancel

Score Text Question Revision form

Enter a score in the Response Score field and click Save and Close. The system adds the scores to the total score for the line.

Awarding Bids

This section provides an overview of awarding bids and discusses how to:

- Award a bid at the header level.
- Award a bid at the line level.
- Post an award.

Understanding Awarding Bids

After you have analyzed an event and have determined the bidder or bidders to whom you want to award the bid, you can award the bid and then post the award. When you post the award, the system sends a message using the preferred contact method to the awarded bidders and creates either a purchase order or blanket order, depending on how you set up the event.

You use the Analyze Event form to award a bid and post an award. You can award a bid at either the header level or the line level. If you award a bid at the header level, you specify a percentage amount for the bid. For example, you can award 50 percent of the event to one bidder and 50 percent to another. If you award a bid at the line level, you can specify either a percentage amount or a quantity.

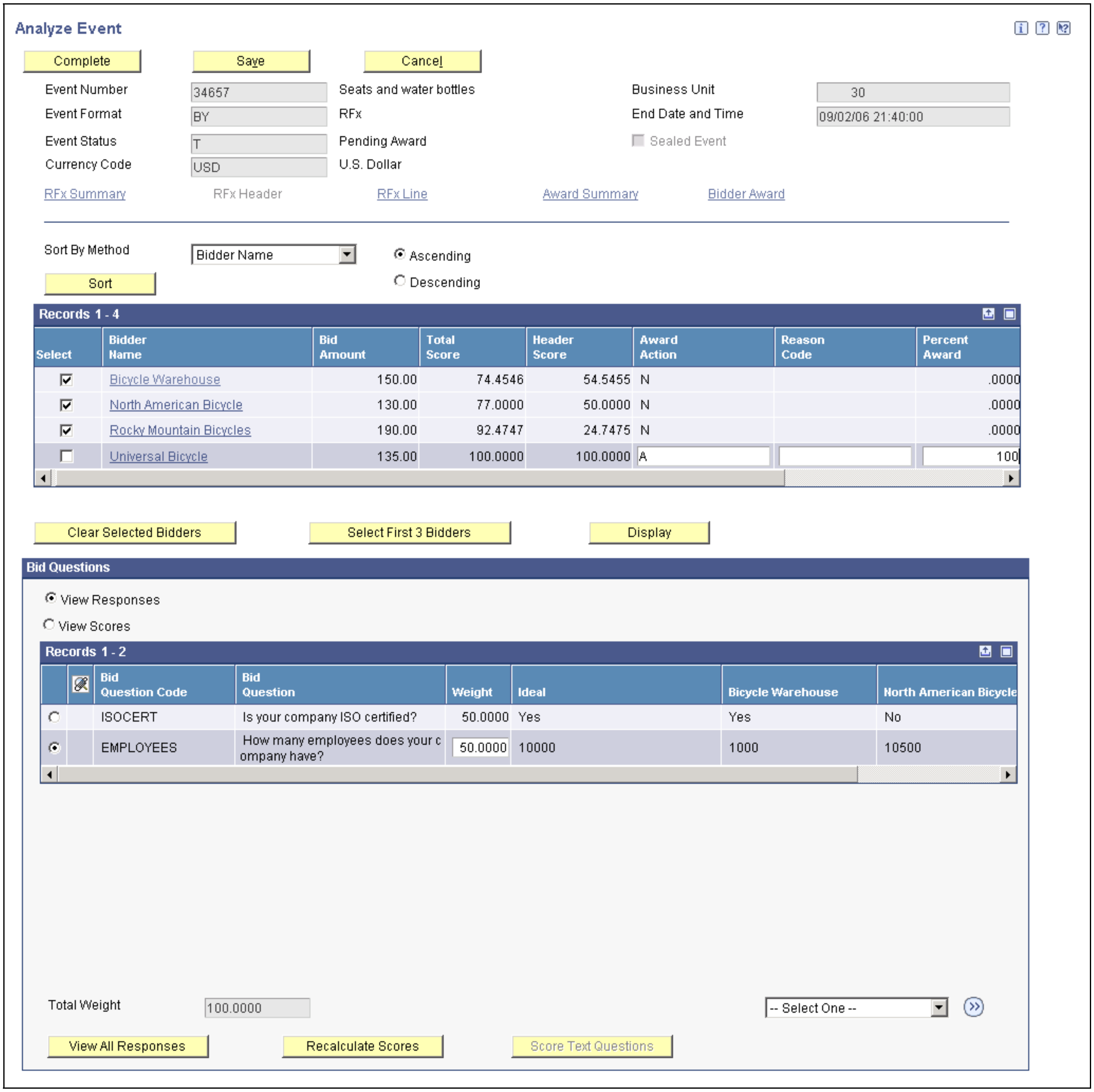
After awarding a bid and posting the award, you must click Complete on the Analyze Event form so that the system can advance the status of the event to *Awarded.*

Forms Used to Award Bids

Form Name	FormID	Navigation	Usage
Search for Events	W43Q50B	Select Daily Processing (G43Q11), Event Workbench	Search for the event that you want to analyze.
Analyze Event	W43Q50B	Select the event that you want to analyze and click Analyze on the Search for Events form.	Perform event analysis.

Awarding a Bid at the Event Header Level

Access the Analyze Event form.

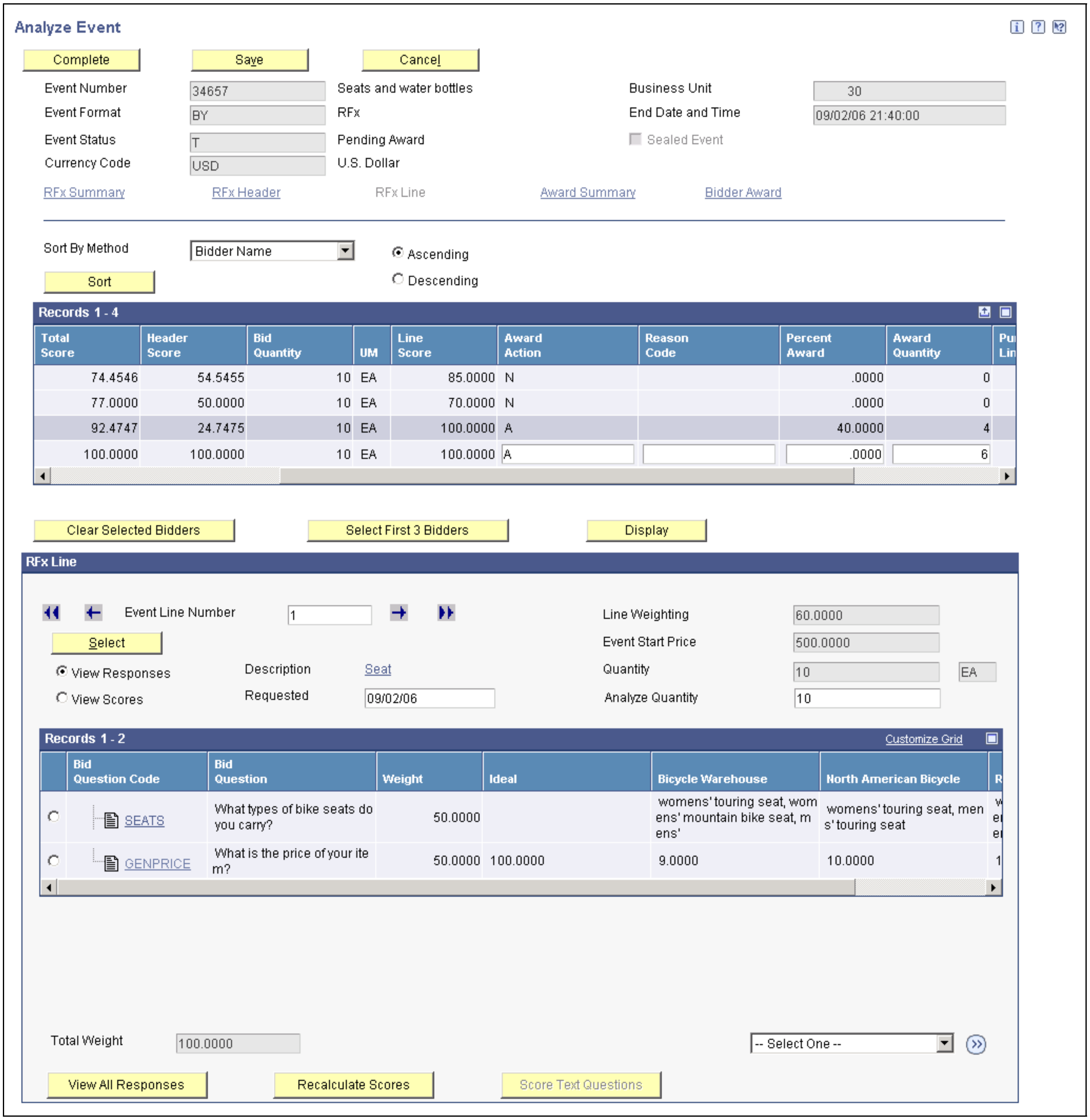


Analyze Event form

1. Click the RFx Header link.
2. Complete the Award Action field for one or more bidders.
3. Complete the Percent Award field for one or more bidders.

