

Oracle® Exchange

Implementation and Setup Guide for Marketplace Exchange

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Preface

This document describes how to set up the Marketplace Exchange.

The setup of other Exchange applications is documented in separate setup guides. (See **Related Documentation**, below.)

Intended Audience

This document is written for the following audiences:

- The Exchange Operator, who establishes the Exchange and is in charge of the day-to-day operation of the Exchange site.
- Companies (buyers and sellers) who register on the Exchange, particularly the designated Exchange Company Administrator for the company, procurement professionals in the company, and catalog authors.
- Any non-technical professional who helps either of the above parties in implementing the Marketplace Exchange.

Structure

This manual describes the following:

Chapter 1, "Marketplace Exchange Overview"

This chapter is an overview of the functionality in the Marketplace Exchange.

Chapter 2, "Exchange Operator Application Setup"

This chapter contains the implementation steps that the Exchange Operator needs to perform after the Exchange software has been installed and before launching the Marketplace Exchange.

Chapter 3, "Marketplace Exchange Application Setup"

This chapter contains the setup steps that each company (specifically, the Company Administrator, Purchasing Manager, and Catalog Author) needs to perform before conducting transactions on the Exchange.

Appendix A, "Registration"

This appendix contains information about the Exchange registration process.

Appendix B, "Catalog Management"

This appendix contains information about the Exchange catalog.

Appendix C, "Drop-Down Menu Configuration"

This appendix contains a complete list of the drop-down menus whose values the Exchange Operator can configure.

Appendix D, "Marketplace Exchange Workflows"

This appendix describes which processes in the Marketplace Exchange are controlled by Oracle Workflow technology.

Related Documents

Other Exchange application setup guides are as follows:

- *Product Development Exchange Setup Guide*
- *Supply Chain Hub Setup Guide*

Other documentation includes the following:

- *Oracle Exchange Installation Guide*—for instructions on installing the Exchange.
- *Oracle Marketplace Exchange Technical Reference Manual*—for information on the Marketplace Exchange data model.

Conventions

The following terms are used commonly in this setup guide:

Exchange Operator

The Exchange Operator is in charge of the setup and day-to-day operation of the Exchange site such as creating catalog categories, specifying billing charges for use of the Exchange services, approving companies that register, and modifying the user interface.

Exchange Company Administrator

The Exchange Company Administrator registers his or her company on the Exchange and is responsible for setting up the Exchange for the company, approving users and affiliates, and performing ongoing administrative tasks as needed.

Independent Entity

A company that registers as an independent entity on the Exchange will not be associated as an affiliate (subsidiary, division, or branch) of any other company and must be approved by the Exchange Operator. Other companies, such as subsidiaries, divisions, or branches, can register as affiliates of the independent entity (with the independent entity's approval).

Affiliate

Other companies, such as subsidiaries, divisions, or branches, can register as affiliates of parent companies (independent entities or other affiliates). The parent company must approve the affiliation.

User

Individuals within a company can register specifically as users of the already-registered company. The Exchange Company Administrator of the company approves the user's registration.

Buyer (or Buying Company)

Any company registered on the Exchange that functions as a buyer (ordering items, managing price changes submitted by sellers, creating buyer auctions, and so on).

Seller (or Supplier or Selling Company)

Any company registered on the Exchange that functions as a seller (adding catalog items, accepting orders created by buyers for the goods it sells, creating seller auctions, and so on).

Purchasing Manager

A user who is assigned the "Purchasing Manager" job function, which enables the user to export suppliers' catalogs, manage pricing changes submitted by suppliers, and view buyer intelligence reports.

Catalog Author

A user who is assigned the "Catalog Author" job function, which enables the user to add or update a seller's catalog items or services and prices to the Exchange unified catalog.

Unified Catalog

A central catalog repository where all sellers can add their catalog items under a basic, common catalog structure.

Job Functions

A job function consists of one or more tasks that users can perform on the Exchange. For example, two of the tasks that a job function called "Seller" includes are "Create, cancel, and award Seller Auctions" and "Bid in Buyer Auctions." An Exchange user who has been assigned this job function can perform these tasks.

Marketplace Exchange Overview

This section provides an overview of the Marketplace Exchange to help you understand the kinds of functionality that you can implement.

Note: Further details about the functionality described in this chapter are available in the setup steps in Chapters 1 and 2 and in the Exchange online Help (when you click the "Help" button on the Exchange) after you register. (Online Help about the registration process and details is available before you register.)

The Marketplace Exchange consists of the following functional areas described in this chapter:

- [Registration and Administration](#) (accessible through the "Company Admin" application link on the Exchange home page) on page 1-2
- [Catalog Hosting](#) (accessible through the "Marketplace Selling" application link on the Exchange home page) on page 1-5
- [Marketplace Purchasing](#) (accessible through the "Marketplace Buying" application link on the Exchange home page) on page 1-9
- [Negotiations](#) (accessible through the "Marketplace Selling" and "Marketplace Buying" application links on the Exchange home page) on page 1-13
- [Exchange Operator](#) (accessible to the Exchange Operator only) on page 1-18
- [Marketplace Intelligence](#) (accessible through the "Marketplace Selling," "Marketplace Buying," and the Exchange Operator applications) on page 1-21
- [Multilingual, Global Support](#) is also described on page 1-24.

The following illustration shows how each functional area is accessible through the Applications links on the Exchange home page:



Registration and Administration

The Registration and Administration functionality of the Exchange is part of the "Company Administration" application.

A designated Exchange Company Administrator administers the Exchange for its users, such as setting a default company currency, loading approval hierarchies for orders that its buyers create on the Exchange, and approving additional users and affiliate companies who register.

Self-Service Registration

- Companies and individuals (users within the company) can submit registration requests online. An easy online registration process collects all data needed to set up user or company accounts.
- The first person to register in his or her company is automatically made the default Exchange Company Administrator for that company. This person can

also designate others in his or her company as Exchange Company Administrators.

- From within the registration pages, the registrant can send the Exchange legal terms and conditions to a third-party legal approver. ([Appendix A](#) provides a complete picture of the registration process.)
- An automated, workflow-driven process routes registration requests to the appropriate approvers. Company registrations are routed to the Exchange Operator for approval. Affiliate and user registrations are routed for approval to the Exchange Company Administrator of the company they are registering under. Workflow-driven e-mail notifications notify both the registrant and the approver of the ongoing approval status.
- Approvers easily approve or reject requests online and can provide a rejection reason.
- Registrants can check their approval status online on the Exchange.
- The Exchange supports hierarchical registration. (See [Registration and Administration Hierarchy](#) in [Appendix A](#) for more information.)
- The Exchange Company Administrator can also administer for its affiliate companies. (See [Registration and Administration Hierarchy](#) in [Appendix A](#) for more information about how this works.)

Bulk Registration

- The Exchange Operator and Exchange Company Administrators can bulk load XML documents to the Exchange to add registrants all at once. The bulk load file can also include updates to existing user and company information.
- Individual approval is not required for bulk load registration, since all individuals and companies in the bulk loaded XML document are considered automatically approved. (The "approval" is already given by the Exchange Operator or Exchange Company Administrator bulk loading the registrants.)

Function Security

- "Job functions" enable the Exchange Operator and Exchange Company Administrator to control people's access to Exchange features and tasks (specifically, links and pages within the Exchange). For example, not all users in a particular company will be allowed to bulk load items to the Exchange catalog. Only users assigned the "Catalog Authoring" job function can perform this task.

- The Exchange Operator delegates job functions to companies. The Exchange Company Administrator in turn assigns all or a subset of those job functions to its users and affiliates.

Profile Information

- Exchange Company Administrators maintain a company-wide profile, which other Exchange participants can view in the Trading Partner Directory.
- The Exchange Company Administrator sets company-wide profile information, but users in that company can change that information for themselves.
- Users maintain their own profile and preferences, such as preferred language, time zone, and credit card information. The Exchange Company Administrator and Exchange Operator can also view and maintain some of the profile information. (The Exchange Operator can change user profiles, but not company profiles. For example, the Exchange Operator can reset a user's password if the user forgot it.)

Company Settings

The Exchange Company Administrator controls the following company-wide settings:

- Transactions (such as purchase orders and invoices) that the company wants delivered to or from its system electronically, via XML, and the data mapping settings to be used in the transaction deliveries.
- Currency conversion rates, via bulk loading. At the company level, the Exchange Company Administrator bulk loads currency conversion rates for negotiations and order approvals. At the Exchange level, the Exchange Operator bulk loads currency conversion rates for billing purposes. (For more information on currencies, see [Multilingual, Global Support](#) on page 1-24.)
- Trading partner key words, to enable people to search for a company or catalog items using words other than an exact company name. If a company is using the "punchout" functionality to host its catalog on the Exchange, trading partner key words are the only way a buyer's search for an item will return the supplier's hosted catalog. See [Punchout to Supplier-Hosted Catalogs](#) on page 1-8.

Address Book

The Exchange Company Administrator can create a company address book and a personal address book. The company address book stores a company's complete list of shipping and billing addresses. Users in that company inherit the company addresses and can decide to keep them as their own address(es), or create their own address(es) in "My Exchange," if the Exchange Company Administrator allows them. The Exchange Company Administrator can create additional bill-to, ship-to, and ship-from addresses that will appear in drop-down menus for transactions that buyers in that company create. The Exchange Company Administrator can enforce these addresses or allow users to create their own.

On Hold and Deactivation

The Exchange Operator can prevent individuals and companies from logging in by placing a company on hold or deactivating a company or user. Typically, the Exchange Operator places a company on hold when there is a billing problem. When the Exchange Operator puts a company on hold, only the Exchange Company Administrator can log in to update billing information. The Exchange Operator can place only a company (not a user) on hold.

When the Exchange Operator deactivates a company, no one in that company or that company's affiliates, including the Exchange Company Administrator, can log in; when the Exchange Operator deactivates a user, that user cannot log in.

Only the Exchange Operator can place holds or deactivate companies or users.

Catalog Hosting

The Catalog Hosting functionality is part of the "Marketplace Selling" application.

The Catalog Hosting functionality enables a designated Catalog Author to add items, through online entry or bulk loading, to the Exchange catalog. A company can also host its own catalog on the Exchange.

For more details on the Exchange unified catalog, see [Appendix B](#).

Catalog Repository

The Exchange catalog repository enables catalog authors to do the following:

- Publish items in a single unified catalog by using online entry or bulk load files.
- Specify base, category, and pricing attributes for items and services.

- Classify items into a standard format determined by the Exchange Operator. The Exchange Operator uses categories and attributes to help catalog authors structure and define catalog items. Buyers can then easily compare different suppliers' item details using common attributes.

Self-Service Catalog Management

The Exchange catalog functionality enables catalog authors to do the following:

- Add and maintain item and price information online, using a self-guided interface.
- Load large catalogs in bulk via XML files or spreadsheet templates:
 - Download instructions (including XML file examples) and a DTD to help prepare XML bulk load files. Download instructions (including examples) and a spreadsheet text file to help prepare spreadsheet bulk load files.
 - Correct or delete rejected catalog content online using a self-guided view-and-resubmit page. (Authors can also correct errors in the file and bulk load the file again.)
 - Configure the catalog loader for error handling. In the bulk load page, the catalog author can ask the Exchange to cancel the upload after a certain number of errors are found.
 - Choose whether to review and approve catalog items before publishing them to the live catalog. If the catalog author sets this option, the catalog items and prices in the bulk load are not available on the Exchange until the author publishes them; otherwise, the successfully loaded changes are published when the bulk load process finishes.
- Bulk load images to the Exchange and attach these images to items if the Exchange Operator has allowed image hosting on the Exchange.
- Specify both marketplace prices (list prices that all buyers on the Exchange can see) and buyer prices (prices that only specific buyers can see) for items. Catalog authors can also specify a "To Be Determined" price if they want the buyer to contact the supplier for the latest price or to purchase the item through negotiation (using the Negotiations functionality).
- Ensure that the content is valid. The Exchange validates the information as it is entered online or bulk loaded. For example, the Exchange makes sure the currency is an ISO standard currency code.

- Download one's own catalog items and prices from the Exchange into a single file, then update or translate the file and bulk load it again. Download other companies' catalogs if the catalog owner has given permission to do so.
- Receive buyer approval of buyer price changes. (Users with a "Purchasing Manager" job function can elect to review and approve seller price changes that exceed a tolerance that they define. See [Buyer Pricing Approval](#) in Appendix B.)
- Appoint third-party content providers to handle catalog management. (The Exchange Operator can also appoint a third-party content provider for all of the Exchange. See [Overview of Third-Party Catalog Authoring](#) in Appendix B.)

Self-Guiding Catalog Searches

The Exchange enables catalog authors to search, sort, and filter the catalog items they have added to the Exchange unified catalog:

- Perform simple text searches to review or add items and prices online. The searches include (in order) stemming, fuzzy matching, and "begins with" searches if an exact match is not found. For example, if a search term is "printer" the search engine finds the stem derivatives "print," "printing," "prints," "printer," and so on. A search on "telefone" will return the fuzzy match "telephone." If a search term is "lead pen," the search engine returns anything that begins with these words, such as "leaded pencils."
- Perform a search within a search, enclose search criteria in quotation marks to search for an exact phrase, or use wildcards to expand the search.
- Search multilingual catalogs by changing the session language (the language on the Exchange home page).
- See search results ranked by relevance. The items that most closely match the search criteria are displayed at the top of the list.
- Sort items by attributes such as price, supplier name, description, category, unit of measure, or currency.
- Filter search results. Filtering search results enables catalog authors to narrow their search by eliminating irrelevant items. Once they choose the value by which they want to filter the items, all items that do not match that value are filtered out of the search results.
- Select an item on the **Search Results** page and click the "Edit Attributes," "Edit Pricing," or "Delete" buttons to make edits online.

Punchout to Supplier-Hosted Catalogs

Instead of adding items to the Exchange unified catalog, sellers can set up the Exchange to host their own catalogs:

- Create a link on the Exchange that goes directly to the supplier-hosted catalog. Buyers can add items from the supplier-hosted catalog directly to their shopping carts on the Exchange.
- Download supplier-hosted configuration instructions from the Exchange. This download includes a Readme file with detailed instructions for setting up a supplier-hosted catalog on the Exchange.
- Define key words that describe the product or service offerings. If the buyer enters a search that matches these key words, a link to the supplier-hosted catalog will appear on the buyer's **Search Results** page. For example, if a supplier's name is "Red and White" and it sells wine, it will enter "wine" as a key word. Any time a buyer searches for wine, the supplier's hosted catalog will appear as a link on the **Search Results** page.

Supplier-hosted catalogs do not have to follow the Exchange unified catalog structure.

Real-Time Price and Availability Information

The seller can export an item's availability into the Exchange. When searching for items in the Exchange unified catalog, buyers can click a "Check Availability" button for an item to display this information from the seller.

Catalog Schema Management Tools

The Exchange Operator can control the catalog structure:

- Create new categories, add new base attributes and category attributes, and create category hierarchies. For example, the Exchange Operator can nest the category "Ball Point Pens" under a category called "Office Supplies."
- Add and update categories and attributes by bulk loading them in a single XML file, or add and update categories and attributes online, through a self-guided process. (Or do both.)
- Set up popular category lists. Buyers on the Exchange see this list and can browse them directly for commonly ordered items.

- Download categories, base attributes, category attributes, and the category hierarchy in a single XML file. The Exchange Operator can then modify or translate the file and bulk load it again.

Marketplace Purchasing

The Marketplace Purchasing functionality is part of the "Marketplace Buying" application.

The "Marketplace Buying" application is where buyers create, view, manage, and approve orders. It is also where a designated Purchasing Manager chooses price approval rules (to approve buyer prices that a seller created for its company) and downloads (with the seller's approval) a particular seller's catalog items.

Preference Settings at Operator, Company, and User Level

The appointed Exchange Company Administrator can select settings that are defaulted on orders that buyers in that company create. Default settings include payment methods, carrier types, and the currency in which buyers conduct transactions on the Exchange.

Buyers within the company can modify their own settings for time zones, language, and credit card information in the **Edit Personal Information** page.

Purchasing Manager

The appointed Purchasing Manager (the user to whom the Exchange Company Administrator has assigned the "Purchasing Manager" job function or the "Set Pricing Approval Rules" task) can specify price tolerances for items. If a seller's price change exceeds this tolerance, the item is not published to the buyer until the Purchasing Manager approves it. See the information about Buyer Pricing Approval in Appendix B for details.

Self-Guiding Item Searches

The Exchange enables buyers to search, sort, and filter catalog items:

- Perform simple text searches. The searches include (in order) stemming, fuzzy matching, and "begins with" searches if an exact match is not found. For example, if a search term is "printer" the search engine finds the stem derivatives "print," "printing," "prints," "printer," and so on. A search on "telephone" will return the fuzzy match "telephone." If a search term is "lead pen,"

the search engine returns anything that begins with these words, such as "lead pencils."

- Perform a search within a search, enclose search criteria in quotation marks to search for an exact phrase, or use wildcards to expand the search.
- Perform advanced searches using attributes such as Price or Manufacturer (for example, you could search for a Description of "laserjet printer," a Supplier of "Hewlett-Packard," and Price range of \$500 to \$1,000).
- Search multilingual catalogs. Sellers can bulk load items in any installed Exchange language. Buyers can choose which language to search in from a "Language" drop-down menu at the "Search" field, even if that language is different than the one they are currently using on the Exchange.
- See search results ranked by relevance. The items that most closely match the search criteria are displayed at the top of the list.
- Sort items by attributes such as price, supplier name, description, category, unit of measure, or currency.
- Filter search results. Filtering search results enables buyers to narrow their search by eliminating irrelevant items. Once they choose the value by which they want to filter the items, all items that do not match that value are filtered out of the search results.
- Compare item information side by side and check items' availability (if the supplier has set up the "Configure Item Availability" transaction).
- View detailed item information from the **Search Results** page, including images and attachments.

Easy Purchasing Process

Buyers can create orders on the Exchange by doing the following:

- Click the "Add to Shopping Cart" icon after searching for and finding the desired items, and follow the step-by-step guidance on the order pages for completing the order or adding additional items.
- Enter free-form text, notes, and attachments on the order and send different line items to different addresses.
- Reorder items by selecting a previously created order and clicking the "Reorder" button. If items on the previous order are no longer available in the Exchange catalog, the Exchange informs the buyer and does not include those items on the new order.

- Transfer the items in the shopping cart to an auction, request for quotation (RFQ), or offer to negotiate a better price.

Order Approval Hierarchy

The Exchange Company Administrator (or Purchasing Manager) can specify approval limits and approving managers for each Exchange-registered user to create a "supervisory" approval hierarchy. The Exchange automatically routes orders outside the buyer's approval limit to the designated approvers, using e-mail notifications with links to the order on the Exchange.

Real-time Order Tracking

- Both buyers and sellers can use a **View Orders** page to track their order status and order history (who approved the order when; buyer, approver, or supplier notes; order cancellations; and order receipt confirmations).
- E-mail notifications remind approvers and suppliers to respond to an order, and let buyers know whether an approver or supplier has approved or accepted their order.

XML Transactions and Transaction Delivery

The Exchange Company Administrator can choose which transactions to send and receive via the Exchange in the form of XML documents. These transactions can be sent from a buyer's or seller's external enterprise resource planning (ERP) system to the Exchange, or from the Exchange to the buyer's or seller's ERP system.

The transaction documents are labeled as "outbound" or "inbound." These labels are given in relation to the Exchange. Any document that is sent from the Exchange to a seller or buyer is called an "outbound" transaction. Any document that is generated by a seller's or buyer's system and sent to the Exchange is called an "inbound" transaction.

Buyers and sellers can choose whether to send or receive the following transactions:

- **Purchase Order Outbound to the Buyer.** Each order the buyer creates on the Exchange is sent automatically from the Exchange to the buyer's system.
- **Purchase Order Inbound from the Buyer.** The buyer can export orders created in its own system to the Exchange. The sellers can view these orders like any other order created on the Exchange and, if desired, choose to import them to the seller's own system.

- **Purchase Order Acknowledgment Outbound to the Buyer.** After a seller has acknowledged a purchase order, the Exchange forwards the purchase order acknowledgment from the seller to the buyer.
- **Purchase Order from Negotiation Outbound to the Buyer.** After a buyer creates an auction or RFQ, the buyer can click a button to create a purchase order from the auction or RFQ and import the purchase order to the buyer's system.
- **Sales Order Outbound to the Seller.** The seller receives any order the buyer creates on the Exchange or exports into the Exchange.
- **Purchase Order Acknowledgment Inbound from the Seller.** Instead of acknowledging orders online, the seller can export purchase order acknowledgments generated by its own system into the Exchange. The Exchange then forwards the inbound purchase order acknowledgment to the buyer.
- **Purchase Order Cancel Outbound.** When a buyer cancels a purchase order and its status changes to "Cancelled," the Exchange will forward the cancelled purchase order to the buyer using the buyer's selected communication method and to the supplier using the supplier's selected communication method. Buyers can cancel orders in the "Marketplace Buying" and "Transportation" applications.
- **Purchase Order Change Outbound.** Buyers can change purchase orders using the "Transportation" application. The Exchange will forward the changed order to the buyer via the buyer's selected communication method and to the supplier via the supplier's selected communication method.
- **Advance Shipment Notices (ASNs) Inbound from the Seller.** The seller generates an advance shipment notice to inform the buyer about an arriving order, and sends the ASN to the Exchange. (Buyers and sellers cannot view ASNs on the Exchange.)
- **Advance Shipment Notices (ASNs) Outbound to the Buyer.** The Exchange forwards a seller's inbound advance shipment notice to the buyer. (Buyers and sellers cannot view ASNs on the Exchange.)
- **Invoices Inbound from the Seller.** The seller generates an invoice against a purchase order and sends it to the Exchange. (Buyers and sellers cannot view invoices on the Exchange.)
- **Invoices Outbound to the Buyer.** The Exchange forwards the seller's inbound invoice to the buyer. (Buyers and sellers cannot view invoices on the Exchange.)

Transaction delivery on the Exchange:

- Ensures secure, guaranteed delivery of business documents.
- Offers multiple communication methods, such as HTTP, HTTPS, Oracle Message Broker, and WebMethods (a third-party licensed product).
- Supports Open Applications Group (OAG) XML standards.

Data Mapping

When transaction documents (in OAG XML format) are exchanged between buyers and sellers and the Exchange, data mapping is used to define the conversions between the buyers' and sellers' codes and those used on the Exchange. The Exchange Company Administrator of the buying and selling companies enters the conversions (translations) they use. (For an example, see [Step 4 Enter Transaction Delivery Data Mappings \(Optional\)](#) on page 3-30.)

Punchout from Oracle iProcurement

Oracle iProcurement can "punchout" to the Exchange. Buyers using iProcurement can punchout to a supplier's catalog that is hosted on the Exchange (see [Punchout to Supplier-Hosted Catalogs](#) on page 1-8) and add items from that catalog to their iProcurement shopping carts.

Negotiations

The Negotiations functionality is available in the "Marketplace Selling" application for creating sellers' auctions, offers to sell, and quotations, and in the "Marketplace Buying" application for creating buyers' auctions, offers to buy, and requests for quotation (RFQs). Negotiations allow buyers and sellers to obtain the best possible price for goods and services.

ATTENTION: The Offers functionality described here and throughout this manual is not available in the initial Release 6.2. Offers will be available in the first revision of Release 6.2.

Table 1–1 Summary of Negotiations Types

	Auctions	RFQs	Offers
Characteristics	Allow auctioneers to solicit bids for goods and services that are clearly defined—for example, office furniture and memory chips.	Allow buyers to collect quotations from suppliers for complex and hard-to-define items or services—for example, made-to-order manufacturing or construction projects. Once suppliers have submitted an initial round of proposals, buyers have the power to fine-tune their request and initiate detailed negotiations, as necessary. This process may go through multiple rounds of negotiations and quotations.	Used for near-commodity items that may have multiple item attributes that are easy to define and understand—basic chemicals, for example, where there is no product differentiation and price changes are mostly influenced by supply and demand. Suppliers or buyers either counter an offer to negotiate the price (counteroffer) or agree to meet an offer (commitment). An offer closes when a commitment is made, even if the date and time have not arrived.
Initiated By	Buyers and sellers.	Buyers only.	Buyers and sellers.
Response Document	A response to an auction is called a bid.	A response to an RFQ is called a quotation.	A response to an offer is called a counteroffer.
Types	Buyer's (or Reverse) Auctions and Seller's (or Forward) Auctions.	RFQs are created by buyers only.	Offers to Buy and Offers to Sell.
Styles	Open, blind, or sealed.	Blind or sealed.	Offers are always blind.
Multiple Rounds Supported?	Auctioneers can choose whether to allow multiple rounds of bidding.	RFQs can lead to multiple rounds of negotiating.	Counteroffers serve as multiple rounds of negotiating until a commitment is made.
Can Include Multiple Items?	Yes.	Yes.	Each offer can only include a single item.

Negotiations Transactions

- There are three negotiations document types depending on a buyer's or seller's transaction requirements. (See the table above.)

- There are three auction styles (Open, Blind, and Sealed) and two RFQ styles (Blind and Sealed). Offers are always Blind.
 - **Open:** In an open auction, all Exchange members participating in the auction can see the bids in the auction, though the bidder identity is concealed. Since bidders can see the behavior and strategy of other bids in real time, open auctions can encourage competition among bidders to submit the best possible price.
 - **Blind:** In a blind auction or RFQ, only the creator of the auction or RFQ can see the bids.
 - **Sealed:** In a sealed auction or RFQ, the auction or RFQ creator cannot see the bids or quotations until the auction or RFQ is unlocked. The participants in the auction or RFQ cannot see the bids or quotations until the auction or RFQ is unsealed. For example, sealing an auction or RFQ from the creator prevents preferential treatment to preferred bidders.
- A guided online process enables easy creation of auctions, RFQs, and offers.
- Templates, reusable attributes lists, reusable invitation lists, and item uploads allow negotiation owners to streamline the auction, RFQ, and offer creation process.
- The Exchange enables the copying of existing auctions to create new auctions, existing RFQs to create new RFQs, and existing offers to create new offers.
- Negotiations are also accessible through the "Marketplace Purchasing," "Transportation," "Product Development," and "Supply Chain Exchange" applications. For example, while adding items to your shopping cart, a buyer can click an "Add to Negotiation" button to create a negotiation for the items instead of an order.

Detailing Your Negotiation

Negotiation owners have the following options:

- Create a Negotiation Event. A Negotiation Event is several related negotiations grouped together, enabling the creator to monitor related negotiations as a group. For example, a Negotiation Event encourages bidders to participate in multiple, similar auctions.
- Set the auction, RFQ, or offer to accept bids in multiple currencies.
- Specify and negotiate business terms and conditions on the auction, RFQ, or offer.

- Specify many items on a single auction or RFQ—over 3,000 lines via a spreadsheet item upload.
- Use response attributes to define the details that a participant should provide when responding to an item in an auction, RFQ, or offer. For example, when an auctioneer adds an item to an auction for vehicles, the auctioneer can add a bid attribute called "mileage" to specify that the bid item must have fewer than 12,000 miles on the odometer. The Exchange Operator or Exchange Company Administrator can also create Exchange-wide or company-wide negotiation attribute lists for repeated use.
- Define response rules for negotiations:
 - Autoextension rules. To encourage competitive bidding, auctioneers can set an auction to automatically extend by a specified period (for example, 20 minutes) if a bid is received during the final minutes (in this example, 20 minutes before the close) of the auction. Auctioneers can also set the number of AutoExtensions that can occur.
 - Partial quantity responses. Allowing partial quantity responses means the participant can submit a response for a quantity less than the quantity specified in the auction, RFQ, or offer.
 - Response to selected items. Negotiation owners can choose whether the respondent can respond to some of the items in the auction or RFQ instead of all of the items.
 - Re-bidding, or one best bid. Auctioneers can use bid controls to allow rebidding in auctions. If rebidding is not allowed, the bidder must submit the most competitive (one best) bid in the first attempt; if another bidder out-bids him, the bidder does not have an opportunity to go lower.
 - Minimum decrement or increment. Auctioneers can specify minimum rates or amounts of change between bids from a bidder.
- Create invitations to participate in negotiations, including to companies not registered on the Exchange. Individual negotiation owners can create reusable invitation lists, and the Exchange Company Administrator can create company-wide reusable invitation lists. (Invitation lists can include only registered Exchange companies.)
- Specify notes and attachments at the negotiation or item level.

Responding to a Negotiation (Placing a Bid, Quotation, or Counteroffer)

- Participants can respond to auctions, RFQs, and offers online. They can also respond to auctions or RFQs using a downloadable spreadsheet.
- Proxy bidding allows the Exchange to automatically rebid on the bidder's behalf whenever a competing bid price beats the bidder's bid price within a set limit.
- Power bidding allows bidders to streamline their rebidding when they have bid on several items in the same auction. Using power bidding, all of a bidder's bids (both losing and winning bids) in an auction will be improved by the percentage the bidder enters in the "Power Bid" field.
- If permitted by the auctioneer, bidders can rebid or create multiple bids for auctions.
- Participants can specify notes and attachments with their responses at the negotiation or item level.
- Multiple rounds of negotiating can occur.
- Once the negotiation is completed, participants are immediately notified of the results through online notifications.

Monitoring Negotiations

Everyone—negotiation owners and respondents—can monitor the status of negotiations online in real time:

- Bidders can choose whether to monitor auctions using the **AutoRefresh** page. On the **AutoRefresh** page, a drop-down menu enables the bidder to select the interval (every 30 seconds, 60 seconds, and so on) for the page to refresh.
- The Exchange provides graphs to monitor auctions and RFQs.

Updating the Negotiation

Negotiation owners can update the negotiation:

- Manually extend the negotiation by changing the close date and time or changing the AutoExtend setting.
- Close the negotiation by bringing the close date and time forward.
- Cancel the negotiation.
- Disqualify a bid or quotation.

Awarding the Negotiation

Awarding the negotiation includes the following options:

- Comparing bids and quotations.
- Awarding the negotiation online.
- Awarding the negotiation offline by downloading and reuploading a spreadsheet.
- Creating a standard or blanket purchase order XML document directly from a buyer's auction or RFQ. A standard purchase order is the outcome of a spot buy, buyer auction or RFQ. A blanket purchase order is the outcome of a long-term buyer auction or RFQ.

Exchange Operator

The Exchange Operator is in charge of the setup and day-to-day operation of the Exchange site such as creating catalog categories, specifying billing charges for use of the Exchange services, approving companies that register, and modifying the user interface.

Only the Exchange Operator has access to the Exchange Operator pages. When the Exchange Operator logs on using the Exchange Operator password (the Exchange Operator gets the password from the installation team), the Exchange displays Operator-only functions (shown in the illustration below). Additionally, the Exchange Operator shares some administration tasks with the Exchange Company Administrators. (See the Setup Overview tables in the next two chapters to see which tasks are shared.)

Exchange ***** Name


[Home](#) [Companies](#) [Billing](#) [Configuration](#) [Site Status](#) [Exchange Intelligence](#)
User Interface
[Identification](#)
[Customize Content](#)
[Edit List of Values](#)
[Customize Images](#)
[Customize Text](#)
Configuration
[Software Setup](#)
[Manage Job Functions](#)
[Manage Regions](#)
Catalog Schema
[Manage Base Attributes](#)
[Create Category](#)
[Edit Category](#)
[Maintain Catalog Hierarchy](#)
[Configure Popular Categories](#)
[Bulk Load Catalog Structure](#)
[View Bulk Load Status](#)
[Catalog Export](#)
[Catalog Export and Load Options](#)
[Manage Third Party Authoring](#)

Configuration and Setup

- Perform software setup, such as URLs and port numbers, character sets, directories, and integration settings.
- Enter site identification information, such as the Exchange name, e-mail addresses, and the default Exchange language and currency.

Branding

Using the links in the "User Interface" section in the "Configuration" tab, the Exchange Operator can make the following branding and user interface changes:

- Upload images such as logos.
- Globally modify many of the text strings appearing on labels, buttons, and elsewhere in the Exchange.
- Modify the Exchange style sheet to change fonts and colors.
- Modify slogan and contact information.
- Modify notification headers and footers.
- Customize the **Catalog News, Contact Us, Fee Schedule, Legal Notices and Terms of Use, Marketplace Buying Home, Marketplace Selling Home,**

Privacy Policy, Registration Confirmation, Supply Chain News, and Welcome pages.

Customization

The Exchange Operator can make the following customizations:

- Customize the online Help files as needed.
- Customize the default job functions that the Exchange provides to govern which users can perform certain tasks.
- Customize the drop-down menu items for fields such as Freight Terms. (See Appendix C for all of the menu items the Exchange Operator can customize.)
- Customize regions, for the Negotiations functionality. For example, when someone creates an offer on the Exchange, he can associate the offer with a region, such as the “Western United States” or limit counteroffers to come only from respondents in a particular region.
- Create the catalog structure (categories and attributes) used to categorize and describe items and services that suppliers add to the Exchange catalog.
- Set up negotiations attribute lists. (See [Negotiations](#) on page 1-13.)

Company and User Administration

- The Exchange Operator approves companies. The Exchange Operator can also approve affiliates and users, though normally this is performed by the parent company’s Exchange Company Administrator.
- The Exchange Operator can view company profiles, and view and update user profiles (for example, to change a user’s password when the user has forgotten it).

Operator Accounts

In addition to maintaining his own Operator profile (such as changing his password or default language), the Exchange Operator can create additional Operators and view the profiles of those Operators.

Site Status

The Exchange Operator can monitor the Exchange to see the users who are signed on—for example, who logged on within the last 24 hours—by clicking the “Site

Status" tab. The **User Login Record** page appears containing the "Logins for today" that displays the user's name, the date and time the user logged in, and the date and time when the user signed off or when the user's session expired.

Exchange Intelligence

- The Catalog Transactions report provides the Exchange Operator with views of all public catalog transactions made on the Exchange for a day, week, or other pre-defined period. The catalog transactions are displayed by category, which is useful for assessing progress, trends, and areas for improvement.
- In the "Site Status" tab, the Exchange Operator can also click the "SQL Engine" link to bring up the **SQL Execution Engine** page, which contains a text area in which the Exchange Operator can enter SQL query statements. This enables the Exchange Operator to directly access information by executing SQL queries against the underlying database tables. The **SQL Execution Engine** page also enables the Exchange Operator to save the results directly to a file in a directory the Operator chooses.

Billing

The Exchange Operator can define a pricing structure to charge companies for their use of the Exchange. The Exchange Operator also specifies the method of communicating that billing information to a billing system. For examples and more information on billing, see [Billing Setup Steps](#) in [Chapter 2](#).

Marketplace Intelligence

The Marketplace Intelligence functionality is available in the "Marketplace Selling," "Marketplace Buying," and Exchange Operator applications, in the "Intelligence" tab. Marketplace Intelligence provides graphical reports of Exchange activities.

The following illustration is an example of the Buyer's Activity Summary report:

Exchange Name

Home

Log Off

My Exchange

Shopping Cart

Conference

Help

Welcome

Shopping

Negotiations

Purchases

Intelligence

Marketplace Buying Intelligence > Buyer's Activity Summary

Buyer's Activity Summary

View a summary of all marketplace purchase activities by transaction type. [Learn more about Buyer's Activity Summary.](#)

Search

Select search criteria and press the **Go** button to view the report.

From

03-04-2001

through

02-05-2001

PST

(Example: 30-04-2001)

Currency

USD

Category

Leave blank to include All Categories.

Trading Partner

All Trading Partners

Go

Search Tips

Search Results

To export this report to a spreadsheet, press the **Export to Spreadsheet** button below.

Hide Chart

Click on a bar for more details.

6,000K

5,000K

4,000K

3,000K

2,000K

1,000K

0K

Trading Partn...

Trading Partn...

ISX

Catalog Purch...

Awarded Bids

Accepted Quot...

Commitments

Sort by

Total

Ascending

Descending

Go

Buyer's Activity Summary (USD)

	Catalog Purchases	Awarded Bids	Accepted Quotations	Commitments	Total
Total	3,480.00	7,471,627.85	12,100.00	0.00	7,487,207.85

Comprehensive and Intuitive View of Exchange Activities

- Summary and detail reports exist for all marketplace transaction types, including auctions, offers, quotations, and catalog sales and purchases.

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- Multiple report parameters enable reporting on all Exchange activities for a selected time period or focus on a single Exchange transaction.
- Report graphs enable people to hide or show data, and sort data. After the data is sorted, the top ten results of the sorted data are displayed in the graph.
- From the summary report for all transaction types, users can click to view more detailed information including the transaction itself. For example, from "Total for Catalog Purchases" in the Buyer's Activity Summary Report, the Exchange will launch the Buyer's Activity - Catalog Purchases Report to provide catalog sales summary information. Clicking on any number in the Buyer's Activity Summary Report will launch the Buyer's Activity Catalog Detail Report to provide catalog sales detail for the number selected. Clicking on the order number displayed in the Buyer's Activity Catalog Detail Report displays the order details.
- Users can download reports to a spreadsheet for further analysis.

Negotiations Reporting

- Reports on sales (for sellers) and purchases (for buyers) are made from awarded auctions, committed offers, and accepted quotations.
- From the report, buyers and sellers can click to view the selected auction, offer, or quotation details.

Catalog Reporting

The Exchange comes with the following catalog reports:

- Catalog sales (seller's) reports and catalog purchases (buyer's) reports.
- Reports on catalog transaction volumes, number of transactions, and unique items sold.
- Reports on catalog transactions via Exchange-hosted catalogs, XML order pass-through transactions (a purchase order that was created in a buyer's system not necessarily for an item on the Exchange and sent to the supplier via the Exchange), and punchout transactions (a purchase order that was created for items in a supplier-hosted catalog).

From the reports, sellers or catalog authors can click to view selected order details.

Secure Reporting

- Access to reports is controlled through job functions and tasks.
- Each company on the Exchange can access only its own data.
- Sellers only have access to sales reports. Buyers only have access to buyer reports.

Multilingual, Global Support

If the Exchange is installed with multiple languages, then these languages appear at the top of the Exchange home page when users log in, as shown in the following illustration. Only the installed languages appear. See the *Oracle Exchange Installation Guide* for details.

Exchange Name



Log in to Exchange Name Here

English • Português • Français • 繁體中文

Username

Password

Go

[Webcast](#)

When a user selects a language at the top of the page, the fields, tabs, and buttons on the Exchange automatically change to that language. Customized text, such as the Exchange **Welcome** page and customized purchase order text, also appears in that language if the Exchange Operator or Company Administrator translated the text into that language.

The following sections describe languages, currencies, and time zones for each functional area in more detail.

Multiple Languages

Registration and Administration

Registration e-mail notifications are sent to the registrant in the language of the Exchange that the registrant uses (the language selected on the Exchange home page).

