Oracle® Sourcing

Implementation and Administration Guide

Release 11*i*

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

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Send Us Your Comments

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

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Preface

Welcome to the Oracle Sourcing Implementation and Administration Guide, Release 11*i*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Purchasing and Oracle Sourcing.

  If you have never used Oracle Purchasing or Oracle Sourcing, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

The Oracle Sourcing Implementation and Administration Guide contains the information you need to understand to implement Oracle Sourcing. This guide contains four chapters:

- Chapter 1, "Overview" provides an overview of Oracle Sourcing and features. It also describes the integration business flows possible with Oracle Purchasing and provides an overview of the implementation process.
- Chapter 2, "Implementing Oracle Sourcing"describes the setup steps performed by the Oracle Sourcing Super User within the Oracle Sourcing application. This chapter also identifies additional implementation tasks performed in other than Oracle Sourcing.
- Chapter 3, "Implementing Vendor Registration and Profiles" describes how to implement the Supplier Management feature. This feature makes it easier to maintain information on your supply base.
- Chapter 4, "Implementing Supplier User Management" explains the different ways users at your suppliers become registered with the system and begin using Collaboration Suite applications.
- Chapter 5, "Maintaining and Administering Oracle Sourcing" provides a checklist of some of the typical maintenance and administration tasks.
- Appendix A, "Implementing E-Business Suite for Oracle Sourcing" Oracle Sourcing makes use of reference data contained in other E-Business Suite applications, especially Oracle Purchasing, and therefore requires that portions of these other applications be implemented. This appendix identifies the portions of Oracle Purchasing that must be implemented.
- Appendix B, "Oracle Sourcing Responsibilities and Functions" lists the responsibilities installed with Oracle Sourcing and the functions defined to each.
- Appendix C, "Oracle Sourcing Notifications" identifies the e-mail notifications used by Oracle Sourcing and contains the notification text.

Documentation Accessibility

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

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

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This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Sourcing.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation** - See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help -** Oracle Sourcing is part of the Oracle eBusiness Suite of applications, which has an intuitive interface designed to guide users without end user documentation.
- **11i Release Content Document -** Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.
- **About document -** Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Guides

Oracle Sourcing shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Sourcing.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle General Ledger User's Guide

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

Multiple Organizations in Oracle Applications

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

Oracle Purchasing User's Guide

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

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the ”About” document for your product. ”About” documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Sourcing implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Sourcing and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Sourcing working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Sourcing and this user guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Sourcing or this user guide. Mail your comments to the following address or call us directly at (650) 506-7200.

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Oracle Corporation
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Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to appsdoc_us@oracle.com.

1 Overview

This chapter provides an overview of Oracle Sourcing, including a discussion of the Oracle Sourcing business flows and how they integrate with Oracle Purchasing.

About Oracle Sourcing

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

Oracle Sourcing helps an enterprise streamline the sourcing process with end-to-end business automation by providing an easy-to-use, web-based platform for both the buyer and the suppliers to conduct negotiations. A complete online help system is also included to provide answers to questions from both buyers and suppliers.

Unified Sourcing Platform

Oracle Sourcing is tightly integrated with the procurement modules of the E-Business Suite. Whether your implementation of Oracle Purchasing is large or small, enterprises adding Oracle Sourcing increase the sourcing effectiveness of their buyers and enhance their investment in Oracle Procurement Suite.

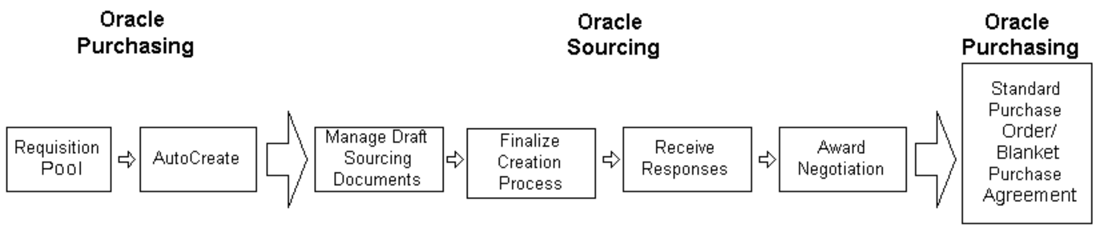
Oracle Sourcing Business Flows

There are three typical business flows that utilize Oracle Sourcing.