Awarding a Bid at the Event Line Level

Access the Analyze Event form.

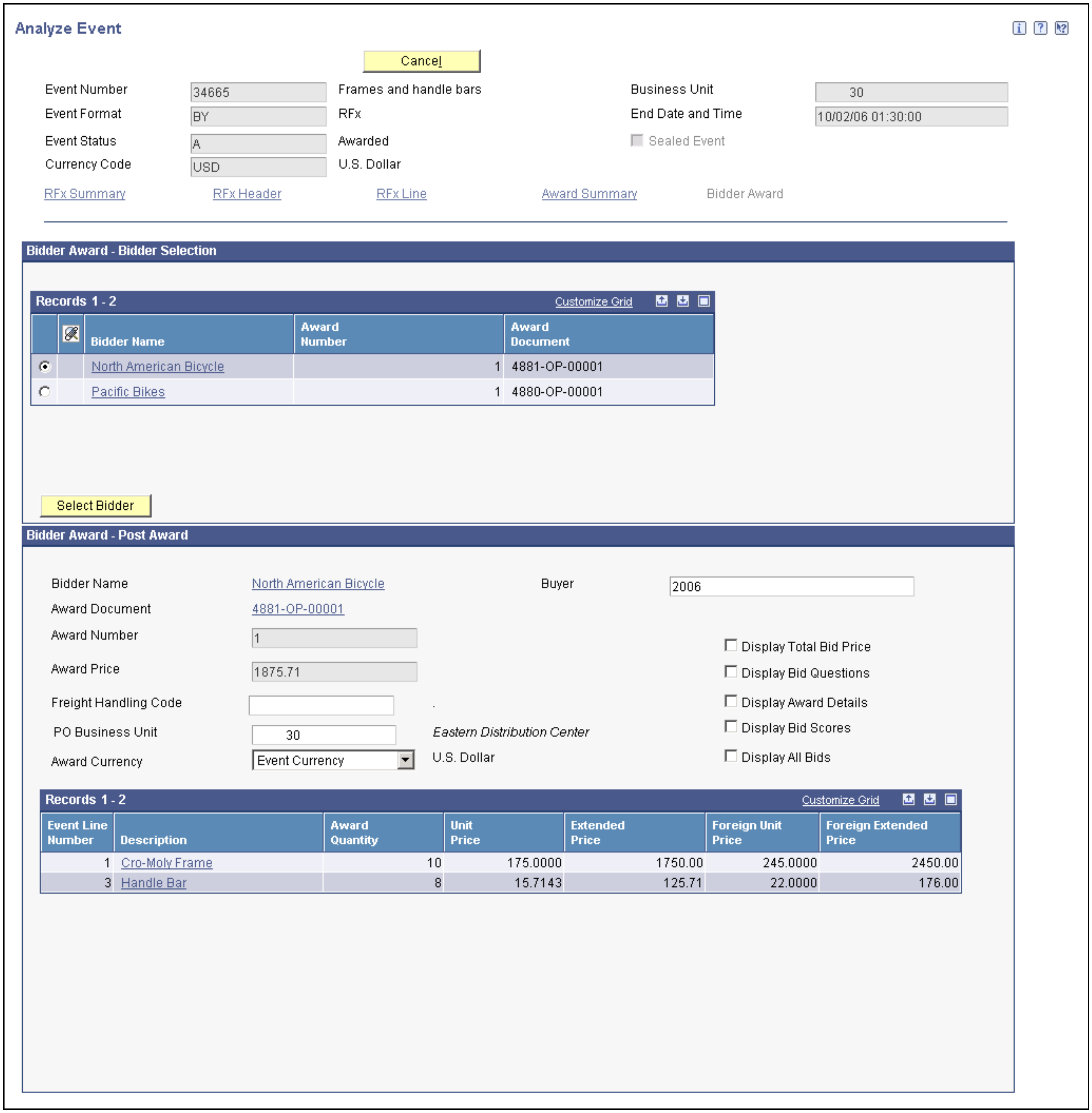


Analyze Event form

1. Click the RFx Line link.
2. Complete the Award Action field for one or more bidders.
3. Complete either the Percent Award field or the Award Quantity field for one or more bidders.

Posting an Award

Access the Analyze Event form.



Analyze Event

Cancel

Event Number 34665 Frames and handle bars
Event Format BY RFx
Event Status A Awarded
Currency Code USD U.S. Dollar
Business Unit 30
End Date and Time 10/02/06 01:30:00
Sealed Event

RFx Summary RFx Header RFx Line Award Summary Bidder Award

Bidder Award - Bidder Selection

Records 1 - 2 Customize Grid

	Bidder Name	Award Number	Award Document
◉	North American Bicycle	1	4881-OP-00001
○	Pacific Bikes	1	4880-OP-00001

Select Bidder

Bidder Award - Post Award

Bidder Name North American Bicycle
Buyer 2006
Award Document 4881-OP-00001
Award Number 1
Award Price 1875.71
Freight Handling Code
PO Business Unit 30 Eastern Distribution Center
Award Currency Event Currency U.S. Dollar

Display Total Bid Price
Display Bid Questions
Display Award Details
Display Bid Scores
Display All Bids

Records 1 - 2 Customize Grid

Event Line Number	Description	Award Quantity	Unit Price	Extended Price	Foreign Unit Price	Foreign Extended Price
1	Cro-Moly Frame	10	175.0000	1750.00	245.0000	2450.00
3	Handle Bar	8	15.7143	125.71	22.0000	176.00

Analyze Event form

Click the Bidder Award link.

1. In the Bidder Award - Bidder Selection subform, choose the supplier for which you want to post an award and click Select Bidder.

   The system displays the Bidder Award - Bidder Selection subform.

2. In the Bidder Award - Post Award subform, review the information and, if necessary, change any of the following fields:

   - Buyer
   - PO Business Unit

- Award Currency
- Freight Handling Code

3. Select one or more of these options, which determine the information that bidders can view in the Bid History program (P43Q41):
   - Display Award Details
   - Display All Bids
   - Display Bid Scores
   - Display Total Bid Price
   - Display Bid Questions
4. Click Post Award.

   The system creates a purchase order or blanket order, depending on the properties of the event, and then populates the Award Document field with the document number.
5. Click Complete to advance the status of the event to *Awarded*.

CHAPTER 6

Using the Bidder Workbench

This chapter provides an overview of the Bidder Workbench and discusses how to:

- Register for an event.
- Accept and decline an invitation.
- Preview an event.
- Respond to an event.
- Review bid history.

Understanding the Bidder Workbench

The Bidder Workbench program (P43Q40) enables bidders to perform all actions that are necessary for them to participate in an event. When bidders receive a fax or email notifying them that they have been invited to an event, they access the Bidder Workbench to register for an event, accept or decline the invitation, preview the event, and respond to the event questions.

If bidders have not yet registered for an event with your company, the system prompts them to first enter registration information, such as tax identification (ID) number, payment instrument, payment terms, maximum and minimum order values, and delivery instructions. Bidders need to enter registration information only once; they will not have to enter the information for the next event to which they are invited.

After they have registered for the event, bidders can then accept or decline the invitation to the event. To accept an invitation, bidders must agree to the event terms and conditions. To decline an invitation, bidders must select a reason code for declining, but can select an option to receive updates on the event.

Registering for an Event

This section discusses how to enter registration information.

Form Used to Enter Registration Information

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Portal	Access the Manage Registration Data form.
Manage Registration Data	W43Q91A	Click Register on the Search for Events form.	Register for an event.

Entering Registration Information

Access the Manage Registration Data form.

Tax ID

Enter the tax identification number. This number is the identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on. The system verifies the number and prints the separators in their correct format, according to the value that you specify in the TAXC (Person/Corporation Code) field. If no value exists for TAXC, the system uses the Corporate Entity.

Individual Tax ID

Enter the identification number assigned by a tax authority to an individual.