After registration, all notifications in the Exchange are sent in the language that the recipient of the notification has specified in the **Edit Personal Information** page.

Negotiations

Buyers and sellers can respond to negotiations in their own language, regardless of the language used by the negotiation owner to create the negotiation.

Negotiation owners can set up the terms and conditions in a negotiation in multiple languages. Negotiation participants will be presented with the text in the participant's own language (the language selected on the Exchange home page).

Catalog Hosting

Suppliers can bulk load catalog items in any of the installed Exchange languages. Buyers can search for items in any installed language, using a "Language" pull-down menu at the "Search" field, if the supplier has translated them.

Marketplace Purchasing

The Exchange Company Administrator or Purchasing Manager can customize the header text on purchase orders created by buyers in the company in each installed Exchange language. Users logged on in that language will then see the customized purchase order text in their language.

Exchange Operator

The language that the Exchange Operator chooses in the **Identification** page in the "Configuration" tab is the default language of the Exchange. However, once a user registers and is approved, he can change the default language for himself in the **Edit Personal Information** page in "My Exchange."

The Exchange Operator can also make branding and customizations changes (any changes that affect text) in each installed Exchange language. See [Chapter 2](#).

Marketplace Intelligence

The Exchange Intelligence reports are presented in each user's default language (the language selected on the Exchange home page).

Multiple Currencies

Registration and Administration

The Exchange Company Administrator can set a default currency for the company. Users within the company can select a different currency for their transactions if desired.

The Exchange Company Administrator bulk loads currency exchange rates that are used for negotiations and order approvals.

Negotiations

Respondents can respond to the negotiation in currencies other than the negotiation currency. The currency exchange rates that the Exchange Company Administrator loads for the company are used to convert the negotiation currencies. The Exchange uses the currency conversion rates of the company that created the negotiation. Additionally, negotiation owners can enter negotiation-specific conversion rates. (Negotiation owners can choose whether to display these rates to the respondent.)

Catalog Hosting

The price lists that suppliers create for specific buyers (buying companies) on the Exchange can be assigned any currency from the list of ISO standard currency codes that the Exchange provides. See [Price Lists](#) in [Appendix B](#).

Marketplace Purchasing

The Exchange creates a separate purchase order for each currency, and for each supplier.

Exchange Operator

The Exchange Operator sets a default currency for the Exchange in the **Identification** page in the "Configuration" tab. Companies can accept this currency as their own default company currency, or change it.

If the Exchange Operator charges for transactions that buyers and sellers perform on the Exchange, the Operator can bulk load currency exchange rates. The Exchange Operator would need to bulk load currency exchange rates only if both of the following are true:

- The Exchange Operator is using a Percent pricing method or a Step Direct or Step Cumulative pricing type. This method and types charge companies based on their transaction amounts in the Exchange.
- The Exchange Operator is billing companies on the Exchange who are creating foreign-currency transactions (transactions in a currency other than the Default Currency selected in the **Identification** page; this is the currency in which companies are billed).

Note: The currency exchange rates that the Exchange Company Administrator loads for its company are separate from the currency exchange rates that the Exchange Operator loads. The Exchange Company Administrator loads exchange rates that are used by its company's users for negotiations and order approvals. The Exchange Operator loads exchange rates that are used solely for the purposes of billing Exchange companies for foreign-currency transactions.

Marketplace Intelligence

Users can choose the currency for which they want to view Exchange Intelligence reports. (Currency is one of the fields that appears when running the report.) Exchange Intelligence reports will present all transactions performed in the chosen currency. Users can also choose "All Currencies" to display the currency beside each transaction. A report total is given when a single currency is selected.

Time Zones

The Exchange Operator (or the Exchange installation team) sets up the default time zone that is used by the Exchange. The default time zone is applied to each user who registers. After users' registrations are approved, they can change their default time zone in the **Edit Personal Information** page in "My Exchange."

Negotiations support time zones for both negotiation creation and monitoring. For example, a close date of 5:00 p.m. Pacific Standard Time (PST) closes at 8:00 p.m. Eastern Standard Time (EST).

Users can also choose the start and end date for Exchange Intelligence reports. The time zone of the report is the time zone that is set for the user (or that the user sets) in the **Edit Personal Information** page in "My Exchange."

Exchange Operator Application Setup

This chapter describes all of the setup steps that the Exchange Operator can or must perform before launching the Marketplace Exchange:

- [Setup Steps Overview](#) on page 2-2
- [Setting Up a Multi-Language or Multi-Currency Exchange](#) on page 2-6
- [Administration Setup Steps](#) on page 2-8
- [Branding and Customization Setup Steps \(Part I\)](#) on page 2-15
- [Catalog Setup Steps](#) on page 2-35
- [Marketplace Purchasing Setup Steps](#) on page 2-44
- [Negotiations Setup Steps](#) on page 2-44
- [Billing Setup Steps](#) on page 2-47
- [Customization Setup Steps \(Part II\)](#) on page 2-80
- [Exchange Launch](#) on page 2-91
- [Ongoing Maintenance](#) on page 2-93

Setup steps that apply only to other Exchange applications, such as Product Development, are documented in those applications' setup guides.

ATTENTION: The Offers functionality described in this chapter and throughout this manual is not available in the initial Release 6.2. Offers will be available in the first revision of Release 6.2.

Setup Steps Overview

The following tables and the steps within the tables show the recommended order of the setup steps. Each setup step is described in detail in the following sections of this chapter.

Note: Although the steps "Customize Job Functions" and "Customize Drop-Down Menu Items (Lookup Types)" are optional, you may still want to review them. For example, many lookup types are used by the "Marketplace Purchasing" and "Negotiations" functionality. Even if you decide not to perform any of the "Customization Setup Steps (Part II)," you may want to look at the "Customize Job Functions" and "Customize Drop-Down Menu Items (Lookup Types)" steps to see if you need to make additional customizations to the "Marketplace Purchasing" or "Negotiations" functionality.

Table 2–1 Administration Setup Steps

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
1	Set Up Operator Login Account(s)	Optional	No
2	Set Up the Software	Required	No
3	Set Password Policy	Optional	No
4	Create a Test Company	Optional	No

Table 2–2 Branding and Customization Setup Steps (Part I) *

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
1	Modify the Exchange Style Sheet	Optional	No
2	Modify Exchange Images	Recommended	No
3	Set Up the Exchange Slogan, Contact Information, and Notification Headers and Footers	Required	No
4	Make Terminology Changes	Optional	No
5	Customize Exchange Site Content	Recommended	No
6	Set Up Regions Data	Required for Offers	No

Table 2–3 Catalog Setup Steps

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
1	Determine Catalog Authoring Activities *	Required	Yes
2	Determine the Catalog Structure *	Required	No
3	Create the Catalog Structure (Categories, Attributes, and Category Hierarchy)	Optional	Can create own categories and category attributes if you've allowed this
4	Check the Catalog Structure	Optional	Yes

Table 2–3 Catalog Setup Steps

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
5	Configure Catalog Export and Load Options	Optional	No
6	Configure Popular Categories List	Optional	No
7	Customize Catalog News	Optional	No

Table 2–4 Marketplace Purchasing Setup Steps

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
Other setup steps in this chapter, such as Customize Drop-Down Menu Items (Lookup Types) in the Customization Setup Steps (Part II) , affect buying activities on the Exchange. Other than these, there is no setup specifically for marketplace purchasing (buying).			

Table 2–5 Negotiations Setup Steps

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
1	Create a Negotiations Item Category	Optional	No
2	Define Exchange-wide Reusable Attribute Lists	Optional	Yes, for its company

Table 2–6 Billing Setup Steps *

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
Note: "Required" means "Required if you choose to implement billing." If you do not choose to charge companies for their use of the Exchange, you do not have to follow these billing steps.			
1	Modify Default Billing Activity Types	Optional	No
2	Activate the Recording of Billing Charges	Required	No
3	Define a Default Exchange Price List	Required	No
4	Set Up Oracle Receivables Integration	Optional	No
5	Select an XML Delivery Method	Optional	No
6	Choose Exchange Payment Methods	Optional	No

Table 2–7 Customization Setup Steps (Part II)

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
1	Customize Job Functions *	Optional	Yes
2	Update List of Blocked Territories	Optional	No
3	Customize Drop-Down Menu Items (Lookup Types)	Optional	No +
4	Set Up Marketplace Intelligence Reports	Optional	Yes, for its own users
5	Set Up a Default Job Functions List	Optional	Yes
6	Customize Help Files	Optional	No

Table 2–8 Exchange Launch

Step Number	Step	Required?	Can the Exchange Company Administrator Perform this Step?
1	Define Company-Specific Billing Price Lists	Optional	No
2	Manage Third-Party Authoring	Optional	Yes

- * These steps can require up-front planning, and therefore may need more of your time and thought before implementing them. Note these steps and allow time in your implementation to prepare for them. See the specific steps for more information.
- + The company can choose preferences among the lookup type values you define, and deselect values it does not allow, but cannot add, modify, or delete the values.

Setting Up a Multi-Language or Multi-Currency Exchange

See [Multilingual, Global Support](#) in [Chapter 1](#) for a complete overview of multi-language and multi-currency support that the Exchange provides.

Setting Up a Multi-Language Exchange

The team who installed the Exchange for you is responsible for creating installations in each language in which you want companies to conduct business on the Exchange.

These languages appear as drop-down menu options next to a "Language" field in some of the Exchange Operator setup pages described in this chapter. Wherever the "Language" field appears, you need to translate and apply the change in each installed language. The "Language" field appears wherever text strings—such as button labels, Exchange page text, and modifiable names and descriptions—appear.

Setting Up a Multi-Currency Exchange

Other than setting the Default Currency in the **Identification** page as described in this chapter, you do not need to do anything special to support multiple currencies on the Exchange unless you are billing Exchange companies. In that case, you additionally need to upload currency conversion rates if both of the following are true:

- You are using a Percent pricing method or a Step Direct or Step Cumulative pricing type. This method and types charge companies based on their transaction amounts in the Exchange.
- You are billing companies on the Exchange who are creating foreign-currency transactions (transactions in a currency other than the Default Currency selected in the **Identification** page; this is the currency in which companies are billed).

See [Billing Setup Steps](#) on page 2-47 for more information. Talk to a financial representative in your organization about how often to update currency conversion rates for billing companies that perform foreign-currency transactions.

Administration Setup Steps

This section describes the following setup steps:

1. Set Up Operator Login Account(s) (Optional)
2. Set Up the Software (Required)
3. Set Password Policy (Optional)
4. Create a Test Company (Optional)

Prerequisites

Finish all installation steps as described the *Oracle Exchange Installation Guide*.

Step 1 Set Up Operator Login Account(s) (Optional)

The Exchange Operator can create additional Operator accounts besides his own. For example, if the volume of activity on the Exchange is high, the Exchange Operator can designate other Operators with their own accounts to log in as an Operator and help manage the activity on the Exchange. The Exchange does not use a "hierarchy" of Operators, and the Exchange Operator can create as many or as few Operator accounts as needed. If you have more than one Operator, you may want to keep track of what each other is doing or designate a specific area to each Operator.

1. Access the Operator Exchange web site and log in. Ask the person who installed the Exchange to provide you with this URL and with a login. The installation process creates the first Operator Account, and you must log in as this Operator.
2. Click the "Operator Account" icon in the top right of the page.

Exchange ***** Name


[Home](#) [Companies](#) [Billing](#) [Configuration](#) [Site Status](#) [Exchange Intelligence](#)
Operators[View Operators](#)**[Create Operator](#)**[Edit Operator Information](#)**Create Operator**

Please enter information about the user you would like to create as the operator.

* Indicates a required field

Contact Title * First Name Middle Name * Last Name Title Exchange **Exchange Name Here****[Address](#)**

3. On the **View Operators** page, click the "Create Operator" link and enter the requested information to create an additional Operator account. Remember the user name and password you specify. Note that if you select a country other than the United States, the page is redisplayed with address fields appropriate for that country.
4. Click the "Submit" button.
5. Create additional Operator accounts if needed.
6. On the **View Operators** page, click the "Edit Operator Information" link if you want to update your own information or password.

To see information on a particular Operator, enter the Operator name in the "Name" field on the **View Operators** page and click the "Go" button. You can use a partial name value as well as wild card (%) symbol. Alternatively, click one of the letter links to limit the display only to Operators whose last name begins with the selected letter.

Step 2 Set Up the Software (Required)

- 1. Access the Operator Exchange web site and log in. Ask the person who installed the Exchange to provide you with this URL and with a login. The installation process creates the first Operator Account, and you must log in as this Operator.
- 2. In the "Configuration" tab, click the "Software Setup" link. Make sure the fields are properly entered in the **Software Setup** page. In most cases, the fields were defined when the Exchange was installed, and you should generally not modify them after that. However, if for some reason you need to make a change, fill in the fields as described in the following table:

Table 2–9 Software Setup Page

Name	Required	Description
Exchange URL	Yes	The URL of the Exchange server
Exchange Port Number	Yes	The server port number
Catalog Directory	Yes	The full directory path to the location for uploaded catalogs
Character Set	Yes	The character set in use by the database and middle-tier server
Server Timezone	Yes	The timezone in which the Exchange server is running
Certifying Authority Certificate Location	No	The full path to the directory containing the certification information
Web Methods URL	No	The URL of the Web Methods server
Exchange Version	No	The Oracle Exchange software version. This field is for display only and not modifiable.
Enter Billing Attributes if you are integrating the Exchange with Oracle Receivables. For instructions on entering the Billing Attributes, see Billing Setup Steps on page 2-47.		
Enter Oracle Message Broker Attributes if you are using Oracle Message Broker.		

- 3. If you have made changes to the **Software Setup** page, click the "Apply Changes" button.
- 4. In the "Configuration" tab, click the "Identification" link. In the **Identification** page, fill in the requested information. (See the table below.) The fields on this

page enable you to customize and otherwise brand the Exchange. Changes you make using this page take effect immediately. You do not have to decide now what the Exchange Name, Exchange Slogan, and Notifications Header and Footer will be, if you do not yet know. Enter something for now; you will return to this page later. Some of the fields, such as "Currency," are set during installation and you cannot change them without contacting the installation team.

Table 2–10 Identification Page

Name	Required	Description
Exchange Name	Yes	The name of the Exchange. Note this name should also be reflected in the images used in the Exchange.
Notifications e-mail address	Yes	The e-mail address of the Exchange Operator to whom registration request notifications should go.
Help e-mail address	Yes	The e-mail address of the Exchange Operator who receives any correspondence via the "Contact Us" link.
Default Language	Yes	The language in which the Exchange appears for users who have not specified a particular language as well as any unregistered users who may be browsing the site.
Default Currency	Yes	The currency in which transactions will take place unless a company specifies an alternate currency.
Default Timezone	Yes	The time zone assigned to new users by default. Users can later change the value.
Show Web Conference Button	Yes	Indicator of whether the Web Conference button appears on the Exchange.
Web Conference URL	No	The URL for Web Conferences.
Language	Yes	The language version to which the values below apply.

Table 2–10 Identification Page

Name	Required	Description
Exchange Slogan (text version)	Yes	The text version of the Exchange-wide slogan.
Exchange Slogan (HTML version)	Yes	The HTML version of the Exchange-wide slogan.
Contact Information	Yes	Any additional contact information such as a 1-800 number. This is displayed at the top of the main Help page.
Notifications Header	No	A header placed at the top of all outgoing notifications (such as notifications that sellers receive of orders placed with their company).
Notifications Footer	No	A footer placed at the bottom of all outgoing notifications (such as notifications that sellers receive of orders placed with their company).

5. If you have multiple languages of the Exchange installed, use the "Language" field to define a different set of language-specific values for each language in the "Language Specific Settings" section.
6. Click the "Apply Changes" button.

Step 3 Set Password Policy (Optional)

Choose your requirements for users' passwords. These requirements apply to all users' passwords, whether registered online or through bulk loading. They apply to the Operator password as well.

If you change the password policy later, after people are already using the Exchange, your changes—except those to the Password Life (see description of Password Life below)—are effective for new passwords only.

1. In the "Configuration" tab, click the "Password Policy" link.
2. On the **Password Policy** page, enter the following information:
 - *Minimum Password Length.* If the user enters less than this number, an on-screen error message will prompt the user to enter a longer password.

- *Password Life.* The Exchange will prompt the user to change his or her password when the duration for which the password has been active exceeds the password life. For example, if the current password life is 90, and you later change it to 5, any Exchange user who registered and created a password five days ago, will be prompted to change it that day (the day you changed it to 5) or the next time the user logs on. Each time a user logs on, the Exchange checks the validity of the password by comparing the password's creation date against the password life.
- *Do not allow password to be same as user name.* If you select this option, an on-screen error message will prompt the user to enter a different password than the user name if the user enters the same for both.
- *Require password to contain at least one numeric digit.* If you select this option, an on-screen error message will prompt the user to include at least one number in the password, if the user did not include a number.
- *Require password to contain at least one character.* If you select this option, an on-screen error message will prompt the user to include at least one letter, if the user entered a password that is all numbers. Punctuation marks (such as !, ?, #) are not allowed.

Step 4 Create a Test Company (Optional)

You may want to register a fictional or "test" company with the Exchange so that you can log on to the Marketplace Exchange and periodically check that the branding, customization, and other changes you make throughout the setup look and work as intended.

Typically, you would create a test company on a test or pre-production instance of the Exchange. Note that on a production instance, your test company may be billed for transactions it performs (if you set up billing), and it will display in the Trading Partner Directory to all companies who register on the Exchange. You cannot delete a company once it is created.

To create a fictional or "test" company:

1. Access the Marketplace Exchange web site. Ask the person who installed the Exchange to give you the URL.
2. Follow the guidance on the Exchange home page to register your test company as an independent entity.

3. Log on to the Operator Exchange and click the "Companies" tab. Click the "Approve Companies" link, locate the company you registered, and follow the guidance on the **Approve Companies** page to approve the company.
4. When you approve the company and assign any of the default job functions that the Exchange provides, decide how you want to test the Exchange. For example, you may want to be sure to assign this company the "Catalog Author" job function so that you can test how your catalog structure (which you will set up later) looks on the **Catalog Authoring** and **Shopping** pages on the Exchange.
5. Register and approve other test companies if needed. For example, you may want to create a buying company who can perform only buyer-specific job functions on the Exchange. See the online descriptions that appear for each job function to help you decide which job functions to assign to your test company.

Branding and Customization Setup Steps (Part I)

The steps in this section require some knowledge of hypertext markup language (HTML), cascading style sheets, and XML.

Caution: As indicated in the steps below, you cannot "undo" some of the branding changes that you make. Whatever branding related files you download from the Exchange for the purposes of modifying them, always save a backup copy of the original downloaded file in case you need to upload it back to the Exchange.

Note: Branding can require significant preparation time, particularly if you enlist the help of a third party to help you design the look and feel of the Exchange.

This section describes the following steps:

1. Modify the Exchange Style Sheet (Optional)
2. Modify Exchange Images (Recommended)
3. Set Up the Exchange Slogan, Contact Information, and Notification Headers and Footers (Required)
4. Make Terminology Changes (Optional)
5. Customize Exchange Site Content (Recommended)
6. Set Up Regions Data (Required for Offers)

The following illustration shows the elements of the Exchange you can customize:

- Logo - Use the **Customize Content** page (step 5).
- Images - Use the **Customize Images** page (step 2).
- Style sheet (fonts and colors) - Use the **Customize Content** page (step 1).
- **Welcome** page - Use the **Customize Content** page (step 5).



Prerequisites

Think through your branding ideas—fonts, color schemes, images, terminology—before implementing them. Since some of the branding changes that you will make (particularly to the style sheet) are reflected throughout the Exchange, any modifications should be carefully thought out and implemented.

Step 1 Modify the Exchange Style Sheet (Optional)

The Exchange style sheet controls the look and feel of the Exchange. The style sheet specifies the default behavior and appearance of many of the items that appear on pages throughout the Exchange. This includes behavior such as:

- default font types, sizes and weights used with text
- default colors used for text, links, buttons, and tabs
- default alignment values

You can modify the specified behavior defined in the default style sheet by downloading and updating a template style sheet file, *custom.xss*, and then uploading it back to the exchange. After successfully uploading the new style sheet back to the Exchange, your changes appear immediately. Note that changing the style sheet is a very high-profile action. Change only the parts of it that you need to, to match your corporate identity.

The following is an example of how one might use the style sheet to change the color scheme:

```
<?xml version="1.0"?>
<!--$Header: custom.xss 115.3 2001/04/04 14:12:44 pkm ship    $-->
<styleSheetDocument xmlns="http://bali.us.oracle.com/cabo/ocelot">

<import href="pom.xss"/>

<!-- The default color scheme, repeated here for easy customization -->
<colorScheme namespace="http://bali.us.oracle.com/cabo/blaf" name="default">
  <color name="VeryDark">#003366</color>
  <color name="Dark">#336699</color>
  <color name="Medium">#6699cc</color>
  <color name="Light">#99ccff</color>
  <color name="VeryDarkShadowAccent">#333300</color>
  <color name="DarkShadowAccent">#666633</color>
  <color name="VeryDarkAccent">#999966</color>
  <color name="DarkAccent">#cccc99</color>
  <color name="MediumAccent">#ffffcc</color>
  <color name="LightAccent">#f7f7e7</color>
  <color name="VeryDarkExtraAccent">#333333</color>
  <color name="DarkExtraAccent">#666666</color>
  <color name="MediumExtraAccent">#999999</color>
  <color name="LightExtraAccent">#cccccc</color>
  <color name="TextForeground">#000000</color>
  <color name="TextBackground">#ffffff</color>
</colorScheme>

</styleSheetDocument>
```

The following is an example of how one might use the style sheet to change the default font:

```
<?xml version="1.0"?>
<!--$Header: custom.xss 115.3 2001/04/04 14:12:44 pkm ship    $-->
<styleSheetDocument xmlns="http://bali.us.oracle.com/cabo/ocelot">
```

```
<import href="pom.xss"/>

<styleSheet>

<style name="DefaultFontFamily">
<property name="font-family">Times</property>
</style>
<style name="DefaultFont">
<includeStyle name="DefaultFontFamily" />
<property name="font-size">18pt</property>
</style>

</styleSheet>
</styleSheetDocument>
```

To download the existing style sheet:

1. In the "Configuration" tab, click the "Customize Content" link to open the **Customize Content** page.
2. Select "Style Sheet" from the "Content Type" drop-down menu.
3. The "Language" drop-down menu does not apply to style sheets. If you want to make language-specific customizations to the style sheet, use the *custom.xss* file to define different behavior for different browser languages.
4. From the "Template or Customization" drop-down menu, select "Template" if you have never customized this language's style sheet before. Select "Customization" if you have already modified this language's style sheet once.
5. Click the "Download Now" button.
6. Save the .zip file and extract the contents to a convenient directory.
7. The .zip file contains three style sheets and a *Readme* file. Two of the style sheets are used by the Exchange and the third, *custom.xss*, is the file you modify. You may wish to print off the files for reference. View the *Readme* file for detailed instructions on how to modify the *custom.xss* file to create a customized style sheet.

To upload your modified *custom.xss* file:

1. Return to the **Customize Content** page.
2. Scroll to the bottom of the page entitled "Step 2: Load Files."

3. Select "Style Sheet" from the "Content Type" drop-down menu.
4. The "Language" drop-down menu does not apply to style sheets. (When you upload the style sheet in one language, it is available in all Exchange languages.)
5. Choose UTF-8 for the "Character Set."
6. Use the "Browse" button to navigate to your modified *custom.xss* file.
7. Click the "Start Load Now" button. When the upload has completed, the **Verify Content** page appears.
8. If your content is acceptable, click the "Publish" button. The **Confirmation** page appears indicating successful customization of the content type. Refresh your browser screen, and you will see any style updates reflected.
9. If you decide your content needs corrections or further modifications, click the "Cancel" button, and you are returned to the **Customize Content** page.

Note: After you modify the .xss file, you must stop and restart the middle tier for the changes to take effect. Stop and restart the middle tier using scripts provided in the *Oracle Exchange Installation Guide* or the *Oracle Exchange Upgrade Guide*.

Step 2 Modify Exchange Images (Optional)

The Exchange enables you to modify or replace existing images for customization and branding purposes. You simply download the image, make your modification to it, save it under the same name and extension, and upload the modified file. You can replace one image file with another by naming the modified file the same as the file you wish to replace and then uploading the new file. Images are language specific. For example, if you modify the French version of an image, it is seen only by the users of the French language version of the Exchange. Users of any other language versions do not see the modification. Since the Exchange keeps copies of the original .gif files, you can undo an image customization.

To customize an image or icon:

1. Before you modify an image, determine its name. You can find out the name of an image file by using your browser to view the source for a page on which the image or icon appears. Scroll through the source until you find the reference to the image. Look for the HTML tag ``. This will

show you the name (and size) of the image file. Once you have identified the file you wish to change, you can modify it.

2. In the "Configuration" tab, click the "Customize Images" link.
3. Select the appropriate language version from the "Language" drop-down menu.
4. Click the "Download Now" button.
5. On your browser's download form, click the "Save it to disk" radio button, and click the "OK" button.
6. Save the .zip file into an appropriate directory. Some of the images are .gif files and some are .jpg files.
7. Extract the files to a convenient directory and find the image file you wish to modify.
8. Modify the image file using your favorite image editor, and save the file *using the original name and extension*. Review the *Readme_customize_images.htm* file included in the .zip file for more information.

To upload your modified image file:

1. In the "Configuration" tab, click the "Customize Images" link.
2. Select the appropriate language version from the "Language" drop-down menu. You must upload to the same language version from which you downloaded.
3. Click the "Browse" button, and locate either a single modified image file or a .zip file containing multiple modified .gif or .jpg files for uploading.
4. Click the "Start Load Now" button.
5. The **Confirmation** page appears notifying you of a successful upload.

To undo an image customization:

1. In the "Configuration" tab, click the "Customize Images" link.
2. Click the word "here" in the sentence "If you want to undo any customization, please click here." The **Undo Image Customization** page appears.
3. Select the appropriate language version from the "Language" drop-down menu.
4. If you are undoing a single file's customization, specify the file's name in the "File Name" field. If you wish to undo all customizations to this language version, leave the "File Name" field blank.

5. Click the "Submit" button. The **Confirmation** page appears indicating that you successfully restored the original image file(s).

Step 3 Set Up the Exchange Slogan, Contact Information, and Notification Headers and Footers (Required)

In the "Configuration" tab, click the "Identification" link. In the **Identification** page, fill in the Exchange Slogan, Contact Information, Notification Header, and Notifications Footer if you haven't already. See [Table 2-10](#) on page 2-11.

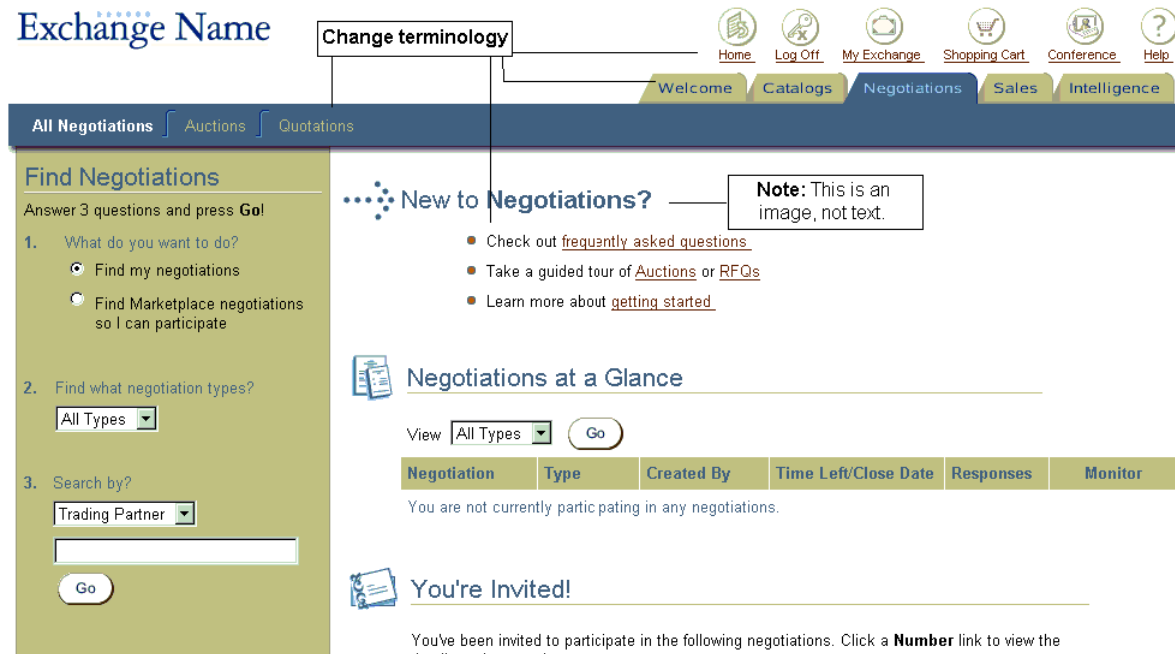
Step 4 Make Terminology Changes (Optional)

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

Some changes, depending on the kinds of changes you want to make, may take time. For example, if you want to change some but not all "OK" buttons to "Proceed," you will need to log on to the Exchange to see that you've changed the right ones.

Note: It is recommended that you make changes to negotiations terminology offline. See **To make negotiations terminology changes**, below.

The following illustration shows an example of the text you can change:



To customize text strings online:

1. In the "Configuration" tab, click the "Customize Text" link.
2. Select the "Language." Text customizations apply only to a particular language. Users of other languages do not see the customized text. For example, a modification to the French language version of the Exchange is not seen by users of other language versions. (Changes to the language version selected as the Default Language in the **Identification** page are seen by users of that language, by any user who doesn't otherwise select an available language version, and by any unregistered users who may be browsing the Exchange.)
3. Select the "Text Type." You can search for text strings among existing customizations, the default text, or both.
4. Enter a search value in the "Text Value" field. You do not have to enclose the string in quotes. You can enter a partial value, and you can use a wild card character (%). Searches are not case sensitive.
5. Click the "Go" button. The **Text Search Results** page displays the following:

- **Default Text:** The text string that the Exchange provides.
 - **Customization:** Any customizations performed on that text, if any.
 - **Name:** The message in which the text string appears.
6. Identify the string you wish to change by clicking the "Select" check box to its left. Or click the "Select All" link.
 7. Click the "Customize" button. Enter your change in the "New Text" field.
 8. Click the "Submit" button. A **Confirmation** page appears indicating that you have successfully modified the text string. The modification is seen immediately by anyone using the same language version.

To customize text strings offline:

1. In the "Configuration" tab, click the "Customize Text" link.
2. Follow the steps in the previous section, **To customize text strings online**, to search for the strings you want to customize. Then click the "Download All Searched Results" button.
3. When prompted, save the .zip file to a convenient directory. Note that the .zip file includes a *readme* file and a text file that can be opened as a tab-delimited file in a spreadsheet program. You will enter all of your string modifications to the spreadsheet text file.
4. Extract and print the *readme* file and follow the instructions to make your text changes.
5. To upload your text customizations, return to the **Customize Text** page. Click the word "here" in the sentence "If you have already downloaded a file and want to upload it back, click here."
6. Use the "Browse" button to navigate to the .txt file containing your customizations.
7. Click the "Start Load Now" button. A **Confirmation** page appears indicating that you have successfully modified the text string. The modifications are seen immediately by anyone using the same language version.

To make negotiations terminology changes:

Changes made to negotiations terminology are reflected in the different negotiations pages and in the e-mail notifications that the Exchange sends to negotiation owners and respondents. For example, you may wish to change the

term "auction" to "trade transaction." (Only certain words are changed in the notifications, not the entire notification itself.)

Certain strings, labels, or buttons are used in several locations on the Exchange. For example, the text string POM_AUCTS_NOTE_TO_BIDDERS appears to both the buyer and the seller. Therefore, the string exists twice so that you can choose to customize the string in one context but not the other. To distinguish which text belongs with which context, the name of the string typically ends in a one-letter suffix. This tells you which string to select for customization. For negotiations, the suffixes are as follows:

- B - Buyer's auction context
 - S - Seller's auction context
 - O - Offer to buy context
 - A - Offer to sell context
 - R- Request for quotation context
1. Follow steps 1-4 above in "To customize text strings offline."
 2. Refer to the special instructions section in the *Readme* for instructions on changing negotiations terminology.
 3. Follow steps 5-7 above, in "To customize text strings offline," to upload your negotiations terminology changes to the Exchange.

To undo your text string changes:

1. Follow steps 1-6 in "To customize text strings online," above. Enter a search that will display the changes you want to undo and select the changes you want to undo.
2. Click the "Undo" button. A **Confirmation** page appears indicating that you have successfully reversed the customization. The updated text is immediately visible in that language version.

Step 5 Customize Exchange Site Content (Recommended)

There are several standard pieces of text that appear throughout the Exchange and that you can customize or update as needed, such as legal notifications, privacy policy, terms of use, and the **Welcome** pages (shown in the illustration below).

Exchange Name


[Welcome](#) | [Catalogs](#) | [Negotiations](#) | [Sales](#) | [Intelligence](#)
[Overview](#) | [Trading Partner Directory](#)
**Welcome to Marketplace Selling**

Marketplace Selling allows suppliers to achieve operational efficiencies by streamlining and automating sales functions.

Exchange connects buyers and sellers with online auctions, quotations, and offers. Sellers connect to buyers faster and more efficiently by using the tools located under the Catalog, Negotiations, Sales and Intelligence tabs.

The Marketplace Selling tabs and tools are described below.

- [Catalog](#) - load and manage your catalog content and configure punch-cuts to external catalog sites
- [Negotiations](#) - initiate, manage, and participate in auctions and requests for quotations
- [Sales](#) - track your sales orders and manage your company's selling preferences
- [Intelligence](#) - analyze your organization's catalog and negotiation sales

**Getting Started**

Take a moment to learn how to do the basics in Marketplace Selling. We recommend learning:

- > [What information is required for catalog items](#)
- > [How to bulk load items into your catalog](#)
- > [How to create an auction](#)
- > [How to monitor bidding in an auction](#)

**Time Saving Tips**

Want to know who is registered fast? Take a look at the [Trading Partner Directory](#).

You can start selling goods and services just by clicking the [Catalog](#) tab and loading your catalog online.

Using the Negotiations tool can also help you do your job. [Create an auction](#) composed of your items or services. The highest bidder wins.

Marketplace Selling and Marketplace Buying home pages can be customized

For example, the Exchange Operator can add help desk phone numbers and hours, Web sites that contain additional information, and any other additional information or fields to the **Contact Us** page on the Exchange:

[Welcome](#) | [Catalogs](#) | [Negotiations](#) | [Sales](#) | [Intelligence](#)

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[Legal Notices and Terms of Use](#) | [Privacy Policy](#) | [Contact Us](#)
Customize content
[Legal Notices and Terms of Use](#)
[Privacy Policy](#)
[Contact Us](#)

Some types of text, such as the main Exchange **Welcome** page, you will probably customize once. Other types of content, such as **Catalog News** or **Fee Schedules**, you may need to update on a regular basis.

To customize a page of content, you download the page from the Exchange, make the modifications to the page using your favorite HTML editor, and then upload the page back to the Exchange. If you have multiple language versions installed, content customizations are specific to a particular language version. Customizations to one language version are not seen by users of any other language version. For

example, if you make a change to the French **Contact Us** text, those changes will not be seen by users of the American English language version. Since this content is HTML-based, you can see the changes immediately after uploading the new pages. You can undo a content customization at any time.

To customize the Exchange site content:

- 1. In the "Configuration" tab, click the "Customize Content" link.
- 2. From the "Content Type" drop-down menu, select the type of content you wish to change.

Exchange Name

Log Off

Operator Account

Help

Home

Companies

Billing

Configuration

Site Status

Exchange Intelligence

Configuration Home > Customize Content

Customize Content

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

* Indicates a required field

Step 1: Download Templates

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

* Content Type

* Language

* Template or Customization

Catalog News

Catalog News

Contact Us

Fee Schedule

Help JSP Files

Help XML Files

Legal Notices and Terms of Use

Logo

Marketplace Buying

Marketplace Selling

Privacy Policy

Download Now

Step 2: Load Files

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Table 2–11 Content Types

Content Type	Use
Catalog News	News (for example, news of catalog structure changes) for catalog authors. See Step 7 Customize Catalog News (Optional) on page 2-43.
Contact Us	The text and response form used to gather user input.
Fee Schedule	A breakdown of the fees charged by the Exchange for operations that is viewed by a company during its registration.
Help JSP files	The online Help pages provided by the Exchange. See Step 6 Customize Help Files (Optional) on page 2-85.
Help XML files	The XML document, default.xml, that controls the organization and processing of online Help pages. If you modify the Help system by creating a new Help page, you must modify the default.xml file so that people can access the new Help page from the Help main contents page. See Step 6 Customize Help Files (Optional) on page 2-85.
Legal Notices and Terms of Use	The legal usage agreement for the Exchange. This legal agreement is accessible to users by clicking the "Legal Notices and Terms of Use" link at the bottom of the Exchange pages or by reading the agreement during registration.
Logo	The branding image used in the Exchange that appears at the top of every page.
Marketplace Buying	The Welcome page used by the "Marketplace Buying" application.
Marketplace Selling	The Welcome page used by the "Marketplace Selling" application.
Privacy Policy	The explanation of the privacy protections afforded by the Exchange.
Registration Confirmation	The text that appears at the bottom of the Confirmation page upon successful registration of a company.
Style Sheet	The custom.xss style sheet file used to control the general look and feel of the Exchange pages. Modifying the style sheet was described in Step 1 Modify the Exchange Style Sheet (Optional) on page 2-16.
Welcome	The content appearing on the Exchange home page, including image files used on the page.

- From the "Language" drop down menu, select the language version you wish to customize. Your customization will only affect the content type for that language. Similar content types for other language versions are unaffected. (Changes to the language version selected as the Default Language in the **Identification** page are seen by users of that language, by any user who doesn't

otherwise select an available language version, and by any unregistered users who may be browsing the Exchange.)

4. From the "Template or Customization" drop-down menu, select "Template" if this content has never been customized or "Customization" if this content type has been customized before, and you wish to update the customization.
5. Click the "Download Now" button.
6. When the Save window appears, click the "Save it to disk" radio button and save the .zip file to a convenient directory. The .zip file contains the HTML (.html) file(s) for the chosen content type. Depending on the content type, there may be a Readme file included as well.
7. Navigate to the directory in which you saved the .zip file. Open the .zip file, and extract the .html file you wish to update.
8. Open the .html file and make the necessary changes using whatever HTML editing tool you choose. If there is a Readme file for the content type, be sure to read the instructions inside. Once you have updated the .html file, save your modifications. Be sure to save the updated file with the original name and extension.