- Oracle Purchasing buyers can select approved requisition lines in the AutoCreate Buyer’s Workbench to aggregate demand into a draft Buyer’s Auction or a Sourcing RFQ. Buyer’s can then automatically launch Oracle

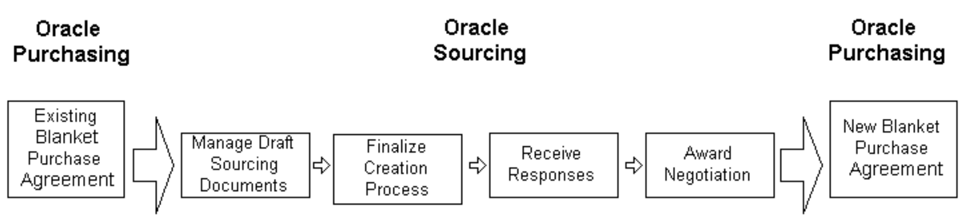
Sourcing to complete the sourcing document and conduct negotiations with suppliers. The backing requisition lines are referenced by the lines on the negotiation.

Figure 1–1 Using AutoCreate to Generate a Draft Sourcing Document



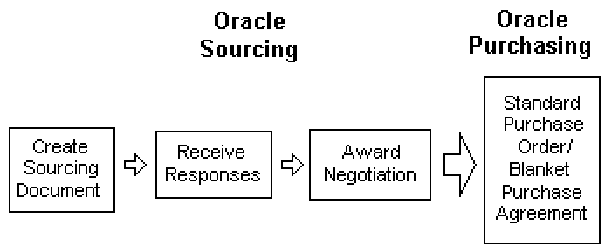
- Oracle Purchasing buyers can select a blanket purchase agreement (BPA) and use it as the basis of a new Buyer's Auction or Sourcing RFQ. The details of the BPA (including header, attachments, price breaks) are copied to the draft negotiation, and the sourcing lines refer to the originating BPA lines.

Figure 1–2 Creating New Documents From Existing Blanket Purchase Agreements



- Oracle Sourcing buyers can define sourcing documents directly in Oracle Sourcing. Inventory items can be selected and goods and services can be entered directly. A large number of items can be quickly entered by using the spreadsheet upload feature.

Figure 1–3 Creating Documents Directly in Oracle Sourcing



Buyers have visibility to information throughout the complete procurement process. Oracle Purchasing users can view the awards that initiated the standard purchase order or blanket purchase agreement. Likewise, requisitioners in Oracle iProcurement can view the negotiation in which their requisitions are being negotiated. Suppliers accessing Oracle iSupplier Portal can drill down from a purchase order to the backing sourcing document and quotation in Oracle Sourcing.

2

Implementing Oracle Sourcing

You can easily implement Oracle Sourcing. If you have Oracle Purchasing also implemented, the Oracle Sourcing implementation process is even easier. Additionally, many implementation steps are optional. This chapter details the steps required to implement Oracle Sourcing.

Implementing Other E-Business Suite Applications

Oracle Sourcing makes use of setup and reference data managed in other E-Business Suite applications, especially Oracle Purchasing. Therefore some portions of other E-Business Suite applications must also be implemented to use Oracle Sourcing.

The Prerequisite step listed in the table below requires you to check the information in Appendix A, "Implementing E-Business Suite for Oracle Sourcing." If you have not implemented the required portions of the Oracle E-business Suite, use the information in this appendix, along with the indicated product documentation, to perform the required implementation steps.

Additionally, there are some Oracle Purchasing steps that are not required by Oracle Sourcing but can be used to support multi-national negotiations, reflect your company's business structure, standardize your business practices, or support optional features of Oracle Sourcing. See Table A–2, "Optional E-Business Suite Implementation Steps," in Appendix A, "Implementing E-Business Suite for Oracle Sourcing." for information on these steps.

Overview of Oracle Sourcing Implementation

The table below, Table 2–1, "Sourcing Implementation Tasks," identifies the steps necessary to implement Oracle Sourcing. It includes both steps performed within Oracle Sourcing and steps performed outside of Oracle Sourcing. For each step, the table indicates whether the step is required and where to look for additional information if any is needed.

Steps 1 through 11 detail the steps performed using the Oracle Sourcing Super User responsibility. These steps use the functions available from the Administration tab of Oracle Sourcing and include tasks such as setting system defaults, customizing the user interface, and creating sourcing document creation tools. See "Implementation Steps Performed in Oracle Sourcing," for instructions on how to perform each of these steps.