Person/Corporation Code

Specify the type of taxpayer. Values for United States entities are:

Blank or *C*: Corporate entity (the Tax ID prints as 12-3456789)

P: Individual (the Tax ID prints as 123-45-6789)

N: Noncorporate entity (the Tax ID prints as 12-3456789)

Values for non- U.S. entities are:

1: Individual

2: Corporate entity

3: Both an individual and a corporate entity

4: Noncorporate entity

5: Customs authority

Payment Instrument

Specify the means by which payment is issued. Examples of payment instruments include check, electronic funds transfer, lockbox, and EDI. Select a valid value from user-defined code table (00/PY).

Payment Terms

Select the default payment terms. Payment terms determine the due date, discount amount, and discount due date that the system assigns when you create an invoice.

History Currency Code

Specify the currency in which amounts are stored in the JD Edwards EnterpriseOne Address Book system. For example, the credit limit, invoiced this year, invoiced prior year, and so on. The currency that you specify is used to record and store transaction history.

Voucher Currency Code

Specify your company’s currency. The system uses this code as the default currency when you enter vouchers for the supplier. You can override the default currency when you enter a voucher. If you leave this field blank, you can either assign the currency code when you enter a voucher or let the system assign the currency code of the voucher company.

Maximum Order Value	Specify the value above which an order is placed on hold. If you enter an order with a total that is more than the maximum order value, the system displays an error message. This field is maintained as an integer without decimals.
Minimum Order Value	Specify the value below which an order is placed on hold. If you enter an order with a total that is less than the minimum order value, the system displays an error message. This field is maintained as an integer without decimals.
Batch Processing Mode	Specify whether a supplier is prohibited from batch processing or if that supplier is in a test or production mode. Values are: *I:* Inhibited from processing *T:* Test mode. The system produces reports only when processing this supplier. *P:* Production mode. The system produces a report and produces orders when processing this supplier.
Item Type Identifier	Specify a code to identify the type of item number to be sent in an EDI transaction. For example, specify a UPC code, supplier part number, or customer part number.
Quantity Decimals	Specify the number of positions to the right of the decimal that will be sent for all quantity fields in an electronic data interchange (EDI) transaction.
Amount Decimals	Specify the number of positions to the right of the decimal that will be sent for all amount fields in an EDI transaction.
Volume Display U/M(volume display unit of measure)	Specify the default value that the system uses to display volume for this branch/plant. The system stores valid values for this field in user-defined code table 00/UM. The system inputs a value in this field from Branch/Plant Constants - Page 2 (P410012).
Weight Display U/M(weight display unit of measure)	Specify which unit of measure the system uses to display the weight of individual order lines and the order as a whole when using the order summary form. The system stores valid values for this field in user-defined code table 00/UM.
Freight Handling Code	Specify the method by which shipments are delivered. For example, the supplier could deliver to your dock, or you could pick up the shipment at the supplier's dock. You can also use these codes to indicate who has responsibility for freight charges. For example, you can have a code indicating that the customer legally takes possession of goods as soon as they leave the supplier warehouse and is responsible for transportation charges to the destination. The system stores valid values in user-defined code table 42/FR.
Delivery Instructions	Specify any special delivery instructions.

Add/Edit VAT IDs

Complete the fields on this subform to enter value added tax (VAT) information.

Country	Specify the code for the country. Select a valid value from user-defined code table 00/LC.
VAT ID	Specify the value added tax (VAT) ID for each country in which your company operates.

Accepting and Declining an Event Invitation

This section discusses how to:

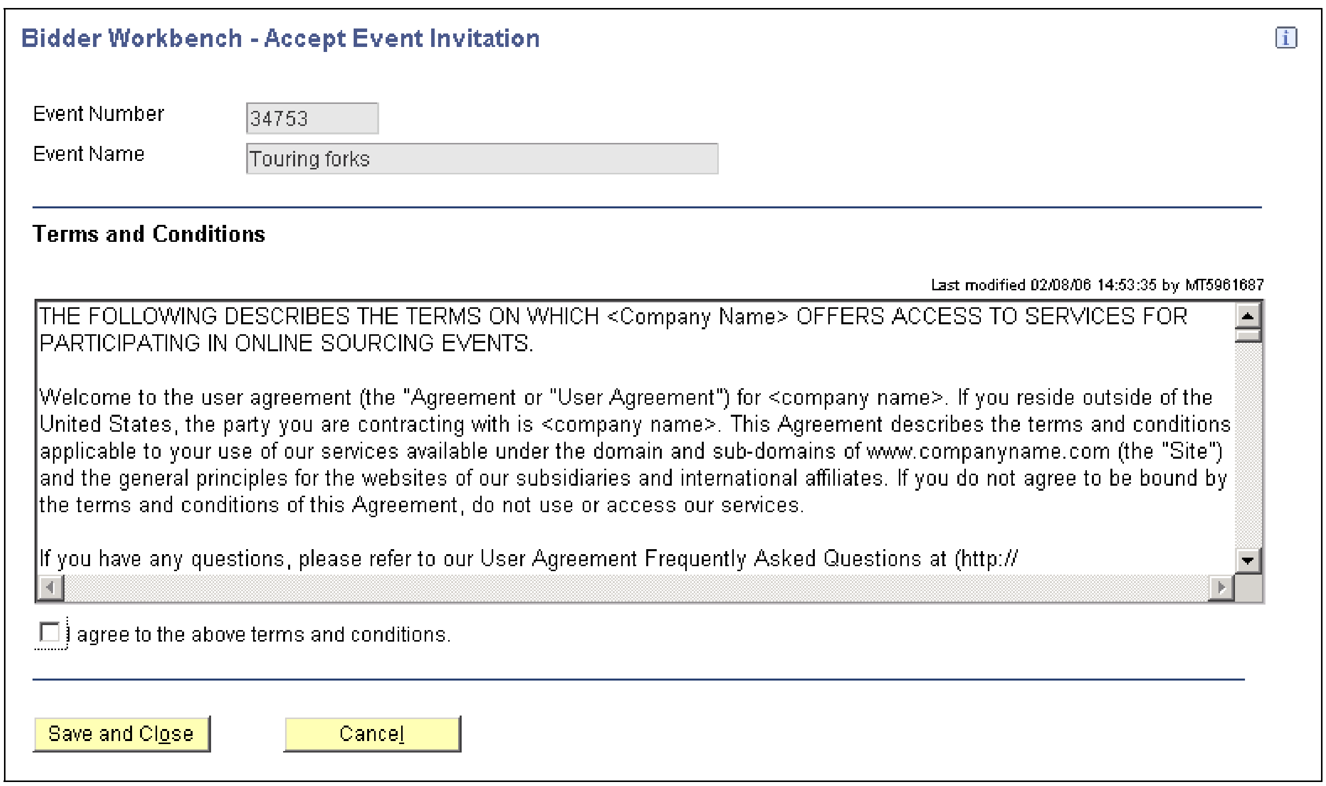
- Accept an invitation
- Decline an invitation

Forms Used to Accept and Decline Event Invitations

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Portal	Accept or decline an event invitation.
Decline Event Invitation	W43Q40D	Click Decline on the Search for Events form.	Decline an event invitation.
Accept Event Invitation	W43Q40E	Click Accept on the Search for Events form.	Accept an event invitation.

Accepting an Event Invitation

Access the Accept Event Invitation form.