Note: Some .html files contain references to images that are not included in the downloaded .zip file. For these files, some HTML editors may give you an error indicating that the image path is not found; when you save the file, the editor changes the image path to a null (" ") path. If this happens, do not reload the .html file to the Exchange. Re-download the .html file and edit it in a plain text editor. This issue does not affect .html files whose images were included in the download, and does not apply to all HTML editors.

9. Return to the **Customize Content** page.
10. Scroll to the bottom section of the page labeled "Step 2: Load Files."
11. Select the appropriate content type from the "Content Type" drop-down menu. Be sure you upload your file as the same content type that you downloaded.
12. Select the appropriate language version from the "Language" drop-down menu. Be sure you upload to the same language version from which you downloaded.
13. The character set defaults for you, depending on which language you chose. For example, if you chose French, the "Character Set" drop-down menu displays

Cp1252 and UTF-8 as character set options. Choose the default character set for that language. For example, for French choose Cp1252. Choose UTF-8 if you created and saved the file using a UTF-8 editor. For more information on character sets, see the *Oracle Exchange Installation Guide*.

14. Use the "Browse" button to locate the updated .html file (or the .zip file containing it).
15. Click the "Start Load Now" button. When the upload has completed, the **Verify Content** page appears.
16. Click the "Preview" button. The page containing the content type appears displaying the updated text. Use this display to verify that your uploaded content is correct.
17. If your content is acceptable, click the "Publish" button. The **Confirmation** page appears indicating successful customization of the content type. If after previewing the new text, you decide your content needs corrections or further modifications, click the "Cancel" button, and you are returned to the **Customize Content** page.

To undo your content changes:

1. In the "Configuration" tab, click the "Customize Content" link.
2. In the **Customize Content** page, click the link in the sentence "If you wish to undo any customization, please click here."
3. In the **Undo Customization** page, identify the content type whose customization you wish to undo by selecting a value from the "Template" drop down menu.
4. Identify the language version of the content type whose customization you wish to undo by selecting a value from the "Language" drop-down menu.
5. Click the "Submit" button. A **Confirmation** page appears indicating successful reversal of the customization.

Step 6 Set up Regions Data (Required for Offers)

Regions data is used by the Offers functionality on the Exchange and by the Transportation application. When someone creates an offer on the Exchange, the offer owner can associate the offer with a region (such as Italy) or limit counteroffers to come only from respondents in a particular region. The Exchange offers default regions for people to pick from. As the Exchange Operator, you can modify these regions, or add ones of your own.

Regions enable a company to limit the scope within which a transaction is considered applicable. For example, some companies are not capable or are simply not willing to conduct business with other companies that are not in the physical vicinity. In particular, geographical considerations play a critical role in determining shipping costs. Such costs can significantly influence business decisions, and many companies would like to be able to control for such costs at the time a transaction is created.

Regions consist of a particular region and any of its sub-regions. The sub-regions may themselves consist of other sub-regions. This allows you to click down to the appropriate level of granularity when associating a company address to a particular business region. For example, some possible business regions might consist of the following:

Table 2–12 Example Regions and Sub-Regions

Country Region	State Sub-Region	County Sub-Region	City Sub-Region	Zip Sub-Region	Companies Eligible for this Region
United States	California				All companies within the state
United States	California	Santa Clara			All companies within the county
United States	California	Santa Clara	San Jose		All companies within the city
United States	California	San Mateo	Foster City	94404	All companies within the zip code

Once business region values exist on the Exchange, an Exchange Company Administrator can associate a company address with the appropriate region in which it wants to do business. Note that the business region chosen can be as broad or as narrow as is necessary. For example, assuming the regions shown in [Table 2–12](#) above, Company A could choose to do business with any other companies in California while Company B could opt to do business only with companies in the city of San Jose.

To avoid requiring you to document most standard geographic data, the Exchange comes with default values for current international country, state, and city combinations. This data is based on United Nations location codes and ISO standards. If these values are appropriate for the processing needs of your Exchange, you can upload this ISO data to the Exchange to provide a complete collection of geographic regions to any Exchange applications that may use them. See "To use the default regions that the Exchange provides," below.

If however, the ISO/UN values are not sufficient for the needs of applications running on your Exchange (for example, the ISO/UN codes may not provide a

sufficient level of detail for your needs), you can create and upload your own custom geographic values. See "To upload your own geographic regions," below.

To use the default regions that the Exchange provides:

1. In the "Configuration" tab, click the "Manage Regions" link.
2. Click the "Load System Supplied Region Data" link.
3. Read the warning text on the page carefully. The region values are based on UN location codes and ISO standards. In many cases, the ISO-based information is sufficient for your needs. In some cases, however, the information is not sufficiently detailed. Determine the applicability of the ISO-based data before you upload it. Once you upload the seed data, there is no way to delete it (although you can edit the data as needed), and the "Load System Supplied Region Data" link will no longer appear on the **Manage Regions** page.
4. If you are satisfied using ISO/UN data, click the "Yes" button.

To upload your own geographic regions:

If you wish to create your own customized region values, in addition to or instead of the seeded values that the Exchange provides, you can download a .txt-based spreadsheet or an XML file in which you can define the geographic region values you wish to use.

The .txt spreadsheet is a tab-delimited file that you can easily edit with a spreadsheet application. Enter your region values as necessary in the columns identified by their headings.

You can edit the XML file using Notepad or any other plain text editor. The .zip file containing the .xml file also contains the document type definition (DTD) document that describes the elements required in the .xml file.

1. In the "Configuration" tab, click the "Manage Regions" link.
2. Click the "Download Region Template" link.
3. Click the appropriate radio button to indicate which type of template (spreadsheet or XML) you wish to download, and click the "Download Now" button.
4. When prompted, save the .zip file and extract the contents to a convenient directory.
5. Enter the information in the file. The table below details all the possible elements you can specify for your region definition. The Country and Country_

Code at a minimum are required. Some elements are applicable to some sub-regions but not others. This provides you with the ability to tailor your region definition to the level of detail required.

Table 2–13 Region Definition Elements

Element Name	Contents
Country	Name of the country
Country_Code	ISO/UN country code. You can find a list of the ISO/UN country codes at Web sites such as ftp://ftp.ripe.net/iso3166-countrycodes .
State	Name of the state
State_Code	ISO/UN state code
City	Name of the city
City_Code	ISO/UN city code
Postal_Code	Postal code value
County	General purpose identifier for levels between state and city
Latitude	Sub-region's latitude
Longitude	Sub-region's longitude
Timezone	Timezone in which this sub-region is located
Alternate_Name	Alternate name for this sub-region
Port_Flag	Whether this region contains a port facility
Airport_Flag	Whether this region contains an airport
Road_Terminal_Flag	Whether this region is a major transportation terminus
Rail_Terminal_Flag	Whether this region is a major rail terminus
State_Postal_Code_Start	The beginning postal code of a range of codes
State_Postal_Code_End	The ending postal code of a range of codes

To provide different regions in different languages, specify the ISO language and territory code, such as EN-US, at the beginning of the file. You can obtain ISO language codes at a number of Web sites, such as <http://www.ics.uci.edu/pub/ietf/http/related/iso639.txt>. You can obtain ISO territory codes at a number of Web sites such as <ftp://ftp.ripe.net/iso3166-countrycodes>.

6. Once you have finished specifying all the appropriate parameter values for all the sub-regions you are defining, return to the **Manage Regions** page.
7. Click the "Bulk Load Regions" link.
8. Click the "Browse" button and navigate to the directory where you saved your file.
9. Click the "Start Load Now" button.

If you are uploading a small number of regions, your upload job may complete quickly in which case a "Job completed successfully" or "Job completed with error(s)" message is displayed. If you are uploading a large number of region values, your job may take some time. You can check the progress of your upload job by returning to the **Manage Regions** page and clicking the "View Upload Jobs" link. The **View Region Jobs** page appears. If your upload was unsuccessful, the "Bulk Load Job Status" display contains a link for your job that allows you to access the **Job Errors** page to view your errors.

10. Once your bulk upload job has run successfully, you can delete the output from the **View Region Jobs** page by selecting the checkbox for your job and clicking the "Delete" button.

To edit geographic region values:

Once you have uploaded the initial geographic region values, either by uploading the UN/ISO-based values or your own custom values, you can edit them as necessary.

To edit a region value:

1. In the "Configuration" tab, click the "Manage Regions" link.
2. In the **Manage Regions** page, click the "Edit Regions" link.
3. Select the Country value which owns the sub-region you wish to edit from the "Country" drop-down menu (you can also enter values directly into the State or Province and City fields if you wish to edit a particular state or city). Once you have entered as many search values as you need, click the "Search" button.
4. Depending on the number of search fields you entered, you may see many entries on the resulting screen. If the sub-region you wish to modify is not displayed, you can access it by clicking the parent sub-region's links. To edit an existing sub-region, click the radio button to its left and click the "Edit" button. To add a new sub-region, click the radio button to the left of the parent sub-region and click the "Add Sub-Region" button.

To add a sub-region to an existing region or sub-region.

1. Expand the sub-regions until you see the parent to which you wish to add a sub-region.
2. Click the radio button to the left of the parent entry and click the "Add sub-region" button.
3. In the **Add Sub-Region** page, select the type of sub-region you wish to add from the "Sub-region Level " drop-down menu.
4. Enter the appropriate information for the new sub-region. Note that not all parameters are required or applicable for all types of sub-regions.
5. Click the "Submit" button.

To edit a sub-region's parameters:

1. Access the desired sub-region by clicking its parent links.
2. Once you have the sub-region displayed, click the radio button to its left and click the "Edit" button.
3. Enter values in the appropriate fields or click the appropriate checkboxes.

Table 2–14 Sub-Region Parameters

Parameter	Contents
Name	Name of the sub-region
Alternate Name	Any alternate name for the sub-region
Abbreviation	Sub-region abbreviation
Latitude	Latitude value for the sub-region
Longitude	Longitude value for the sub-region
Timezone	Timezone in which the sub-region is located
Port	Whether the sub-region has port facilities
Airport	Whether the sub-region has airport facilities
Road Terminal	Whether the sub-region is a road terminus
Rail Terminal	Whether the sub-region is a rail terminus

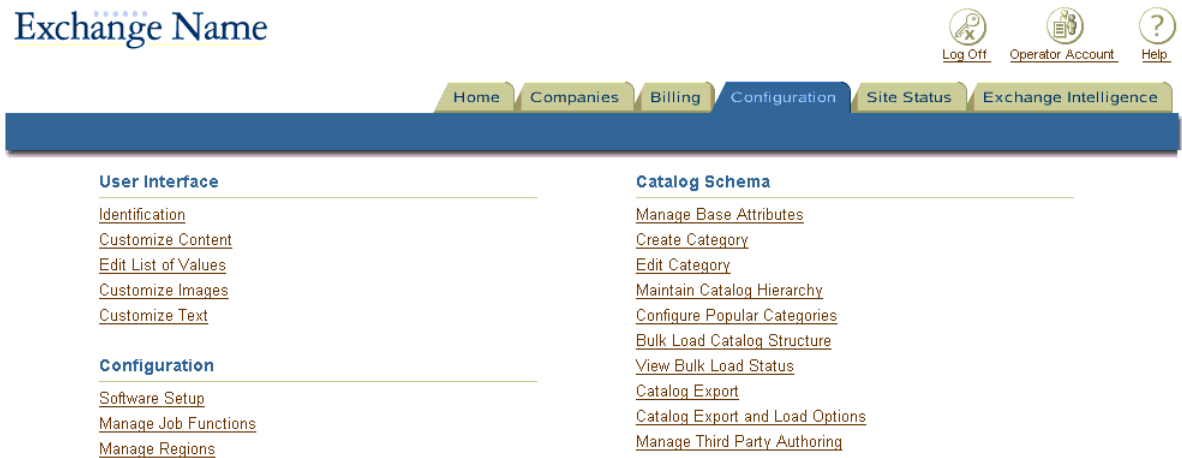
4. Click the "Submit" button to update the region definition.

Catalog Setup Steps

This sections consists of the following steps:

1. Determine Catalog Authoring Activities (Required)
2. Determine the Catalog Structure (Required)
3. Create the Catalog Structure (Categories, Attributes, and Category Hierarchy) (Optional)
4. Check the Catalog Structure (Optional)
5. Configure the Catalog Export and Load Options (Optional)
6. Configure Popular Categories List (Optional)
7. Customize Catalog News (Optional)

The steps in this section are performed in the "Catalog Schema" section of the Exchange Operator application, as shown in the following illustration:



Step 1 Determine Catalog Authoring Activities (Required)

In this step, decide what activities a catalog author on the Exchange should be given access to.

Note: This step can take time, particularly if you need to create a contract with a third-party catalog content provider.

Consider the following:

- Is the default "Catalog Authoring" job function sufficient or does a specialized job function need to be created for various suppliers? (See **Customize Job Functions** at the end of this chapter and return here.)
- Is a third party content provider necessary or desired? You can appoint several third-party catalog content providers and let individual suppliers choose which third parties to use. Or you can appoint one third-party content provider for all of the Exchange. For a complete discussion of your options, see [Overview of Third-Party Catalog Authoring](#) in [Appendix B](#).

Step 2 Determine the Catalog Structure (Required)

The catalog structure is also known as the catalog schema. The catalog schema consists of the categories and attributes that make up the Exchange catalog.

The Exchange catalog structure is made up of two kinds of categories, which work together to create a category hierarchy. The catalog structure also consists of attributes. As the Exchange Operator, you create and modify the categories, category hierarchy, and attributes that suppliers and buyers see on the Exchange.

Note: This step can take significant preparation time for you to determine a catalog structure that will work for companies participating on the Exchange. For a complete picture of the Exchange catalog structure and how it affects buyers and sellers on the Exchange, see [Appendix B](#).

After you have reviewed [Appendix B](#), consider the following questions when developing the catalog schema for the Exchange.

- What categories and attributes are needed? How should the categories be structured?
- Will you let companies bulk load their own categories and category attributes? (You can allow this by selecting a check box in the **Catalog Export and Load Options** page, in the "Configuration" tab. This is [Step 5 Configure Catalog Export and Load Options \(Optional\)](#) below.)

- Decide how many and which attributes are searchable, and so on. If you create your own category attributes or base attributes, you define them using attribute properties. These attribute properties include whether the attribute is searchable, whether it displays on the **Search Results** page when buyers search for items or displays only when they click to view the item's details, and so on. Making too few attributes searchable can limit the number of search "hits." However, the more attributes you make searchable, the longer it takes for the Exchange to conduct searches that buyers or catalog authors perform. (Also, if you make long values like description searchable, the accuracy of the search is diluted, and if you make attributes that are not displayed searchable, buyers and catalog authors will not understand why a particular item was included in their search results.) Making too many attributes visible on the **Search Results** page can make a buyer's search results hard to analyze. (For example, they may need to scroll too far horizontally to see all of the items' attributes.)

For detailed descriptions of attributes and their properties, see the *Readme* file that appears when you click the "Download Now" button in the **Bulk Load Catalog Structure** page in the "Configuration" tab.

- Note that you can make new base attributes that you create "Required" or change existing "Optional" attributes to "Required" only if there are no items yet in the catalog or if all items currently in the Exchange catalog, in all translations, already have a value for that attribute. You can make new category attributes that you create "Required" or change existing "Optional" category attributes to "Required" only if there are no items yet in that category or if all items currently in that category, in all translations, already have a value for that attribute.
- Note that it is difficult to delete an item category once you create it and sellers start adding items in that category. You cannot delete a category that already contains items. (You would have to ask sellers to delete the items first.)
- Get approval from your Exchange organization on your catalog structure.

Step 3 Create the Catalog Structure (Categories, Attributes, and Category Hierarchy) (Optional)

You can use any combination of online editing and XML files to maintain your categories, attributes, and category hierarchy.

To create categories, attributes, and a category hierarchy online:

1. In the "Configuration" tab access the links in the "Catalog Schema" section:

- Click the "Create Category" link to create new item categories and category attributes. Enter the following information for the category:
 - **Category Name.** The name of the category that displays to companies on the Exchange. It must be unique. Limit = 250 characters.
 - **Category Key.** An internal identifier for the category. It must be unique. Companies can use the category key to identify a category when they upload their catalogs. The key can be the same as the name. Or you can use any identifier you want, such as UNSPSC code. The key never changes. (To change it, you would delete the category and recreate it using another key.) Limit = 250 characters.
 - **Category Description (Optional).** A description, for your own purposes as the Exchange Operator. Limit = 2,000 characters.

Note: The maximum character lengths given above vary depending on how you or your Exchange installation team has configured the database character set for the Exchange and depending on the language of your catalog content. If the Exchange is using a variable-length database character set encoding, then the maximum character length depends on its length when converted to bytes. That is, the actual character lengths allowed may be less than what is stated above, for some languages (such as Japanese).

- Click the "Maintain Category Hierarchy" link to create a browsing category. Also use this link to create a category hierarchy, associating parent categories with sub-categories for easy browsing. To associate an item category with a parent category, you must create the item category first, using the "Create Category" link.

When you display a parent category in the **Maintain Category Hierarchy** page, the Exchange displays its current sub-categories. Only the first sub-category level is displayed. You do not see any sub-categories below that, if there are any. You see only one sub-category level at a time. And when a move a sub-category, all the sub-categories below it are moved as well. (Moving a sub-category requires clicking the "Remove" button to remove it from its current parent, then searching for and adding it to another parent category.)

Note: You cannot search for item categories on the **Maintain Category Hierarchy** page. If you want to move an item category from one parent to another, and you do not know to which parent category it belongs, use the **Catalog Structure** page in the Exchange (or your own records) to find out. (In the "Marketplace Selling" application of the Exchange, click the "Catalogs" tab, then "Catalog Authoring" and "Review Catalog Structure.")

- Click the "Manage Base Attributes" link to create new base attributes or edit existing base attributes if desired. You cannot delete any of the default base attributes that the Exchange provides.
- 2. For detailed descriptions of categories and attributes, including base attribute properties that you cannot modify and the impact of making catalog structure changes after sellers add items to the Exchange catalog, see the *Readme* file that appears when you click the "Download Now" button in the **Bulk Load Catalog Structure** page in the "Configuration" tab.

To bulk load categories, attributes, and a category hierarchy in a single file:

1. In the "Configuration" tab, click the "Bulk Load Catalog Structure" link.
2. In the **Bulk Load Catalog Structure** page, click the "Download Now" button to download a WinZip file. A *Readme* file in the downloaded WinZip file contains detailed instructions on, including examples of, preparing an XML file for creating, updating, or changing categories and attributes.
3. After you have uploaded your file, click the "View Bulk Load Status" link to check that the contents have uploaded successfully to the Exchange. If there are errors, correct them in your XML file and upload the XML file again.

To download your catalog structure:

To download categories, category attributes, and base attributes so that you can make changes to them, go to the "Configuration" tab and click the "Catalog Export" link. Follow the instructions on the screen. You can download the categories and attributes in any language supported by the Exchange. Only those languages that are supported by the Exchange display in the pull-down menu at the "Language" field. When you choose a language, you receive the category information in that language, if someone has provided the translations. The downloaded file is in XML format.

Note: The XML file is downloaded in the UTF-8 encoding format. If you are using a UTF-8 editor or if the file does not contain special or accented characters or multibyte languages (such as Chinese), you do not have to change this encoding when you reupload the file to the Exchange. If, however, you are not using a UTF-8 editor, then any special or multibyte characters in the file will not display properly when you open the file. In this case, you must do either of the following: a) use a UTF-8 editor; or b) find a utility that converts the file from UTF-8 encoding to the encoding that matches your text editor, and update the encoding in the file.

For instructions on creating, modifying, or translating the categories and attributes XML file and uploading the file to the Exchange, see the *Readme* file included in the Zip resources download on the **Bulk Load Catalog Structure** page.

Step 4 Check the Catalog Structure (Optional)

Using the test company you created earlier, go to the Marketplace Exchange and make sure the structure looks how you intended. Your test company needs to be assigned the "Catalog Author" job function to see the structure from the catalog author's perspective and a shopping or buyer job function to see the structure from a buyer's perspective.

If you want to download your categories and category attributes just to view them, use the **Catalog Structure** page. On the Exchange home page, click the "Marketplace Selling" link, click the "Catalogs" tab, then click the "Export Catalog Structure" link and follow the instructions on the screen. The **Export Catalog Structure** page downloads a spreadsheet text file so that you can view all the categories, sub-categories, and category attributes in a hierarchy format.

Step 5 Configure Catalog Export and Load Options (Optional)

The Exchange comes with default catalog export and load options that you can change if desired.

To check the default settings and change them if desired:

1. In the "Configuration" tab, click the "Catalog Export and Load Options" link.
2. In the **Catalog Export and Load Options** page, set the following options:
 - **Catalog Load** - Can catalog authors edit the catalog structure?

Typically, categories (such as Ball Point Pens) and category attributes (such as Ink Color) in the Exchange catalog are controlled by you, and catalog authors (suppliers or third-party catalog content providers) cannot create new categories or category attributes. However, this option lets you allow catalog authors to include new item categories, new category attributes, or both in their catalog uploads if they are using XML to bulk load catalog items. If you allow automatic category creation during catalog uploads, the catalog author can use the XML bulk loading feature to classify an item under a category that doesn't yet exist in the Exchange, and the Exchange will add that category. When people then order that supplier's item, the item information will show that the item belongs to the category that the supplier created. And when people enter a search for the category, they will also find the category that the supplier created. They just won't see the category or its items by browsing the Exchange list of categories, nor will the category display in the Exchange list of categories, unless you, as the Operator, assign it to a parent category.

Catalog authors cannot create base attributes using this functionality, only categories or category attributes.

Note: If you allow catalog authors to create new categories, the catalog authors must use both the category name and category key to specify categories, even if they are specifying categories that already exist.

- **Catalog Load - How many days until files are deleted?**

When suppliers or third-party catalog content providers bulk load catalog items to the Exchange using XML or a spreadsheet text file, the Exchange creates a job for the bulk load. When the job completes loading to the Exchange, the job displays errors that occurred, if any, that the catalog author can investigate and fix. Some suppliers also use a catalog authoring feature that does not make the catalog items visible in the Exchange catalog until the supplier explicitly reviews and publishes the bulk load job. Use the "Catalog Load - How many days until files are deleted?" option to control how many days the bulk load job is available to the catalog author for correcting errors or for reviewing and publishing.

- **Catalog Export - How many days until files are deleted?**

When suppliers or buyers download a supplier's catalog items from the Exchange, a two-step process occurs: the Exchange creates the file and

stores it (which can take a while for large catalogs), then the supplier or buyer selects the file and clicks the "Export" button to save the file to a local directory. Use this option to control how long the catalog file remains displayed and accessible for exporting in the **Export Catalog** page in the Exchange. For example, if the supplier wants to export the same file again the next day or a week later, it will still be available if you choose 8 days.

- **Image Load - Can companies load images?**

Use this option to indicate whether companies can load images to the Exchange and, if so, how many megabytes of disk space you allow each company. In the Exchange, suppliers can load images, then use the catalog authoring functionality to attach a loaded image to a particular item.

If you choose "No," companies cannot load images. The **Bulk Load Images** and **Maintain Images Online** pages in the Exchange will not be available to companies at all.

If you choose "Yes" to allow image hosting on the Exchange, companies can upload images. Choose how many megabytes (MB) of disk space you want to allow each company. The MB number applies to all companies on the Exchange. For example, if you enter 10 MB, every company on the Exchange has 10 MB available to it for hosting images. (If you enter 0 MB, the **Bulk Load Images** and **Maintain Images Online** pages in the Exchange will still be available to the company or companies, but they won't be able to upload any images.)

You can change this MB number for specific companies by going to the **Registered Companies** page in the "Companies" tab and clicking the "Update Company Settings" link. For example, if you enter 10 MB in the **Catalog Export and Load Options** page and 20 MB for ABC Co. in the **Registered Companies** page, all companies on the Exchange have 10 MB available to them for hosting images except for ABC Co., which has 20 MB available.

Each company can see the total MB of image disk space allocated to it in the **Bulk Load Images** and **Maintain Images Online** pages.

Make sure, if you choose to let a company load images, that the company is also assigned the Image Load task.

- **Third Party Catalog Authoring - How many days until the audit trails of online activities are deleted?**

Choose how many days online activity data is kept for the "Review Third Party Activities" report. For example, if you enter seven days, suppliers can

review third parties' online catalog authoring activity within the last seven days.

3. Click the "Apply Changes" button.

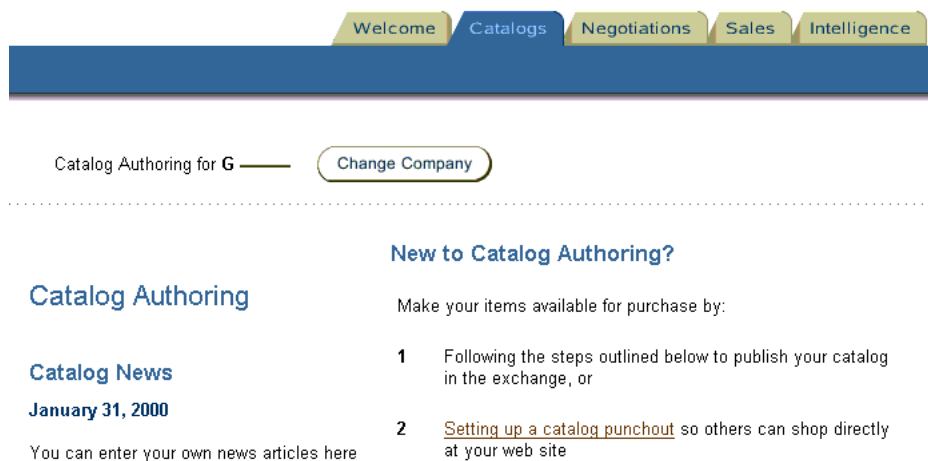
Step 6 Configure Popular Categories List (Optional)

Use the **Configure Popular Categories** page in the "Configuration" tab to display up to 10 item categories or browsing categories that are most commonly used for ordering on the Exchange. This list displays on the Exchange home page, in the **Catalog Authoring** home page, and in the **Product Development** home page.

1. In the "Configuration" tab, click the "Configure Popular Categories" link.
2. Follow the guidance on the **Configure Popular Categories** page to list and order your top 10 categories.

Step 7 Customize Catalog News (Optional)

You can use the Catalog News functionality (shown in the illustration below) to communicate important information about the Exchange catalog, including updates to categories or attributes, to catalog authors.



To customize the catalog news:

1. In the "Configuration" tab, click the "Customize Content" link to open the **Customize Content** page.
2. From the "Content Type" drop down menu, select "Catalog News."
3. For detailed instructions on using the Customize Content page, see [Step 5 Customize Exchange Site Content \(Recommended\)](#) on page 2-24.

Marketplace Purchasing Setup Steps

Other setup steps in this chapter, such as [Step 3 Customize Drop-Down Menu Items \(Lookup types\) \(Optional\)](#) on page 2-84, affect buying activities on the Exchange. Other than these, there is no setup specifically for marketplace purchasing (buying).

Negotiations Setup Steps

This section consists of the following steps:

1. Create a Negotiations Item Category (Optional)
2. Define Exchange-wide Reusable Attribute Lists (Optional)

The steps in this section are performed in the Negotiations section of the Exchange Operator application.

Step 1 Create a Negotiations Item Category (Optional)

You can select an item category to appear as the "generic" category in Exchange negotiations. When an Exchange user creates a new negotiation or negotiation template, the user must select an Exchange category for each item added to the negotiation. If you have set a category, such as "Miscellaneous," as the generic category for negotiations, the user will have the option to select that category without searching the Exchange catalog structure for a specific item category. The option to select the generic item category will appear (with the name of the category that you have selected as the generic item category) at the "Category" field.

For the negotiations item category, you must select a category that you already created in the [Catalog Setup Steps](#) on page 2-35.

To configure the generic item category:

1. In the "Configuration" tab, click the "Negotiations Configuration" link.

2. On the **Generic Item Category** page, enter the name of the generic item category you want assigned to miscellaneous or generic items during new negotiation creation. You can also click the Flashlight icon at the "Category" field to search for your desired generic item category. Your generic item category must already exist in the Exchange catalog structure.
3. Click the "Done" button. The Exchange will validate your generic item category. You will receive an error message if you have entered an invalid category. Make a new selection, then click the "Done" button.

The category you select for negotiations behaves like any other item category on the Exchange. See [Appendix B](#).

Step 2 Define Exchange-wide Reusable Attribute Lists (Optional)

You can create attribute lists to include on negotiation templates or to use when creating any new negotiation. These attribute lists are then available to all companies on the Exchange.

Note: The Exchange Company Administrator of each registered company on the Exchange can also create its own attribute lists.

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

If a user includes an attribute list on a negotiation template, the attributes on the list will apply to all items added to a negotiation created with that template (though the person using the template can edit and remove attributes as appropriate).

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

To create a new attribute list:

1. In the "Configuration" tab, click the "Manage Reusable Attribute Lists" link.
2. On the **Negotiation Attribute Lists** page, click the "Create New List" link.

3. On the **Create Attribute List** page, enter a List Name and brief Description for your attribute list. Choose the Status (either "Active" or "Inactive"). An "Active" list can be used immediately; an "Inactive" list will be stored in the Exchange, but will not be available for use unless you edit the list and change its status to "Active."
4. To add attributes to your attribute list, click the "Add Attributes" link on the **Create Attribute List** page. An attribute list must include at least one attribute.
5. On the **Add Attributes** page, enter your attribute information in the appropriate fields. Required fields are marked with an asterisk (*):
 - ***Attribute.** Enter a name for your attribute (for example: "Mileage"; "PPM Defect Rate"; "Grade"; and so on).
 - **Response.** If you want this attribute to be required (all participants must enter a value for this attribute when responding), select "Required." If you want this attribute to be optional (participants are not required to enter a value for this attribute when responding), select "Optional." If you want this attribute to be displayed to the participant without allowing any response, select "Display Only."
 - **Value Type.** Select the type of value that participants should enter for this attribute when bidding. Participants may enter *Text* (letters, words, digits, and so on), *Numbers* (digits with decimals allowed), *Dates* (numbers in date format), or *URLs* (Web site addresses that begin with a valid URL protocol, such as `http://`, `https://`, and `ftp://`; only values with a *URL* type display as links; for example, a Web site address entered in a *Text* type will display simply as text). The value type you select also governs the value you can enter in the "Negotiation Value" field. *Text* is the most flexible value type. If you select *Text*, participants will be allowed to enter letters as well as numbers. If you select *Numbers*, participants will only be allowed to enter digits; if you select *Dates*, participants will only be allowed to enter numbers in date format.
 - **Negotiation Value.** If desired, set your item specifications by entering a target value for the item in the "Negotiation Value" field (for example: "Fewer than twelve thousand miles per vehicle"; "Fewer than eight defects per million parts manufactured"; and so on).
 - **Display Value to Participants.** If you want participants to see the Negotiation Value, select "Yes" from the drop-down menu at the "Display Value" field. If you do not want participants to see the Negotiation Value, select "No" from the drop-down menu at the "Display Value" field.

6. When you have finished entering your attribute information, click the "Add Another" button to add another new attribute, or click the "OK" button to add your current attribute to your attribute list and return to the **Create Attribute List** page.
7. On the **Create Attribute List** page, review your attribute list name, description, status, and attributes. When you are satisfied with your attribute list, click the "Submit" button.

Billing Setup Steps

If you choose to charge companies for their use of the Exchange, follow the steps in this section:

1. Modify Default Billing Activity Types (Optional)
2. Activate the Recording of Billing Charges (Required *)
3. Define a Default Exchange Price List (Required *)
4. Set Up Oracle Receivables Integration (Optional)
5. Set Up an XML Delivery Method (Optional)
6. Choose Exchange Payment Methods (Optional)

* "Required" means "Required if you choose to implement billing." If you choose not to charge companies for their use of the Exchange, you do not have to follow the steps in this section.

Note: Determining how much you want to charge companies for their use of the Exchange can require significant preparation time. Allow yourself the time to think through your billing strategy before implementing the billing steps described below.

Billable Activities

You can bill for the following activities on the Exchange:

Registration and Administration

Company Subscription This specifies a flat monthly fee for the company or companies you assign to this pricing. The Company Subscription billing activity type defaults a pricing method and type of Amount and Fixed because you specify

one flat monthly fee. The fee you specify is not charged until you use the **Charge Subscription Fees** page to submit the charges for a given calendar month. (Note that if you submit subscription fees for a past month, the **Charge Subscription Fees** page uses the current price list assigned to a company to determine the subscription fee charges even if the current price list is different than last month's price list.)

You can charge a subscription fee in addition to, or instead of, charging by transaction. You can charge either a company subscription fee, a user subscription fee, or both.

User Subscription This specifies a monthly fee for a company based on the number of users in that company who are registered with the Exchange that month. For example, if a company has 10 registered users at the beginning of the calendar month, and two more register at the end of that month, the company is charged for 12 users that month even if two of them don't access the Exchange that month. The fee you specify is not charged until you use the **Charge Subscription Fees** page to submit the charges for a given calendar month. (Note that if you submit subscription fees for a past month, the **Charge Subscription Fees** page uses the current price list assigned to a company to determine the subscription fee charges even if the current price list is different than last month's price list.)

The User Subscription charge that you specify is per user. Therefore, you can use a pricing method of Multiple only. For example, using Multiple/Fixed pricing, you can charge a flat \$5 per user per month. In this example, if 12 users in that company are registered with the Exchange that month, the total charge is \$60. Or, using Multiple/Step Direct pricing, you can charge \$5 per user per calendar month for 1-10 registered users and \$2 per user per calendar month for 10-20 registered users. In this example, if 10 users in that company are registered with the Exchange that month, the total charge is \$20.

You can charge a subscription fee in addition to, or instead of, charging by transaction. You can charge either a company subscription fee, a user subscription fee, or both.

Manual charge types You can define multiple different manual charge types to track additional miscellaneous charges against a company. Charge information for such charge types must be entered manually against a company. Manually entered charges can be downloaded and processed within the billing system. There is a default manual charge type called Miscellaneous Charge which you can use, or you can define your own manual charge types.

User-defined charge types You can create your own billing activity types. You can use these billing types to integrate with non-Exchange systems. For example, you might

have a hybrid Exchange in which the actual activity (such as an auction or spot purchase) occurs outside the Exchange, but the billing is performed by the Exchange. In such cases, the use of a user-defined billing type indicates the need to include information from outside the Exchange to complete the billing.

Marketplace Purchasing

Spot Purchase This specifies the charges to be incurred to the supplier when a purchase order submitted by a buyer is approved. A spot purchase order is created when a buyer adds catalog items to the shopping cart and completes the order. (Once the order is approved, it is sent automatically to the supplier.) If the supplier rejects the purchase order by the acknowledge-by date or (if there is no acknowledge-by date) by the need-by date on the order, the supplier is credited back the amount.

Transaction Delivery This specifies the charges to be incurred for each XML transaction delivery associated with a catalog purchase. These charges are incurred only if the company sets up XML transaction delivery of these documents outside of the Exchange.

- **Purchase Order Outbound.** The buyer is charged for the purchase order XML transaction delivery.
- **Sales Order Outbound.** The seller is charged for the sales order XML transaction delivery.
- **Purchase Order Acknowledgment Outbound.** The buyer is charged for XML transaction delivery of the supplier's acknowledgment of the purchase order.

Negotiations

Publish Buyer Auction This specifies the charges to be incurred to the buyer for each buyer auction that gets published. (Once the auction is published, the Exchange does not credit back the charges if the auction is canceled.) The Publish Buyer Auction type defaults a pricing method and type of Amount and Fixed. This is because there is no transaction amount (for example, no auction award amount) associated with publishing a buyer auction. Therefore, the charge, if you specify one, is for each published buyer auction.

Award Buyer Auction This specifies the charges to be incurred to the buyer for each buyer auction that is awarded once the buyer accepts a bid.

Publish Seller Auction This specifies the charges to be incurred to the seller for each seller auction that gets published. (Once the auction is published, the Exchange does not credit back the charges if the auction is canceled.) The Publish Seller Auction type defaults a pricing method and type of Amount and Fixed. This is because there is no transaction amount (for example, no auction award amount) associated with publishing a seller auction. Therefore, the charge, if you specify one, is for each published seller auction.

Seller Auction - Award Bid This specifies the charges to be incurred to the seller for each seller auction that is awarded once the seller accepts a bid.

Award Request For Quote This specifies the charges to be incurred by the buyer for each request for quotation (RFQ) that is awarded once the buyer accepts a quote.

Commitment to Buying Offer This specifies the charges to be incurred by the buyer once the commitment to the original offer to buy or a related counteroffer to buy is finalized. The commitment may optionally be finalized on buyer's approval. This charge will be reversed if this commitment is cancelled.

Commitment to Selling Offer This specifies the charges to be incurred by the seller once the commitment to the original offer to sell or a related counteroffer to sell is finalized. The commitment may optionally be finalized on seller's approval. This charge will be reversed if this commitment is cancelled.

Publish Offer to Buy This specifies the charges to be incurred by the buyer for each offer to buy that gets published. Once the offer to buy is published, the Exchange does not credit back the charges if the offer is canceled. The Publish Offer to Buy type defaults to a pricing method of Amount and type of Fixed.

Publish Offer to Sell This specifies the charges to be incurred by the seller for each offer to sell that gets published. Once the offer to sell is published, the Exchange does not credit back the charges if the offer to sell is canceled. The Publish Offer to Sell type defaults to a pricing method of Amount and type of Fixed.

Publish Request for Quote This specifies the charges to be incurred by the buyer for each request for quotations (RFQ) that gets published. (Once the RFQ is published, the Exchange does not credit back the charges if the RFQ is canceled). The Publish RFQ type defaults to a pricing method of Amount and type of Fixed.

Other Exchange Applications

Supply Planning For the Supply Chain feature of the Exchange, this specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to supply planning. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged. The Supply Planning billing activity type defaults a pricing method and type of Amount and Fixed.

Demand Planning For the Supply Chain feature of the Exchange, this specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to demand planning. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged. The Demand Planning billing activity type defaults a pricing method and type of Amount and Fixed.

Production Sequencing For the Supply Chain feature of the Exchange, this specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to production sequencing. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged. The Production Sequencing billing activity type defaults a pricing method and type of Amount and Fixed.

Vendor/Customer Managed Inventory For the Supply Chain feature of the Exchange, this specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to supplier- or customer-managed inventory. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged. The Vendor/Customer Managed Inventory billing activity type defaults a pricing method and type of Amount and Fixed.