Steps 12 through 18 identify additional tasks that are performed outside of Oracle Sourcing using the System Administrator and possibly other responsibilities. See "Implementation Steps Performed in Other Oracle Applications," for a description of the step and the location of the documentation necessary to perform it.

Since Oracle Sourcing is one of the Collaboration Suite applications, you must use the supplier and supplier user registration features before your supplier users can participate in sourcing events. You can also choose to implement other features such as Supplier Profile Management to maintain information about your supplier base. See Chapter 4, "Implementing Supplier User Management" and Chapter 3, "Implementing Vendor Registration and Profiles" for more information on how to register suppliers and supplier users, and how to implement additional supplier management capabilities.

Table 2–1 Sourcing Implementation Tasks

Step Number	Step Name	Required?	Information Source
Prerequisite	Review Information in Appendix A	Yes	Appendix A, Implementing E-Business Suite for Oracle Sourcing
1	Set Up System Parameters	Yes	Instructions in this chapter.
2	Customize Text	No	Instructions in this chapter.
3	Customize Content	No	Instructions in this chapter.
4	Define Negotiations Terms and Conditions	No	Instructions in this chapter.
5	Define Reusable Attribute Lists	No	Instructions in this chapter.
6	Define Price Elements and Price Element Lists	No	Instructions in this chapter.

Table 2–1 Sourcing Implementation Tasks

Step Number	Step Name	Required?	Information Source
7	Define Reusable Invitation Lists	No	Instructions in this chapter.
8	Define Negotiation Templates	No	Instructions in this chapter.
9	Select Rank Indicator and Define Visibility	No	Instructions in this chapter.
10	Define a Default Unit of Measure for Amount-Based Line Types	Yes	Instructions in this chapter.
11	Define Supplier URLs for Supplier Discovery	No	Instructions in this chapter.
12	Assign Sourcing Responsibilities	Yes	*Oracle Applications System Administration Guide* using information in this chapter
13	Set System Profile Options	Yes	*Oracle Applications System Administration Guide* using the information below.
14	Define Buyer Security	No	*Multiple Organizations in Oracle Applications* and *Oracle Purchasing User's Guide*
15	Set up Enhanced Supplier Search	No	Oracle iSupplier Portal Family Pack I About document
16	Implement Automatic Purchase Order Generation	No	*Oracle Workflow Guide* using the information below
17	Customize Online Help	No	*Oracle Applications System Administration Guide* using the information below
18	Set Up Single Frame iHelp User Interface	No	*Oracle System Administration Guide* using the information below

Prerequisites

Before you begin implementing Oracle Sourcing, you should consult the information on implementation steps performed in other E-Business Suite applications located in Appendix A, "Implementing E-Business Suite for Oracle Sourcing." Note that if Oracle Purchasing has already been installed, these steps may have already been performed. If Oracle Purchasing has not been implemented, you should perform all the required steps and whichever optional steps you decide are appropriate.

Implementation Steps Performed in Oracle Sourcing

Implementation tasks in Oracle Sourcing are performed by the Sourcing Super User. The Sourcing Super User is responsible for setting up and maintaining the Oracle Sourcing system. This includes many tasks such as initial system setup and customization, as well as creating negotiation creation tools such as price element lists, reusable attribute lists, and reusable invitation lists. You can set some values at implementation time or set them later.