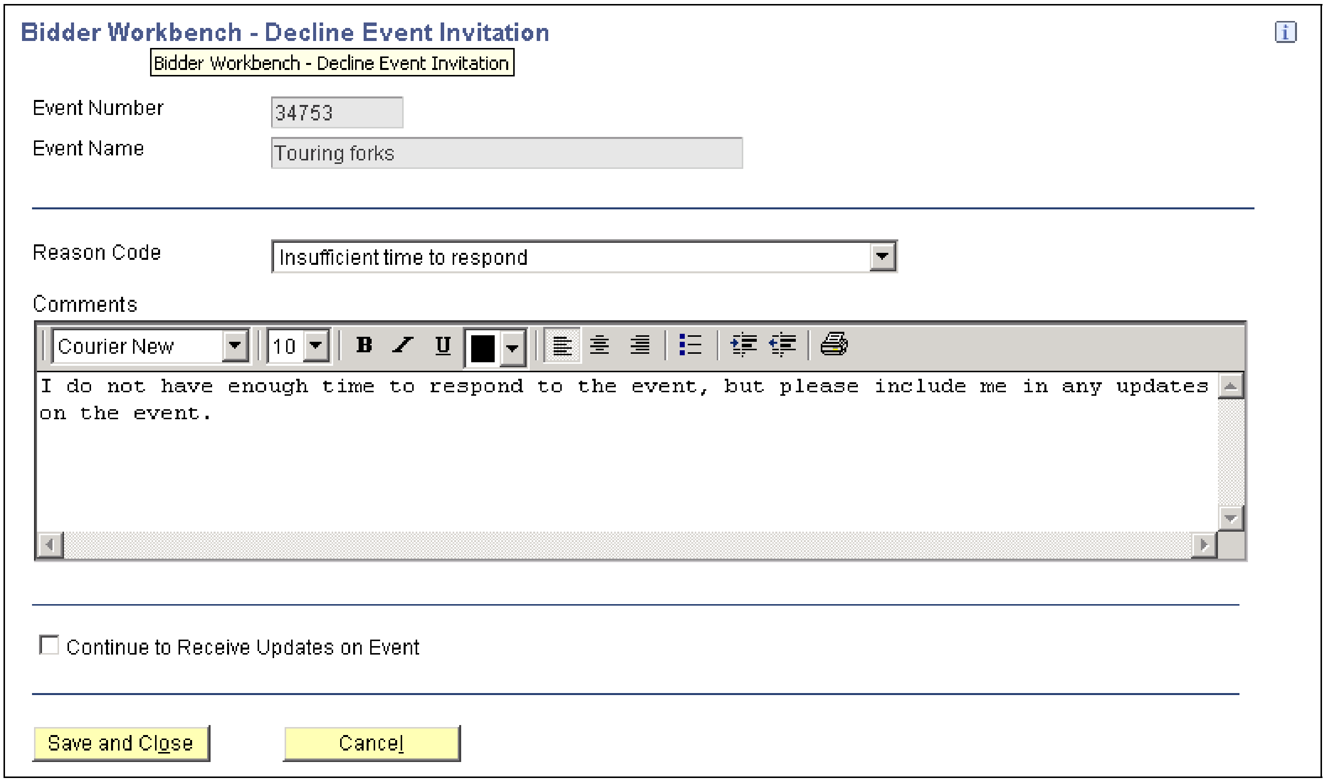
Accept Event Invitation form

Terms and Conditions Review the terms and conditions for the event.

I agree to the above terms and conditions. Select this option to agree to the event terms and conditions.

Declining an Event Invitation

Access the Decline Event Invitation form.



Decline Event Invitation form

Reason Code	Select a reason for declining the invitation. The system stores valid reason codes in user-defined code table 43Q/DR.
Comments	Enter text to provide further explanation for declining the invitation.
Continue to Received Updates on Event	Select this option to inform the buyer that you would like to continue to receive updates on the sourcing event.

Previewing an Event

This section provides an overview of event preview and discusses how to preview an event.

Understanding Event Preview

The event preview process enables bidders to review information about the event before it begins. During event preview, bidders can review the event name and description, obtain contact information for the buyer, and review all questions for the event. While reviewing the bid questions, bidders cannot provide responses; they can only view them.

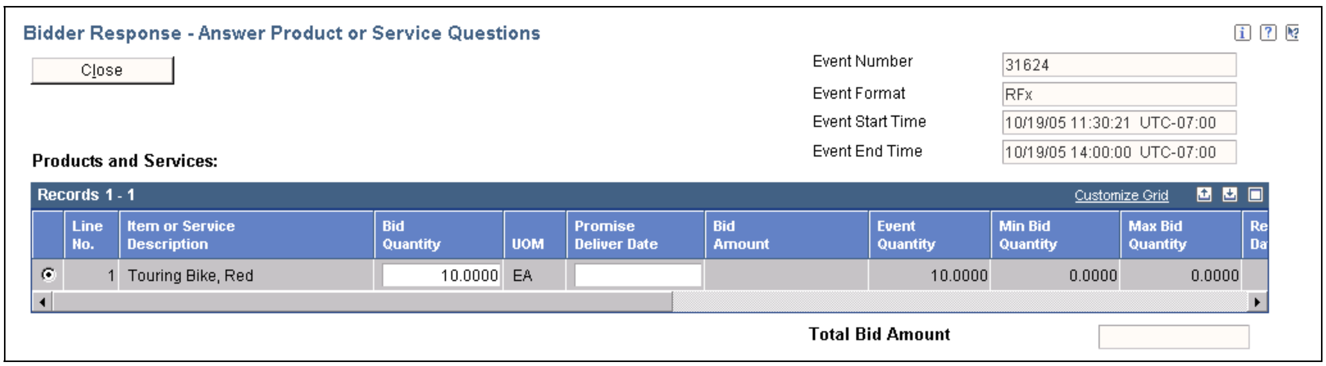
After previewing an event, if bidders decide that they no longer want to participate in the event, they can decline their invitation, thus removing themselves from the list of bidders.

Forms Used to Preview an Event

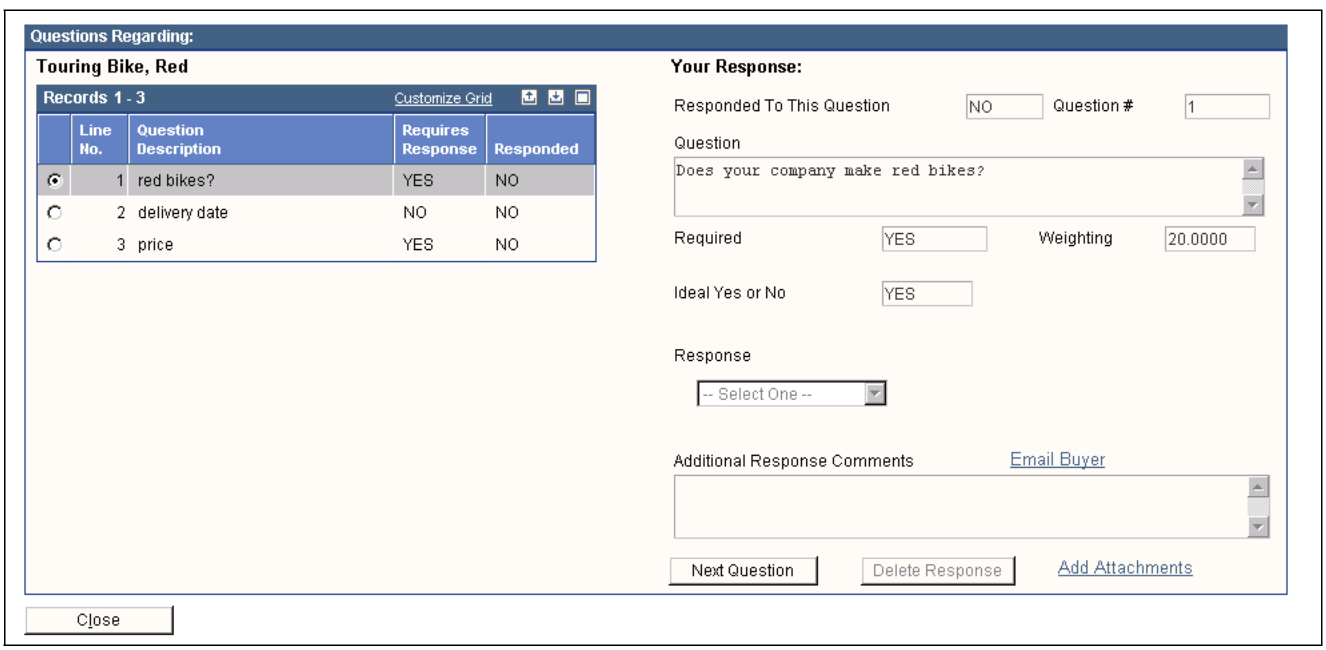
Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the portal.	Search events and select the event that you want to preview.
Overview and Questions	W43Q42B	Click Preview on the Search for Events form.	Review overview information for the event.
Answer Product or Service Questions	W43Q411A	Click Products or Services or Company on the Overview and Questions form.	Review the questions for the event.

Previewing an Event

Access the Answer Product or Service Questions form.



Answer Product or Service Questions form (1 of 2)



Answer Product or Service Questions form (2 of 2)

When the event is in a status of *Preview*, you can only view the bid questions; you cannot respond. If you need to contact the buyer, click the Email Buyer link.

Responding to Events

This section provides an overview of event response and discusses how to:

- Respond to an event.
- Enter bidder price breaks.
- Enter buyer price breaks.
- Enter price components.
- Select values for a list question.