Example Fee Schedules

In the following illustration, the Exchange Operator has created a Fee Schedule that lasts from January 6, 2001 to January 9, 2001. (This Fee Schedule belongs to a Price List, which the Exchange Operator then assigns to a company or to all companies. A Price List can contain one or more Fee Schedules, with different effectivity dates.)

Fee Schedule 1

A price list can have several fee schedules; however, effectivity dates may not overlap and must be contiguous. [Learn more about fee schedules.](#)

* Effective From 01-06-2001 00:00 PST

Effective To 01-09-2001 23:59 PST

Price Lines

Click a Billing Activity link below to specify pricing for all related transactions. [Learn more about price lines.](#)

Billing Activity Type	Pricing Method	Pricing Type
Award Buyer Auction	Amount	Fixed
Company Subscription	Amount	Fixed
Demand Planning	Amount	Fixed
Production Sequencing	Amount	Fixed
Publish Buyer Auction	Amount	Fixed
Publish Seller Auction	Amount	Fixed
Award Seller Auction	Amount	Fixed
Spot Purchase	Amount	Fixed
Supply Planning	Amount	Fixed
Transaction Delivery	Amount	Fixed
User Subscription	Multiple	Fixed

In the Fee Schedule, the Exchange Operator can charge for any Billing Activity Type by clicking a Billing Activity Type link. For a given Billing Activity Type, the Exchange Operator specifies a Pricing Method, Pricing Type, and Price Breaks.

Definitions of the Pricing Method and Pricing Type options are provided in [Step 3 Define a Default Exchange Price List \(Required\)](#) on page 2-58. The following examples show how the price breaks work for each of the possible Pricing Method and Pricing Type options.

Amount (Pricing Method) and Fixed (Pricing Type) Example

For the following line break, the charge is \$10.00 for every transaction—for example, for every buyer spot purchase. For a Fixed type, there can be only one price break, from 0 to infinity.

Break From	Break To	Rate or Amount
0		10.00

If this were a Company Subscription price break, the charge would be \$10.00 per calendar month. If this were a User Subscription price break, the pricing method would be Multiple and the charge would be \$10.00 per registered Exchange user per calendar month.

Amount (Pricing Method) and Step Direct (Pricing Type) Example

For the following line breaks, if a company performs a \$2,500 transaction, the charge is \$15.00. If a company performs a \$1,000 transaction, the charge is \$15.00.

Break From	Break To	Rate or Amount
0	1,000	10.00
1,000		15.00

If this were a User Subscription price break, the pricing method would be Multiple and the charge would be \$10.00 for each registered Exchange user per calendar month if the company has under 1,000 registered users.

Amount (Pricing Method) and Step Cumulative (Pricing Type) Example

For the following line breaks, if a company performs a \$2,500 transaction, the charge is \$25.00: \$10.00 is charged for the first \$1,000, and \$15.00 is charged for the remaining \$1,500, since \$1,500 falls between 1,000 and 5,000.

Break From	Break To	Rate or Amount
0	1,000	10.00
1,000	5,000	15.00
5,000		20.00

If a company performs a \$7,000 transaction, the charge is \$45.00: \$10.00 is charged for the first \$1,000; \$15.00 is charged for the next \$4,000; and \$20.00 is charged for the remaining \$2,000.

If this were a User Subscription price break, the pricing method would be Multiple and the charge would be \$10.00 for each registered Exchange user per calendar month if the company has under 1,000 users.

Note: For Step Cumulative pricing only, the Break To is inclusive. For example, using the price breaks above:

- With Step Direct, a transaction amount of \$1,000 elicits a \$15 charge (the Break To of 1000 is exclusive).
- With Step Cumulative, a transaction amount of \$1,000 elicits a \$10 charge (the Break To of 1000 is inclusive).

This does not apply to the User Subscription billing activity type. For the User Subscription billing activity type, Step Direct and Step Cumulative pricing behave the same—the Break To is exclusive.

Percent (Pricing Method) and Fixed (Pricing Type) Example

For the following line break, if a company performs a \$2,500 transaction, the charge is 10% of \$2,500, or \$250. For a Fixed type, there can be only one price break, from 0 to infinity.

Break From	Break To	Rate or Amount
0		10.00

Percent (Pricing Method) and Step Direct (Pricing Type) Example

For the following line breaks, if a company performs a \$2,500 transaction, the charge is 15% of \$2,500, or \$375. If a company performs a \$1,000 transaction, the charge is 15% of \$1,000, or \$150.

Break From	Break To	Rate or Amount
0	1,000	10.00
1,000		15.00

Percent (Pricing Method) and Step Cumulative (Pricing Type) Example

For the following line breaks, if a company performs a \$2,500 transaction, the charge is \$175: 10% is charged for the first \$1,000 (\$100) and 5% is charged for the remaining \$1,500, since \$1,500 falls between \$1,000 and \$10,000 (5% of \$1,500 = \$75).

Break From	Break To	Rate or Amount
0	1,000	10.00

Break From	Break To	Rate or Amount
1,000	10,000	5.00
10,000		2.00

If a company performs a \$15,000 transaction, the charge is \$650: 10% is charged for the first \$1,000 (\$100), 5% is charged for the next \$9,000 (\$450), and 2% is charged for the remaining \$5,000 (\$100).

Note: For Step Cumulative pricing only, the Break To is inclusive. For example, using the price breaks above:

- With Step Direct, a transaction amount of \$1,000 elicits a \$15 charge (the Break To of 1000 is exclusive).
 - With Step Cumulative, a transaction amount of \$1,000 elicits a \$10 charge (the Break To of 1000 is inclusive).
-

Prerequisites

- Determine a billing strategy—for example, how much you want to charge companies for their use of the Exchange and whether you want to charge different fees for different companies.
- Select a default currency for the Exchange in the **Identification** page in the "Configuration" tab.
- Decide how to export billing information to your system. See [Billing and Customer Export Options](#) on page 2-72.

Step 1 Modify Default Billing Activity Types (Optional)

The Exchange offers default billing activity types that you can use to charge companies for certain transactions that they perform on the Exchange. These billing activity types are listed and described in [Billable Activities](#) on page 2-47.

You can change the names of these default billing activity types to better suit your needs, and you can change the bill-to party they use. For example, Seller Auction - Award Bid charges the originator of the transaction (the seller), but you could

change this to charge the buyer. The default bill-to parties that the Exchange provides (until you change them) are as follows:

Table 2–15 Default Bill-To Parties

Billing Activity	Bill To Party
Award Buyer Auction	Originator
Award Request for Quote	Originator
Commitment to Buying Offer	Originator
Commitment to Selling Offer	Originator
Company Subscription *	Partner
Demand Planning *	Originator
Production Sequencing *	Originator
Publish Buyer Auction *	Originator
Publish Offer to Buy *	Originator
Publish Offer to Sell *	Originator
Publish Request for Quote *	Originator
Publish Seller Auction *	Originator
Seller Auction - Award Bid	Originator
Spot Purchase	Partner
Supply Planning *	Originator
Transaction Delivery	Partner
User Subscription	Partner
Vendor/Customer Managed Inventory *	Originator
* ATTENTION: Do not modify the bill-to parties of these billing activity types. See the Note below.	

Modifications to billing activity types should be carefully thought out, planned, and documented.

Note: Billing activity types with a default Pricing Method and Type of Amount and Fixed should not have their bill-to party changed because the Exchange can only bill one party for these billing activity types. For example, "Publish Buyer Auction" bills the company who published the auction. If you change the bill-to party of "Publish Buyer Auction," the Exchange will return no billing data. Billing activity types whose bill-to party should not be modified are marked with an asterisk in [Table 2-15](#) above.

To change a billing activity type name:

1. In the "Billing" tab, click the "Manage Billing Activity Types" link.
2. Select the billing activity type you want to modify.
3. In the **Edit Billing Activity Type** page, change the name of the Billing Activity Type.
4. Click the "Submit" button to save your change.

To change a billing activity type's bill-to party:

1. In the "Billing" tab, click the "Manage Billing Activity Types" link.
2. Select the billing activity type you want to modify.
3. Change the Bill-To Party to either of the following:
 - Transaction Originator. The company who originates the transaction gets charged.
 - Transaction Partner. The company who receives the transaction gets charged. For example, Spot Purchase charges the partner—in this case, the seller who receives the purchase order.

Note: Transaction Delivery charges the company who elected to receive the transaction (either the buyer or seller, depending on the transaction and the companies' transaction delivery setup). Company Subscription and User Subscription charge the specified company.

4. Click the "Submit" button to save your changes.

To translate an edit to a billing activity type:

If the Exchange is installed in several languages, you may need to translate your billing activity type edits so they will be available to users of the appropriate languages. You need to translate only changes that you make to a billing activity type name or description. If you don't create a translated version, the edited billing activity type will not appear in that language.

To create a translated version of a billing activity type edit:

1. Click the Operator Account icon in the upper-right corner of the page.
2. Click the "Edit Operator Information" link.
3. From the "Language" drop-down menu, select the language in which you wish to add or edit the billing activity type.
4. Click the "Apply Changes" button. The Exchange now displays pages in the language version you selected.
5. Click the "Billing" tab, and make your edit in that language.

Step 2 Activate the Recording of Billing Charges (Required)

1. In the "Billing" tab, click the "Billing Parameters" link.
2. In the **Billing Parameters** page, set "Enable Billing" to **Yes** to indicate that you are going to start collecting billing information for companies now.

Yes means that you are recording billable activities for transactions that companies perform on the Exchange. (Whether you charge or invoice the companies yet is up to you. Setting "Enable Billing" to **Yes** means that you are collecting all of the activities that you intend to bill for.) **No** means that the Exchange does not record the billable activities for any transactions. The **No** option is available if at any time you need to suspend recording billing activity.

Note: You must choose **Yes** before you can create a Default Price List as described in the next step.

3. Click the "Submit" button. You will return to this page later.

Step 3 Define a Default Exchange Price List (Required)

You assign a price list to a specific registered company or companies on the Exchange. A price list contains the pricing information (also called fee schedules)

that you specify to charge a company for its activities on the Exchange. A fee schedule lets you create different billing information for different time periods. For example, a price list can contain one fee schedule for April and another for May through September. For each, you can specify different pricing. You can have one or more fee schedules in a price list. Each fee schedule lets you specify the charges for that period by entering billing information for each billing activity type (for example, for every buyer auction award).

A Default Price List contains pricing information for all companies that are not yet assigned to a company-specific price list. The Default Price List is automatically assigned to newly approved companies in the Exchange. It is used only *until* you assign the company to a specific price list. If a company is assigned to a price list and then the price list expires, the transactions that the company performs appear on the **Pricing Exceptions** page. Only one Default Price List can be active (the Default List button selected on the **Price Lists** page) at a time. You cannot delete the Default List once you create it. However, you can modify it by clicking the "View" link on the main Price Lists page and adding a new fee schedule to the price list.

Note: Whenever a billing activity type is added to an Exchange release, or if you create new manual charge types, you need to create a new fee schedule or price list if you want to incorporate the new charges into your current pricing.

To create a Default Price List:

1. Click the "Billing" tab, then the "Create New Pricelist" link.
2. Enter a List Name and any Description you want.

These will appear on the **Billing** home page when you finish creating the price list. You can enter whatever List Name you want as long as it is unique.

3. Enter Effective From and Effective To dates for your fee schedule.

For a Default List, the Effective To date must be blank.

You can create more than one fee schedule, but the date ranges cannot overlap and must be contiguous.

Note: When you add a fee schedule to a price list that already has a fee schedule, your new fee schedule is an exact copy of the previous one, until you modify it.

- **Effective From Date (Required).** This is the date the price list becomes effective. Unless the date is in the future, you cannot change this date once you click "Apply Changes." Please note:
 - *If this is the first fee schedule in the price list:* The Effective From date can be any date. For example, you can enter a past date if you received erred transactions in the **Pricing Exceptions** page and need to resubmit them for pricing.
 - *If there is already a fee schedule, and the latest fee schedule is still active:* You cannot change an active fee schedule, but you can add a new fee schedule. Subsequent fee schedules in a price list must have an Effective From date of tomorrow or later. Once you enter the Effective From date, the currently active fee schedule automatically changes its Effective To date to the day before your new Effective From date. This ensures that for each price list, only one fee schedule is in use at a time. To start a fee schedule today, you must create a new price list.
 - *If there is already a fee schedule, and the latest fee schedule has expired:* You cannot change an expired fee schedule, but you can add a new fee schedule. The Effective From date of your new fee schedule defaults to the day after the expired fee schedule. This ensures that there are no gaps between the fee schedules. (Note that if a company is currently assigned to an expired price list, the Exchange captures these "un-priced" transactions in the **Pricing Exceptions** page, so that you can resubmit them for pricing.)
 - *If there is already a fee schedule, and the latest fee schedule doesn't start until some time in the future:* You can change both the Effective From and Effective To dates, but be careful not to create unintentional gaps between the fee schedules. (If you want to start a future-effective fee schedule sooner, change its Effective From date to an earlier date, rather than creating a new fee schedule.)
- **Effective To Date.** This is the date the price list expires. This can be blank if you want to use the price list indefinitely. For a Default List, the Effective To date must be blank. You can still add a new fee schedule later even when the Effective To date is blank. When you add the new fee schedule later, the currently active fee schedule changes its Effective To date to the day before your new Effective From date.
- 4. Make sure that these are the name and effective dates you want, then click the "Apply Changes" button. (You cannot change this information once you click "Apply Changes.")

5. Select each Billing Activity Type at the bottom of the screen to define your pricing rules. See [Billable Activities](#) on page 2-47 for descriptions of the Billing Activity Types.
6. If you don't want to bill for a particular type, such as Publish Buyer Auction, do not select that type and do not enter information for it. Each type defaults to a method and type of Amount and Fixed, with a charge of 0, unless you change it. After you finish entering information for one billing activity type, click the Done button to save your changes, return to the **Price List** line page, and select the next billing activity type.
7. Select a Pricing Method and Pricing Type. For examples, see [Example Fee Schedules](#) on page 2-51.

Note: Some billing activity types restrict the Pricing Method and Pricing Type you can use.

- **Pricing Method.** This specifies what is entered for a Rate or Amount for the price breaks:
 - *Percent.* Charges by percent of the transaction amount. For example, the price breaks can charge 25% for a transaction amount between \$0 and \$5,000 and 10% for a transaction amount of \$5,000 or more. In this example, the company is charged \$500 for \$5,000 of activity (10% of \$5,000 = \$500). (Note: The entered value is treated exactly as a percentage. For example, 25 means 25% and .025 means .025%.)
 - *Amount.* Charges a single amount for each price break. For example, the price breaks can charge \$10.00 for a transaction amount between \$0 and \$500. The value should not use a currency symbol—for example, enter 2,000, not \$2,000.
 - *Multiple.* Currently used for the User Subscription billing activity type, this pricing method multiplies your rate or amount by the break from/to value. For example, using Multiple/Fixed pricing, you can charge a flat \$5 per user per month. In this example, if 12 users in that company are registered with the Exchange that month, the total charge is \$60 (12 x \$5).
- **Pricing Type.** This specifies how the Break From and Break To ranges are broken down. Choose one Pricing Type:

- *Fixed.* Charges one amount or percentage per transaction. For a Fixed type, there can be only one price break, from 0 to infinity. The rate or amount is applied per transaction.
- *Step Direct.* Charges an amount or percentage per fixed range of transaction amounts.
- *Step Cumulative.* Charges a certain amount or percentage per incremental range of transaction amounts.

For examples, see [Example Fee Schedules](#) on page 2-51.

8. (Optional) Enter a Minimum Fee and Maximum Fee. (For a pricing method and type of Amount and Fixed, which charges per transaction, a minimum and maximum fee are not used.)
 - *Minimum Fee.* For any transaction amount greater than 0, this minimal amount is charged. For example, if a company incurred only \$15 for a spot purchase, but the minimum charge is 20, the company will be charged \$20. The value should not use a currency symbol - for example, enter 2,000, not \$2,000.
 - *Maximum Fee.* No matter what the transaction amount is, you will not charge more than this amount for any transaction. The value should not use a currency symbol - for example, enter 2,000, not \$2,000.
9. Click the "Done" button.
10. Click "Add Price Break" to enter one or more price breaks. For examples of price breaks, see [Example Fee Schedules](#) on page 2-51.

For a Fixed price type, you can enter only one price break. For the other price types (Step Direct and Step Cumulative), you must enter at least two price breaks.

Enter only the Break From value. The Exchange defaults the Break To value. For example, if you want a price break that breaks from 0 to \$2,000, click "Add Price Break" and enter 2,000 (do not use a currency symbol) in the next Break From.
11. After you enter billing information for the activity types you want to charge for, click the "Done" button and return to the **Billing** home page.
12. Select Default List.
13. Click the "Apply Changes" button. (You need to click "Apply Changes" only when you change the Default List, not when you add a new price list.)

Step 4 Set Up Oracle Receivables Integration (Optional)

Set up Oracle Receivables if you want to process invoices and payments for billable activities and enable companies to view those invoices and payments online in the Exchange. (Alternatively, you can export billable activities to your own system to process invoices and payments. See [Billing and Customer Export Options](#) on page 2-72.) If you want to both process and track invoices and payments online in the Exchange, complete the following steps to set up Oracle Receivables for use with the Exchange.

To set up Oracle Receivables integration:

1. Install and set up Oracle Financials:
 - Install Oracle Financials Release 11i on an Oracle database (RDBMS version 8.1.6). For information about the patch set, see <http://www.oracle.com/support/>.
 - Upgrade your financials applications to multi-org capability, including defining a set of books. See the manual *Multiple Organizations In Oracle Applications* and the *Oracle General Ledger User's Guide* for instructions.
 - Set up the following products in the Oracle Financials instance: Oracle General Ledger, Oracle Receivables, Oracle Payables, Oracle Order Management.
2. Set up database links between the Exchange and Oracle Receivables

Create two database links as follows:

- A database link called "oex_ar_dblink" in the Exchange instance, connecting to the Oracle Financials instance.
- A database link called "ar_oex_dblink" in the Oracle Financials instance, connecting to the Exchange instance.

The SQL command to create a database link is as follows:

```
CREATE DATABASE LINK <name> CONNECT TO <user name> IDENTIFIED BY
<password> USING <connect string>
```

For example:

```
CREATE DATABASE LINK oex_ar_dblink CONNECT TO <ORACLE user name for APPS
super user> IDENTIFIED BY <ORACLE password for APPS super user> USING
<name of target database for Oracle Receivables>
```

```
CREATE DATABASE LINK ar_oex_dblink CONNECT TO <ORACLE user name for APPS
```

```
super user> IDENTIFIED BY <ORACLE password for APPS super user> USING  
<name of target database for the Exchange>
```

If you wish to create database links with names different from the above, do the following:

- In the Exchange instance: By default, the database link name "oex_ar_dblink" is stored in the ERP_DBLINK_NAME column of the POM_BILLING_SEAT_PARAMETERS table. To use a database link with a different name, create the new database link as described above, using your new name, then manually update the ERP_DBLINK_NAME column.
- In the Oracle Financials instance: By default, the database link name "ar_oex_dblink" is used in the synonyms POM_BILLING_OEX_INTERFACE and POM_BILLING_PAYMENT. These synonyms are created as part of the "Exchange Billing Interface" AR patch. To use a different database link name, create the new database link as described above, using your new name, then recreate the synonyms as follows (using the ORACLE account for APPS super user):

```
CREATE SYNONYM pom_billing_oex_interface FOR pom_billing_oex_  
interface@<new_dblink_name>;
```

```
CREATE SYNONYM pom_billing_payment FOR pom_billing_payment@<new_  
dblink_name>;
```

3. Install the "Exchange Billing Interface" Oracle Receivables (AR) patch. The patch set can be downloaded from external-ftp.us.oracle.com or [tcpatch](http://www.oracle.com/support/), or MetaLink. (Access MetaLink via <http://www.oracle.com/support/>.) The corresponding bug and patch number is 1397257. After applying 1397257, apply the patch for bug 1462935.
4. Set up an Oracle Receivables instance. For information about creating an Oracle Receivables instance, see the *Oracle Receivables User's Guide*. This instance needs to be able to communicate with the Oracle Exchange instance via database linking (in either direction) for the integrated Receivables option to work. If database links cannot be established, you need to use the spreadsheet or XML export options (described in [Billing and Customer Export Options](#) on page 2-72).

Note: At present, Oracle does not support database links between the Exchange and Receivables when Receivables is hosted on Oracle Business OnLine.

The following steps are the steps in Oracle Receivables that require specific values to enable transaction import from the Exchange; for the complete Receivables setup steps, see the *Oracle Receivables User's Guide*:

- **Define the Transaction Flexfield Structure.** To use AutoInvoice to import invoices from the Exchange, define the following descriptive flexfields and segments within them:

Table 2–16 Invoice Transaction Flexfield Context

Code	Name	Description
EXCHANGE INVOICES	Exchange Invoices	Exchange Invoices

Table 2–17 Invoice Transaction Flexfield Segments

Name	Column	Value Set	Displayed
Billing Party ID	Billing Party ID (INTERFACE_HEADER_ATTRIBUTE1)	30 characters	No
Billing Site Use ID	Billing Site Use ID (INTERFACE_HEADER_ATTRIBUTE2)	30 characters	No
Billing Interface Request ID	Billing Interface Request ID (INTERFACE_HEADER_ATTRIBUTE3)	30 characters	No
Billing Period	Billing Period (INTERFACE_HEADER_ATTRIBUTE4)	30 characters	No

Table 2–18 Line Transaction Flexfield Context

Code	Name	Description
EXCHANGE INVOICES	Exchange Invoices	Exchange Invoices

Table 2–19 Line Transaction Flexfield Segments

Name	Column	Value Set	Displayed
Billing Party ID	Billing Party ID (INTERFACE_LINE_ ATTRIBUTE1)	30 characters	No
Billing Site Use ID	Billing Site Use ID (INTERFACE_LINE_ ATTRIBUTE2)	30 characters	No
Billing Interface Request ID	Billing Interface Request ID (INTERFACE_LINE_ ATTRIBUTE3)	30 characters	No
Billing Period	Billing Period (INTERFACE_LINE_ ATTRIBUTE4)	30 characters	No
Billing Activity Type Name	Billing Activity Type ID (INTERFACE_LINE_ ATTRIBUTE5)	30 characters	No

- **Define an AutoInvoice line ordering rule for Exchange transactions.** For the Exchange, order the invoice lines by 'Activity Type Name' as follows:
 - Name: Exchange Invoice Line Ordering Rule
 - Description: Exchange Invoice Line Ordering RuleOrder by the following:
 - Sequence: 1
 - Transaction Attribute: INTERFACE_LINE_ATTRIBUTE5
 - Type: AscendingINTERFACE_LINE_ATTRIBUTE5 corresponds to the Activity Type Name descriptive flexfield segment.
- **Define an invoice grouping rule for Exchange transactions.** For the Exchange, define the rule as follows:
 - Name: Exchange Invoice Grouping Rule
 - Line Ordering Rule: Exchange Invoice Line Ordering Rule
- Define auto-accounting.

- **Define a transaction type for Exchange transactions.** Name the transaction type for invoices as follows: Exchange Invoice. Make sure "Tax calculation" is unchecked.
- **Define a batch source for Exchange transactions.** Make sure the "Require Salesperson" system option is set to "no" before you define the batch source as follows:

- Name: Exchange Import
- Description: Invoices Imported from Exchange
- Type: Imported
- Active: Enabled
- Automatic Batch Numbering: Enabled, Last Number: 1
- Automatic Trans Numbering: Enabled, Last Number: 1
- Standard Transaction Type: Exchange Invoice

For the AutoInvoice options, enter the following:

- Grouping Rule: Exchange Invoice Grouping Rule
- Invalid Line: Reject Invoice
- Allow Sales Credit: No

For the customer information, enter the following:

- Bill-to Customer: Value
- Bill-to Address: Value
- Bill-to Contact: Value
- Payment Method Rule: Value
- Customer Bank Account: ID

For the accounting information, enter the following:

- Payment Terms: Value

For other information, enter the following:

- Transaction Type: Value
- Memo Line Rule: Value

- **Define receipt classes and payment methods for the Exchange as follows:**

- Receipt Class Name: Exchange Manual Payment
- Creation Method: Manual
- Remittance Method: No remittance
- Notes Receivable: No
- Require Confirmation: No
- Payment Method Name: Exchange Manual Payment
- Printed Name: Exchange Manual Payment

- Receipt Class Name: Exchange Credit Card Payment
- Creation Method: Automatic
- Remittance Method: Standard
- Notes Receivable: No
- Require Confirmation: No
- Payment Method Name: Exchange Credit Card Payment
- Receipt Maturity Date Rule: Earliest
- Lead Days: 0
- Payment Type: Credit Card
- Merchant ID: (Enter the customer merchant ID)

- Receipt Class Name: Exchange EFT
- Creation Method: Automatic
- Remittance Method: Standard
- Notes Receivable: No
- Require Confirmation: No
- Payment Method Name: Exchange EFT
- Printed Name: Electronic Funds Transfer
- Number of Receipts Rule: One per Invoice
- Receipt Maturity Date Rule: Earliest or Latest (choose either)

- Lead Days: 0
- Payment Type: (Enter any value except credit card.)
- **Set up document sequencing.** If you are using automatic receipts in Oracle Receivables, set up document sequencing for the payment methods "Exchange Credit Card Payment" and "Exchange EFT" that you defined above.
- **Create standard memo lines.** Create one standard memo line for each billing activity type.
 - Name: Use the exact same billing activity type name, such as Spot Purchase, for each standard memo line.
 - Line Type: Line
 - Unit of Measure: Each

Enter other values, such as the ad hoc tax code, as suit your business needs.

5. Enter data into the following fields in the **Software Setup** page in the "Configuration" tab to provide the database integration information:
 - **Billing Database SID.** Oracle system identifier (SID) of the Oracle Financials database.
 - **Billing Database Connect String.** Java Database Connectivity string to specify how the Exchange connects to Oracle Receivables.
 - **Billing Database Username.** ORACLE user name for the APPS super user in the Financials database.
 - **New Billing Database Password.** ORACLE password for the APPS super user in the Financials database.
 - **Retype New Billing Database Password.**
6. In the "Billing" tab, click the "Billing Parameters" link, set the "Integrate with Oracle Receivables" field to Yes in the **Billing Parameters** page, and enter the following information:
 - **Organization Name.** Enter the organization name exactly as you entered it in Oracle Receivables. If the organization you specify does not exist in Oracle Receivables, you will receive an error message when you click "Submit." You must fix the problem before you can continue.
 - **Payment Terms.** Enter a Payment Term exactly as it was defined in Oracle Receivables. All companies who choose the invoice payment method will be billed using this payment term. For example, a payment term named

1/10 Net 30 indicates that the invoice is due in 30 days, but companies get a 1% discount if they pay within 10 days. (The payment terms for credit card and electronic funds transfer payment methods are always immediate.)

To run Receivables import programs:

After you integrate with Receivables, you will need to periodically run the Receivables programs for importing customers and creating invoices, and check the **Billing Exceptions** page to make sure no errors occurred while the invoices were being created.

Run the following programs in Receivables, in this order:

1. Oracle Exchange Customer Import request set. This request set transfers customer data from the Exchange to the Receivables interface tables and then to customer tables within Receivables.
2. Oracle Exchange Invoice Import request set. This request set transfers invoice data to Receivables, and then runs AutoInvoice to create the invoices. Invoices are created for any company who has not been billed for the last month. The invoices are created at the end of each month.

Select the following parameters in AutoInvoice:

- Transaction Source: Exchange Import
 - Default Date: (Enter today's date)
 - Transaction Flexfield: (Not required. Click Cancel if you don't want to enter a transaction flexfield.)
 - Transaction Type: Exchange Invoice
3. Automatic Receipts. This program, which is run from the Receipt Batches window in Receivables, selects invoices for payment processing. When you submit the program, you must enter a Payment Method type of "Exchange EFT" or "Exchange Credit Card Payment." Automatic Receipts selects invoices marked with the specific payment method. Payment settlement for credit card transactions is done through integration with Oracle iPayment. Automatic Receipts then creates a receipt document in Receivables for the payment.

Select the following information in the Receipt Batches window:

- Batch Type: Automatic
- Currency: (If you enter a foreign currency, enter exchange rate information for this batch.)

- Batch Date: (Enter any date.)
- GL Date: (Since the receipt classes for the "Exchange EFT" and "Exchange Credit Card Payment" payment methods do not require confirmation, you must enter a General Ledger date. The default is the batch date. The date must fall within an open or future accounting period.)
- Payment Method: (Enter either "Exchange EFT" or "Exchange Credit Card Payment.")
- After you choose Create: Select the Approve and Create check boxes.

Remember to check the output after you submit each program above to see if any errors occurred. See the *Oracle Receivables User's Guide* for information.

The invoicing and payment activities resulting from running these programs are reflected in the Exchange. Exchange Company Administrators (or anyone in the company who is assigned the "Account Manager" job function) can view these invoices and payments by clicking the "View Invoices" and "View Payments" links in the "Billing" tab in the "Company Administration" application on the Exchange.

Step 5 Select an XML Delivery Method (Optional)

If you decide to export billing information to an external enterprise resource planning (ERP) system using XML, rather than integrating directly with Oracle Receivables, as described in the previous step:

1. In the "Billing" tab, click the "Delivery Methods" link. The Exchange offers six XML delivery methods to choose from. Choose one method for delivering billing XML information and one method for delivering customer XML information. (They can be different methods, or the same method.) See the Delivery Method descriptions at the beginning of the next section ([Billing and Customer Export Options](#) on page 2-72).
2. In the "Billing" tab, click the "Billing Parameters" link to open the **Billing Parameters** page.
3. Choose No in the drop-down menu next to the "Integrate with Oracle Receivables" field. Choose Yes or No for the following options:
 - **Export Billing Activities through XML.** If you choose **Yes**, each billable activity incurred on the Exchange is sent immediately, in "real time," through XML to your own system. If you choose **No**, you can still export billable activities later, by date range, by using the **Transfer Billable Activities** page. For a complete discussion of your options, see [Billing and Customer Export Options](#) on page 2-72.

- **Export Customer Information through XML.** If you choose **Yes**, any change to customer information, such as a new company's registering on the Exchange or an existing company's changing its information, is sent immediately through XML to your own system. If you choose **No**, you can still export customer information later, by date range, by using the **Transfer Customer Information** page. For a complete discussion of your options, see [Billing and Customer Export Options](#) on page 2-72.

Step 6 Choose Exchange Payment Methods

Before you start collecting payment from companies for their use of the Exchange, choose which payment methods you will accept. You can choose among Invoice, Credit Card, or Electronic Funds Transfer (EFT).

To choose the accepted Exchange payment methods:

1. In the "Configuration" tab, click the "Edit List of Values" link to open the **Choose Lookup** page.
2. Select the "Billing Types" lookup type.
3. Click the "Edit" button. See [Appendix C](#) for more information on editing lists of values.

The Exchange Company Administrator can choose among the Exchange payment methods you allow. Note that the Exchange payment method is different than company payment methods. Buyers and sellers on the Exchange can also choose their preferred payment methods (Credit Card, Cash on Delivery, Invoice Account, or Other). The Exchange payment method that you choose as the Exchange Operator is the method that buyers and sellers use to pay *the Exchange*. The Exchange Company Administrator chooses an *Exchange* payment method when registering the company on the Exchange.

The XML or spreadsheet exports described in the next section include the Exchange Company Administrator's Exchange payment information, such as credit card information. (If you are integrating with Oracle Receivables, you can receive credit card payments from companies through Receivables integration with Oracle iPayment. See the documentation that comes with the iPayment product.)

Billing and Customer Export Options

The Exchange lets you choose how you want to export billing and customer information to an external enterprise resource planning (ERP) system:

- **Integrate with Oracle Receivables.** If you integrate the Exchange with Oracle Receivables, you receive the Exchange billing and customer information directly into your Oracle Receivables system, and companies can also view their invoices, payments, and credits online in the Exchange. See [Step 4 Set Up Oracle Receivables Integration \(Optional\)](#) on page 2-63.
- **Integrate with an external ERP application.** If you integrate with your own or a third-party application, there are several ways to export billing or customer information to your system, described below. Customer information includes new companies that register with the Exchange and changes that existing companies make to their information.

If you will be exporting billing and customer information to your system using XML, choose one of the following XML delivery methods in the **Delivery Methods** page in the "Billing" tab. Choose one method for delivering billing XML information and one method for delivering customer XML information. (They can be different methods, or the same method.)

- **No Electronic Delivery.** If you choose "No Electronic Delivery," no electronic delivery from the Exchange to your system will take place. (If you transfer XML information to your system either in real time or by date range, but choose "No Electronic Delivery" here, the Exchange does not export the data.)
- **HTTP.** If you choose to have your Exchange transactions delivered electronically, you can select the HTTP communication method to have your transactions delivered (in the Open Applications Group XML format) to your company domain server. You must provide the following information to the Exchange:
 - **Server Address** (full URL where the Exchange can post the data). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as `http://www.oracle.com:5454/xml/dataReceive`.
 - **Server User ID.** You must provide the user ID that the Exchange can use to access your company domain server.
 - **Server Password.** You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTP as the transmission method:

- There is no encryption on the e-mail message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.

- There is no guaranteed delivery. Due to the inherent nature of e-mail, once the message is sent from the Exchange e-mail server, there is no way to ensure that the intended recipient actually received the message.
- HTTP with webMethods. If you choose to have your Exchange transactions delivered electronically, you can select the HTTP with webMethods communication method to have your transactions delivered (in the Open Applications Group XML format) to your company domain server.

This method uses the webMethods B2B for Partners communication software to transmit your transaction documents over the Internet. The receiving server must have the webMethods B2B server software installed, configured, and running on a server accessible through the Internet. webMethods installation, configuration, and licensing information can be obtained from the webMethods web site at <http://www.webmethods.com>.

You must provide the following information to the Exchange:

- Server Address (IP Address or Domain Name). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. You should not provide the full URL (do not put `http://` in front of the IP address or domain name). For example, provide an address or name such as `142.83.24.25:5555` or `www.oracle.com:5454`.
- Server User ID. You must provide the user ID that the Exchange can use to access your company domain server.
- Server Password. You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTP with webMethods as the transmission method:

- There is no encryption on the e-mail message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- Messages transmitted using the webMethods method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.
- HTTPS. If you choose to have your Exchange transactions delivered electronically, you can select the HTTPS communication method to have your transactions delivered (in the Open Applications Group XML format) through a

secure connection to your company domain server. You must provide the following information to the Exchange:

- Server Address (full URL where the Exchange can post the data). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as <http://www.oracle.com:5454/xml/dataReceive>.
- Server User ID. You must provide the user ID that the Exchange can use to access your company domain server.
- Server Password. You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTPS as the transmission method:

- There is no guaranteed delivery. Due to the inherent nature of e-mail, once the message is sent from the Exchange e-mail server, there is no way to ensure that the intended recipient actually received the message.
- HTTPS with webMethods. If you choose to have your Exchange transactions delivered electronically, you can select the HTTPS with webMethods communication method to have your transactions delivered (in the Open Applications Group XML format) through a secure connection to your company domain server.

This method uses the webMethods B2B for Partners communication software to transmit your transaction documents over the Internet. The receiving server must have the webMethods B2B server software installed, configured, and running on a server accessible through the Internet. webMethods installation, configuration, and licensing information can be obtained from the webMethods web site at <http://www.webmethods.com>.

You must provide the following information to the Exchange:

- Server Address (IP Address or Domain Name). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. You should not provide the full URL (do not put <http://> in front of the IP address or domain name). For example, provide an address or name such as 142.83.24.25:5555 or www.oracle.com:5454.
- Server User ID. You must provide the user ID that the Exchange can use to access your company domain server.

- **Server Password.** You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTPS with webMethods as the transmission method:

- Messages transmitted using the webMethods method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.
- **SMTP (E-mail).** If you choose to have your Exchange transactions delivered electronically, you can select the SMTP communication method to have your transactions delivered (in the Open Applications Group XML format) by e-mail. The transaction will be sent as inline text in the e-mail. You must provide the following information to the Exchange:
 - **E-mail Address.** You must provide a full e-mail address to which transactions will be delivered (for example: myname@company.com).

Note the following business considerations when selecting SMTP as the transmission method:

- There is no encryption on the e-mail message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- There is no guaranteed delivery. Due to the inherent nature of e-mail, once the message is sent from the Exchange e-mail server, there is no way to ensure that the intended recipient actually received the message.

Transfer billable activities as they occur, directly to your system

You can export billable activities as they happen on the Exchange to your own system, using XML. For example, when a company awards an auction, and you have defined pricing for auction awards, that pricing can be sent through XML to your own system as soon as the company clicks the "Submit Award" button.

To transfer billable activities this way, do the following:

1. In the "Billing" tab, click the "Delivery Methods" link. In the **Delivery Methods** page, choose a Communication Method for transferring the billing XML data to your system. See the Delivery Method descriptions at the beginning of this section ([Billing and Customer Export Options](#) on page 2-72).

Recall that you need to set up your system to receive the data. Use the information in the online Help referenced below to help you understand the

data that is sent and the XML format that is used, so that you can determine what is required in your system to receive the data.

2. In the "Billing" tab, click the "Billing Parameters" link and set the "Export Billing Activities through XML" field to Yes.
3. For a detailed description of the data that is sent using XML, see the online Help.

Online Help --> "Help" button > "Billing" section > Exporting Billing Information > "What does the billing XML data look like?"

Transfer billable activities by date range, directly to your system

You can transfer billable activities through XML within a date range that you specify, using the **Transfer Billable Activities** page. This page sends the XML data directly to your system. The XML data is the same, and of the same format, as the XML data that is sent to your system if you chose to transfer billable activities as they occur, as described above.

To transfer billable activities by date range, do the following:

1. In the "Billing" tab, click the "Delivery Methods" link. In the **Delivery Methods** page, choose a Communication Method for transferring the billing XML data to your system. See the Delivery Method descriptions at the beginning of this section ([Billing and Customer Export Options](#) on page 2-72).

Recall that you need to set up your system to receive the data. Use the information in the online Help referenced below to help you understand the data that is sent and the XML format that is used, so that you can determine what is required in your system to receive the data.

2. In the "Billing" tab, click the "Transfer Billable Activities" link.
3. For information on the fields in the **Transfer Billable Activities** page, see the online Help.

Online Help --> "Help" button > "Billing" section > Exporting Billing Information > "How do I import billable activities to my system using XML?"

Note that the "Transfer" options refer to XML activities only. For example, the "Transferred Activities" option includes only activities that were previously transferred via XML (not spreadsheet).

4. If the **Confirmation** page shows that some or all of the information failed to be transferred, contact your system administrator for help. The Exchange does not

detect whether your system received the data, but it does check whether it was successfully exported from the Exchange.