Using the Administration Tab Functions

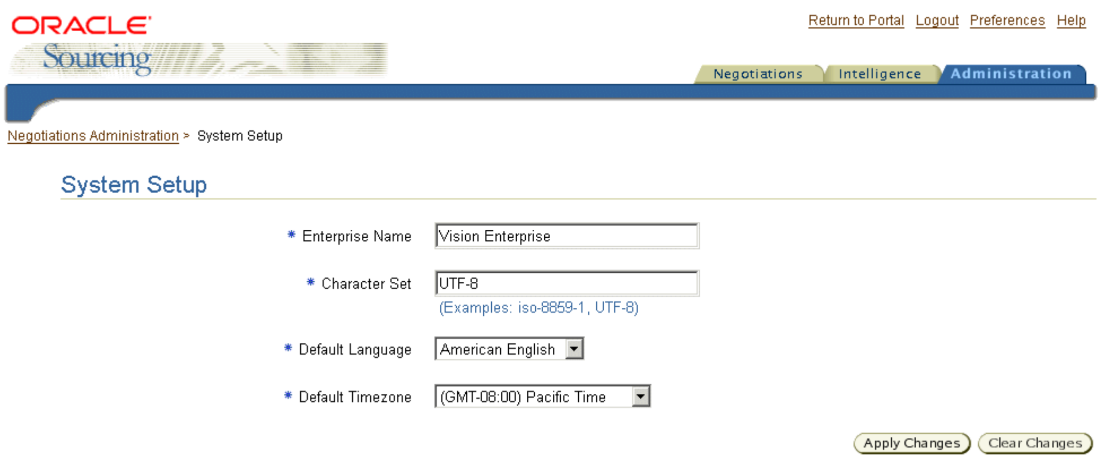
The implementation steps you perform as the Sourcing Super User use the setup and administration functions is available from the **Negotiations Administration** page. This page appears when you click the Administration tab.

You use the links available from this page to set up and maintain your Oracle Sourcing system as described in the following steps.

Step 1: Setup System Parameters (Required)

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

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "System Setup."



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

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

Step 2: Customize Text (Optional)

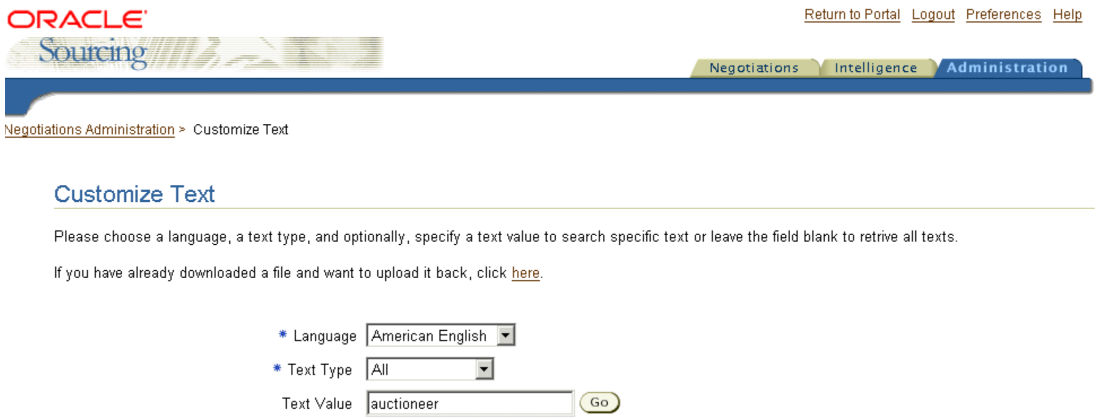
Sometimes there may be words or phrases that you need to modify throughout the system. For example, you can change the word *Auction* everywhere to *Trade Transaction*. Or you may wish to change the label on a tab or button and have that change show up everywhere on the system. The **Customize Text**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

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

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

To customize text strings online:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Customize Text."



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

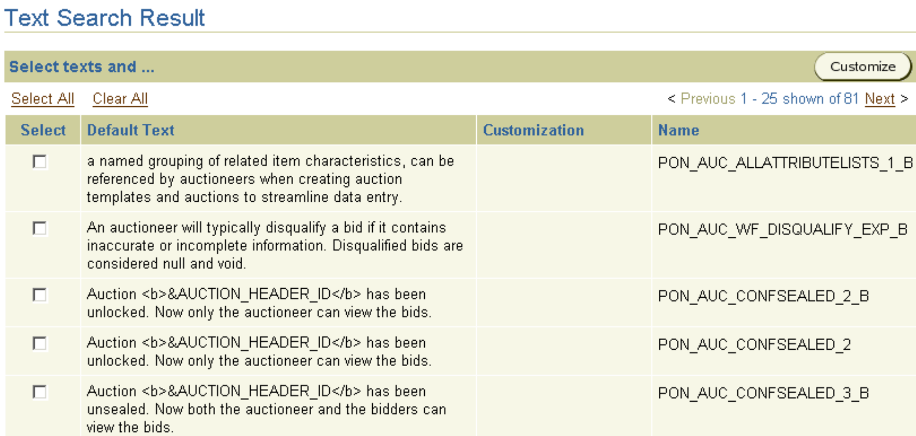
   Text customizations apply only to a particular language. People using other languages do not see the customized text. For example, a modification to the French version of the system is not seen by people using other languages. If you have installed the system in more than one language, customize the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