Understanding Event Response

After the event begins, bidders can access the Overview and Questions form and begin the process for submitting a bid. If the event contains both header and detail questions, the Overview and Questions form contains two links: Company and Products and Services. The Company link provides access for answering header questions, and the Products and Services link provides access for the detail questions.

As bidders click on each individual line for the event, the system displays the corresponding questions for that line. For each question, the system indicates whether a response is required and whether the bidder has responded to the question. The system updates the Responded field after the bidder has selected a response and then selected the next question.

If the buyer has entered price break information, the system displays the Enter Buyer Price Breaks link, which bidders can use to enter applicable price breaks for the ranges specified by the buyer. If the buyer did not attach price break information to the price question, the system displays the Enter Bidder Price Breaks link, which bidders can use to enter their own quantity ranges and applicable price breaks.

If the buyer has entered price component information, the system displays the Enter Price Components link. When bidders click this link, the system displays a form on which bidders must enter the prices for each component of an item, such as shipping, labor, and parts.

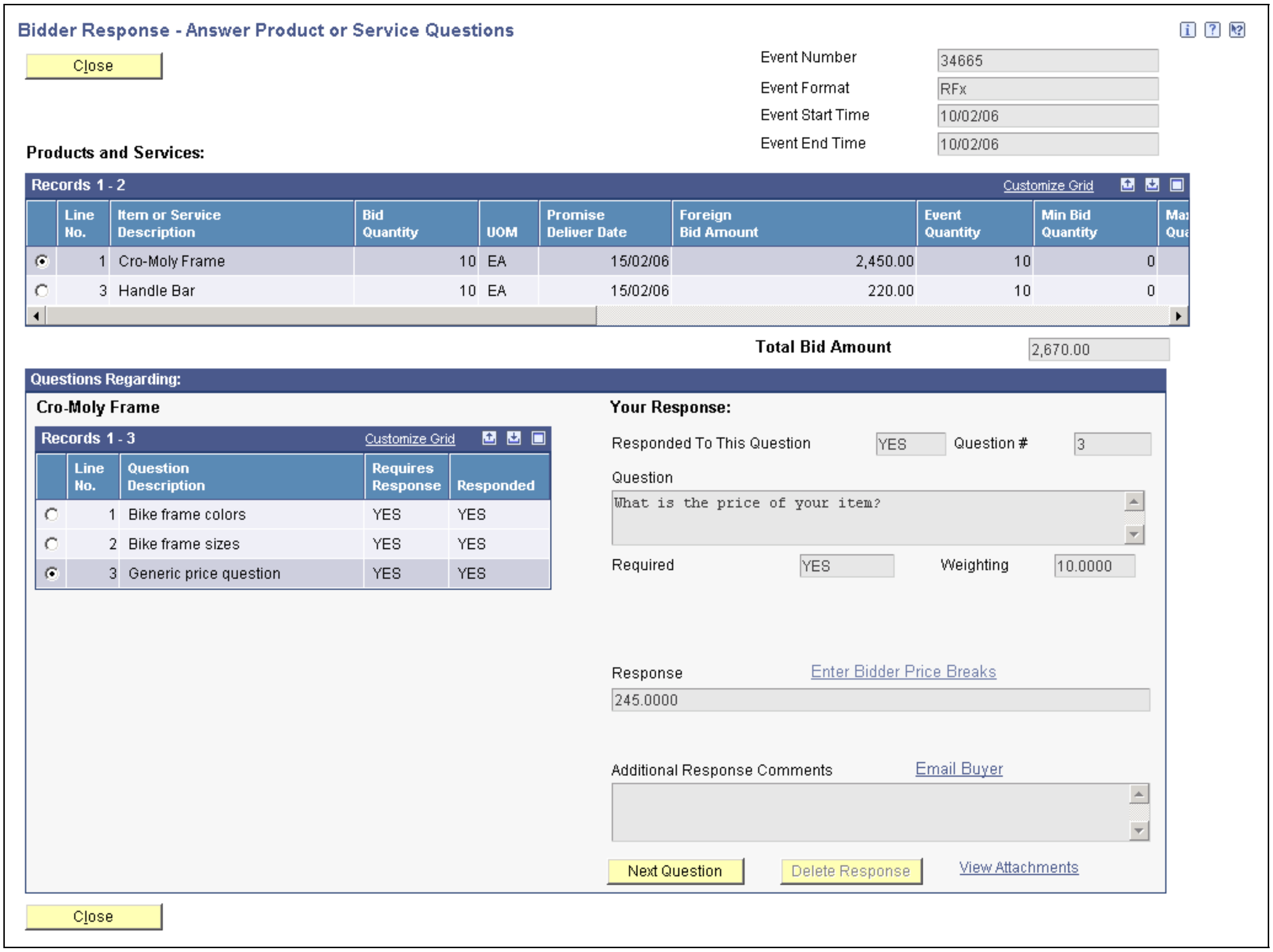
When bidders are finished responding to the event, they click Save and Continue to return to the Overview and Questions form. Bidders can then review their total score and then click Submit Bid to submit their bid.

Forms Used to Respond to an Event

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Portal	Search events and select the event for which you want to provide responses.
Overview and Questions	W43Q42B	Click Respond on the Search for Events form.	Review overview information for the event.
Answer Company Questions	W43Q400A	Click Company on the Overview and Questions form.	
Answer Product or Service Questions	W43Q411A	Click Products or Services on the Overview and Questions form.	Provide responses to event questions.
Ship To Address	W43Q411C	Click the link in the Ship To field.	View the address to which the item should be shipped.
Enter Price Breaks	W43Q412A	Click Enter Bidder Price Breaks or Enter Buyer Price Breaks on the Answer Product or Service Questions form.	Enter bidder or buyer price breaks.
Enter Price Components	W43Q413A	Click Enter Price Components on the Answer Product or Service Questions form.	Enter price component information.
List of Values	W43Q411D	Click Choose Value from List on the Answer Product or Service Questions form.	Select values for a list question.

Responding to an Event

Access the Answer Product or Service Questions form.



Answer Product or Service Questions form

1. Select an event line and complete the following fields for that line:

Bid Quantity

Specify the quantity that you want to provide for the supplier. The system uses the quantity from the event as the default value. If the properties of the event indicate that you must bid on the quantity requested by the buyer, the system disables this field.

Promised Delivery Date

Specify the date by which you plan to deliver the item. The system uses this date in conjunction with the receipt date to evaluate supplier performance.

Note. If this date is in the past when you post an award for this supplier, the system does not allow you to create a purchase order.

Bid Amount

The system displays the bid amount, which is calculated using the price question response multiplied by the quantity.

Event Quantity

The system displays the total quantity for the event.

Min Bid Quantity

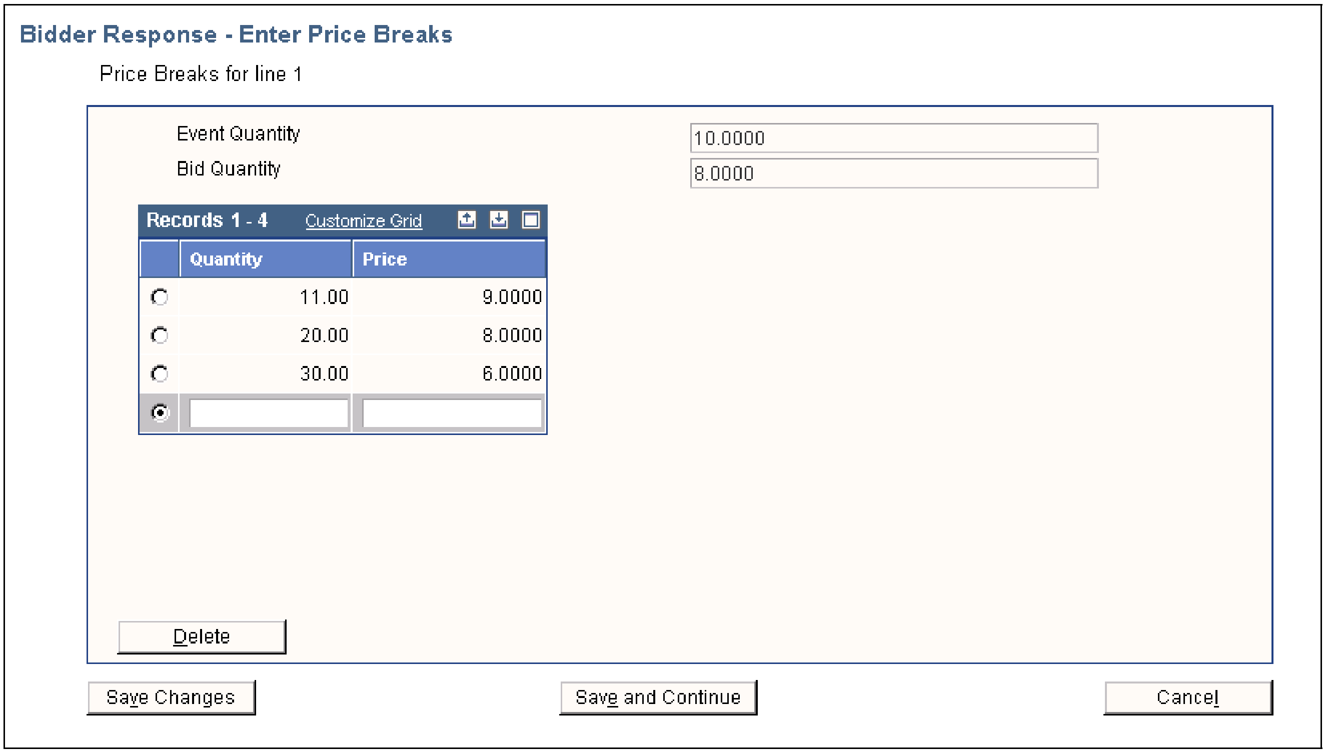
The system displays the minimum quantity for which bidders can submit a response. The system displays a value in this field only when the buyer has set up the event line to allow a quantity range instead of a specific quantity.