Download billable activities to a spreadsheet text file

You can download billable activities to a spreadsheet text file, within a date range that you specify, using the **Download Billable Activities** page.

1. In the "Billing" tab, click the "Download Billable Activities" link.
2. For information on the fields in the **Download Billable Activities** page and in the spreadsheet itself, see the online Help.

Online Help --> "Help" button > "Billing" section > Exporting Billing Information > "What does the billing spreadsheet data look like?"

Note that the "Transfer" options refer to spreadsheet activities only. For example, the "Transferred Activities" option includes only activities that were previously transferred via spreadsheet (not XML).

Note: The spreadsheet file is downloaded in the UTF-8 encoding format. You must use a UTF-8 viewer/editor to view/edit the file; otherwise, characters in the file will not display properly when you open the file. In this case, you must do any of the following: a) change to a UTF-8 viewer/editor; b) find a utility that converts the file from UTF-8 encoding to the encoding that matches your text editor; or c) use a spreadsheet application that supports UTF-8.

Transfer customer updates as they occur, directly to your system

You can transfer customer updates as they happen on the Exchange to your own system, using XML.

To transfer customer updates this way, do the following:

1. In the "Billing" tab, click the "Delivery Methods" link. In the **Delivery Methods** page, choose a Communication Method for transferring the billing XML data to your system. See the Delivery Method descriptions at the beginning of this section ([Billing and Customer Export Options](#) on page 2-72).

Recall that you need to set up your system to receive the data. Use the information in the online Help referenced below to help you understand the data that is sent and the XML format that is used, so that you can determine what is required in your system to receive the data.

2. In the "Billing" tab, click the "Billing Parameters" link and set the "Deliver Customer Information through XML" field to Yes.
3. For a detailed description of the data that is sent using XML, see the online Help.

Online Help --> "Help" button > "Billing" section > Exporting Billing Information > "What does the customer XML data look like?"

Transfer customer updates by date range, directly to your system

You can transfer customer updates through XML within a date range that you specify, using the **Transfer Customer Information** page. This method sends the XML data directly to your system. The XML data is the same, and of the same format, as the XML data that is sent to your system if you chose to transfer customer updates as they occur, as described above.

To transfer customer updates by date range:

1. Follow the same steps as described in [Transfer billable activities by date range, directly to your system](#) on page 2-77, except choose the "Transfer Customer Information" link.
2. For a detailed description of the data that is sent using XML, see the online Help.

Online Help --> "Help" button > "Billing" section > Exporting Billing Information > "What does the customer XML data look like?"

3. If the confirmation page shows that some or all of the information failed to be transferred, contact your system administrator for help. The Exchange does not detect whether your system received the data, but it does check whether it was successfully exported from the Exchange.

Download customer information to a spreadsheet text file

You can download information to a spreadsheet text file, within a date range that you specify, using the **Download Customer Information** page:

1. Follow the same steps as described in [Download billable activities to a spreadsheet text file](#) on page 2-78, except choose the "Download Customer Information" link.
2. For a list and description of the data that is included in the spreadsheet text file, see the online Help.

Online Help --> "Help" button > "Billing" section > Exporting Billing Information > "What does the customer spreadsheet data look like?"

Customization Setup Steps (Part II)

This section consists of the following steps:

1. Customize Job Functions (Optional)
2. Update List of Blocked Territories (Optional)
3. Customize Drop-down Menu Items (Lookup Types) (Optional)
4. Set Up Marketplace Intelligence Reports (Optional)
5. Set Up a Default Job Functions List (Optional)
6. Customize Help Files (Optional)

Step 1 Customize Job Functions (Optional)

The Exchange provides job functions that you can use to control the access that companies have to certain Exchange functions. You can customize these job functions to create new "types" of roles and security for companies. A job function consists of one or more tasks that users can perform on the Exchange. For example, two of the tasks that a job function called "Seller" includes are "Create, cancel, and award Seller Auctions" and "Bid in Buyer Auctions." An Exchange user who has been assigned this job function can perform these tasks. An Exchange user who has not been assigned a job function that contains these tasks cannot perform these tasks.

Exchange tasks are predetermined (seeded) in the Exchange and cannot be edited. However, as the Exchange Operator, you can create new job functions by deciding which Exchange tasks should be grouped together to form the job function. The Exchange also offers default job functions, but as the Exchange Operator, you can update them and create new ones. Be sure that a company is assigned job functions that contain all of the tasks you want the company to be able to perform.

The Exchange Company Administrator of each registered company on the Exchange receives only the job functions you assign to the company. The Exchange Company Administrator in turn delegates those job functions to users and affiliates. The Exchange Company Administrator cannot modify job functions, but can create new job functions out of the tasks you have assigned to the company. The Exchange Company Administrator cannot assign more job functions and tasks to its affiliates and users than you have assigned to the company.

Caution: It is recommended that you not start registering and approving companies and assigning them job functions until you have made all of your job functions customizations, if any. Otherwise, you must remove old job functions and assign the companies the new ones you've created, and this could interfere with job functions customizations that the companies themselves have performed.

To determine whether customizations are needed:

Use the following steps to help you decide whether to customize or create new job functions.

1. Make a high-level inventory of the business processes that the Exchange will provide. For example, some of these business processes might be industry-specific.
2. Identify the roles and responsibilities of the people who will support these processes.
3. Think of the job functions that you would need to cover these roles and responsibilities.
4. Look at the default job functions that the Exchange provides to ensure that there is not an existing job function you can use. Map these to the job functions that you need. Create new job functions if needed. You should not duplicate existing job functions.

To view a list of all of the job functions and their tasks:

1. In the "Configuration" tab, click the "Manage Job Functions" link.
2. The table in the **Manage Job Functions** page lists all of the job functions provided by the Exchange and a high-level description of each. (You may need to click the "Go" button first, leaving the search fields blank, to see the table.)

Exchange Name

Log Off

Operator Account

Help

Home

Companies

Billing

Configuration

Site Status

Exchange Intelligence

[Configuration Home](#) > [Manage Job Functions](#)

Manage Job Functions

Job Functions are the mechanism for granting users access to individual Exchange Tasks (e.g. Catalog Authoring, etc.) within Exchange Name Here.

- [Create a new Job Function](#)
- [Set default Job Function to delegate when approving independent companies](#)
- [Manage anonymous access](#)

FAQ Shortcut

- [What is a job function?](#)
- [What is an exchange task?](#)
- [How do I assign job functions to users?](#)
- [How does job function delegation work?](#)
- [How do I delegate job functions to affiliate companies?](#)

Search

Enter search criteria and press the **Go** button to find job functions. Pressing the **Go** button without entering search criteria returns all job functions.

Job Function Name

Description

Searching for **mo** returns **moon over miami** and **over the moon**

Go

[Search Tips](#)

3. Click any job function to see a list of the tasks it contains and a description of each task.

To customize or create a new job function:

1. In the "Configuration" tab, click the "Manage Job Functions" link.
2. In the **Manage Job Functions** page, click the "Update" link in the table for a particular job function to add or remove tasks from that job function. (You may need to search for the job function first.) Click the "Create a new Job Function" link at the top of the **Manage Job Functions** page to create your own job function out of existing tasks.

Note: A job function is typically "owned" by whomever created the job function. Because job functions can only be edited by their owners, you will only be allowed to edit those job functions that you have created. An "Update" link will not appear if you are not the owner of that job function.

3. Enter or update the Name and Description of the job function. Since Exchange Company Administrators can also create job functions, you should give your new job function a distinctive name and description so that it won't possibly conflict with any functions created by Exchange Company Administrators.

If the Exchange is installed in multiple languages, make the change in each installed language of the Exchange. Select the language from the "Language" drop-down menu in the **Update Job Functions** page, change the Name or Description, and click the "Review and Submit" button. Do this for each language in the "Language" drop-down menu. You only need to do this if you are changing the Name or Description, so that the change is made in all languages.

Note: The "Manage anonymous access" link lets you control what a user can see before logging in to the Exchange by modifying the "Unknown User" job function.

4. Add Exchange tasks to the job function either individually or by copying an existing job function. Follow the guidance on screen to search for the task or job function.
 - If you are adding tasks individually, select the checkbox to the left of the Exchange task(s) you want to add to your job function, then click the "Add to Job Function" button.
 - If you are copying tasks from an existing job function, select the checkbox to the left of the job function(s) from which you want to copy the Exchange tasks, then click the "Copy Exchange Tasks" button.
 - To delete an Exchange task from this job function, click the "Remove" link of the Exchange task.
5. When you are satisfied with the tasks you have entered, click the "Submit" button.

6. When you have finished editing your job function, click the "Review and Submit" button. Review your job function. Use your Browser's "Back" button to make changes as necessary. When you are satisfied with your new or edited job function, click the "Submit" button.

Step 2 Update List of Blocked Territories (Optional)

United States Export Control laws govern all exports of commodities and technical data from the United States. In accordance with these regulations, users of the Exchange may be restricted from conducting business with companies located in certain countries. The Exchange enforces these restrictions by maintaining a list of restricted countries and blocking any reference to a company located in a blocked country.

For example, any company with its headquarters in a blocked country cannot register with the Exchange. Also, any company operating in an unblocked country but having an address in a blocked country cannot define that address to the Exchange.

The Exchange is installed with these countries already blocked. You should review this list and update it whenever required. If the blocked countries are not applicable for the country in which your Exchange operates, you can use the instructions below to remove the restrictions or add additional ones.

To update the list of blocked countries:

1. In the "Configuration" tab, click the "Block / Unblock territories" link. The **Blocked Territories** page appears showing you the countries which are currently blocked.
2. To remove a country's block, select the country and click the "Submit" button.
3. To block a country, select the country from the "Block this territory" drop-down menu and click the "Submit" button.

Step 3 Customize Drop-Down Menu Items (Lookup types) (Optional)

Throughout the Exchange, drop-down menus are used to provide users with a list of approved options from which to select. These lists are called "Lists of Values" or "Lookup Types." The Exchange comes with typical values already predefined for these lists. For most Lookup Types, the Exchange Operator can modify these values, add new values, or delete existing values.

For a list of all the Lookup Types you can customize and instructions for modifying them, see [Appendix C](#).

Step 4 Set Up Marketplace Intelligence Reports

To enable users to access the marketplace intelligence reports, assign the "View Seller Intelligence Reports" task to those job functions you want to have access to the seller reports. Assign the "View Buyer Intelligence Reports" task to those job functions you want to have access to the buyer reports. See [Step 1 Customize Job Functions \(Optional\)](#) on page 2-80 for instructions.

Step 5 Set Up a Default Job Functions List (Optional)

You can create a default job functions list, which you can select and assign to every company that registers on the Exchange. This makes it easier for you to assign default privileges to all companies that register on the Exchange.

To create a default job functions list:

1. In the "Configuration" tab, click the "Manage Job Functions" link.
2. In the **Manage Job Functions** page, click the "Set default Job Function to delegate when approving independent companies" link.
3. Click the "Select and add existing job functions" link to add job functions to the default job functions list. Click the "Create and assign new job function" if you want to create a new job function for the default job functions list. (See [Step 1 Customize Job Functions \(Optional\)](#) on page 2-80 for instructions.) Click the "Remove" link to remove a job function from the default job functions list.
4. When you are finished creating the default job functions list, click the "Review and Submit" button. If you are satisfied with the changes, click the "Submit" button. Use your browser's Back button to make additional changes if necessary.

Step 6 Customize Help Files (Optional)

You can download then customize and reorganize Help content, as needed. For example, you may wish to supply additional instructions based on business rules used by your Exchange.

When you chose the name of your Exchange in [Branding and Customization Setup Steps \(Part I\)](#) on page 2-15, this name was also automatically used in the online

Help. The following token automatically substitutes the name of your Exchange into the online Help:

```
<%= core.getOexOperationName() %>
```

For example, the following sentence may appear in the online Help:

You must select an item category to classify each catalog item or service you include in My Exchange Name.

When you download the Help file, the same sentence looks like this:

You must select an item category to classify each catalog item or service you include in <%= core.getOexOperationName() %>.

Do not change this token if you want your Exchange name to default in the online Help. Similar tokens are also used for e-mail addresses and Exchange URLs given in the online Help files.

If you have multiple languages installed, changes to Help pages apply to a particular language version. For example, if you modify the French version of a Help page, those changes are only seen by users of the French language version of the Exchange. (Changes to the language version specified as the Exchange's Default Language in the **Identification** page are seen by users of that language version, by any users who have not otherwise selected a particular language version for use, and by any unregistered users browsing the Exchange.

The Help pages used in the Exchange are Java Server Pages, or .jsp files. These files can be thought of as basic .htm files with Java directives, or commands, imbedded in them. Even though these files are not .htm files, they can be read and edited using most typical text or HTML editors.

The structure of the Help system used by the Exchange is defined in an .xml file called default.xml. Information in this .xml file defines many attributes of the Help system, but most importantly it contains the names of the .jsp files which comprise the Help system. Once you decide you need to modify a particular Help page, you will need to inspect the default.xml file to determine the name of the page's .jsp file. Also, if you created and added a new Help page, you would need to add an entry to the default.xml file so the page will appear in the Help system.

To determine the page's Help tag:

1. In the Exchange itself (that companies and users use), click the "Help" icon.
2. Navigate to the specific Help page you wish to modify.

3. In your browser's "Location" field, note the URL string. The URL should end in a parameter called "type=". Make a note of the value for the "type=" parameter. You will need this value later.

To determine the page's file name:

1. In the "Configuration" tab, click the "Customize Content" link. The **Customize Content** page appears.
2. Select the "Help XML Files" from the "Content Type" drop-down menu.
3. Select the appropriate language from the "Language" drop-down menu.
4. Select "Template" from the "Template or Customization" drop-down menu if you have not modified the Help structure. Select "Customization" from the "Template or Customization" drop-down menu if you have modified the structure of the Help system in the past.
5. Click the "Download Now" button. Save the .zip file and extract the two files to a convenient directory.
6. Open the default.xml file using a text editor such as Notepad.
7. Search the default.xml file for the "type" value you noted above. The value should appear in an attribute called "Tag."

Following the "Tag" attribute, you should see another attribute called "Page=". This attribute value refers to a file whose extension is .jsp. This .jsp file is the file you need to modify. Note the name of the .jsp file. You will need it later.

To download and modify the Help file:

1. In the "Configuration" tab, click the "Customize Content" link. The **Customize Content** page appears.
2. Select the "Help JSP Files" from the "Content Type" drop-down menu.
3. Select the appropriate language from the "Language" drop-down menu.
4. If you have not modified this particular Help page before, select "Template" from the "Template or Customization" drop-down menu. If you have already modified this Help page, select "Customization" from the "Template or Customization" drop-down menu.
5. Click the "Download Now" button. Save the .zip file and extract its contents to a convenient directory.

6. Sort the extracted files by name and find the file identified by the "Page" attribute you noted above. This is the file you will modify.
7. Open the file in your favorite HTML editing tool and update the content as necessary. If your editing tool does not recognize .jsp files as valid file types, rename the file with a .htm extension and open the renamed file.
8. If you need to link to another Help file from your Help file, use the format `HelpDetail.jsp?type=tag_for_file`. For example, if you wished to create a link from your Help file to a Help file called `WhatSetUpSteps`, whose tag you specified as `what_set_up_steps` in the `default.xml` file, you would create the following link in your Help .jsp page: ``.
9. Once you have finished updating the file, be sure to save it with the original name and extension (.jsp).

To add a new Help file:

1. In the "Configuration" tab, click the "Customize Content" link. The **Customize Content** page appears.
2. Select the "Help JSP Files" from the "Content Type" drop down menu.
3. Select the appropriate language from the "Language" drop down menu.
4. Select "Template" from the "Template or Customization" drop down menu.
5. Click the "Download Now" button. Save the .zip file and extract its contents to a convenient directory.
6. Select a .jsp file from the directory. It does not matter which one you choose, but since you are going to delete the contents anyway, a small file is easier.
7. Open the file in your favorite HTML or text editing tool. If your editing tool does not recognize .jsp files as valid file types or if for some reason you cannot open the file, you can rename the file with a .htm extension and open the renamed file. If your editor opens the file with the presentation (browser) version of the page, choose the source code view instead.
8. Scanning from the top, find the presence of the `<jsp:useBean` directive. Immediately after the close of the `<jsp:useBean` statement, you should see the HTML content for the page begin.
9. Scroll to the end of the page. The last line of the file should be an HTML comment statement containing a `$Header` string. The HTML content for the page ends just prior to this comment statement.

10. Delete the existing text between the `<jsp:useBean` directive and the comment containing the `$Header` string. You now have an empty `.jsp` page into which you can enter your new text.
11. Enter the new text according to normal HTML rules, except for linking. If you need to link to another Help file from your new Help file, use the format `HelpDetail.jsp?type=tag_for_file`. For example, if you wished to create a link from your Help file to a Help file called `WhatSetUpSteps`, whose tag is specified as `what_set_up_steps` in the `default.xml` file, you would create the following link in your new Help `.jsp` page: ``.
12. Once you have created your new page, save the new file. Be sure to save the file with a unique name and with the `.jsp` extension. You will have to inspect the `default.xml` file to see which file names have already been used.
13. Modify the `default.xml` file by following steps 1-5 above, except choosing "Help XML Files" from the "Content Type" drop-down menu. Update the `default.xml` file to accommodate your new Help file. The commented text at the top of `default.xml` explains the standards to follow. Make sure that if you insert a new Help subtopic in between existing subtopics, you reorder them accordingly using the `Order` tag in the `default.xml` file.

To upload the modified files back to the Help system:

1. Return to the **Customize Content** page.
2. Scroll to the lower section of the page labeled "Step 2: Load Files."
3. From the "Content Type" drop-down menu, select "Help JSP Files" to upload Help files or "Help XML Files" to upload the `default.xml` file.
4. Select the appropriate language from the "Language" drop down menu. Be sure you upload to the same language version from which you downloaded the files.
5. Use the "Browse" button to navigate to your modified `.jsp` or `.xml` file.
6. Click the "Start Load Now" button. The **Verify Content** page appears.
7. If your updated help text is correct, click the "Publish" button. If you notice an error and wish to correct your file, click the "Cancel" button.

Note: After you modify Help .jsp files, you must stop and restart the middle tier for the changes to take effect. You do not need to stop and restart the middle tier if you modify only the XML file. Stop and restart the middle tier using scripts provided in the *Oracle Exchange Installation Guide* or the *Oracle Exchange Upgrade Guide*.

Exchange Launch

Be sure you have completed the steps in this chapter before you make the Exchange public and start registering companies on the Exchange. Decide whether to allow online registration or to bulk load registrants. See [Self-Service vs. Bulk Load Registration](#) in [Appendix A](#)

Once you have registered companies on the Exchange, you can perform the setup steps in this section:

1. Define Company-Specific Billing Price Lists (Optional)
2. Manage Third-Party Authoring (Optional)

Note: You can assign job functions to companies when you approve their registration (the Exchange prompts you to assign a job function), or after they register using the **Registered Companies** page in the "Companies" tab. If you must change a company's job function assignments, the change takes effect the next time a company logs on. On occasion, you may be asked by an Exchange Company Administrator to approve a new user's registration request or to change a user's job function assignments. Administer users using the **Registered Users** or **Approve Users** pages in the "Companies" tab.

Step 1 Define Company-Specific Billing Price Lists (Optional)

You can have multiple price lists effective (active) at one time, but each company can be assigned to only one active price list on the **Assign Price Lists** page. Every new price list you create requires you to enter a fee schedule with at least an Effective From date.

To create and assign company-specific price lists:

1. In the "Billing" tab, click the "Create New Pricelist" link.
2. Follow steps 2-11 in [Step 3 Define a Default Exchange Price List \(Required\)](#) on page 2-58.
3. After you enter billing information for the activity types you want to charge for, click the "Done" button and return to the **Billing** home page.

4. Click the "Price List Assignments" link to assign the price list to a specific company. You can assign only Active price lists to companies. Active price lists are price lists with effective dates that include today.

Step 2 Manage Third-Party Authoring

If you decided to control third-party catalog authoring for the Exchange, register and approve the third-party provider and perform the steps below.

Note: If you assign a supplier the "Manage Third Party Authoring" task, then that supplier can also use a **Manage Third Party Authoring** page on the Exchange and undo the changes you make. See [Overview of Third-Party Catalog Authoring](#) in [Appendix B](#) for information on third-party authoring scenarios.

1. Once you have registered and approved a third-party catalog content provider or providers, go to the "Configuration" tab and click the "Manage Third Party Authoring" link to open the **Manage Third Party Authoring** page.
2. Click the "Add Third Party Content Providers" link to search for and select the registered content provider company.

Note: You will not find the company if the company has not been assigned the "Third Party Catalog Author" job function.

3. Click the "Grant Exchange Tasks" button to grant the content provider company specific catalog authoring tasks that it can perform for suppliers.

Note: The "Third Party Catalog Author" job function and the **Manage Third Party Authoring** page are independent of each other. For example, you can assign the "Bulk Load Catalog" task to a third-party provider using the **Manage Third Party Authoring** page; but if you have removed the "Bulk Load Catalog" task from the default "Third Party Catalog Author" job function that the Exchange provides, the third party will not be able to bulk load catalog items.

(The "Remove from List" button takes away the selected provider's access to the Exchange catalog completely. However, if you have assigned the "Manage Third Party Authoring" task to a supplier, that supplier can reinstate a third-party content provider that you have removed. If you do not want a third party to perform catalog authoring for anyone any more, remove the "Third Party Catalog Author" job function from the third-party company.)

4. Select the "Assign" check box to assign the task, or deselect the "Assign" check box to remove a task.

If you have assigned the "Manage Third Party Authoring" task to a supplier, that supplier can reassign a task that you have deselected. If you do not want a third party to perform that task for anyone any more, remove the task from the "Third Party Catalog Author" job function.

5. Click the "Update" button to save your task changes.
6. In the **Manage Third Party Authoring** page, click the "Apply Changes" button to save changes you made to the Third Party Content Provider list.

Ongoing Maintenance

The following sections are not an exhaustive list of the ongoing activities you should perform on the Exchange, and you may have your own list that better suits your business practices. This section gives you an idea to help you develop your own checklist of ongoing activities.

Registration and Administration

- If you allow companies to register online on the Exchange, click the "Companies" tab and the "Approve Companies" link to check for new registration requests that need to be approved.
- Add new lists of values as needed. See [Appendix C](#).

Billing

- Check the **Pricing Exceptions** page (in the "Billing" tab) for errors.
- If you are integrated with Oracle Receivables, check the **Billing Exceptions** page for errors and run the Customer import concurrent programs. See [Step 4 Set Up Oracle Receivables Integration \(Optional\)](#) on page 2-63.

- Upload currency conversion rates if and as needed by clicking the "Billing" tab, then the "Load Currency Exchange Rates" link. A downloadable *Readme* file provides detailed information on loading currency conversion rates. You need to upload currency conversion rates if *both* of the following are true:
 - You are using a Percent pricing method or a Step Direct or Step Cumulative pricing type. This method and types charge companies based on their transaction amounts in the Exchange.
 - You are billing companies on the Exchange who are creating foreign-currency transactions (transactions in a currency other than the Default Currency selected in the **Identification** page; this is the currency in which companies are billed).

If you do not load currency exchange rates, and you charge a company for a transaction that was performed in a different currency than the default Exchange currency, you will receive a pricing exception in the **Pricing Exceptions** page.

- If you are charging subscription fees, using the Company Subscription or User Subscription billing activity types, use the **Charge Subscription Fees** page to submit the charges. The fee you specify is not charged until you use the **Charge Subscription Fees** page to submit the charges for a given calendar month. To access this page, click the "Billing" tab, then the "Charge Subscription Fees" link and follow the guidance on screen.

Note: The first time you submit subscription fees in the **Charge Subscription Fees** page, you can choose any month. After that, you can choose only subsequent, consecutive, past months. For example, if you first submit subscription fees for April, the only month you can submit the next time is May, and you cannot submit May until June 1 or later. When you submit subscription fees for a past month, note that the **Charge Subscription Fees** page uses the current price list assigned to a company to determine the subscription fee charges. If you used a different price list last month than this month, this month's current price list is used to calculate the subscription fee charges.

Marketplace Purchasing

- Exchange Company Administrators have been instructed to contact the Exchange Operator for detailed information on XML transaction delivery

documents, including the document type definitions (DTDs) that are used, example transactions, and references to the Open Applications Group (OAG) standards that are used in the documents. If you receive a request for this information, access the Oracle MetaLink Web site at <http://metalink.oracle.com>. Create an iTAR on MetaLink to request the information.

Catalog Hosting

- Create Catalog News as necessary, especially when you make a change that affects existing catalog content.
- Check your e-mail for bulk load error notifications. See [Bulk Loaders](#) in [Appendix B](#).
- If you let suppliers include their own categories and attributes in their bulk loads, you may want to log on to the Exchange and review the category structure periodically.

Marketplace Exchange Application Setup

This chapter provides all of the setup steps an **Exchange Company Administrator**, with the help of a designated Purchasing Manager and Catalog Author, needs to perform to set up the Exchange for his or her company:

- [Setup Steps Overview](#) on page 3-2
- [Setting Up a Multi-Language or Multi-Currency Exchange](#) on page 3-5
- [Registration and Administration Setup Steps \(Part I\)](#) on page 3-6
- [Catalog Setup Steps](#) on page 3-12
- [Marketplace Purchasing Setup Steps](#) on page 3-22
- [Negotiations Setup Steps](#) on page 3-33
- [Registration and Administration Setup Steps \(Part II\)](#) on page 3-39
- [Ongoing Maintenance](#) on page 3-48

The **Exchange Company Administrator** is the person who registers his or her company on the Exchange and is responsible for setting up the Exchange for the company, approving users and affiliates, and performing ongoing administrative tasks as needed.

ATTENTION: The Offers functionality described in this chapter and throughout this manual is not available in the initial Release 6.2. Offers will be available in the first revision of Release 6.2.

Setup Steps Overview

The following tables and the steps within the tables show the recommended order of the setup steps. Each setup step is described in detail in the following sections of this chapter.

Table 3–1 Registration and Administration Setup Steps (Part I)
Performed by: Exchange Company Administrator

Step Number	Step	Required?	Can the Exchange Operator Perform This Step?
1	Register Company	Required	Yes
2	Set Company Profile	Optional	No
3	Edit Trading Partner Preferences	Optional	Yes
4	Upload Company Currency Conversion Rates	Optional	No

Table 3–2 Catalog Setup Steps
Performed by: Exchange Company Administrator or Catalog Author

Step Number	Step	Required?	Can the Exchange Operator Perform This Step?
1	Determine Catalog Authoring Activities	Optional	Yes
2	Manage Third-Party Authoring	Optional	Yes
3	Set Bulk Load Preferences	Optional	No
4	Decide How to Categorize and Describe Catalog Items +	Required if adding or bulk loading catalog items	No
5	Add or Bulk Load Catalog Items	Optional *	No
6	Configure Item Availability	Optional	No

Table 3–2 Catalog Setup Steps
Performed by: Exchange Company Administrator or Catalog Author

Step Number	Step	Required?	Can the Exchange Operator Perform This Step?
7	Configure Punchout to Supplier-Hosted Catalog	Optional *	No
8	Control Buyer Catalog Exports	Optional	No
<p>* At least one of these steps is required if you want to sell items on the Exchange.</p> <p>+ This step can require up-front planning, and therefore may need more of your time and thought before implementing it. Note this step and allow time in your implementation to prepare for it. See the specific step for more information.</p>			

Table 3–3 Marketplace Purchasing Setup Steps
Performed by: Exchange Company Administrator or Purchasing Manager

Step Number	Step	Required?	Can the Exchange Operator Perform This Step?
1	Specify Address Book Settings	Optional	No
2	Customize Purchase Order Text	Optional	No
3	Modify Transaction Settings	Optional	No
4	Enter Transaction Delivery Data Mappings	Optional	No
5	Set Up Buyer Pricing Approval Rules	Optional	No

Table 3–4 Negotiations Setup Steps
Performed by: Exchange Company Administrator

Step Number	Step	Required?	Can the Exchange Operator Perform This Step?
1	Define Negotiations Terms and Conditions	Optional	No
2	Modify Default Invitation Recipients	Optional	No
3	Define Company-Specific Reusable Attributes Lists *	Optional	Yes, for the Exchange
4	Define Company-Specific Reusable Invitation Lists +	Optional	No
5	Define Company-Specific Negotiation Templates +	Optional	No
6	Select a Transaction Delivery Method for Negotiation-Generated Purchase Orders	Optional	No
* This step can also be performed by anyone with the "Manage Attribute Lists" job function. + Users within the company can also define their own private lists.			

Table 3–5 Registration and Administration Setup Steps (Part II)
Performed by: Exchange Company Administrator

Step Number	Step	Required?	Can the Exchange Operator Perform This Step?
1	Customize Job Functions	Optional	Yes
2	Set Up Marketplace Intelligence Reports	Optional	Yes
3	Set Up a Default Job Functions List	Optional	Yes

Table 3–5 Registration and Administration Setup Steps (Part II)
Performed by: Exchange Company Administrator

Step Number	Step	Required?	Can the Exchange Operator Perform This Step?
4	Register and Approve Others	Optional	Yes
5	Upload Approval Hierarchy	Optional	No
6	Choose Alternate Points of Contact	Optional	No

Setting Up a Multi-Language or Multi-Currency Exchange

See [Multilingual, Global Support](#) in [Chapter 1](#) for a complete overview of multi-language and multi-currency support that the Exchange provides.

Setting Up a Multi-Language Exchange

If the Exchange is installed in multiple languages, then these languages appear at the top of the Exchange home page when users log in. Consider the following points if you are setting up a multi-language Exchange:

- Some of the setup steps (such as [Step 2 Customize Purchase Order Text \(Optional\)](#) on page 3-25) described in this chapter include a "Language" field that enables you to specify the information in multiple languages.
- Translate your catalog items if you want them available in other languages. See the bulk load *Readme* files for information and instructions on translating items. To download the Readme file, click the "Marketplace Selling" link on the Exchange home page, then click the "Catalogs" tab. In the **Catalog Authoring** home page, click the "Download Templates/DTDs" link and in the **Download Spreadsheet Templates & XML Resources** page, click the "Download Now" button.
- Users can specify a Default Language in the **Edit Personal Information** page. In addition, regardless of what a user's Default Language setting is, the user can click any language that appears on the Exchange home page to change the Exchange language just for that logon session. Whatever language is chosen for

the user is what the user sees when conducting transactions, such as creating an order, or entering or viewing numbers on the Exchange. For example, American English uses periods to indicate decimal separators in prices or currency conversion rates. German uses commas to indicate decimal separators.

Setting Up a Multi-Currency Exchange

If you will be conducting negotiations in multiple currencies (for example, allowing bidders to bid in multiple currencies or requiring order approvals for orders created in foreign currencies), upload currency conversion rates to handle the conversions. You don't have to upload the currency conversion rates for negotiations. The creators of the negotiations can define their own conversion rates on the negotiations.

Registration and Administration Setup Steps (Part I)

The first person to register his or her company on the Exchange (either as an *independent entity* or *affiliate*) also becomes that company's default Exchange Company Administrator. Other people in the company, or affiliates of the company, who register with the Exchange need to be approved by the default Exchange Company Administrator. (The Exchange Company Administrator can appoint another registered user in the company as the default Exchange Company Administrator.)

This section consists of the following steps:

1. Register Company (Required)
2. Set Company Profile (Optional)
3. Edit Trading Partner Preferences (Optional)
4. Upload Company Currency Conversion Rates (Optional)

You need to be assigned the "Company Administrator" job function to perform these steps.

Prerequisites

- Receive the Exchange URL from the Exchange Operator.
- Decide who will be the Exchange Company Administrator for your company.
- Decide on a registration hierarchy if any. See [Registration and Administration Hierarchy](#) in [Appendix A](#).

- Review the [Registration and Approval Process](#) in [Appendix A](#) for more information on how the registration process works.
- Review the legal terms and conditions of the Exchange by clicking the "Legal Notices and Terms of Use" link on the Exchange home page. (You do not have to be logged in to do this.)

Step 1 Register Company (Required)

The first person in your company to register on the Exchange becomes the default Exchange Company Administrator for your company. However, you can always designate another Exchange Company Administrator later.

To register:

1. Access the Exchange and register online. You could also use bulk load registration. In a bulk load registration, the Exchange Operator (or parent company, if you are registering as an affiliate) gathers all of the companies who want to register and registers them (including the companies' users, if desired) in a single bulk load file. Or the Exchange Operator may use a combination of online and bulk load registration. Typically, the Exchange will provide a link on the Exchange home page if you are allowed to register online. In a bulk load registration, the Exchange Operator creates user names and passwords for you. For more information on bulk load registration, see [Appendix A](#).

Exchange Name



Log in to Exchange Name Here

English • Français • 日本語

Username

Password

Go

[Lost password?](#)

[I am a new user](#)

[Sign me up!](#)

[Check my registration status](#)

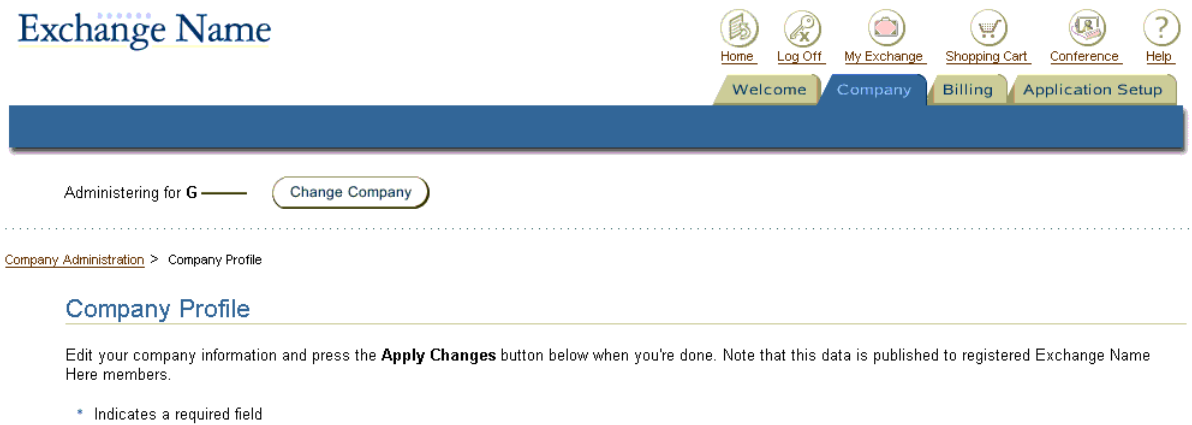


2. Click the "Help" icon in the top-right of the Exchange for detailed information on registering, including a description of all of the information you will be asked to enter during registration.

- 3. Wait for approval. If the Exchange Operator bulk loaded your registration, wait for the Exchange Operator to contact you that the bulk load has completed and to give you user names and passwords.

Step 2 Set Company Profile (Optional)

- 1. Once your registration has been approved, access the "Company Administration" application (from the Exchange home page, click the "Company Admin" link).
- 2. On the **Company Administration** home page, click the "Company Profile" link to edit your company's personal profile information if needed. The **Company Profile** page displays the same information that you entered when you registered, but you can edit that information.



- 3. In the **Company Profile** page, check that the "Company Currency" field displays the currency you want. The Company Currency is the currency in which your company conducts business on the Exchange. For example, if your currency is set to USD, then USD is the default currency that will appear whenever a user in your company creates a new negotiation or sets order approval limits on the Exchange. The company currency that appears by default in the "Company Currency" field is originally set by the Exchange Operator for all companies on the Exchange; however, you can change it for your company.

Note that you can also use the **Company Profile** page to designate a default Exchange Company Administrator other than yourself, once others in your company register.

4. On the **Company Administration** home page, click the "Trading Partner Keywords" link if you want to enter key words that other Exchange members can use when searching for your company. (Or you can come back and do this any time.) If your company will be using the punchout functionality to host its catalog on the Exchange, trading partner key words are the only way a buyer's search for an item will return your company's hosted catalog. For example, if a seller's name is "Red and White" and it sells wine, it would enter "wine" as a key word. Any time a buyer searches for wine, the seller's hosted catalog will appear as a link on the **Search Results** page when shopping for items.

Step 3 Edit Trading Partner Preferences (Optional)

Trading partner preferences refer to the transaction values that apply when your company buys or sells goods or services.

For example, when a buyer purchases your goods, that buyer must select a method of payment for those goods. The preference values you set as a seller for the payment method (such as MasterCard, Visa, or Invoice Account) will determine the values from which the buyer can choose when entering order information. The values will appear in the drop-down menu at the "Payment Method" field. The preferred method you choose appears by default on the order.

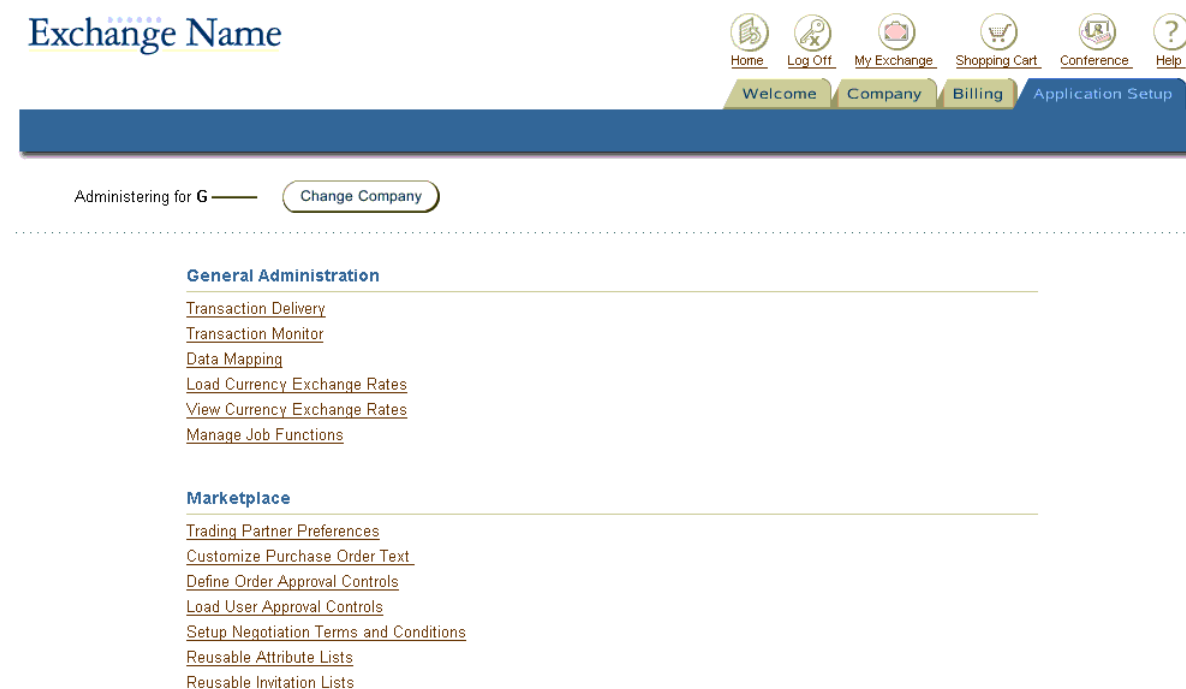
For each of the following preferences, you can select a default value (for example, a default Payment Method of "Invoice") and delete values that you will not accept (for example, a Payment Term of "1/10 Net 30"). You cannot add values (such as a new Payment Method). If you want to add a preference value, contact the Exchange Operator. The Exchange Operator can add, modify, and delete values from these methods and terms (also called "Lookup Types"; see [Appendix C](#) for a complete list of the values that the Exchange Operator can control).