4. Select the Text Type to search for text strings among existing customizations, the default text, or both.

5. Enter a search value in the Text Value field.

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

6. Click Go.



Text Search Result

Select texts and ... Customize

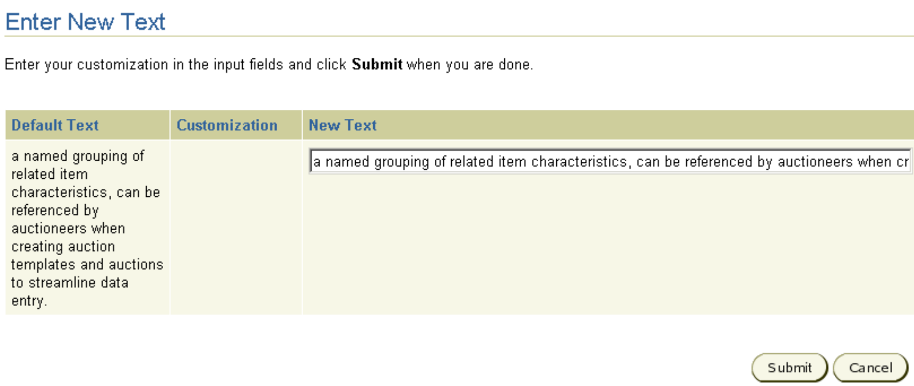
Select All Clear All < Previous 1 - 25 shown of 81 Next >

Select	Default Text	Customization	Name
☐	a named grouping of related item characteristics, can be referenced by auctioneers when creating auction templates and auctions to streamline data entry.		PON_AUC_ALLATTRIBUTELISTS_1_B
☐	An auctioneer will typically disqualify a bid if it contains inaccurate or incomplete information. Disqualified bids are considered null and void.		PON_AUC_WF_DISQUALIFY_EXP_B
☐	Auction &AUCTION_HEADER_ID has been unlocked. Now only the auctioneer can view the bids.		PON_AUC_CONFSEALED_2_B
☐	Auction &AUCTION_HEADER_ID has been unlocked. Now only the auctioneer can view the bids.		PON_AUC_CONFSEALED_2
☐	Auction &AUCTION_HEADER_ID has been unsealed. Now both the auctioneer and the bidders can view the bids.		PON_AUC_CONFSEALED_3_B

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

- **Default Text**: The text string that the system provides.
- **Customization**: Customizations performed on that text, if any.

7. Select the string you wish to change, or click the "Select All" link for each page of strings you are selecting.
8. Click Customize.



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

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

To customize text offline:

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

7. Click the word "here" in the sentence "If you have already downloaded a file and want to upload it back, click here."
8. Select the Language in which you want the customizations to appear.

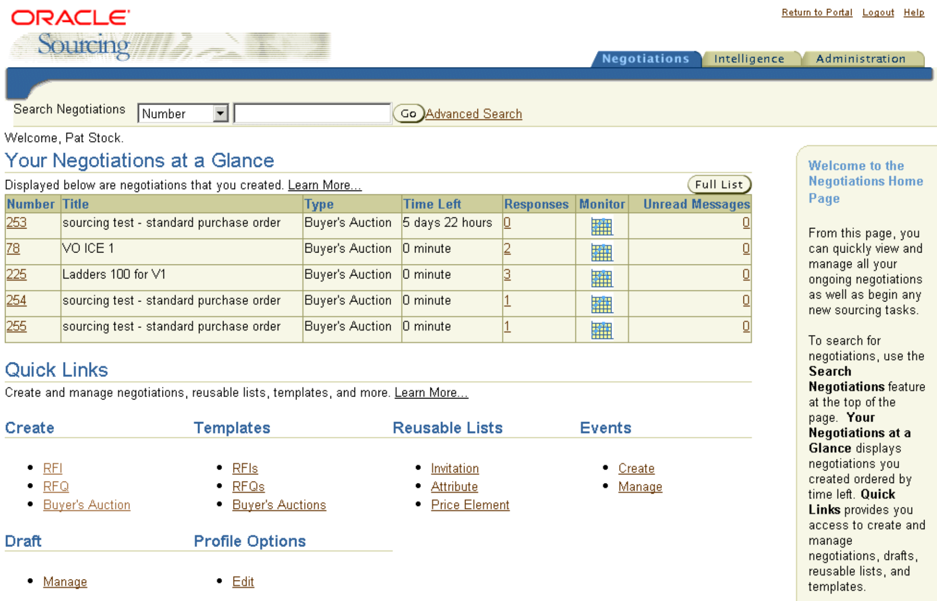
   Be sure this is the same language you chose when downloading the customizations.
9. Use the Browse button to navigate to the.txt file containing your customizations.
10. Click Start Load Now.