Max Bid Quantity	The system displays the maximum quantity for which bidders can submit a response. The system displays a value in this field only when the buyer has set up the event line to allow a quantity range instead of a specific quantity.
Request Date	The system displays the date on which the event was created.
Bid Required	The system displays either *Yes* or *No*, depending on how the buyer set up the event.
Line Score	The system calculates and displays the score for each line after the bidder enters and saves responses.
Buyer Attachments	Click View to review attachments that the buyer added to the event line.
Bidder Attachments	Click Edit in this field to add attachments to a response.
Ship To	Click the link in this field to view the address to which you should ship the item.
Mode of Transport	The system displays the mode of transport, which the buyer enters when creating the event. The mode of transport describes the nature of the carrier being used to transport goods, for example, by rail, by road, and so on. The system stores valid values for this field in user-defined code table 00/TM.
Freight Handling Code	The system displays the method by which supplier shipments are delivered, which the buyer enters when creating the event. Examples include: the bidder delivers to the buyer's dock, or the buyer picks up the shipment at the bidder's dock. The system stores valid values for this field in user-defined code table 42/FR.

2. Review and respond to each question attached to the selected event line.
3. To answer the next question, click Next Question.
4. Click Email Buyer if you want to contact the buyer for additional information.
5. Click Attachments to add additional information to your response.
6. When you are finished responding to the questions, click Save and Continue.
7. On Overview and Questions, review your score and then click Submit Bid to submit your bid.
8. Click OK on the Confirmation form.

Entering Bidder Price Breaks

Access the Enter Price Breaks form.

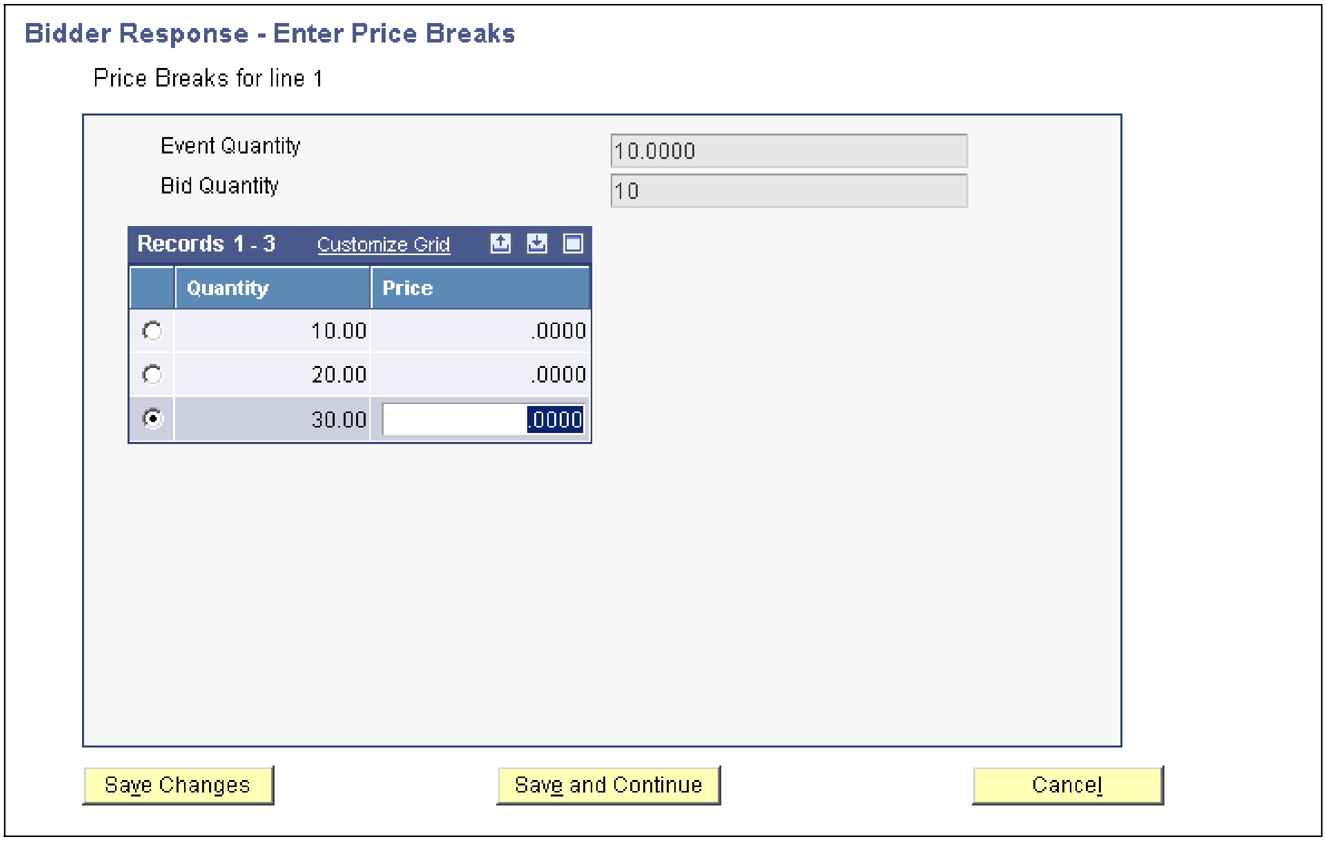


Enter Price Breaks form

Enter the quantities and corresponding prices at which the buyer can receive a price break. When you are finished, click Save and Continue.

Entering Buyer Price Breaks

Access the Enter Price Breaks form.

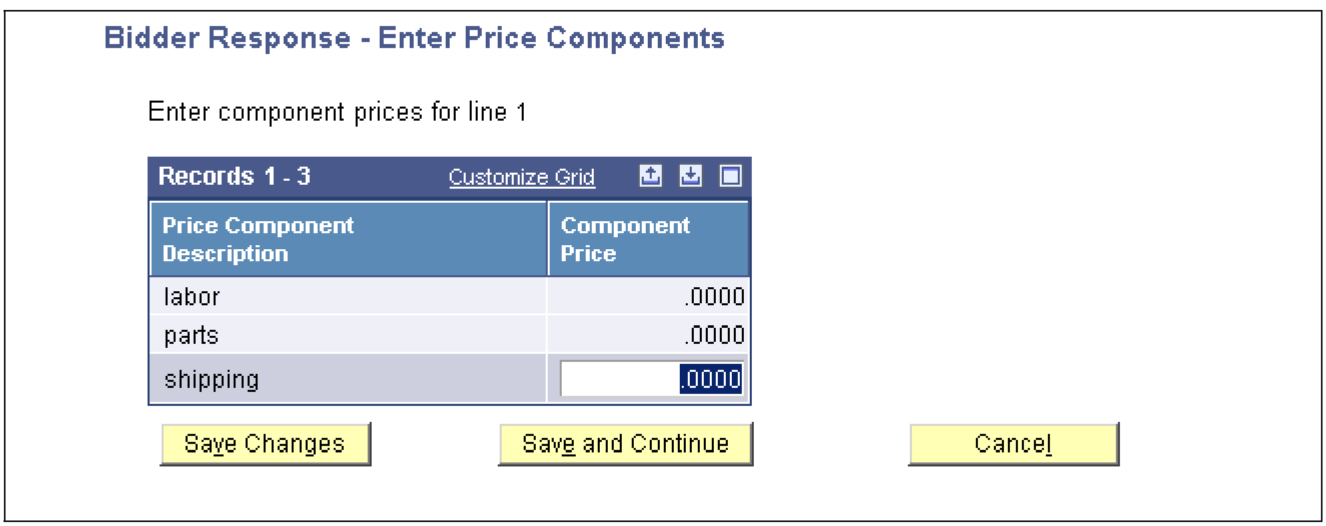


Enter Price Breaks form

Enter prices for the quantities defined by the buyer and then click Save and Continue.