- **Payment Methods.** Preferred method of payment, such as invoice or credit card.
- **Payment Terms.** Provision for paying for the goods or services ordered, such as "Immediate."
- **FOB Terms.** Point at which the seller's responsibility for the goods ceases and the buyer takes title of the goods purchased.
- **Freight Carriers.** Carrier chosen to transport the goods.

- **Freight Terms.** Provisions for freight payment.

To pick preferences:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Application Setup" tab, then the "Trading Partner Preferences" link.



3. On the **Trading Partner Preferences** page, choose whether you will allow multiple shipments for orders. (Or you can return to this option later if you're not sure yet.) Multiple shipments allow buyers who are purchasing your items or services to enter different shipping information (ship-to address, need-by date, and mailstop) for individual lines on an order. For example, an order for 10 computer monitors and 20 printers contains two lines; a buyer can ship all the monitors to one address and all the printers to a different address. The buyer also can specify different need-by dates and mailstops for each line. (To order 10 laser printers but ship seven to one location and the rest to a different

location, a buyer would select and add the item to the shopping cart twice, the first time specifying a quantity of seven and the second time a quantity of three.)

4. In the "Terms and Conditions" section, select the default value you want to appear on orders that buyers send to your company. Click the "Edit" button to delete those values you will not accept. For detailed descriptions of each of the values, see [Appendix C](#). Note that the Exchange Operator may delete or add values.
5. You will return to the "Designated Transaction Contacts" section later. (This section is used to choose a single point of contact for negotiations and orders. Any notifications that are sent for these transactions are sent to the person you designate.)
6. Click the "Apply Changes" button.

Step 4 Upload Company Currency Conversion Rates (Optional)

If you will be conducting transactions in multiple currencies (for example, allowing bidders to bid in multiple currencies) or requiring order approvals for orders that buyers in your company create in foreign currencies, upload currency conversion rates to handle the conversions.

To facilitate and standardize currency exchange rate conversion across your company, the currency exchange rates can be used by all Exchange users in your company (rather than, for example, requiring each individual user to enter acceptable bid currencies and exchange rates when creating a new auction). For order approvals, the currency exchange rates are used to convert an order amount in a foreign currency to your company currency for *approval purposes only* (the Exchange does not apply the conversion to orders themselves).

You can upload currency conversion rates as frequently as your company needs. The conversions are not automatically updated. You must update them yourself through bulk loading.

You can bulk load your currency exchange rates using XML-based resources or a spreadsheet-based template.

To bulk load currency exchange rates:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. In the **Company Administration** home page, click the "Application Setup" tab.

3. On the **Company Administration** home page, click the "Load Currency Exchange Rates" link.
4. On the **Load Currency Exchange Rates** page, click the "Download Now" button for the XML resources, spreadsheet template, and *Readme* instructions file for bulk loading your currency exchange rates.

Refer to *Readme* for complete information on loading and understanding the currency conversions.

5. Once you have completed your currency exchange rate files according to the directions in the *Readme* file, return to the **Load Currency Exchange Rates** page, click the "Browse" button and locate your currency exchange rate file (saved as a .txt file for spreadsheet-based upload or saved as a .xml file for XML-based upload).
6. Click "Start Load Now."

To view bulk loaded currency exchange rates:

1. Follow steps 1-3 above.
2. Click the "View Currency Exchange Rates" link.
3. Select the "From" and "To" currency for which you want to see the exchange rate.

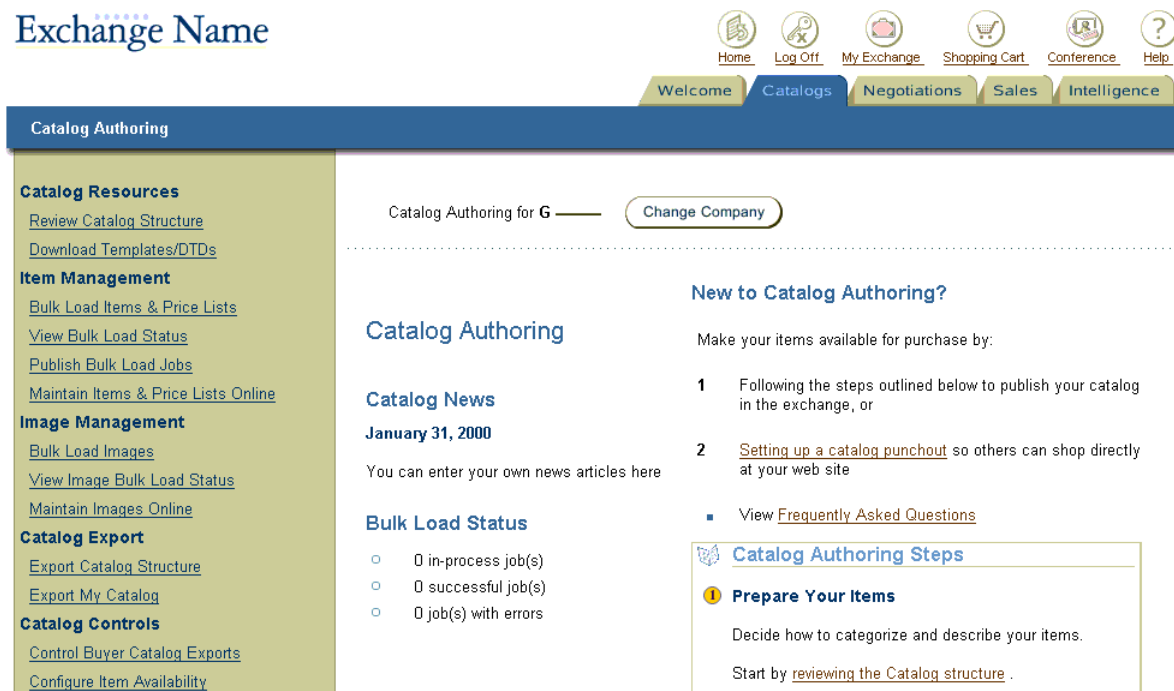
Catalog Setup Steps

This section consists of the following steps. Perform these steps if you will be selling goods or services on the Exchange:

1. Determine Catalog Authoring Activities (Optional)
2. Manage Third-Party Authoring (Optional)
3. Set Bulk Load Preferences (Optional)
4. Decide How to Categorize and Describe Catalog Items (Required if Adding or Bulk Loading Catalog Items)
5. Add or Bulk Load Catalog Items (Optional) *
6. Configure Item Availability (Optional)
7. Configure Punchout to Supplier-Hosted Catalog (Optional) *
8. Control Buyer Catalog Exports (Optional)

* At least one of these steps is required if you want to sell items on the Exchange.

You need to be assigned the "Catalog Author" job function to perform most of these steps. These steps are performed in the **Catalog Authoring** home page, as shown in the following illustration:



Prerequisites

See [Appendix B](#) for a complete discussion of your options in regard to placing your catalog items on the Exchange.

Step 1 Determine Catalog Authoring Activities (Optional)

Determine what activities a catalog author in your company should be given access to.

Note: This step can take time, particularly if you need to create a contract with a third-party catalog author.

Consider the following:

- Is the default "Catalog Authoring" job function sufficient, or does a specialized job function need to be created? (See [Step 1 Customize Job Functions \(Optional\)](#) on page 3-40 and return here.)
- Is a third-party content provider necessary or desired? You can select and manage an Exchange-approved third-party author if the Exchange Operator (or, if you are an affiliate, your parent company) has assigned you the "Manage Third Party Authoring" task. For a complete discussion of third-party authoring options, see [Overview of Third-Party Catalog Authoring](#) in [Appendix B](#).

Step 2 Manage Third-Party Authoring (Optional)

As a seller, you can grant access to a third-party catalog content provider to add your items to the Exchange catalog using the bulk load or online editing features.

If you decided to use a third-party catalog content provider, follow the steps below to select and control a third party's access. You can perform the steps below only if the Exchange Operator has assigned you the "Manage Third Party Authoring" task. The third-party catalog content provider must also first register on the Exchange and be granted third-party authoring privileges. See [Overview of Third-Party Catalog Authoring](#) in [Appendix B](#) for more information.

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click the "Catalogs" tab and, in the **Catalog Authoring** home page, click the "Manage Third Party Authoring" link.
3. Follow the guidance on screen. If you need additional help, see the online Help.

Online Help: "Help" icon > "Catalog Authoring" section > Using Third Party Catalog Authors

You will not find the third-party company in the **Manage Third Party Authoring** page if:

- The company has not yet registered with the Exchange.
- The company has not been assigned the "Third Party Catalog Author" job function. If the company's registration has been approved and you still can't

find the company, contact the Exchange Operator about assigning the company the "Third Party Catalog Author" job function. If the company registered as an affiliate, contact the company's Exchange Company Administrator.

You can grant only those tasks that you yourself have been granted by the Exchange Operator or your Exchange Company Administrator.

Step 3 Set Bulk Load Preferences (Optional)

The **Set Bulk Load Preferences** page lets you choose whether to review bulk load jobs before publishing them on the Exchange.

By default, the **Set Bulk Load Preferences** page is set to require your review and explicit publication of bulk loaded items and prices before they are available on the Exchange. However, you can change this setup if you prefer your bulk loaded items to be published and available on the Exchange as soon as the bulk load completes.

You do not need to review and publish your catalog items when you add them online—only when you bulk load them.

To choose whether to review your bulk load changes before explicitly publishing them on the Exchange, follow these steps:

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click the "Catalogs" tab.
3. In the **Catalog Authoring** home page, click the "Set Bulk Load Preferences" link.
4. In the **Set Bulk Load Preferences** page, choose one of the following options:
 - **Jobs loaded by my company and by my third-party content providers.** If you select this option, any bulk load of your catalog items—whether performed by you or by a third-party content provider—must be reviewed before being explicitly published in the Exchange catalog, using the **Publish Job** page. (If you did not assign the publish job task to the third-party content provider, then you must review and publish the third party's bulk load jobs.)
 - **Jobs loaded by my company only.** If you select this option, you must review all of your company's bulk load jobs before explicitly publishing them in the Exchange catalog.
 - **Jobs loaded by my third party content provider(s) only.** If you select this option, only bulk load jobs that your third-party content provider has performed for you must be reviewed before being explicitly published in

the Exchange catalog. Any of your own bulk load jobs are published as soon as you bulk load them.

- **None.** If you select this option, you are choosing not to review your catalog item bulk loads. All bulk load jobs for your company are published as soon as you (or your third-party content provider, if you're using one) bulk load them, without your (or your third-party content provider's) reviewing them first.

5. Click the "Apply Changes" button to save your options.

If you decide to use the review and publish feature, you must use the **Publish Job** page to review your bulk loaded items and prices before publishing them to the Exchange. For more information, see the online Help.

Online Help: "Help" icon > "Catalog Authoring" section > Bulk Loading Catalog Items

Note: Be careful about publishing several bulk load jobs at once. The online Help gives some example scenarios.

Online Help: "Help" icon > "Catalog Authoring" section > Bulk Loading Catalog Items > "Can I publish pricing for unpublished items?"

Step 4 Decide How to Categorize and Describe Catalog Items (Required if Adding or Bulk Loading Catalog Items)

If you will be selling items or services on the Exchange using the Exchange unified catalog, decide how to categorize and describe your items.

Note: Deciding how to categorize and describe your catalog items according to the structure provided by the Exchange unified catalog can take time. Allow yourself the time to think through and prepare your catalog data for the Exchange unified catalog. See [Appendix B](#) for a complete description of the Exchange catalog structure.

If you do not want to add your items to the Exchange unified catalog, you can set up the Exchange to provide a link from the Exchange directly to your own hosted

catalog site. (See [Step 7 Configure Punchout to Supplier-Hosted Catalog \(Optional\)](#), below.)

You decide how to categorize and describe your items by reviewing the categories and attributes that make up the Exchange catalog structure.

Note: Since the Exchange Operator can add, edit, or delete categories, base attributes, and category attributes periodically, it is important to always view the latest catalog structure before adding your catalog items.

To view base and pricing attributes in the Exchange catalog structure:

1. In the "Marketplace Selling" application of the Exchange click the "Catalogs" tab, then click the "Review Catalog Structure" link. The **Catalog Structure** page displays.
2. Click "View Base Attributes" to view base attributes and "View Pricing Attributes" to view pricing attributes. The **View Base Attributes** and **View Pricing Attributes** pages display whether the attribute is required and what data type it must be.
3. Click an attribute's name to get more information about it. Or see the online Help.

Online Help: "Help" icon > "Catalog Authoring" section

Note: You must use the correct data type when specifying item information for an attribute. See [Appendix B](#) for more information.

To view category information in the Exchange catalog structure:

To view categories and category attributes online:

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click the "Catalogs" tab, then click "Catalog Authoring" in the task bar directly below the tabs.
3. Click the "Review Catalog Structure" link.
4. Browse the list of categories by using the "Find Categories" search field, or by clicking on any of the categories listed on the **Catalog Structure** page.

5. When you find the lowest-level (item) category, click the "Category Attributes" link below it if you plan to specify category attributes (such as "Seat Depth" for the category "Chairs"). See which category attributes are required (if any) and what their data types are.

To view categories and category attributes offline, in a spreadsheet format:

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click on the "Catalogs" tab, then click on "Catalog Authoring" in the task bar directly below the tabs.
3. Click the "Export Catalog Structure" link and follow the guidance on screen. Note: Closely check the creation date of any file in "Completed" status. The catalog structure can change often, so files can quickly become obsolete.
4. When your new catalog structure file appears in "Completed" status in the "Catalog Files" table, select the radio button to the left of the file, then click the "Export" button.
5. Save the WinZip (.zip) file to the drive/location of your choice. Open the *Readme_Hierarchy.htm* file in the .zip file for directions on reading the catalog structure file included in the .zip.

Step 5 Add or Bulk Load Your Catalog Items (Optional)

See the online Help for further details on all of these steps.

Online Help: "Help" icon > "Catalog Authoring" section

To add items and prices to the Exchange catalog online:

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click on the "Catalogs" tab, then click on "Catalog Authoring" in the task bar directly below the tabs.
3. On the **Catalog Authoring** home page, click the "Maintain Items & Price Lists Online" link.
4. Click the "New Item" link to add a new item to the Exchange catalog.
5. At the **Edit Item** page, enter all of your item and price information. The required information fields on the **Edit Item** page are marked with an asterisk (*).

To bulk load items and prices to the Exchange catalog:

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click the "Catalogs" tab.
3. On the **Catalog Authoring** home page, click the "Download Templates/DTDs" link to choose XML or spreadsheet bulk load resources. See the *Readme* files in these resource downloads for step-by-step instructions on completing an XML or a spreadsheet text file for bulk loading your catalog items.
4. After completing the file, click the "Bulk Load Items & Price Lists" link, select the bulk load method you are using (XML file, spreadsheet text file, or a .zip file that contains the XML or spreadsheet text file), and bulk load your file.
5. Check your catalog status and resolve errors if any.
6. Review and publish your catalog items and price lists to the Exchange if you chose to use the review and publish feature. See the online Help for additional information on the review and publish feature.

Online Help: "Help" icon > "Catalog Authoring" section > Bulk Loading Catalog Items > "How do I publish my catalog items on the Exchange after bulk loading?"

Step 6 Configure Item Availability (Optional)

The seller can use XML to import its item availability into the Exchange. When searching for items, buyers can click a "Check Availability" button for an item (shown in the illustration below) to display this information from the supplier. When a buyer clicks this button, the Item Availability XML transaction sends a message from the Exchange to the seller's item availability system and brings back that data to the Exchange when the buyer asks for it. It brings back the current availability as entered in the seller's system.

Shopping > Search Results

Top Category Matches: [Attaches](#), [Sheaves](#), [Adjustable speed drives](#), [Kinetic power transmission](#), [Chain drives](#), [Computer](#)

Search Results for: drive

Select item(s) and...

Add to CartCompareCheck Availability

Filter Results or Sort by:

- None -

Ascending

Descending

Go

Select AllClear All

Previous1 - 25 shown of 46Next

Select	Supplier	Description	Unit	Price	Currency	Category
<input type="checkbox"/>	P _____	Disk Drive	Each	107.00	USD	Attaches
<input type="checkbox"/>	Testing Seller Co	VARIABLE PITCH SHEAVE	Each	5.76	USD	Sheaves
<input type="checkbox"/>	Testing Seller Co	V BELT SHEAVE	Each	1.67	USD	Sheaves

To configure item availability:

- 1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
- 2. Click the "Catalogs" tab.
- 3. On the **Catalog Authoring** home page, click the "Configure Item Availability" link and follow the guidance on the **Configure Item Availability** page.

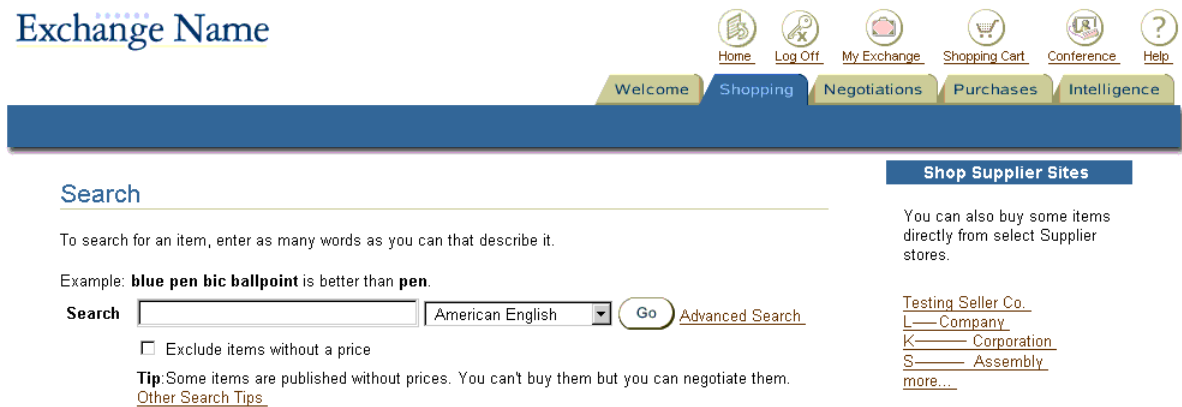
See the *Supply Chain Hub Setup Guide* for more information on the "Configure Item Availability" (also called the Real-time Inventory Availability/Pricing Check) transaction.

Step 7 Configure Punchout to Supplier-Hosted Catalog (Optional)

If you are hosting your own Web catalog you must set up a link on the Exchange to your site. While buyers are browsing the Exchange, they enter keywords to search for particular products and services. One of the setup steps for adding a supplier-hosted catalog to the Exchange is to enter keywords for the catalog. If the key words the buyer enters match the key words associated with the supplier-hosted catalog, the Exchange displays a link to the supplier’s catalog site. When the buyer completes selecting items to purchase, the supplier-hosted site returns the shopping cart contents to the Exchange to complete the buyer’s transaction.

The Exchange supports both XML and cXML protocols for exchanging information between the supplier-hosted site and Oracle Exchange.

Supplier-hosted catalogs also appear in a "Shop Supplier Sites" box on the **Shopping** home page, as shown in the following illustration:



Suppliers can add catalog items to the Exchange unified catalog or link to their hosted catalog directly from the Exchange. (See [Appendix B](#) for more information.)

To place a supplier-hosted catalog on the Exchange:

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click the "Catalogs" tab, then the "Configure Catalog Punchout" link.
3. Click the "Download Punchout Whitepaper" link for detailed instructions on placing your catalog on the Exchange.

Step 8 Control Buyer Catalog Exports (Optional)

Use the **Control Buyer Catalog Exports** page if you want to grant registered Exchange companies permission to download your catalog items. When you grant permission to a company to download your catalog items, the company can download item information and related pricing, including either the list (marketplace) price or the pricing specific to that company. The company can make as many downloads as it wishes as long as you have granted it access. It is up to you and the company to agree on the company's use of the catalog. Your permission is granted to that company until you remove the company from your access list. If

you grant access to your catalog items to all companies on the Exchange, you can later turn off that option if you want.

If you want to grant someone permission to download your catalog items:

1. Access the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Selling" link).
2. Click the "Catalogs" tab to open the **Catalog Authoring** home page.
3. On the **Catalog Authoring** home page, click the "Control Buyer Catalog Exports" link.
4. Click the link "Show Export Access Policy" and follow the instructions on the screen.
5. Remember to click the "Set Access Policy" button to save your change. If you add specific buyers to your access list, also click the "Apply Changes" button to save your changes.

Marketplace Purchasing Setup Steps

This section consists of the following steps:

1. Specify Address Book Settings (Optional)
2. Customize Purchase Order Text (Optional)
3. Modify Transaction Settings (Optional)
4. Enter Transaction Delivery Data Mappings (Optional)
5. Set Up Buyer Pricing Approval Rules (Optional)

Except for Step 5, you need to be assigned the "Company Administrator" job function to perform these steps. Steps 1-4 are performed in the "Company" and "Application Setup" tabs of the "Company Administrator" application, as shown in the illustration below. Step 5 is performed in the "Purchases" tab of the "Marketplace Buying" application; anyone with a "Company Administrator" or "Purchasing Manager" job function can perform Step 5.

Exchange ***** Name


[Welcome](#) [Company](#) [Billing](#) [Application Setup](#)

Administering for G

[Change Company](#)**General Administration**[Transaction Delivery](#)[Transaction Monitor](#)[Data Mapping](#)[Load Currency Exchange Rates](#)[View Currency Exchange Rates](#)[Manage Job Functions](#)**Marketplace**[Trading Partner Preferences](#)[Customize Purchase Order Text](#)[Define Order Approval Controls](#)[Load User Approval Controls](#)[Setup Negotiation Terms and Conditions](#)[Reusable Attribute Lists](#)[Reusable Invitation Lists](#)

Step 1 Specify Address Book Settings (Optional)

The Company Address Book stores a company's complete list of shipping and billing addresses. While the addresses in the Company Address Book can be viewed by all the Exchange users in a company, only the Exchange Company Administrator can edit addresses, enter new addresses, or set new defaults in the Company Address Book. Users in a company and the Exchange Company Administrator can also enter addresses in a Personal Address Book by clicking the "My Exchange" icon, then the "Address Book" link. Both company and personal addresses are displayed in the Personal Address Book.

Once entered into the Company Address Book (or Personal Address Book), addresses cannot be deleted. Addresses can only be edited or deselected as shipping and billing defaults.

Use the Company Address Book to specify ship-to, ship-from, and bill-to addresses that you want to default on orders that people in your company create:

1. Access the "Company Admin" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Company" tab, then click "Company Address Book."
3. In the **Company Address Book** page, choose whether you will allow users in your company to specify their own bill-to, ship-to, or ship-from addresses when creating negotiations or orders on the Exchange. (Links online describe what each of these addresses means.)
4. If you want, click the "Create New Address" link to create bill-to, ship-to, and ship-from addresses that users in your company will see as drop-down menu options when completing their orders on the Exchange.
5. To keep your addresses clearly organized, be sure to give different nicknames to each of the addresses you enter.
6. Indicate whether the address is a shipping (ship-to) address, a ship-from address, and/or a billing address. In each instance, you can select to set the address as your default address for shipping, ship-from, or billing. This is the address that appears by default in the appropriate address fields on transactions in the Exchange unless users change it or select another address from the address book. If allowed to create their own addresses, users can also set their own personal address defaults, which override the company address defaults.
7. When you are finished entering information, click the "OK" button.
8. Add other addresses or edit addresses if desired by clicking the "Create New Address" link on the Company Address Book.
9. When you have finished adding new addresses and editing defaults, click the "Apply Changes" button.
10. When you have finished updating your Company Address Book, click the "Apply Changes" button.

The Exchange provides the capability to associate company addresses with particular areas of the country called business regions. Once you have associated an address with its appropriate business region, your company can be selected by any other companies seeking to transact business only with companies in that target region. Business regions are used by the Offers functionality on the Exchange. Once you have associated users with an address that is associated with a business region, those users are authorized to create offers and can restrict the recipients of those offers to a particular business region.

Business regions are available if the Exchange Operator has set them up. (See [Chapter 2](#).) If the Exchange Operator has provided business regions for the Exchange, you will see a link in the Company Address Book called "To assign a business region and user(s) to the address, click here." The **Assign Business Region and Users** page appears. From this page, you can assign an address to a business region, and assign users to a business region.

See [Step 6 Set up Regions Data \(Required for Offers\)](#) on page 2-29 for information on how regions are used.

Step 2 Customize Purchase Order Text (Optional)

You can customize the text that appears at the top of a purchase order and above the billing and shipping sections on the purchase order, as shown in the following illustration.

WelcomeShoppingNegotiationsPurchasesIntelligence

Order Summary

Order Summary

Review your order and press the **Submit** button if you're ready to send the order to the supplier. Use your browser's Back button if you need to make changes.

Submit

Hard Drive

Order Total (USD) 5.76

This is the customized text at the top of my company's purchase orders.

SupplierTesting Seller Co

BuyerG

Order Placed ByPatti Patterson

Order Date20-06-2001

DescriptionHard Drive

Acknowledgment RequiredNo

Additional shipping or tax charges may be added to your order by the supplier.

Shipping

This is the customized text above my company's orders' shipping information.

Need-By Date30-06-2001 23:59 PDT

Ship-To Address222 Burning Lake Rd

WCA 94065

US

Mail Stop

Billing

This is the customized text above my company's orders' billing information.

Payment MethodInvoice Account

Bill-To Address222 Burning Lake Rd

WCA 94065

US

Attachments

Marketplace Exchange Application Setup 3-25

To customize purchase order text:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Application Setup" tab, then the "Customize Purchase Order Text" link.
3. Choose the "Language" in which you want users to see the text. If the Exchange supports multiple languages, you must create the purchase order text in each language if you want users in other languages to see the text in their preferred language.
4. If you want the language you chose to be the "Default language," select the "Default language" checkbox. This language will be used if you could not create the text in a user's preferred language.
5. Enter the order, billing, or shipping text you want.
6. Click "Apply Changes."

Step 3 Modify Transaction Settings (Optional)

If you want to send and receive documents through the Exchange via XML, follow the steps below to choose your transaction delivery communication method. A list and description of the XML transactions you can send and receive is provided in the [Marketplace Purchasing](#) section in [Chapter 1](#).

For detailed descriptions of the XML transactions that are sent, including the document type definitions (DTDs) that are used, example transactions, and references to the Open Applications Group (OAG) standards that are used in the XML documents, contact the Exchange Operator.

To enter your company's transaction delivery settings:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. In the **Company Administration** home page, click the "Application Setup" tab, then the "Transaction Delivery" link.
3. Select the transaction type (purchase order outbound, purchase order from auction outbound, sales order outbound, purchase order acknowledgment outbound, etc.) for which you want to enter settings.
4. Click the "Edit Transaction Type" button.

5. Select a transaction communication method for the transaction type:

- No Electronic Delivery. If you choose "No Electronic Delivery," no electronic delivery from the Exchange to your system will take place.
- HTTP. If you choose to have your Exchange transactions delivered electronically, you can select the HTTP communication method to have your transactions delivered (in the Open Applications Group XML format) to your company domain server. You must provide the following information to the Exchange:
 - Server Address (full URL where the Exchange can post the data). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as <http://www.oracle.com:5454/xml/dataReceive>.
 - Server User ID. You must provide the user ID that the Exchange can use to access your company domain server.
 - Server Password. You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTP as the transmission method:

- There is no encryption on the e-mail message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- There is no guaranteed delivery. Due to the inherent nature of e-mail, once the message is sent from the Exchange e-mail server, there is no way to ensure that the intended recipient actually received the message.
- HTTP with webMethods. If you choose to have your Exchange transactions delivered electronically, you can select the HTTP with webMethods communication method to have your transactions delivered (in the Open Applications Group XML format) to your company domain server.

This method uses the webMethods B2B for Partners communication software to transmit your transaction documents over the Internet. The receiving server must have the webMethods B2B server software installed, configured, and running on a server accessible through the Internet. webMethods installation, configuration, and licensing information can be obtained from the webMethods web site at <http://www.webmethods.com>.

You must provide the following information to the Exchange:

- **Server Address (IP Address or Domain Name).** You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. You should not provide the full URL (do not put `http://` in front of the IP address or domain name). For example, provide an address or name such as `142.83.24.25:5555` or `www.oracle.com:5454`.
- **Server User ID.** You must provide the user ID that the Exchange can use to access your company domain server.
- **Server Password.** You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTP with `webMethods` as the transmission method:

- There is no encryption on the e-mail message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- Messages transmitted using the `webMethods` method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.
- **HTTPS.** If you choose to have your Exchange transactions delivered electronically, you can select the HTTPS communication method to have your transactions delivered (in the Open Applications Group XML format) through a secure connection to your company domain server. You must provide the following information to the Exchange:
 - **Server Address (full URL where the Exchange can post the data).** You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as `http://www.oracle.com:5454/xml/dataReceive`.
 - **Server User ID.** You must provide the user ID that the Exchange can use to access your company domain server.
 - **Server Password.** You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTPS as the transmission method:

- There is no guaranteed delivery. Due to the inherent nature of e-mail, once the message is sent from the Exchange e-mail server, there is no way to ensure that the intended recipient actually received the message.
- HTTPS with webMethods. If you choose to have your Exchange transactions delivered electronically, you can select the HTTPS with webMethods communication method to have your transactions delivered (in the Open Applications Group XML format) through a secure connection to your company domain server.

This method uses the webMethods B2B for Partners communication software to transmit your transaction documents over the Internet. The receiving server must have the webMethods B2B server software installed, configured, and running on a server accessible through the Internet. webMethods installation, configuration, and licensing information can be obtained from the webMethods web site at <http://www.webmethods.com>.

You must provide the following information to the Exchange:

- Server Address (IP Address or Domain Name). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. You should not provide the full URL (do not put `http://` in front of the IP address or domain name). For example, provide an address or name such as `142.83.24.25:5555` or `www.oracle.com:5454`.
- Server User ID. You must provide the user ID that the Exchange can use to access your company domain server.
- Server Password. You must provide the server password that will allow the Exchange access into your company domain server.

Note the following business considerations when selecting HTTPS with webMethods as the transmission method:

- Messages transmitted using the webMethods method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.
- SMTP (E-mail). If you choose to have your Exchange transactions delivered electronically, you can select the SMTP communication method to have your transactions delivered (in the Open Applications Group XML format) by e-mail. The transaction will be sent as inline text in the e-mail. You must provide the following information to the Exchange:

- E-mail Address. You must provide a full e-mail address to which transactions will be delivered (for example: myname@company.com).

Note the following business considerations when selecting SMTP as the transmission method:

- There is no encryption on the e-mail message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
 - There is no guaranteed delivery. Due to the inherent nature of e-mail, once the message is sent from the Exchange e-mail server, there is no way to ensure that the intended recipient actually received the message.
6. Enter the communication method information required for the selected transaction communication method (as applicable).
 7. Click the "Done" button.
 8. Repeat Steps 3 through 7 above for the other transaction types.

Step 4 Enter Transaction Delivery Data Mappings (Optional)

When transaction documents are exchanged between your company and the Exchange, data mapping is used to define the conversions between your codes and those used on the Exchange. Enter data mappings if you are using transaction delivery or supplier-hosted catalogs.

For example, the Exchange uses the unit of measure (UOM) code EA for "Each." Your company uses E. You would enter the following values in the **Data Mapping** page:

- **Exchange Value.** EA
- **The Exchange to My Company.** E
- **My Company to the Exchange.** E

Another company may use EACH. That company would enter the following values:

- **Exchange Value.** EA
- **The Exchange to My Company.** EACH
- **My Company to the Exchange.** EACH

When you send and receive documents with this company using XML transaction delivery on the Exchange, your UOM code of E is automatically mapped to the

other company's UOM code of EACH. When the company receives the XML document, the UOM code that they receive is EACH, even though the code that you continue to send and use is E.

If you do not enter data mapping settings, and if you do not use the same mapped values as the Exchange, you will receive an XML transaction delivery error.

You can update your data mappings at any time.

To enter your company's data mapping settings:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. In the **Company Administration** home page, click the "Application Setup" tab, then click the "Data Mapping" link.
3. Select the data type for which you would like to enter settings and click the "Edit Mapping" button.
4. Enter your preferred value for documents sent from the Exchange to your company and documents sent from your company to the Exchange. If you want to clear the data fields, click the "Clear Changes" button.
5. Click the "Apply Changes" button.
6. Repeat these steps for the other data types.

Step 5 Set Up Buyer Pricing Approval Rules (Optional)

When adding or loading catalog items to the Exchange, a seller can create buyer pricing that is visible on the Exchange only to specific buyers. The designated Exchange Company Administrator or Purchasing Manager of a buying company can choose to review and approve or reject buyer pricing changes before they are published to the Exchange, by setting up pricing approval rules. (The Exchange Company Administrator or Purchasing Manager is notified only of buyer pricing changes that exceed the tolerances set in the pricing approval rules, not changes to the marketplace price.) The pricing approval rules that a buying company sets up apply to all sellers on the Exchange.

To set up buyer pricing approval rules:

1. Access the "Marketplace Buying" application (on the Exchange home page, click the "Marketplace Buying" link).
2. Click the "Purchases" tab.

3. In the **Purchases** home page, click the "Set Pricing Approval Rules" link.
4. Choose whether you want to approve price increases.

The "Price Increase Tolerance" is the maximum percentage increase you allow to prices before the increase is brought to your attention. For example, you can set a tolerance of 5. If a seller increases your price by more than 5%, the price change is not published to the Exchange (to the buyers in your company) until you approve it. You will be notified through e-mail and can approve or reject the pricing in the **Approve Price List** page. If the price increase is 5% or less, the price is automatically published to the Exchange without your approval. Only price increases beyond your tolerance are brought to your attention, not price decreases.

5. Choose whether you want to approve all new prices.
 - *Yes.* You want to approve new buyer prices, when previously a buyer price did not exist. You have two "Yes" options:
 - Include "To Be Determined" prices. When a supplier prefers the buyer to contact the supplier for the latest price or to purchase an item through negotiation, the supplier's item displays with a "To Be Determined" price code instead of a price. Choose the first "Yes" option if you want to include new "To Be Determined" prices in your approval of new prices.

Note: Items with a "To Be Determined" price cannot be placed on an order. When shopping for items, you can add "To Be Determined" priced items to your shopping cart; however, for the "To Be Determined" priced items, the Exchange will prompt buyers to begin negotiation for the items by clicking the "Add to Negotiation" button in the Shopping Cart Contents page. (Buyers can complete the order for the rest of the priced items in your shopping cart.)

- Approve numeric new prices only. Choose the second "Yes" option if want to approve items with prices, not with "To Be Determined" price codes. If you choose this option, you are approving all new prices except "To Be Determined" prices.
 - *No.* You do not want to approve new buyer prices.
6. Choose whether you want all unit of measure changes to come through your approval, regardless of price impact.

7. Choose whether you want to approve existing prices that change to or from "To Be Determined."

For example, you could choose to approve all new prices except "To Be Determined" prices, as described above. Then in this step, you could still choose to approve existing prices that change to or from "To Be Determined."

8. Click "Apply Changes."

Note that buyer pricing information consists of the item number, unit, price, currency, and supplier comments. Changes to the item number, currency, or comments are not brought to your attention. Although you will be automatically notified when a seller deletes a buyer price, a seller's deleting an item altogether from the catalog is not brought to your attention.

For instructions on later approving or rejecting pricing from sellers, see the online Help:

Online Help: "Help" icon > "Catalog Authoring" section > Approving Buyer Price Lists

Negotiations Setup Steps

This section consists of the following steps:

1. Define Negotiations Terms and Conditions (Optional)
2. Modify Default Invitation Recipients (Optional)
3. Define Company-Specific Reusable Attributes Lists (Optional)
4. Define Company-Specific Reusable Invitation Lists (Optional)
5. Define Company-Specific Negotiation Templates (Optional)
6. Select a Transaction Delivery Method for Negotiation-Generated Purchase Orders (Optional)

You need to be assigned the "Company Administrator" job function to perform most of these tasks. Anyone with the "Manage Attribute Lists" job function can also perform Step 3 Define Company-Specific Reusable Attributes Lists.

The steps in this section take place in the "Company Administrator" application and in the "Negotiations" tab of the "Marketplace Buying" or "Marketplace Selling" applications, as shown in the following illustration.

Exchange Name

Home

Log Off

My Exchange

Shopping Cart

Conference

Help

Welcome

Shopping

Negotiations

Purchases

Intelligence

All Negotiations

Auctions

RFQs

Auctions

Create Buyer's Auction

Monitor Bidding Activity

Award Business

View All Auctions

View Open Auctions

For a selected Auction, view bid history, cancel Auction, disqualify bid, close Auction early, extend Auction, or compare bids.

Manage Sealed Auctions

View All Events

New to Auctions?

Check out frequently asked questions

Learn more about getting started

Auctions at a Glance

Auction	Title	Bid	Created By
You are not currently participating in any auctions.			

Auction Tools

Seller's Auction Templates

Reusable Invitation Lists

Reusable Attribute Lists

Create New Event

Monitor

Bids

Respond to Auctions

Find open auctions to place a bid.

View All Active Bids

You're Invited!

You have been invited to bid in the following supplier auctions. Click an Auction link to view details and bids.

Auction	Title	Supplier	Time Left/Close Date
12764	New Seller Auction April 4	Car—	15-08-2001 15-08-2001 05:00 PST

Step 1 Define Negotiation Terms and Conditions (Optional)

1.

Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link). Click the "Application Setup" tab and the "Set Up Negotiation Terms and Conditions" link. Use the **Negotiation Terms and Conditions** page to define the terms and conditions that you want to display on negotiations.
- These are the terms and conditions that are presented to participants before they respond to a negotiation for the first time. When responding to a negotiation created by someone in your company, participants must agree to accept your Terms and Conditions before submitting a response. These Terms and Conditions are presented to the first Exchange user from any company that responds to the negotiation; subsequent responses from that participant, or other Exchange users from that participant's company, will not require acceptance of the Terms and Conditions again.