> **Note:** A typical use for text customization is to modify the text in the e-mail notifications generated by Workflow and sent to Suppliers. Appendix C, "Oracle Sourcing Notifications." contains a list of all the installed Sourcing notifications along with their default text. You can use this list to identify notifications you wish to change. Note that this appendix does not contain notifications generated by the registration system.

Step 3: Customize Content (Optional)

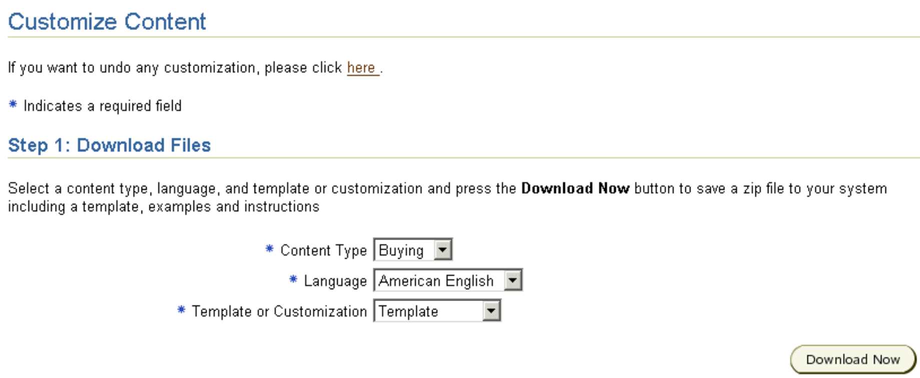
You can customize text on the **Negotiations Home** page to add your own company specific information. Since you can customize both the Buying **Negotiations Home** page (the page seen by your own users) as well as the Selling **Negotiations Home** page (the page seen by your suppliers), you can customize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

The following graphic shows the Sourcing Buyer **Negotiations Home** page. Only the text in the box on the right side of the page can be customized. None of the other links on the page can be modified.



To download and customize content:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Customize Content."



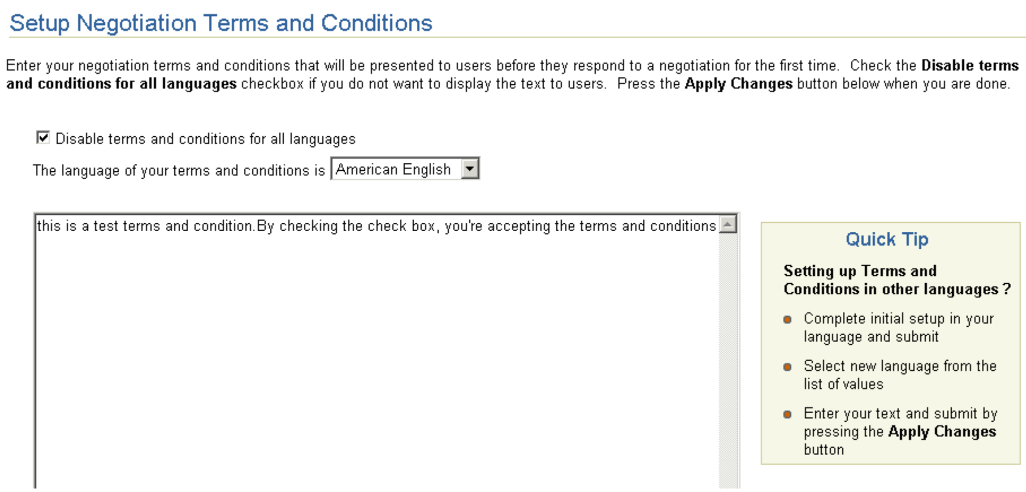
3. On the **Customize Content** page, select:
   - the content type (Buying or Selling **Home** page),
   - the language
   - either template or customization. You can use the template when you first create a customization.
4. Click Download Now.
5. Extract the.zip file to a convenient directory, and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

Step 4: Define Negotiation Terms and Conditions (Optional)

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

To define negotiation terms and conditions:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Set Up Negotiation Terms and Conditions."