Entering Price Components

Access the Enter Price Components form.

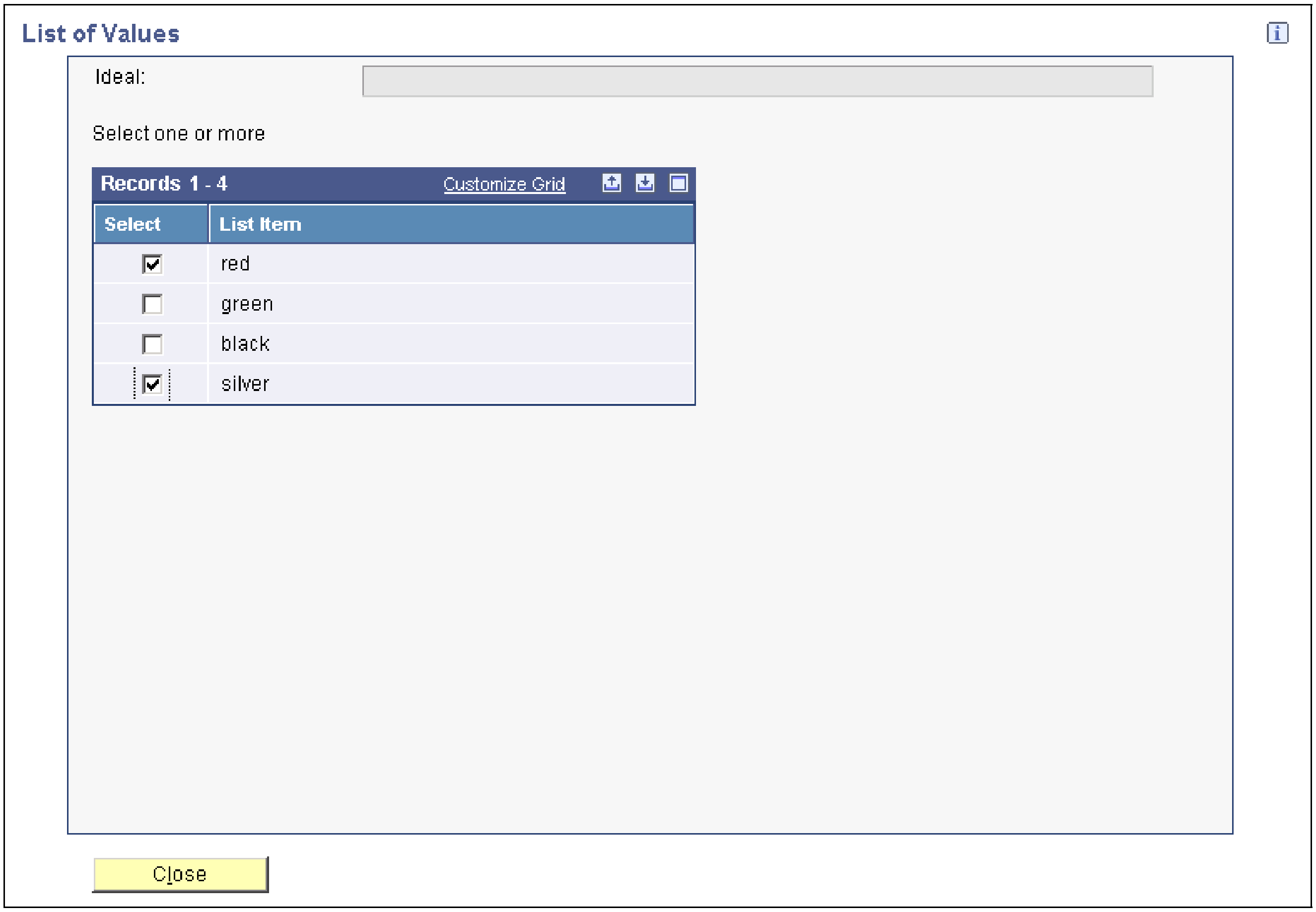


Enter Price Components form

Enter a price for each component and then click Save and Continue.

Selecting Values for a List Question

Access the List of Values form.



List of Values form

Select values from the list and then click Close. The system allows you to select more than one value only when the Allow Multiple Selection option for the list question is selected.

Reviewing Bid History

This section provides an overview of bid history review and discusses how to review bid history.

Understanding Bid History Review

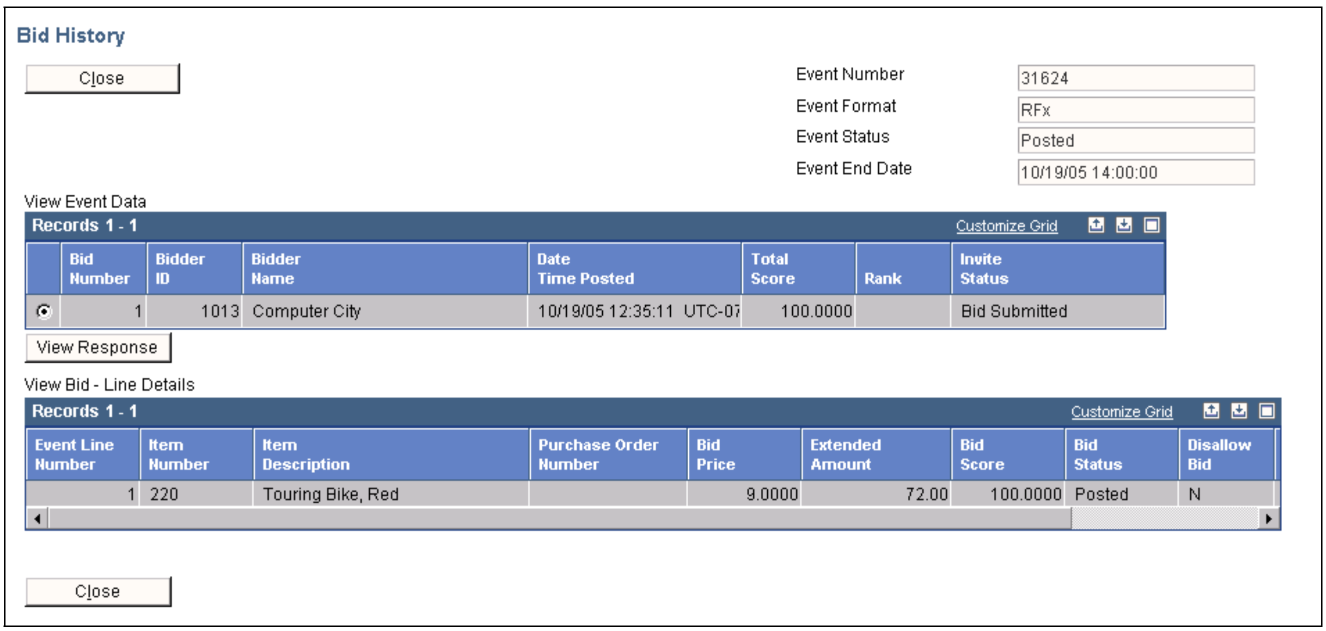
If the buyer has selected the Display Bid History Page option for the event, bidders can review their bid history after submitting their bid. When reviewing their history, bidders cannot change any of their responses, but they can contact the buyer if they need additional information.

Forms Used to Review Bid History

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Portal	Search for the event that you want to preview.
Bid History	W43Q41D	Click View in the Bidder History field on the Search for Events form.	Review lines and click View Response.
Overview and Questions form	W43Q42B	Click View Response on the Bid History form.	Review overview information for the event.
Answer Product or Service Questions	W43Q411A	Click Products or Services on the Overview and Questions form.	Review responses to event questions.

Reviewing Bid History

Access the Bid History form.