If the Exchange supports multiple languages, select a language from the pull-down menu at the "Language" field and translate the terms and conditions for each language if your participants speak other languages.

2. Make sure you have set the following selling preferences as described in [Step 3 Edit Trading Partner Preferences \(Optional\)](#) on page 3-9:
 - Payment Terms
 - Freight Terms
 - Freight Carriers
 - FOB
3. Confirm your company's default ship-to and bill-to addresses, which will be used on negotiations. (See [Step 1 Specify Address Book Settings \(Optional\)](#) on page 3-23.)

Step 2 Modify Default Invitation Recipients (Optional)

Modify the default recipient of invitations to participate in negotiations if you haven't already when you set up the trading partner preferences.

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Application Setup" tab, then the "Trading Partner Preferences" link.
3. In the "Designated Transaction Contacts" section of the **Trading Partner Preferences** page, designate a single point of contact who will receive all of your company's invitations to negotiations. Negotiation invitations will be delivered to this contact person via e-mail.

Step 3 Define Company-Specific Reusable Attribute Lists (Optional)

You can create negotiation attribute lists to include on your auction, RFQ, or offer templates or to use when creating any new auction, RFQ, or offer. Attribute lists are named groups of item attributes (item characteristics) that apply to items in a negotiation. Attributes define the details that a participant should provide when responding to an item in an auction, RFQ, or offer. For example, when an auctioneer adds an item to an auction for vehicles, the auctioneer can add an attribute called "mileage" to specify that the bid item must have fewer than 12,000 miles on the odometer. If you or your company's users repeatedly include the same item attributes with your negotiation items, attribute lists can streamline new negotiation creation and standardize your negotiation items.

If you include an attribute list on a negotiation template, the attributes on the list will apply to all items added to the negotiation created with that template (though the person using the template can edit and remove attributes as appropriate).

The Exchange Operator can also create attribute lists that are available to all companies on the Exchange.

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

To create a new attribute list for negotiations:

1. Access the "Marketplace Buying" or the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Buying" or "Marketplace Selling" link).
2. Click the "Negotiations" tab.
3. In the task bar directly below the tabs, click the "Auctions," "RFQs," or "Offers" link.
4. Click the "Reusable Attribute Lists" link.
5. On the **Create Attribute List** page, enter a List Name and brief Description for your attribute list. Choose the Status (either "Active" or "Inactive"). An "Active" list can be used immediately; an "Inactive" list will be stored in the Exchange, but will not be available for use unless you edit the list and change its status to "Active."
6. To add attributes to your attribute list, click the "Add Attributes" link on the **Create Attribute List** page. An attribute list must include at least one attribute.
7. On the **Add Attributes** page, enter your attribute information in the appropriate fields. Required fields are marked with an asterisk (*):
 - ***Attribute.** Enter a name for your attribute (for example: "Mileage"; "PPM Defect Rate"; "Grade"; and so on).
 - **Response.** If you want this attribute to be required (all participants must enter a value for this attribute when responding), select "Required." If you want this attribute to be optional (participants are not required to enter a value for this attribute when responding), select "Optional." If you want this attribute to be displayed to the participant without allowing any response, select "Display Only."
 - **Value Type.** Select the type of value that participants should enter for this attribute when bidding. Participants may enter *Text* (letters, words, digits,

and so on), *Numbers* (digits with decimals allowed), *Dates* (numbers in date format), or *URLs* (Web site addresses that begin with a valid URL protocol, such as `http://`, `https://`, and `ftp://`; only values with a *URL* type display as links; for example, a Web site address entered in a *Text* type will display simply as text). The value type you select also governs the value you can enter in the "Negotiation Value" field. *Text* is the most flexible value type. If you select *Text*, participants will be allowed to enter letters as well as numbers. If you select *Numbers*, participants will only be allowed to enter digits; if you select *Dates*, participants will only be allowed to enter numbers in date format.

- **Negotiation Value.** If desired, set your item specifications by entering a target value for the item in the "Negotiation Value" field (for example: "Fewer than twelve thousand miles per vehicle"; "Fewer than eight defects per million parts manufactured"; and so on).
 - **Display Value to Participants.** If you want participants to see the Negotiation Value, select "Yes" from the drop-down menu at the "Display Value" field. If you do not want participants to see the Negotiation Value, select "No" from the drop-down menu at the "Display Value" field.
8. When you have finished entering your attribute information, click the "Add Another" button to add another new attribute, or click the "OK" button to add your current attribute to your attribute list and return to the **Create Attribute List** page.
 9. On the **Create Attribute List** page, review your attribute list name, description, status, and attributes. When you are satisfied with your attribute list, click the "Submit" button.

Step 4 Define Company-Specific Reusable Invitation Lists (Optional)

If you typically invite the same core group of buyers or sellers to many (or all) of your negotiations, you can add these people to a reusable invitation list to use with your negotiations. Using an invitation list can help standardize your business practice by ensuring that all appropriate people are invited to targeted negotiations and helps streamline the negotiation process. You can add invitation list(s) when creating a new negotiation; you can also attach invitation list(s) to a negotiation template. (Invitation lists can include only registered Exchange companies.)

To create a new invitation list:

1. Access the "Marketplace Buying" or the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Buying" or "Marketplace Selling" link).
2. Click the "Negotiations" tab.
3. In the task bar directly below the tabs, click the "Auctions," "RFQs," or "Offers" link.
4. Click the "Reusable Invitation Lists" link.
5. See the online Help for detailed descriptions of the invitation list fields and other information:

Online Help: "Help" icon > "Negotiations" section > Creating New Negotiations > "How do I create and edit a reusable Invitation List?"

For more information about how to add invitation list(s) to a negotiation, see the online Help:

Online Help: "Help" icon > "Negotiations" section > Creating New Negotiations

Step 5 Define Company-Specific Negotiation Templates (Optional)

If the majority of the auctions, RFQs, or offers you create contains the same features—the same item attributes, business terms and conditions, response controls, and so on—you may want to create a template that you can use each time you create a new auction, RFQ, or offer. Using a template can save you time by streamlining the negotiation creation process. Your template will contain the features that are similar among the negotiations you commonly create. When you create a new auction, RFQ, or offer using a template, you simply open the template, add to and edit details of the template (as necessary), and publish your negotiation. Templates can be used over and over again.

You can create as many templates as you'd like. You can create both "private" templates (templates that only you can view, edit, and use) and (as the Exchange Company Administrator) "public" templates (templates that all Exchange users in your company can view and use).

To create an auction, RFQ, or offer template:

1. Access the "Marketplace Buying" or the "Marketplace Selling" application (on the Exchange home page, click the "Marketplace Buying" or "Marketplace Selling" link).

2. Click the "Negotiations" tab.
3. In the task bar directly below the tabs, click the "Auctions," link to create auction templates, the "RFQs" link to create RFQ templates, or the "Offers" link to create offers templates.
4. On the **Auctions** (or **RFQs** or **Offers**) home page, click the "Create Auction (or RFQ or Offer) Template" link.
5. See the online Help for descriptions of the template fields.

Online Help: "Help" icon > Negotiations section > Creating New Negotiations > (see the topics on how to create and edit templates)

Step 6 Select a Transaction Delivery Method for Negotiation-Generated Purchase Orders (Optional)

You can import purchase orders created from buyers' auctions and RFQs, using the Purchase Order from Negotiation Outbound transaction delivery document.

When awarding a Buyer's Auction or RFQ, the buyer can generate one or more purchase orders for auction or RFQ items (one purchase order for each supplier to whom business was awarded). The Exchange will send the purchase order(s) to the buyer via the buyer's selected communication method.

For instructions on selecting a transaction delivery method for auction-generated purchase orders, see [Step 3 Modify Transaction Settings \(Optional\)](#) in the section [Marketplace Purchasing Setup Steps](#).

Registration and Administration Setup Steps (Part II)

This section consists of the following steps:

1. Customize Job Functions (Optional)
2. Set Up Marketplace Intelligence Reports (Optional)
3. Set Up a Default Job Functions List (Optional)
4. Register and Approve Others (Optional)
5. Upload Approval Hierarchy (Optional)
6. Choose Alternate Points of Contact (Optional)

You need to be assigned the "Company Administrator" job function to perform these steps.

Step 1 Customize Job Functions (Optional)

The Exchange provides job functions that you can use to control the access that companies have to certain Exchange functions. You can customize these job functions to create new "types" of roles and security for companies. A job function consists of one or more tasks that users can perform on the Exchange. For example, two of the tasks that a job function called "Seller" includes are "Create, cancel, and award Seller Auctions" and "Bid in Buyer Auctions." An Exchange user who has been assigned this job function can perform these tasks. An Exchange user who has not been assigned a job function that contains these tasks cannot perform these tasks.

The Exchange Operator assigns each company job functions, but as the Exchange Company Administrator, you can create and edit new ones (not existing ones) for your company's users or affiliates. Exchange tasks are predetermined (seeded) in the Exchange and cannot be edited. Be sure that a user is assigned job functions that contain all of the tasks you want the user or affiliate to be able to perform. The Exchange Company Administrator cannot assign more job functions and tasks than have been assigned to it by the Exchange Operator.

Caution: If you want to create job functions other than those that the Exchange Operator assigns you, generally you should create them *before* you register and approve other users in your company. If you customize job functions after users in your company are already using the Exchange, be sure to update each person's assigned job functions to use the new ones you created and let users know that their access to certain pages has been updated. Note that if you have affiliates, your customizations to job functions could interfere with job functions customizations that the affiliates themselves have performed for their users.

To determine whether customizations are needed:

1. Make a high-level inventory of the business processes that your company will be using on the Exchange. For example, some of these business processes might be industry-specific.
2. Identify the roles and responsibilities of the people in your company who you will register on the Exchange and who will support these processes.
3. Think of the job functions that you would need to cover these roles and responsibilities.

4. Look at the job functions that the Exchange Operator has already assigned your company. Map these to the job functions that you need. Create new job functions if needed. You should not duplicate existing job functions. You may want to contact the Exchange Operator first to see if a job function already exists but has not yet been assigned to you, before you create a new one.

To view a list of all of the job functions and their tasks:

The following steps describe how to view all of the job functions and their tasks that the Exchange Operator has assigned you.

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Application Setup" tab, then the "Manage Job Functions" link.
3. The table in the **Manage Job Functions** page lists the job functions and a high-level description of each. (You may need to click the "Go" button first, leaving the search fields blank, to see the table.)

Exchange Name

Home

Log Off

My Exchange

Shopping Cart

Conference

Help

Welcome

Company

Billing

Application Setup

Application Setup > Manage Job Functions

Manage Job Functions

Job Functions are the mechanism for granting users access to individual Exchange Tasks (e.g. Catalog Authoring, etc.) within Exchange Name Here.

Create a new Job Function

Set default Job Functions to assign when approving users

Set default Job Function to delegate when approving affiliate companies

FAQ Shortcut

What is a job function?

What is an exchange task?

How do I assign job functions to users?

How does job function delegation work?

How do I delegate job functions to affiliate companies?

Job Function Search Results

1 - 24 shown of 24

Job Function	Description	Owner	Update
Account Manager	Manage billing activity incurred on the Exchange.	exch	

4. Click any job function to see a list of the tasks it contains and a description of each task.

To create a new job function:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Application Setup" tab, then the "Manage Job Functions" link.
3. In the **Manage Job Functions** page, click the "Create New Job Function" button at the top of the **Manage Job Functions** page to create your own job function out of existing tasks. You cannot update existing job functions, only create new ones. You can update only new job functions you create. (A job function is typically "owned" by whomever created the job function. Because job functions can only be edited by their owners, you will only be allowed to edit those job functions that you have created. An "Update" link will not appear if you are not the owner of that job function.)
4. Add Exchange tasks to the job function either individually or by copying an existing job function. Follow the guidance on screen to search for the task or job function.
 - If you are adding tasks individually, select the checkbox to the left of the Exchange task(s) you want to add to your job function, then click the "Add to Job Function" button.
 - If you are copying tasks from an existing job function, select the checkbox to the left of the job function(s) from which you want to copy the Exchange tasks, then click the "Copy Exchange Tasks" button.
 - To delete an Exchange task from this job function, click the "Remove" link of the Exchange task.
5. When you are satisfied with the tasks you have entered, click the "Submit" button.
6. When you have finished editing your job function, click the "Review and Submit" button. Review your job function. Use your Browser's "Back" button to make changes as necessary. When you are satisfied with your new or edited job function, click the "Submit" button.

Step 2 Set Up Marketplace Intelligence Reports (Optional)

To enable users to access the marketplace intelligence reports, assign the "View Seller Intelligence Reports" task to those job functions you want to have access to

the seller reports. Assign the "View Buyer Intelligence Reports" task to those job functions you want to have access to the buyer reports. See the previous step for instructions on modifying job functions.

Step 3 Set Up a Default Job Functions List (Optional)

You can create a default job functions list, which you can select and assign to every affiliate or user who registers on the Exchange. This makes it easier for you to assign default privileges to all affiliates and users who register under your company on the Exchange.

To create a default job functions list:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Application Setup" tab, then the "Manage Job Functions" link.
3. In the **Manage Job Functions** page, click the "Set default Job Functions to assign when approving users" or "Set default Job Functions to assign when approving affiliate companies."
4. Click the "Select and add existing job functions" link to add job functions to the default job functions list. Click the "Create and assign new job function" if you want to create a new job function for the default job functions list. (See [Step 1 Customize Job Functions \(Optional\)](#) on page 3-40 for instructions.) Click the "Remove" link to remove a job function from the default job functions list.
5. When you are finished creating the default job functions list, click the "Review and Submit" button. If you are satisfied with the changes, click the "Submit" button. Use your browser's Back button to make additional changes if necessary.

Step 4 Register and Approve Others (Optional)

You are also responsible for approving users and affiliate companies, if any. If you will be allowing and approving affiliate companies, see [Registration and Administration Hierarchy](#) in [Appendix A](#) first, to understand how a hierarchy of companies works on the Exchange.

To register and approve others:

1. Open up the registration process to individuals in your company, or use bulk load registration. To use bulk load registration, access the "Company

Administration" application and, in the "Company" tab, click the "Bulk Registration Management" link. (See [Self-Service vs. Bulk Load Registration in Appendix A](#) for more information.)

2. If you let people in your company or affiliates register online, approve them. Access the "Company Administration" application and, in the "Company" tab, click the "Approve Users" link. (When you bulk load users, they are considered automatically approved by you, and you need to let them know their user names and passwords.)
3. Assign users (or affiliates) the job functions that the Exchange provides or that you created. The registration approval process on the Exchange guides you through assigning job functions. Or click the "Registered Users" link in the "Company" tab to change users' job function assignments after you approve them.

Step 5 Upload Approval Hierarchy (Optional)

You can define approval controls for orders that people in your company create on the Exchange. For example, if your company has four registered users, you can create approval controls that enable three of them to approve their own orders up to \$5,000.00, but for any order over \$5,000.00 you require the approval of the other user, who is their manager. These approval controls apply only to orders that you create by adding items to your shopping cart on the Exchange.

Until you define approval controls and limits for someone in your company, that person has unlimited approval authority. For more information about the approval process, see the online Help.

Online Help: "Help" icon > "Shopping" section > Order Approval

You must approve registered users in your company before you specify them in an approval hierarchy.

To create approval controls or an approval hierarchy:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. Click the "Application Setup" tab, then the "Define Order Approval Controls" link. (You can also access this link through the "Marketplace Buying" application, through the "Purchases" tab.)
3. In the **Order Approval Controls** page, select your options and click "Apply Changes."

- **Enable Order Approvals?** Choose **Yes** to require order approvals. Then specify a default approver. If you want to create a hierarchy of approvers in addition to the default approver, see step 4 below. Choose **No** if you do not want to require order approvals or if you no longer want to use the approval hierarchy that you defined previously
- **Can order owners approve their own documents?** If you choose **Yes**, everyone in your company who creates an order on the Exchange can approve his or her own order up to (and including) the approval limit you set for that person, if any.
- **Who is the default approver?** The default approver approves orders when no other approver can be found, when the previous approver did not respond by the "Respond By" date, when the order total exceeds everyone's approval limits, or when a currency conversion rate is not found for an order created in a foreign currency (in this case, the default approver gets the approval notification first because the Exchange cannot determine the total order amount in the Exchange functional currency, and therefore cannot determine whose approval limit it falls within).

Note: The default approver does not have to be the final approver or someone outside the approval hierarchy. For example, someone within the approval hierarchy, with an approval limit and approving manager, could also be the default approver. In that case, that person still needs manager approval for orders he or she creates over his or her approval limit; however, that person also plays the role of default approver when the default approver is needed—for example, when a currency conversion rate is not found for an order created in a foreign currency.

4. Define approval limits and approver relationships to create an approval hierarchy by either or both of the following methods:
 - Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link). Click the "Company" tab, then the "Registered Users" link. Select a user and click the "Edit Profile" button. Scroll down to the "Define Order Approval Controls" section to specify an approval limit and approving manager for this person.
 - If you prefer to create one approval hierarchy, including approval limits, for everyone in your company at once and upload that as a file to the Exchange, access the "Company Administration" application. Click the

"Application Setup" tab, then the "Load User Approval Controls" link and follow the instructions on screen. Click the "Download Now" button to download a WinZip (Zip) file that contains instructions and templates.

You can use any combination of online editing, XML files, and spreadsheet text files to create and update approval limits and approver relationships.

If you ever need to change an approval hierarchy, here is what happens to existing orders:

The following approval changes do not affect existing orders:

- A change to the "Enable Order Approvals" section in the **Order Approval Controls** page does not affect existing orders, but affects orders that are created after you save this change.
- A change to the "Can order owners approve their own documents?" section in the Order Approval Controls page does not affect existing orders, but affects orders that are created after you save this change.

The following approval changes do affect existing orders:

- A change to the "Who is the default approver?" section in the **Order Approval Controls** page can affect existing orders. If an existing order has not yet gone through the approval hierarchy, or is halfway through the approval hierarchy, the Exchange uses the latest default approver you have specified (if a default approver is needed) rather than the default approver that was specified when the order was first created.
- A change to the approval limits or approver relationships affects existing orders. *The Exchange always looks for the latest next approver.* For example, your approvers are as follows, and currently Joe Smith's order for \$4,000 is in Anna Garcia's approval queue:

Company User	User's Approval Limit (USD)	User's Approving Manager
Joe Smith	100	Anna Garcia
Anna Garcia	1,000	Ben Moore
Ben Moore	(No approval limit)	(No approving manager)

You make the changes *highlighted* below after Joe Smith's order for \$4,000 is submitted and sitting in Anna Garcia's approval queue:

Company User	User's Approval Limit (USD)	User's Approving Manager
Joe Smith	100	Margaret Jones
Margaret Jones	500	Anna Garcia
Anna Garcia	5,000	Ben Moore
Ben Moore	(No approval limit)	(No approving manager)

Instead of going to Anna Garcia, and then to Ben Moore for final approval, as the order would have done before the changes, Joe Smith's order is now approved and sent to the supplier when Anna Garcia approves it, since \$4,000 is now within her approval limit. The next order for over \$100 that Joe Smith submits will go first to Margaret Jones for approval. Since his current order was already in Anna Garcia's queue, it did not "go back" to Margaret Jones for approval. *The Exchange always looks for the latest next approver.*

Step 6 Choose Alternate Points of Contact (Optional)

Once others in your company register, you can designate them in additional roles if desired:

1. Access the "Company Administration" application (in the Exchange home page, click the "Company Administration" link).
2. Click the "Company" tab, then the "Company Profile" link. In the "Designated Default Administrator" section of the **Company Profile** page, designate another registered Exchange user in your company as the default Exchange Company Administrator for your company if desired. Although you (as an Exchange Company Administrator) can still perform administrative tasks for your company, the default Exchange Company Administrator receives all registration requests for your company and is the single point of contact for administrative tasks. For example, a "contact your Exchange Company Administrator" link on the Exchange will provide the e-mail address of the default Company Administrator. Although any Exchange Company Administrator in a company can approve a registration request, only the default Exchange Company Administrator receives the registration request notifications.

3. In the "Designated Transaction Contacts" section, choose a single point of contact for negotiations and orders. Any notifications that are sent for these transactions are sent to the person you designate.

Ongoing Maintenance

The following sections are not an exhaustive list of the ongoing activities you should perform on the Exchange, and your company may have its own list that better suits your business practices. This section gives you an idea to help you develop your own check list of ongoing activities.

Registration and Administration

- If you let people in your company or affiliates register online, approve them. Access the "Company Administration" application and, in the "Company" tab, click the "Approve Users" link. (When you bulk load users, they are considered automatically approved, and you need to let them know their user names and passwords.)
- Update company currency conversion rates (see [Step 4 Upload Company Currency Conversion Rates \(Optional\)](#) on page 3-11) as appropriate.
- If the Exchange charges for its services, click the "Billing" tab in the "Company Admin" application to see your charges. You need to be assigned account manager tasks to see your company's billing information. Click the "View Exchange Price List" link to view what the Exchange charges. Click the "View Charges" link to view your company's actual charges. (Some transactions may be marked with the status "Exception." Exception transactions occur when no pricing is currently specified for your company, or some other pricing error occurred. The Exchange Operator is made aware of these exceptions and can resubmit them for pricing later. Once resolved and resubmitted, these transactions reappear without the Exception status.) You will see "View Invoices," "View Payments," and "View Credits" links—and see "billed" versus "unbilled" transactions in the **View Charges** page—only if the Exchange is integrated with Oracle Receivables to process and display invoices and payments online.

Catalog Hosting

- Periodically review the catalog structure or download spreadsheet templates to make sure your bulk load files are using the latest catalog structure and templates.

- Review Catalog News on the **Catalog Authoring** home page for latest dispatches regarding content management.
- You may receive e-mail notifications about the success or failure of bulk loads or about buyer review and approval of pricing changes.
- Check whether your third-party content provider has loaded bulk load jobs that require your review and publication by clicking the "View Bulk Load Status" link on the **Catalog Authoring** home page. (See [Step 3 Set Bulk Load Preferences \(Optional\)](#) on page 3-15.) To review the online activities of your third-party content provider, click the "Marketplace Selling" link on the Exchange home page, click the "Catalogs" tab and, on the **Catalog Authoring** home page, click the "Review Third Party Online Activities" link. (This link is also available in the "Company Admin" application.) Follow the instructions on the screen.

The **Review Third Party Online Activities** page shows only those changes that the third party made online. If you want to monitor a third party's bulk load activities, click the "View Bulk Load Status" link in the **Catalog Authoring** home page. To monitor downloads of your catalog that the third party may have performed, click the "Export My Catalog" link in the **Catalog Authoring** home page. The **Export My Catalog** page shows who performed recent exports.

Marketplace Purchasing

- Update approval hierarchies (see [Step 5 Upload Approval Hierarchy \(Optional\)](#) on page 3-44) as appropriate.
- Note that buyers can check the **View Orders** page (in the "Marketplace Buying" application, click the "Purchases" tab) to see if approvers or suppliers have rejected any of their orders. They will also be notified by e-mail and by the notifications in the "To Do List" in "My Exchange."
- Note that sellers can check the **View Orders** page (in the "Marketplace Selling" application, click the "Sales" tab) for orders that require their acknowledgment. They will also be notified by e-mail and by the notifications in "My Exchange."
- Check whether there are price list changes awaiting approval (if you set Pricing Approval Rules). In the "Marketplace Buying" application, click the "Purchases" tab, then the "Approve Price Changes" link. See the online Help for more information:

Online Help: "Help" icon > "Catalog Authoring" section > Approving Buyer Price Lists

Negotiations

Review your invitation lists to reflect the changes in your business. Check your attributes lists to streamline the negotiation creation process. Update your companies' standards and business practices on the negotiation templates.

Registration

This Appendix provides information on the following topics:

- [Independent Entity, Affiliate, and User Registration](#) on page A-2
- [Registration and Administration Hierarchy](#) on page A-3
- [Registration and Approval Process](#) on page A-7
- [Self-Service vs. Bulk Load Registration](#) on page A-11

Independent Entity, Affiliate, and User Registration

When people register on the Exchange, they can register as an *independent entity*, *affiliate*, or *user* of an already-registered company. The Exchange Operator must approve all independent entities. The Exchange Operator can also approve affiliates and users, but this is normally the responsibility of the parent company with whom the affiliate or user is registering. (If the Exchange Operator tries to approve an affiliate or user online, the Exchange will give a warning message that this company or user is pending approval by the parent company.)

Independent Entity (Company Registration)

If you register your company as an independent entity on the Exchange, then your company will not be associated as an affiliate (subsidiary, division, or branch) of any other company. Other companies, such as your company's subsidiaries, divisions, or branches, can register as affiliates of your company (with your approval). If another company registers as an affiliate of your company, you will be responsible for approving that company's affiliation with your company.

Once you have registered your company as an independent entity, you will be responsible for administering your company's account and users on the Exchange. If another company registers as an affiliate (subsidiary, division, or branch) of your company, you will be responsible for approving that company's association with your company. Once you approve the affiliate company account, you will have access to perform administrative tasks for the affiliate company on the Exchange.

Affiliate (Company Registration)

You can choose to register your company as an affiliate (subsidiary, division, or branch) of a registered parent company on the Exchange. The parent company with whom you associate your company must approve the affiliation.

As an affiliate of a parent company, you allow the parent company's Exchange Company Administrator access to perform administrative tasks for your company's Exchange account at any time. You will also be able to administer your own company's account and users.

In addition, other companies can register as Exchange affiliates of your company. If this is the case, then your company will act as both an affiliate (of your parent company) and a parent company (to the company or companies that register as your affiliates). You will allow the parent company's Exchange Company Administrator access to perform administrative tasks for your company, and you

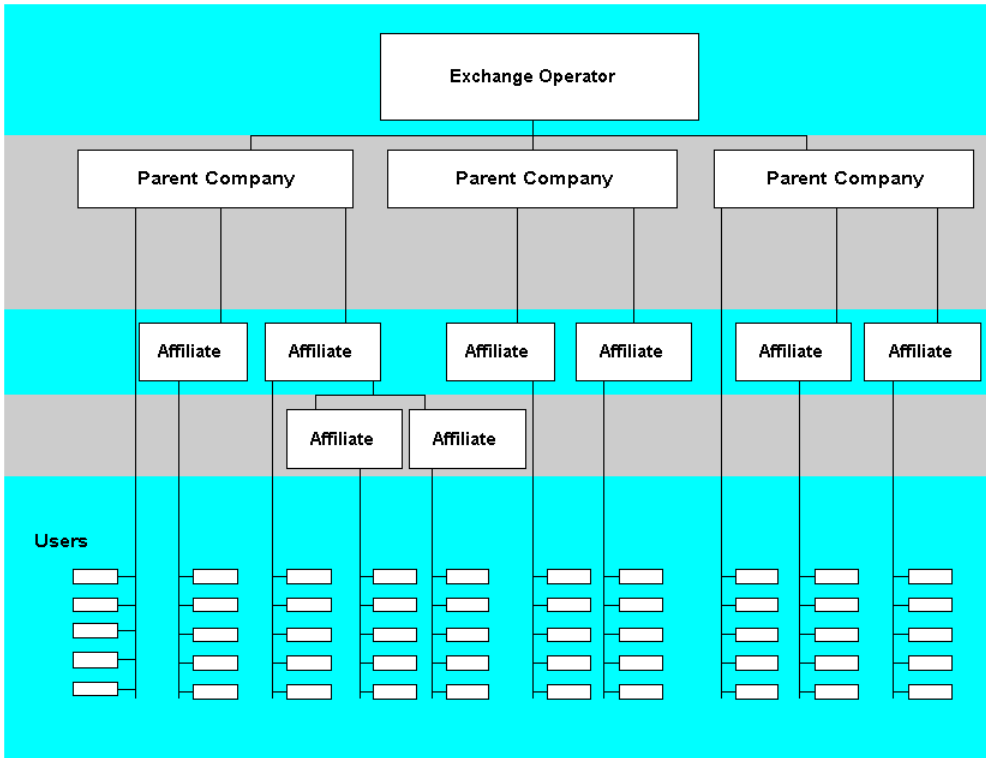
will have access to perform administrative tasks for your affiliate company's Exchange account.

User Registration

Users can register under a company after the company is registered (as either an independent entity or affiliate) on the Exchange. The Exchange Company Administrator of the company approves the users and assigns them job functions that will allow them to perform transactions on the Exchange.

Registration and Administration Hierarchy

You can register as an independent entity, an affiliate of another registered company, or a user of a registered company. Affiliate companies can have other affiliate companies registered under them, and those affiliates in turn can have more affiliates registered under them. There is no limit to the number of layers of affiliates on the Exchange.



Users can view and navigate a graphical representation of a company's relationship with its affiliates when registering or administering on the Exchange.

The Exchange Operator

The Exchange Operator is responsible for approving companies that register as independent entities. The Exchange Operator manages the Exchange. The Exchange Operator also can, as an emergency or backup measure, approve affiliates or users of other companies, with the responsible Exchange Company Administrator's permission. When the Operator approves an independent entity's registration, the Operator also assigns job functions to that company. Job functions control who has access to certain tabs, pages, and links in the Exchange.

Independent Entity

When a company registers as an independent entity on the Exchange, the registration request is sent to the Exchange Operator for review. Other companies can register as affiliates of the independent entity, with the independent entity's approval, and the independent entity's Exchange Company Administrator can administer those companies as well as administer and approve users of his or her own company. When approving affiliates or users, the Exchange Company Administrator also assigns job functions to them. Job functions control who has access to certain tabs, pages, and links in the Exchange. The Exchange Company Administrator can also use job functions to give affiliates full or partial administrative control over their company and users.

Affiliate

When a company registers as an affiliate of an independent entity or of another affiliate, the registration request is sent to the Exchange Company Administrator of the parent company for approval. Other companies can register as affiliates of another affiliate, with the affiliate's approval, and the affiliate's Exchange Company Administrator can administer those companies and administer and approve users of his or her own company. While approving affiliates or users, the Exchange Company Administrator also assign job functions to them. Job functions control who has access to certain tabs, pages, and links in the Exchange. The Exchange Company Administrator can also use job functions to give affiliates full or partial administrative control over their company.

User

Users can register only under an already-registered company (an independent entity or an affiliate). A user's registration request is sent to the Exchange Company Administrator of the company for approval. While approving users, the Exchange Company Administrator also assigns job functions to them. Job functions control who has access to certain tabs, pages, and links in the Exchange.

Relationship between Parent and Affiliate Companies

Any company (an independent entity or an affiliate) with affiliates registered under it is called a "parent" company. A parent company may choose to do all administrative tasks for an affiliate company, or may give the affiliate full or partial administrative tasks for the affiliate's company. (The affiliate Exchange Company Administrator can never be assigned more administrative tasks than the parent

Company Administrator has been assigned—only the same tasks, or a subset of those tasks.)

Regardless of whether an affiliate has full or partial administrative rights for its company, the parent Exchange Company Administrator can still administer for it. The parent Exchange Company Administrator can also administer for its affiliates' affiliates. This means the parent company can click the "Change Company" button in the "Company Admin" application, select one of its affiliate companies, and perform any of the administrative tasks in the "Company Admin" application for that company. However, all notifications to approve users and affiliates that register under an affiliate company are sent only to that affiliate company—but both the affiliate and the affiliate's parent company can approve the affiliate's or user's registration.

Nothing that a parent company does for its own company automatically applies to its affiliates. There is no automatic "inheritance" of a parent company's setup or options to its affiliates, other than that an affiliate can never perform more tasks than its parent company has been assigned. For example, the exchange rates that an Exchange Company Administrator of a "parent" company on the Exchange uploads will be valid only for the "parent" company. The exchange rates will not be available to any of that parent company's affiliates. (The Exchange Company Administrator can upload exchange rates for each affiliate separately when administering for affiliates.) In another example, affiliates also do not "inherit" the buyer prices of their parent company. Prices created specifically for a buyer are visible only to that buying company's users, not its affiliates. A seller would have to create price lists for each company, including each affiliate, and not just for the affiliates' parent company.

Note: If the Exchange Operator deactivates a company, then its users, its affiliates, and its affiliates' users cannot log in.

To administer for affiliate companies:

1. Access the "Company Administration" application (on the Exchange home page, click the "Company Admin" link).
2. In a specific company administration page, click the "Change Company" button at the top of the page to select and administer for an affiliate company.

Registration and Approval Process

Independent Entity Registration

If you register as an independent entity:

1. Begin registration

Begin registering as an independent entity by accepting the role of Company Administrator for your company and entering your company and payment information.

2. Read the legal agreement

If you accept the agreement:

If you have the authority to accept the legal agreement and complete your registration submission:

- Wait for approval. The Exchange Operator reviews your registration request for authenticity, accuracy, and completeness. You may be contacted by the Exchange Operator if questions arise about your registration.

If you forward the agreement to a legal representative:

If you submitted the legal agreement for review by a legal representative in your company:

- Wait for legal review. The legal representative receives an automated e-mail of the agreement for review and (from the e-mail) submits a response to the agreement directly to the Exchange. The e-mail includes contact information for the Exchange Operator in case the legal representative has questions. If the legal representative does not respond in seven days, your registration request automatically expires (you will be notified by e-mail) and you will need to register again. The Exchange Operator is not informed of your registration request until the legal representative accepts the agreement. You can check your registration status by clicking the "check your registration status" link on the Exchange home page. The status will let you know whether legal review is pending, has been approved, or has been rejected.
- Receive notification of legal representative's response. You will receive an automated e-mail notification as soon as your legal representative approves or rejects the agreement. If your legal representative rejects the agreement by responding to the e-mail with "Reject," your registration is automatically

rejected by the system. The Exchange Operator never received your registration request. The legal representative can discuss the agreement with the Operator offline, and once an agreement is reached, you can register again. If your legal representative accepts the agreement within seven days, your next step is to await approval from the Exchange Operator.

3. Receive notification of approval or rejection

When the Exchange Operator approves or rejects your registration request, the Exchange sends you an automated e-mail notifying you of the decision. How long it takes to receive a response depends on the Exchange Operator. You can check your registration status by clicking the "check your registration status" link on the Exchange home page. If your request is rejected, the Exchange Operator will provide a reason.

4. Begin business on the Exchange

If your registration is approved, you can begin business on the Exchange. As part of the approval process, the Exchange Operator chooses which job functions are assigned to you. Job functions control who has access to certain tabs, pages, and links in the Exchange. To check your assigned job functions, click the "My Exchange" icon in the top right of any page on the Exchange, then click "Edit Personal Information." Scroll to the "Job Function" section of the **Edit Personal Information** page.

Affiliate Registration

If you register as an affiliate of a parent company:

1. Begin registration

Begin registering as an affiliate of a parent company by accepting the role of Company Administrator for your company and entering your company and payment information.

Note: Your registration request will be submitted to the Exchange Company Administrator of the parent company. If the parent Company Administrator approves your registration, the parent Company Administrator may choose to do all administrative tasks for your company, or may give you full or partial administrative tasks for your company. Regardless of whether you have full or partial administrative rights for your company, your parent company's Company Administrator can still administer for you.

2. Read the legal agreement

If you accept the agreement:

If you have the authority to accept the legal agreement and complete your registration submission:

- Wait for approval. The Exchange Company Administrator of the parent company you've registered with reviews your registration request for authenticity, accuracy, and completeness. You may be contacted by the parent Company Administrator if questions arise about your registration.

If you forward the agreement to a legal representative:

If you submitted the legal agreement for review by a legal representative in your company:

- Wait for legal review. The legal representative receives an automated e-mail of the agreement for review and (from the e-mail) submits a response to the agreement directly to the Exchange. The e-mail includes contact information for the Exchange Company Administrator of your parent company in case the legal representative has questions. If the legal representative does not respond in seven days, your registration request automatically expires (you will be notified by e-mail) and you will need to register again. The Exchange Company Administrator of your parent company is not informed of your registration request until your legal representative accepts the agreement. You can check your registration status by clicking the "check your registration status" link on the Exchange home page. The status will let you know whether legal review is pending, has been approved, or has been rejected.
- Receive notification of legal representative's response. You will receive an automated e-mail notification as soon as your legal representative approves or rejects the agreement. If your legal representative rejects the agreement

by responding to the e-mail with "Reject," your registration is automatically rejected by the system. The Exchange Company Administrator of your parent company never received your registration request. The legal representative can discuss the agreement with the parent Company Administrator offline, and once an agreement is reached, you can register again. If your legal representative accepts the agreement within seven days, your next step is to await approval from the parent Company Administrator.

3. Receive notification of approval or rejection

When the Exchange Company Administrator of your parent company approves or rejects your registration request, the Exchange sends you an automated e-mail notifying you of the decision. You can check your registration status by clicking the "check your registration status" link on the Exchange home page. If your request is rejected, the Company Administrator will provide a reason.

4. Begin business on the Exchange

If your registration is approved, you can begin business on the Exchange. As part of the approval process, the Exchange Company Administrator of your parent company chooses which job functions are assigned to you, including whether you have full or partial administrative privileges over your company (see the Note above). Job functions control who has access to certain tabs, pages, and links in the Exchange. To check your assigned job functions, click the "My Exchange" icon in the top right of any page on the Exchange, then click "Edit Personal Information." Scroll to the "Job Function" section of the **Edit Personal Information** page.

As an emergency or backup measure, the Exchange Operator can approve your company's affiliates or users.

User Registration

If you register as a user of a company:

When you register as a user of a company, the legal agreement has already been reviewed and accepted by your company, so your registration approval process is as follows:

1. Begin registration

Begin registering as a user of a company by selecting the company you want to register with and entering your user information.

2. Read the legal agreement

Read the legal agreement agreed upon between the Exchange and your company, and submit your registration.

3. Wait for approval

The Exchange Company Administrator of your company reviews your registration request for authenticity, accuracy, and completeness. You may be contacted by the Company Administrator if questions arise about your registration.

4. Receive notification of approval or rejection

When your Exchange Company Administrator approves or rejects your registration request, the Exchange sends you an automated e-mail notifying you of the decision. You can check your registration status by clicking the "check your registration status" link on the Exchange home page. If your request is rejected, the Company Administrator will provide a reason.

5. Begin business on the Exchange

As part of the approval process, your Exchange Company Administrator chooses which job functions are assigned to you. Job functions control who has access to certain tabs, pages, and links in the Exchange. To check your assigned job functions, click the "My Exchange" icon in the top right of any page on the Exchange, then click "Edit Personal Information." Scroll to the "Job Function" section of the **Edit Personal Information** page.

As an emergency or backup measure, the Exchange Operator can approve your registration.