Bid History

Close

Event Number	31624
Event Format	RFx
Event Status	Posted
Event End Date	10/19/05 14:00:00

View Event Data

Records 1 - 1 Customize Grid

	Bid Number	Bidder ID	Bidder Name	Date Time Posted	Total Score	Rank	Invite Status
	1	1013	Computer City	10/19/05 12:35:11 UTC-07	100.0000		Bid Submitted

View Response

View Bid - Line Details

Records 1 - 1 Customize Grid

Event Line Number	Item Number	Item Description	Purchase Order Number	Bid Price	Extended Amount	Bid Score	Bid Status	Disallow Bid
1	220	Touring Bike, Red		9.0000	72.00	100.0000	Posted	N

Close

Bid History form

Review event information. To review more detailed information or to review responses to questions, click View Response and then click Products and Services on the Overview and Questions form.

APPENDIX A

Tables Used by the Operational Sourcing System

This appendix discusses the tables used by the JD Edwards EnterpriseOne Operational Sourcing System.

Tables Used by the Operational Sourcing System

This table lists the JD Edwards EnterpriseOne Operational Sourcing system tables:

Table	Description
Event Header (F43Q10)	Stores event header information, such as business unit, company, start times, event properties, payment information, and buyer contact information.
Event Detail (F43Q11)	Stores information for each line in an event, such as item number and description, quantity, and line weight.
Event Currencies (F43Q15)	Stores the currencies in which bidders can submit their bids for an event and the corresponding exchange rate.
Event Header Bid Questions (F43Q20)	Stores the header questions attached to each event, along with information such as best and worst values, ideal answers, and question weights.
Event Header Bid Question List (F43Q201)	Stores the list questions attached to an event and the list of values from which bidders can select responses.
Event Detail Bid Questions (F43Q21)	Stores the questions attached to each line in an event, along with information such as best and worst values, ideal answers, and question weights.
Event Detail Bid Question List (F43Q211)	Stores the list questions attached to each line in an event and the list of values from which bidders can select responses.
Event Detail Bid Question Price Component (F43Q212)	Stores the price component information for each line in an event.
Event Detail Price Break (F43Q213)	Stores the price break information for each line in an event.
Event Invited Bidders (F43Q30)	Stores the bidders and suppliers who were invited to each event and information such as address book number, email address, fax number, bid status (accepted, declined, submitted, and so on), and search type.

Table	Description
Event Bidder Password Temp Table (F43Q35)	Stores the address book numbers of bidders and suppliers who have been invited to events and their passwords.
Response Header (F43Q40)	Stores the address book numbers of bidders and suppliers who have responded to an event and information such as their bid status and their header score.
Response Header Question (F43Q401)	Stores the responses to all header questions for each bidder and supplier who are participating in an event.
Response Header Question List (F43Q402)	Stores the responses to list questions of each bidder and supplier participating in an event.
Bidder Response Decline (F43Q403)	Stores the bidders and suppliers who have declined an event invitation and their reason for declining.
Response Disallow (F43Q404)	Reserved for future use
Response Disallow Line (F43Q405)	Reserved for future use
Response Line (F43Q41)	Stores the line information for each bid for an event, including the quantity, bid amount, question score, and the promised delivery date.
Response Detail Question (F43Q411)	Stores the responses to all line questions and the corresponding score for each bidder and supplier who are participating in an event.
Response Detail Question Price Break (F43Q412)	Stores bidder price break information for each event, including price break quantity and price.
Response Detail Question Price Components (F43Q413)	Stores price component information for each event, including component description and price.
Response Detail Question List (F43Q50)	Stores the responses to list questions of each bidder and supplier participating in an event.
Analyze Event Detail (F43Q51)	Stores analysis information by event line for each event, including bidder or supplier number, item number, bid amount, bid question score, award action, award quantity, and award percentage.
Bid Questions (F43Q60)	Stores all bid question templates and their associated information, such as effective date range, best and worst values, and weight.
Bid Question List Values (F43Q61)	Stores the values for list questions.
Bid Question Price Component (F43Q62)	Stores component information for price questions, including the component descriptions, question weights, and associated item or commodity values.
Sourcing Constants (F43Q90)	Stores the values specified in the JD Edwards EnterpriseOne Operational Sourcing system constants.

Table	Description
Bidder Registration (F43Q91)	Stores bidder registration information such as address book number, currency codes, minimum and maximum order values, and tad identification number.
F43Q911 – Bidder Country VAT (F43Q911)	Stores VAT (value added tax) information for bidders, such as country and VAT identification number.
Adhoc Item Definition (F43Q92)	Stores information for items that are added on an ad hoc basis during RFx creation, such as item number, stocking type, location, and so on.

Glossary of JD Edwards EnterpriseOne Terms

activity	A scheduling entity in JD Edwards EnterpriseOne tools that represents a designated amount of time on a calendar.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.
application server	A server in a local area network that contains applications shared by network clients.
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
alternate currency	A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction. In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
back-to-back process	A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.
batch processing	A process of transferring records from a third-party system to JD Edwards EnterpriseOne. In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.
batch server	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
batch-of-one immediate	A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect and store-and-forward.
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules,

and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.

business function event rule See named event rule (NER).

business view A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.

central objects merge A process that blends a customer's modifications to the objects in a current release with objects in a new release.

central server A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.

charts Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.

connector Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.

contra/clearing account A general ledger account in JD Edwards EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in JD Edwards EnterpriseOne Financial Management.

Control Table Workbench An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.

control tables merge A process that blends a customer's modifications to the control tables with the data that accompanies a new release.

cost assignment The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.

cost component In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).

cross segment edit A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.

currency restatement The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.

database server A server in a local area network that maintains a database and performs searches for client computers.

Data Source Workbench An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail information	Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
enterprise server	A server that contains the database and the logic for JD Edwards EnterpriseOne.
EnterpriseOne object	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
EnterpriseOne process	A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
Environment Workbench	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the system-release number data source. It also updates the Environment Plan detail record to reflect completion.
escalation monitor	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a "business unit."
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
interface table	See Z table.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access JD Edwards EnterpriseOne.
in-your-face-error	In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	This internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
jargon	An alternative data dictionary item description that JD Edwards EnterpriseOne appears based on the product code of the current object.
Java application server	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log	The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.
JDENET	A JD Edwards EnterpriseOne proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all JD Edwards EnterpriseOne supported platforms.
Location Workbench	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the system data source.
logic server	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.
MailMerge Workbench	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
master business function (MBF)	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
master table	See published table.
matching document	A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
media storage object	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
message center	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.
messaging adapter	An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.
messaging server	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
named event rule (NER)	Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
nota fiscal factura	In Brazil, a nota fiscal with invoice information. See also *nota fiscal.*

Object Configuration Manager (OCM)
In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.

Object Librarian
A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.

Object Librarian merge
A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

Open Data Access (ODA)
An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA)
An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package
JD Edwards EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.

package build
A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.

Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”

package location
The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.

Package Workbench
An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the system-release number data source. It also updates the Package Plan detail record to reflect completion.

planning family
A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

preference profile
The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.

print server
The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.

pristine environment
A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option — A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

production environment — A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.

production-grade file server — A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

program temporary fix (PTF) — A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

project — In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path — The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

proxy server — A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

published table — Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

publisher — The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

pull replication — One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.

QBE — An abbreviation for query by example. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event — A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when certain transactions occur.

refresh — A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

replication server — A server that is responsible for replicating central objects to client machines.

quote order — In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.

selection

Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.

Server Workbench

An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number data source. It also updates the Server Plan detail record to reflect completion.

spot rate

An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.

Specification merge

A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.

specification

A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.

Specification Table Merge Workbench

An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.

store-and-forward

The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.

subscriber table

Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.

supplemental data

Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.

For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.

table access management (TAM)

The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.

Table Conversion Workbench

An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table conversion

An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table event rules

Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.

terminal server

A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing — The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.

three-way voucher match — In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.

transaction processing (TP) monitor — A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.

transaction set — An electronic business transaction (electronic data interchange standard document) made up of segments.

trigger — One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.

triggering event — A specific workflow event that requires special action or has defined consequences or resulting actions.

two-way voucher match — In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.

User Overrides merge — Adds new user override records into a customer's user override table.

variance — In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.

Version List merge — The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.

visual assist — Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.

vocabulary override — An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.

wchar_t — An internal type of a wide character. It is used for writing portable programs for international markets.

web application server — A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.

web server — A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.

Windows terminal server — A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

workbench A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.

work day calendar In JD Edwards EnterpriseOne Manufacturing, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

workflow The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.

workgroup server A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.

XAPI events A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.

XML CallObject An interoperability capability that enables you to call business functions.

XML Dispatch An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.

XML List An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.

XML Service An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.

XML Transaction An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS) Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.

Z table A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.

Z transaction Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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