Self-Service vs. Bulk Load Registration

The Exchange Operator decides whether to let companies register themselves online through the Exchange self-service registration, to turn this feature off and bulk register the companies, or to allow both. (To disable self-service registration, the Exchange Operator would remove this task from the "Unknown User" job function.)

The Exchange Company Administrator of each registered company on the Exchange can also bulk-register users using the "Bulk Registration Management" link in the "Company Administration" application of the Exchange, or approve individual users' registration requests online.

Online registration requires online review and approval. With bulk load registration, the parties are considered automatically approved once they are uploaded. (However, just as with self-service registration, the "approval" is already given by the Exchange Operator or Exchange Company Administrator bulk loading the registrants.) The Exchange Operator or Company Administrator specifies user names and passwords in the bulk load file. When the bulk load completes, the Operator or Administrator must let the registrants know that they can log on. (If desired, users can then change their passwords by clicking the "Edit Personal Information" link in "My Exchange.")

Some bulk load scenarios include the following:

- The Exchange Operator can bulk load a company and its users.
- The Exchange Operator can bulk load just one representative from each company and let that representative register its own users.
- The Exchange Company Administrator can register online and then bulk load other users in the company.

The Exchange Operator or Company Administrator provides the same information through bulk load registrations as through online registrations. For example, one must designate a default Company Administrator in the bulk load registration file, just as online registration requires. In online registration, the approver assigns job functions while approving the registrant. In bulk loading, one can do the same by specifying job functions for each user in the bulk load file.

For instructions on bulk registering companies, see the *Readme* file that appears in the WinZip download when you click the "Download Now" button on the **Bulk Registration** page.

Catalog Management

This Appendix provides information on the following topics:

- [Punchout to Supplier-Hosted Catalog](#) on page B-1
- [Exchange Unified Catalog](#) on page B-2

Sellers can add catalog items to the Exchange unified catalog or link ("punchout) to their hosted catalog directly from the Exchange. The following table explains the benefits of each option.

Table B–1 Comparison of Supplier-Hosted and Exchange Unified Catalogs

Supplier-Hosted Catalog	Exchange Unified Catalog
Best suited for products requiring a high degree of configuration (such as computer hardware), specialized services, or products with fluctuating prices.	Best suited for commodity-type items (such as office supplies); products with pre-negotiated or stable prices; maintenance, repair, and operating supply (MRO) items; and products built to a predetermined specification (such as mass produced mechanical parts).
The seller closely manages the content presented to buyers.	The seller avoids managing a complex Web site and Web content.

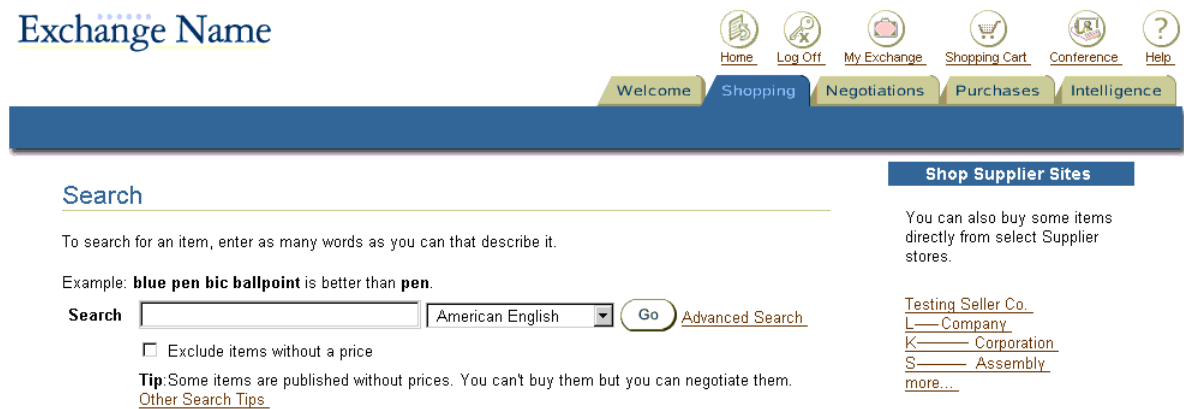
Punchout to Supplier-Hosted Catalog

If you are hosting your own Web catalog you must set up a link on the Exchange to your site. While buyers are browsing the Exchange, they enter keywords to search for particular products and services. One of the setup steps for adding a supplier-hosted catalog to the Exchange is to enter keywords for the catalog. If the key words the buyer enters match the key words associated with the supplier-hosted catalog, the Exchange displays a link to the seller’s catalog site.

When the buyer completes selecting items to purchase, the supplier-hosted site returns the shopping cart contents to the Exchange to complete the buyer’s transaction.

The Exchange supports both XML and cXML protocols for exchanging information between the supplier hosted site and Oracle Exchange.

Supplier-hosted catalogs also appear in a "Shop Supplier Sites" box on the **Shopping** home page, as shown in the following illustration:



Exchange Unified Catalog

The Exchange unified catalog provides a basic structure with which sellers can classify their items. The Exchange Operator can create categories, a category hierarchy, and attributes to classify and describe items. Using the Exchange unified catalog, buyers can rapidly search for and compare items based on common criteria.

When sellers load their catalog items to the Exchange unified catalog, they must classify their items in a category the Exchange Operator created (unless the Operator allows sellers to include their own categories in their catalog uploads; see [Step 5 Configure Catalog Export and Load Options \(Optional\)](#) on page 2-40), and sellers must specify all attributes that the Operator makes required.

Catalog authors can easily observe the Exchange Operator’s catalog structure on the Exchange, as shown in the following illustration:

Exchange Name


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

Catalog Authoring

[Catalogs](#) > [Catalog Structure](#)

Catalog Structure

Click the **View Base Attributes** link and the **View Pricing Attributes** link to see all base attributes and pricing attributes available in the Exchange Name Here catalog.

▶ [View Base Attributes](#)▶ [View Pricing Attributes](#)

Search or browse the Exchange Name Here category hierarchy to find the best home for your items and discover category-specific category attributes.

Don't want to browse online? Click here to [export a text file](#) with the complete category hierarchy including category attributes.

Find Categories

 Search [Search Tips](#)

Quick Tutorial

✔ Why review the structure?

This helps you decide how to categorize and describe your items.

✔ What are attributes?

Attributes express your items' characteristics.

There are 3 kinds of attributes:

Base Attributes apply to all items regardless of how they are categorized (e.g. Item Description).

Some base attributes are required for items to be published in the Exchange Name Here catalog.

Pricing Attributes provide pricing information for items (e.g. Unit of

The Exchange categories and attributes enable catalog authors to fully describe their items or services to buyers. If a catalog author needs additional categories and attributes other than those specified in the Exchange to correctly describe and categorize their items and services, the catalog author should contact the Exchange Operator.

For instructions for the Exchange Operator on creating the catalog structure, see [Catalog Setup Steps](#) on page 2-35.

For instructions for catalog authors on adding items or services to the Exchange catalog according the Exchange catalog structure, see [Catalog Setup Steps](#) on page 3-12.

Categories

The Exchange catalog structure is made up of two kinds of categories:

- **Browsing categories**, also known as navigation or parent categories, contain sub-categories, but not items.

- **Item categories**, also known as genus categories, are the lowest-level categories that contain items. They can contain only items and not other sub-categories. Item categories are always found at the lowest level of the category structure, and they can also be associated with category attributes, such as "Ink Color" or "Barrel Size" for the category "Pens."

Note: An item cannot be in more than one item category.

When catalog authors (sellers or third-party content providers) add items to the Exchange catalog, they must classify their items by associating them with item categories.

For example:

```
Office Supplies <-- browsing category
  Desk Furniture      <-- browsing category
    Writing Instruments <-- browsing category
      Ball Point Pens  <-- item category
        BIC224Blue
        BIC998Red
      Fountain Pens    <-- item category
        FTHRBlack
```

The Exchange Operator creates the browsing categories and item categories that companies see on the Exchange.

Category Hierarchy

Browsing categories and item categories make up the category hierarchy in the Exchange catalog. (The Exchange Operator does not have to create browsing categories. If the Exchange Operator creates only item categories and no browsing categories, buyers will not be able to find items by browsing a list of categories; they can only search for items. Likewise, sellers will not be able to find item categories by browsing a list of categories; they can only search for the item category to help them classify their items. Browsing categories enable buyers and sellers to browse and search for items and categories.)

The Exchange Operator does not have to create the same number of levels within a browsing category. For example, the Exchange Operator can place the item category "Calendars" directly under the topmost browsing category "Office Equipment, Accessories, and Supplies":

```
Office Equipment, Accessories, and Supplies
```

Calendars

In this same browsing category, the Exchange Operator can also place the item category "Appointment Books" two levels down:

Office Equipment, Accessories, and Supplies
 Office and Desk Accessories
 Appointment Books

Sellers can easily view the category attributes of an item category online, or download a spreadsheet text file to view all of the categories, sub-categories, and category attributes in a hierarchy format.

Attributes

The Exchange catalog structure also includes attributes to describe items:

- **Base attributes**, such as "Supplier" and "Supplier Item," apply to all items or services in the catalog. The Exchange provides a core list of base attributes, but the Exchange Operator can add to this list or even change the names and requirements of some base attributes.
- **Pricing attributes**, such as "Price" and "Unit," provide pricing information for the item or service. Catalog authors can specify a marketplace price, a buyer price, or both for items. (They can also specify no price or a "To Be Determined" price. Specify a "To Be Determined" price if you want the buyer to contact you for the latest price or to purchase an item through negotiation.)

Note: If a seller specifies a "To Be Determined" price, the buyer can search for and find the item and add it to the shopping cart; however, the buyer cannot complete an order for the item. Instead, from the **Shopping Cart Contents** page, the buyer can begin the negotiation process for the "To Be Determined" priced item by clicking the "Add to Negotiation" button.

If a seller specifies no price at all (neither a marketplace nor buyer price), the item is not visible to buyers in the Exchange catalog, but as the seller, you or your third-party catalog content provider can still search for and edit the item

The Exchange Operator cannot update pricing attributes. They are fixed by the Exchange.

- **Category attributes** apply only to items within a specific category. "Ink Color" is an example of a category attribute for the category "Ball Point Pens." Category attributes vary from one category to another. The Exchange Operator creates all category attributes. The Exchange Operator can specify category attributes only for item categories.

Some base attributes and pricing attributes are required. Whether a category attribute is required depends on which category it is in. For example, the category attribute "Color" may exist in many categories, from "Cars" to "Chairs." But the Exchange Operator may choose to make "Color" a required attribute only for "Cars." Catalog authors can see which attributes are required by viewing them online, via the **Catalog Structure** page, shown in the following illustration:

Exchange Name

Home

Log Off

My Exchange

Shopping Cart

Conference

Help

Welcome

Catalogs

Negotiations

Sales

Intelligence

Catalog Authoring

Catalogs > Catalog Structure > Catalog Base Attributes

Catalog Base Attributes

Base attributes apply to all items in the Exchange Name Here catalog regardless of category.

Click a column header link for a description of the attribute property. Click an attribute name link for a detailed attribute description.

Sort by

Name

Ascending

Descending

Go

Previous

1 - 25 shown of 29

Next

Name	Key	Type	Search Visible	Details Visible	Sequence	Searchable	Required
Alias	ALIAS	Translatable Text	No	Yes	6.0	Yes	No
Attachment URL	ATTACHMENT_URL	URL	No	Yes	9.0	No	No

Base attributes and category attributes are also used on negotiations. If a negotiation owner adds items to the negotiation from the Exchange catalog, the item category, and the Description, Manufacturer, Manufacturer Item, and Unit of Measure base attributes associated with that item are automatically carried over to the negotiation, and the negotiator can further modify them on the negotiation if necessary. If the category that the negotiator chooses on the negotiation has category attributes associated with it, those are carried over, too, and the negotiator can further modify them if needed.

Data Types

The Exchange Operator controls what data type each attribute must be. For example, "Lead Time" is a "Number" data type. If a seller enters "four" instead of "4" for "Lead Time," the Exchange will give an error.

The data types are as follows:

- **Text.** Values for this attribute must be text or numbers only. The values cannot be translated; they will always display the same in all languages.
- **Translatable Text.** Values for this attribute (text or numbers) can be translated; the Exchange allows you to display different values for this attribute in different languages.

Online Help: "Help" icon > "Catalog Authoring" section > Frequently Asked Questions > "Can I load my items to the Exchange catalog in multiple languages?"

- **Number.** Values for this attribute must be a number only. The values can contain decimals (such as .86). Except for "Price" and "Lead Time," the number can be negative.
- **Date.** Values for this attribute must use the canonical date format of YYYY/MM/DD when bulk loading catalog items. (On the Exchange, the date will display in each person's preferred date format, in the **Edit Personal Information** page in "My Exchange." But when bulk loading catalog items, you must use the canonical date format.)
- **URL.** Values for this attribute must be a Web site address, such as <http://www.company.com/images/pict1.gif>. They must begin with a valid URL protocol, such as <http://>, <https://>, and <ftp://>. Only attributes with a URL "Type" display as links in the Exchange. For example, a Web site address entered in a Translatable Text type attribute will display simply as text.

The Exchange Operator also controls whether a base attribute or category attribute that a seller specifies for an item will display in the Exchange catalog when buyers shop for or view the items.

Price Lists

Price lists are used to manage pricing information on the Exchange. A buyer price list is a list of catalog prices that are created for, and apply only to, a specific buyer. Buyer price lists allow you to create special pricing exclusively for specific buyers.

When you, as a catalog author, publish your catalog items and services in the Exchange catalog, you can associate many sets of prices, or price lists, with the items in the catalog. One set of prices (usually called the "List Prices" or "Marketplace Prices") apply to "generic" buyers on the Exchange—that is, buyers for whom you have not created a special set of prices. You may decide to give discounts or other special pricing to a specific buyer on the Exchange. For that buyer, you would create a buyer price list.

You can create multiple buyer price lists in the Exchange, and any of your items can be associated with one or more price lists. You can only create one buyer price list for any one company on the Exchange, and you cannot associate more than one buyer with any one price list. A single price list cannot contain multiple currencies.

Some Exchange buyers are restricted (by their own company's Exchange Administrator) to viewing only those items that appear on buyer price lists created for their company. For example, the Exchange buyers of Acme Inc., all of whom have this restricted pricing view, would not be able to view your catalog items until you created a buyer price list of items exclusively for Acme Inc. In addition, all Acme buyers who purchase your items on the Exchange would use the buyer prices, currency, and unit of measure that you have assigned to this Acme Price List (Acme buyers could not use your "list prices" if any). No Exchange buyers from other companies would have access to the buyer prices on your Acme Price List. Additional price lists must be created and loaded for each company's affiliate as well. A price list for parent Company A does not cascade down to its affiliate Company B. See [Registration and Administration Hierarchy](#) in [Appendix A](#).

Buyer Pricing Approval

Some buyer pricing that a seller creates or changes may be submitted to buyers for their review before the pricing is made available on the Exchange, if the buyer chooses to set up pricing approval rules.

An appointed Purchasing Manager in the buying company (a user who has been assigned the "Purchasing Manager" job function or the "Set Pricing Approval Rules" task) can use the **Set Buyer Pricing Approval Rules** page to specify price tolerances. For example, the Purchasing Manager can set a "Price Increase Tolerance" of five in the **Set Buyer Pricing Approval Rules** page. If a seller increases a buyer price for the buying company by more than 5%, the price change is not published to the Exchange until the Purchasing Manager of the buying company approves it. The Purchasing Manager will be notified through e-mail and can approve or reject the pricing in the **Approve Price List** page. If the price increase is 5% or less, the price is automatically published to the Exchange without the buyer's approval. Only price increases beyond the buyer's tolerance are

brought to the buyer's attention, not price decreases. (The buyer is notified only of buyer pricing changes that exceed tolerances, not changes to the marketplace price.) The pricing approval rules that a buyer sets up apply to all sellers on the Exchange. For instructions on setting buyer price tolerances, see the online Help:

Online Help: "Help" icon > "Catalog Authoring" section > Approving Buyer Price Lists

Bulk Loaders

The Exchange uses bulk loaders to bulk load catalog files to the Exchange. If you are a seller who encounters the following problems while bulk loading, contact the Exchange Operator:

- Catalog authors get a "Service Unavailable" error when bulk loading.
- Small bulk load jobs take over an hour to complete.
- Bulk load jobs are staying in a "Pending" status.

For instructions for the Exchange Operator on how to troubleshoot the catalog bulk loader, see the *Oracle Exchange Installation Guide*.

Overview of Third-Party Catalog Authoring

A seller can use a third-party catalog content provider to add the seller's items to the Exchange catalog. The third-party provider uses catalog authoring tasks (such as bulk loading or online editing) that have been assigned to it by you or the seller.

A third-party content provider company must first register with the Exchange. (The company can register as an independent entity or as an affiliate of another company.) If the third-party company registers as an independent entity, the Exchange Operator must approve the company specifically as a third-party content provider by assigning it the "Third Party Catalog Author" job function. If the company registers as an affiliate, the Exchange Company Administrator of the parent company must approve the company specifically as a third-party content provider.

The Exchange Operator can create any one of the following scenarios:

Different Scenarios

Approve several third-party content providers and let sellers choose The Exchange Operator approves several third-party content providers and let each seller choose

the third-party content provider(s) it wants, using the **Manage Third Party Authoring** page. Each seller also uses this page to choose the specific catalog authoring tasks that it will allow the third-party content provider to perform for it. For example, a seller can allow a third party to bulk load catalog items for it but not edit the items online.

Approve one third-party content provider for all of the Exchange The Exchange Operator approves one third-party content provider for all of the Exchange. The Exchange Operator still lets each seller use the **Manage Third Party Authoring** page to choose the specific catalog authoring tasks that the seller will allow the third party to perform for it.

Approve one third-party content provider and not let sellers choose The Exchange Operator approves a third-party content provider for all of the Exchange and not permit the seller to manage the third party's access to catalog authoring activities. Instead, the Exchange Operator uses a **Manage Third Party Authoring** page in the Operator Exchange (see [Step 2 Manage Third-Party Authoring](#) on page 2-92) to choose the catalog authoring tasks that the provider can perform for all sellers on the Exchange. All sellers—if they're using a third-party provider—must use only this provider to perform their catalog authoring tasks. Alternatively, the Exchange Operator can control a third-party's access for some sellers and not others.

Approve one catalog author for all of the Exchange The Exchange Operator approves a third-party content provider for all of the Exchange and does not let anyone, except for that content provider, perform catalog authoring for the Exchange. That is, the Exchange Operator does not grant catalog authoring tasks to any seller, only to this designated third-party content provider. Sellers must use this provider to perform all of their catalog authoring tasks.

Controlled Access

Sellers can choose and grant access to third-party content providers if they are assigned the "Manage Third Party Authoring" task. If sellers are assigned this task, they can use the **Manage Third Party Authoring** page to select and manage a third party's authoring privileges. (See [Step 2 Manage Third-Party Authoring \(Optional\)](#) on page 3-14.)

The third-party content provider cannot perform catalog authoring for somebody else until it is assigned the "Third Party Catalog Author" job function. The third party still cannot perform any of the tasks in that job function for a particular seller until that seller (or, depending on the scenarios above, the Exchange Operator) also grants these tasks using the **Manage Third Party Authoring** page. (By default, an

approved third-party content provider is automatically assigned only the Bulk Load Catalog task, until the seller assigns it other tasks. If, however, the seller itself was never assigned the Bulk Load Catalog task, then the default task assigned to that third party, for that seller, is the View Item task. Still, the third party cannot perform either of these tasks until the supplier appoints the third party.)

Note: If the Exchange Operator decides to manage third-party authoring and also allows the sellers manage this too for themselves, any tasks the Exchange Operator assigns to or removes from a third party in the **Manage Third Party Authoring** page can be revoked by the seller in the seller's **Manage Third Party Authoring** page.

A seller cannot assign a third party more catalog authoring tasks than the seller itself has been assigned. For example, if you do not allow a seller to delete items from the catalog online, this seller cannot assign online item deletion to a third party.

A third-party catalog content provider cannot perform more catalog authoring tasks than it has been assigned. In the following example, the third-party company has assigned four tasks to employees (catalog authors) in its company: View Catalog Resources, Bulk Load Catalog, Add and Update Item Online, and Delete Item Online. For Seller A, however, catalog authors in the third-party company can only view catalog resources and add and update items online because these are the tasks Seller A has allowed using the Manage Third Party Authoring page. But for Seller B, the third-party company can perform all of these tasks except for deleting items online, because these are the tasks Seller B has allowed using the Manage Third Party Authoring page.

Table B-2 Example Third-Party Tasks

Third Party employees' assigned tasks:	Seller A grants these tasks:	Seller B grants these tasks:
View Catalog Resources	View Catalog Resources	View Catalog Resources
Bulk Load Catalog	--	Bulk Load Catalog
Add and Update Item Online	Add and Update Item Online	Add and Update Item Online
Delete Item Online	--	--

Setup Overview

The steps for setting up third-party catalog authoring are as follows:

Register The third-party content provider company registers with the Exchange as an independent entity or affiliate. The Exchange Operator (or, in the case of an affiliate, the The Exchange Company Administrator of the parent company) approve the third party specifically as a third-party content provider. The seller or third-party content provider can ask that this company requests to be approved as a third-party content provider. Or the Exchange Operator can grant the third-party job function to everyone and let individual sellers choose who has access to their catalog items.

Approve The third party's registration is approved and the third party is assigned the "Third Party Catalog Author" job function.

Note: The "Third Party Catalog Author" job function and the **Manage Third Party Authoring** page are independent of each other. For example, the third-party provider can be assigned the "Bulk Load Catalog" task via the **Manage Third Party Authoring** page; but if the "Bulk Load Catalog" task has been removed from the default "Third Party Catalog Author" job function that the Exchange provides, the third party will not be able to bulk load catalog items.

As an approved company, the third-party content provider will have its own logon to the Exchange and, if assigned additional tasks, can even perform other tasks on the Exchange such as selling its own items or buying items on the Exchange. With its own logon and third-party content provider approval, the third-party content provider can manage catalogs for multiple the Exchange sellers while still maintaining itself as a separate entity from the sellers it works for.

Assign tasks to third-party company Depending on which scenario the Exchange Operator chooses (as described above), either the Exchange Operator or the seller chooses which catalog authoring tasks to allow the third party to perform, using the **Manage Third Party Authoring** page. A designated third-party content provider cannot perform specific catalog authoring tasks until the tasks are explicitly assigned to it.

Assign tasks to third-party employees Finally, the third-party content provider needs to assign the "Third Party Catalog Author" job function to the employee(s) in its

company who will log on to the Exchange and perform the catalog authoring tasks. The employee(s) in turn need to be granted the particular catalog authoring tasks by you or the seller before they can perform them. (See [Table B-2, "Example Third-Party Tasks"](#) above.)

Drop-Down Menu Configuration

This Appendix provides information on the following topics:

- [Exchange Lists of Values](#) on page C-1
- [Editing Lists of Values](#) on page C-6

Exchange Lists of Values

Throughout the Exchange, drop-down menus are used to provide users with a list of approved options from which to select. These lists are called "Lists of Values" or "Lookup Types." The Exchange comes with typical values already predefined for these lists.

For most Lookup Types, the Exchange Operator can modify these values, add new values, or delete existing values. (The values that cannot be modified will be apparent in the **Customize Values** page when the Exchange Operator customizes the lookup types.) The Exchange Company Administrator cannot modify, add, or delete these values; however, the Exchange Company Administrator can choose the values it wants to default on transactions conducted by users in the company and can deselect values it will not accept.

Tip: As the Exchange Operator, establish a process for capturing Lists of Values requirements from companies who participate on the Exchange and getting approval to include these in the Lists of Values, since these are values that will be seen by all companies on the Exchange. For example, if your Exchange spans multiple industries, industry-specific Lists of Values may not apply to all participants.

Table C–1 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Billing Spreadsheet Download Type	The Exchange Operator’s choice of which billable activities to download using the spreadsheet export: <ul style="list-style-type: none"> ■ All Activities ■ Already Downloaded Activities ■ Activities Not Yet Downloaded 	Billing
Billing Types	Billing payment methods (Invoice, Credit Card, or EFT) approved for paying the Exchange Operator for the Exchange services	Billing
Billing XML Transfer Type	The Exchange Operator’s choice of which billable activities to transfer to an external system using XML: <ul style="list-style-type: none"> ■ All Activities ■ Transferred Activities ■ Activities Not Yet Transferred 	Billing
Challenge/Response Questions	Verification of user security if a user has forgotten his password	Registration
Customer Spreadsheet Download Type	The Exchange Operator’s choice of which customer information updates to download using the spreadsheet export: <ul style="list-style-type: none"> ■ All Updates ■ Already Downloaded Updates ■ Updates Not Yet Downloaded 	Billing
Customer XML Transfer Type	The Exchange Operator’s choice of which customer information updates to transfer to an external system using XML: <ul style="list-style-type: none"> ■ All Updates ■ Already Transferred Updates ■ Updates Not Yet Transferred 	Billing
Contact Title	Abbreviation (such as Ms. or Mr.) used in notification salutations.	Registration Administration
Counteroffer Limit	Number of counteroffers that the creator of an offer is willing to accept from participants	Negotiations

Table C-1 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Credit Card Types	Credit cards approved for use by the Exchange	Registration Administration Marketplace Purchasing
FOB Terms *	<p>Point at which the supplier's responsibility for the goods ceases and the buyer takes title of the goods purchased:</p> <ul style="list-style-type: none"> ■ Origin. Supplier's responsibility for goods ceases upon transfer to carrier. ■ Destination. Supplier's responsibility for goods ceases upon acceptance by buyer. ■ CIF. Supplier's responsibility for goods ceases at specified location. ■ Other. If "other" is selected, the buyer will be directed to enter a text note explaining FOB terms in the "Additional Information - Notes" field. 	Marketplace Purchasing Negotiations
Freight Carrier *	<p>Carrier chosen to transport the goods to the buyer:</p> <ul style="list-style-type: none"> ■ DHL Worldwide Express ■ FedEx 2 Day ■ FedEx Freight Services ■ FedEx International ■ FedEx International Economy Freight ■ FedEx Overnight ■ FedEx Same Day ■ Other (enter details in the Notes field) ■ UPS 2nd Day ■ UPS Ground ■ UPS Next Day ■ UPS Worldwide Express ■ United States Postal Service 	Marketplace Purchasing Negotiations

Table C–1 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Freight Terms *	Provisions for freight payment: <ul style="list-style-type: none"> ■ Allowed. Supplier reimburses buyer for freight. ■ Due. Buyer pays freight. ■ Other. If "other" is selected, the buyer will be directed to enter a text note explaining freight terms in the "Additional Information - Notes" field. ■ Paid. Supplier pays freight. ■ Pre-paid. Supplier pays freight and invoices buyer. 	Marketplace Purchasing Negotiations
Iteration Limit	Number of counteroffer iterations that the offer creator is willing to accept from a single participant	Negotiations
Months	All available months (for example, the "Month" drop-down menu when entering credit card expiration dates)	Registration and Administration
Payment Method *	Preferred method of payment for a seller's goods or services: <ul style="list-style-type: none"> ■ American Express ■ Cash on Delivery (COD) ■ Diner's Club ■ Discover ■ Invoice Account ■ MasterCard ■ Other (enter details in the Notes field) ■ Visa 	Registration Administration Marketplace Purchasing Negotiations

Table C–1 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Payment Terms *	Provision for paying for the goods or services ordered: <ul style="list-style-type: none"> ■ Immediate. The balance of the transaction is due immediately (on the transaction date). ■ Net 15 (or 30, 45, or 60). The balance of the transaction is due within 15 (or 30, 45, or 60) days of the invoice date. ■ 1/10 Net 30 (or 45 or 60). The buyer will receive a one percent discount if payment is received within 10 days of the invoice date. The balance of the transaction is due within 30 (or 45 or 60) days of the invoice date. ■ 2/10 Net 30 (or 45 or 60). The buyer will receive a two percent discount if payment is received within 10 days of the invoice date. The balance of the transaction is due within 30 (or 45 or 60) days of the invoice date. ■ Other. If "other" is selected, the buyer will be directed to enter a text note explaining payment terms in the "Additional Information - Notes" field. 	Marketplace Purchasing Negotiations
Shipping Methods	Arrangements by which the goods are delivered from the supplier to the buyer	Marketplace Purchasing Negotiations
Shipping Terms	Party responsible for paying for shipping the goods	Marketplace Purchasing
Trading Partner Types	Principal business activity of a company	Registration Administration
Transportation Method	Method used to deliver the goods ordered	Transportation application
* The Exchange Company Administrator can select preferred or unaccepted values for these Lists of Values.		

Editing Lists of Values

The following instructions are for the Exchange Operator only. The setup step [Step 3 Edit Trading Partner Preferences \(Optional\)](#) on page 3-9 explains how the company can select default values for some of the Lookup Types.

To edit lists of values in the Operator Exchange:

1. In the "Configuration" tab, click the "Edit List of Values" link to open the **Choose Lookup** page.
2. Choose which lookup type you wish to modify by clicking the "Select" radio button to its left.
3. Click the "Edit" button. The **Customize Values** page for that lookup type appears, displaying all existing entries for that lookup type.
4. Choose the language from the "Language" drop-down menu. This is the language for which you are making the change. For example, if you change the name or description of a lookup type, you may want to translate the change in each installed Exchange language.
5. To edit existing values, change the "Meaning" and "Description" fields. The value you enter for the "Meaning" field is the value that appears in the drop-down menu on the Exchange; it must be unique. The "Description" field is optional.
6. To add new values to a lookup type, scroll down to the bottom of the page and fill in the fields to create your new lookup type, then click the "Add" button.

Not all lookup types let you add new values. These lookup types do not provide an "Add" button.

The value you enter for the "Code" field is used when creating any XML documents that use this lookup type.

7. Click the "Select" checkbox to the left of your new value to enable it for use.
8. Click the "Apply Changes" button.

To disable a lookup type value in the Operator Exchange:

1. In the "Configuration" tab, click the "Edit List of Values" link to open the **Choose Lookup** page, select the lookup type for which you wish to disable a value, and click the "Edit" button.

2. Click the checkbox to the left of the value to remove the check. This deselects the value.
3. Click the "Apply Changes" button. The value is now disabled and will not appear in any menu on the Exchange.

Marketplace Exchange Workflows

Some of the processes that occur on the Exchange are controlled by Oracle Workflow technology. These workflow-governed processes are listed and described below, in the following sections:

- [Registration Workflow](#) on page D-1
- [Catalog Hosting Workflow](#) on page D-2
- [Marketplace Purchasing Workflow](#) on page D-3
- [Negotiations Workflow](#) on page D-5

The workflow notifications described in the following sections are sent via e-mail and via the "To Do List" on the Exchange (when you click the "My Exchange" icon).

Caution: Any customizations that you make to the Marketplace Exchange application's workflows are not supported by Oracle.

Registration Workflow

There is one registration workflow that controls the automated registration process. Once someone registers online, the registration workflow routes the request to a third-party legal approver that the registrant specifies, if any. After legal approval, if any, the workflow routes the registration request to the appropriate approver. The workflow "times out" the registration request if the legal approver doesn't respond. The workflow sends notifications to the legal approver and Exchange approver about new registration requests. The workflow sends notifications to the registrant after each step.

Catalog Hosting Workflow

The following workflows control catalog authoring processes:

Catalog Bulk Loading and Publishing Workflow

When a catalog author reviews a bulk load job, a catalog workflow sends the following notifications:

- After the catalog author publishes the job, the Exchange sends a notification to the catalog author that the publication process succeeded or failed. If the publication process failed, the Exchange sends notifications to both the catalog author and the Exchange Operator.
- If the catalog author discards a bulk load job, the Exchange sends a notification that the discard process succeeded or failed. If the discard process failed, the Exchange sends notifications to both the catalog author and the Exchange Operator.

Buyer Pricing Approval Workflow

A buyer can choose to review and approve or reject buyer pricing changes before they are published to the Exchange by setting up pricing approval rules (see [Step 5 Set Up Buyer Pricing Approval Rules \(Optional\)](#) on page 3-31). If a buyer sets up pricing approval rules, a catalog workflow sends the buyer and seller notifications to update them on the status of the price changes.

The Exchange sends the buyer one notification summarizing any or all of the following activity, if any of these activities occurred in the last 24 hours:

- The seller has submitted updated buyer pricing that requires the buyer's approval.
- The seller has deleted a buyer price, leaving the buyer with the market price. (The buyer is not notified when a seller deletes an item altogether.)
- The buyer still has not approved a seller's buyer pricing after 5 days.

The Exchange sends the seller one e-mail summarizing any or all of the following activity, if any of these activities occurred in the last 24 hours:

- The buyer rejects a seller's buyer pricing.
- The buyer approves a seller's buyer pricing.
- The buyer still has not approved a seller's buyer pricing after 5 days.

When a buyer approves or rejects an entire price list (rather than just one or several price changes at a time), the buyer price approval workflow sends the following notifications:

- A notification to the buyer that the approval or rejection of the price list was successful.
- A notification to both the buyer and Exchange Operator if the approval or rejection failed for some reason.

Marketplace Purchasing Workflow

When a buyer creates an order, a workflow sends notifications to the buyer, buyer's approvers, and seller to update the parties on the status of the order.

The Exchange sends the following notifications to buyers:

- A notification lets the buyer know whether the order has been approved by the final approver or rejected by an approver. If the order has been approved, the Exchange also already sent the order automatically to the seller.
- If a buyer's order did not need to be approved, the Exchange sends a notification to the buyer confirming that the order has been sent to the seller.
- If the buyer specifies an "Acknowledge-By Date" when entering order information, the Exchange sends a notification on the acknowledge-by date if the seller has not responded to the order by the acknowledge-by date.
- The Exchange sends a notification to let the buyer know whether the seller has accepted or rejected the order.
- If the buyer specifies an "Acknowledge-By Date" when entering order information, and the supplier with whom the buyer has placed the order fails to acknowledge the order by the acknowledge-by date, the Exchange will automatically cancel the order the day after the acknowledge-by date. If this occurs, the Exchange will send a notification to the buyer to communicate the order cancellation. The notification is also sent if the buyer's approvers did not approve or reject the order by the day before the buyer's acknowledge-by date or, if the buyer gave no acknowledge-by date, by the earliest need-by date.
- A notification is sent when a buyer clicks the "Cancel" button for a "New" or "Accepted" order. (If the buyer did not specify an "Acknowledge-By Date" when entering order information, the order status is "New." If the supplier already accepted the order, the order status is "Accepted.") A buyer's cancellation request of a "New" or "Accepted" order requires the seller's approval. The

Exchange sends this notification to let the buyer know that the cancellation request has been submitted to the seller.

- When the seller responds to a cancellation request by a buyer, the Exchange sends this notification to let the buyer know whether the seller accepted or rejected the request.

The Exchange sends the following notifications to approvers, if the Exchange Company Administrator has enabled order approvals for orders created by buyers in the company:

- The Exchange sends a notification to the approver that an order from a buyer in the company requires that approver's approval.
- The Exchange sends a notification that a previous notification has been canceled before the approver had a chance to respond for either of the following two reasons:
 - The approver did not respond by the order's acknowledge-by date or, if the buyer did not give an acknowledge-by date, by the earliest need-by date on the order.
 - The approver did not respond in time, and the order was therefore forwarded to the next, or the default, approver.

Note: If the buyer cancels an order while it is still in a "Pending" status (pending manager approval), the approval notification is simply removed from the approver's To Do List.

The Exchange sends the following notifications to sellers:

- After a buyer places an order and the order is approved (if approval was required), the Exchange will send a notification to the seller to make the seller aware of the new order.
- When the buyer specifies an "Acknowledge-By Date" on the order, the Exchange includes this information in an "Acknowledgment Required" notification to the seller.
- If the buyer specifies an "Acknowledge-By Date" when entering order information, and the seller with whom the buyer has placed the order fails to acknowledge the order prior to the acknowledge-by date, the Exchange will send a warning to remind the seller to acknowledge the order. The warning will

be sent on the acknowledge-by date. If the order is not acknowledged, it will be canceled on the day after the acknowledge-by date.

- If the buyer specifies an "Acknowledge-By Date" when entering order information (the order status is "Acknowledgment Required") and then cancels the order before the seller has responded, the order changes to a "Cancelled" status. The Exchange sends this notification to let the seller know that the buyer has cancelled the order.
- If the buyer did not specify an "Acknowledge-By Date" when entering order information (the order status is "New") or if the seller already accepted the order (the order status is "Accepted"), a buyer's cancellation of the order requires the seller's approval. The Exchange sends this notification to the seller to request approval of the cancellation.

Negotiations Workflow

The following negotiations processes are controlled by workflows. At each step, the workflows send notifications to the negotiation owner or respondent about the activity:

- A notification to the negotiation owner confirming that the auction, RFQ, or offer has been created.
- A notification to the negotiation owner confirming that the auction, RFQ, or offer is now open for bids, quotations, or counteroffers.
- A notification to negotiation owners and participants (including participants who have not yet responded) that the auction or RFQ has been cancelled.
- A notification to respondents that the auction or RFQ has been awarded.
- A notification to the respondent that his or her bid (on an auction) or quotation (for an RFQ) has been disqualified.

For offers notifications, follow this example:

1. ABC Corp. creates an offer.
2. XYZ Corp. commits to the offer.

The notifications that are sent in this example are as follows:

- Commitment received—sent to ABC Corp.
- Commitment accepted/rejected—sent to XYZ Corp.
- Commitment canceled—sent to ABC Corp.

- Commitment updated—sent to ABC Corp.
- Counteroffer received—does not apply to this example.
- Counteroffer canceled—does not apply to this example.
- Offer updated—sent to ABC Corp., XYZ Corp., and companies invited to participate in the offer who have not yet responded.
- Offer Open—sent to ABC Corp. and XYZ Corp.
- Offer canceled—sent to ABC Corp., XYZ Corp, and companies invited to participate in the offer who have not yet responded.

Another example is as follows:

1. ABC Corp. creates an offer.
2. XYZ Corp. counteroffers.
3. ABC Corp. commits to XYZ Corp.'s counteroffer.

The notifications that are sent in this example are as follows:

- Commitment received—sent to XYZ Corp.
- Commitment accepted/rejected – does not apply to this example.
- Commitment canceled—sent to XYZ Corp.
- Commitment updated—sent to XYZ Corp
- Counteroffer received—sent to ABC Corp.
- Counteroffer canceled—sent to ABC Corp.
- Offer updated—sent to ABC Corp, XYZ Corp., and companies invited to participate in the offer who have not yet responded.
- Offer Open—sent to ABC Corp. and XYZ Corp.
- Offer canceled—sent to ABC Corp., XYZ Corp, and companies invited to participate in the offer who have not yet responded.

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