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

   If multiple languages are installed, select a Language and translate the terms and conditions for each language if your suppliers speak other languages.
4. Click Apply Changes.

Step 5: Define Reusable Attribute Lists (Optional)

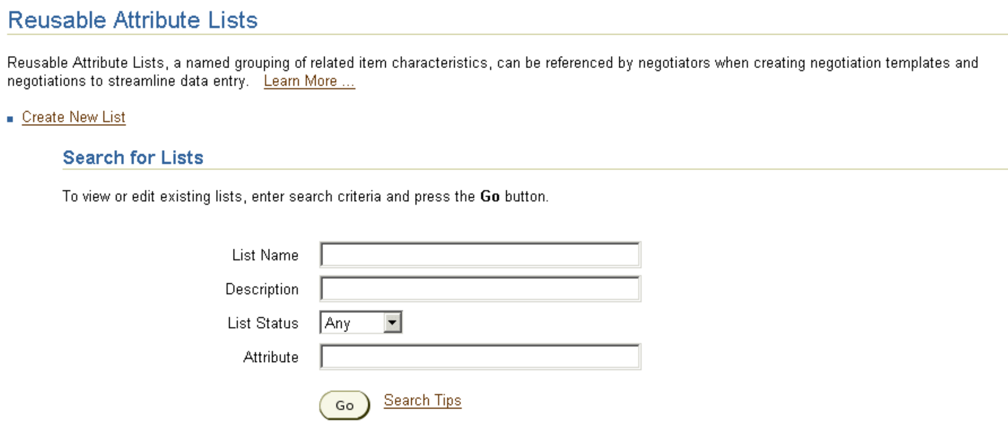
You can create negotiation attribute lists to include on your RFI, RFQ, or auction templates, or to use when creating any new sourcing document. Attribute lists are named groups of item attributes (item characteristics) that apply to items in a negotiation. Attributes identify any additional details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

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

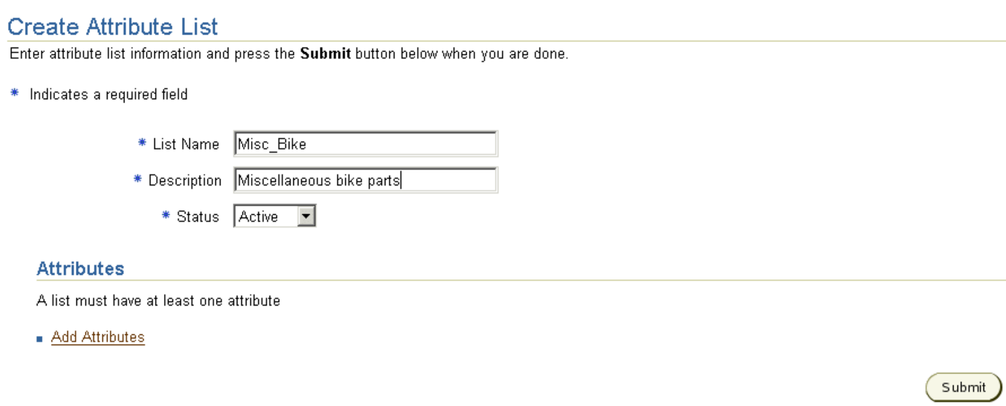
If you include an attribute list on a sourcing document template, the attributes on the list will apply to all items added to the sourcing documents created with that template (though the person using the template can edit and remove attributes as appropriate). Except for the attribute list name, you can edit attribute lists after you have created them.

To create or edit a new attribute list:

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

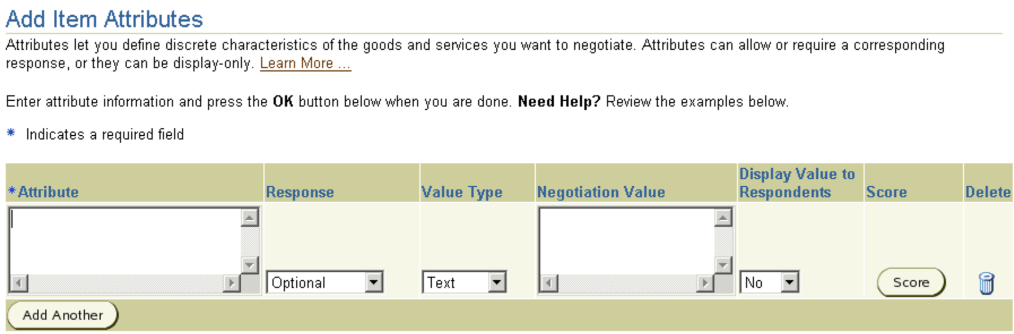


3. On the **Reusable Attribute Lists** page, click "Create New List."



4. On the **Create Attribute List** page, enter a List Name and brief Description for your attribute list. Choose the Status (Active or Inactive). An Active list can be used immediately; an Inactive list will be stored in the system, but will not be available for use unless you edit the list and change its status to Active.

5. To add attributes to your attribute list, click "Add Attributes." An attribute list must include at least one attribute.



6. On the **Add Item Attributes** page, enter your attribute information in the appropriate fields. Required fields are marked with an asterisk (*):

- *Attribute: Enter a name for your attribute (for example, Mileage, PPM Defect Rate; Grade).
- Response: If you want all suppliers to enter a value for this attribute when responding, select Required. If you don't want to require suppliers to enter a value for this attribute when responding, select Optional. If you want this attribute to be displayed to the supplier without allowing any response, select Display Only.
- Value Type: Select the type of value that suppliers should enter for this attribute when responding. They may enter *text* (letters, words, digits, and so on), *number* (digits with decimals allowed), *date* (numbers in the default date format or the format you or the supplier select as your date preference), or *URL* (Web site addresses that begin with a valid URL protocol for example, http://, https://, and ftp://. Values with a URL type display as links; for example a Web site address entered as a *Text* type will display simply as text). The value type you select also governs the value you can enter in the Negotiation Value field.

- Negotiation Value: If desired, set your item specifications by entering a target value for the item in the Value field (for example: "Fewer that twelve thousand miles per vehicle"; "Fewer that eight defects per million parts manufactured"; and so on).
- Display Value to Respondents: If you want suppliers to see the Negotiation Value, select Yes. If you do not want suppliers to see the value, select No.
- Score: Weighted attributes are used in Multi-Attribute Weighted Scoring negotiations. Weighted attributes allow you to include attributes in addition to price when calculating and ranking bids. To weight an attribute, the attribute must be required. When you click Score, the **Enter Scoring Criteria** page allows you to define acceptable values or ranges of values for this attribute and give each value/range of values a score. When a supplier enters a value, that value is evaluated, and its score, relative to competing responses, is used when ranking the responses.
  See the online help for more information about weighted attributes and how Multi-Attribute Weighted Scoring negotiations work.

7. When you have finished entering your attribute information, click Add Another to add additional attribute(s), or click OK to add your current attribute to your attribute list and return to the **Create Attribute List** page.
8. On the **Create Attribute List** page, review your attribute list name, description, status, and attributes. When you are satisfied with your attribute list, click Submit.

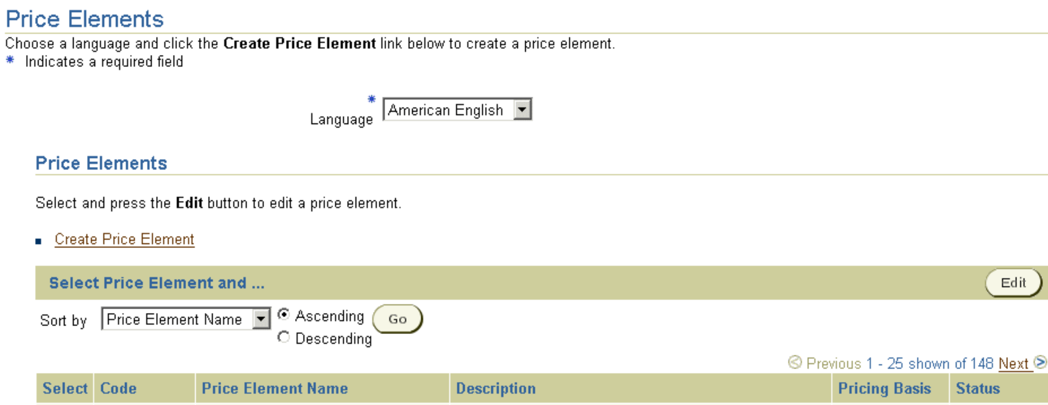
Step 6: Define Price Elements and Price Element Lists (Optional)

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

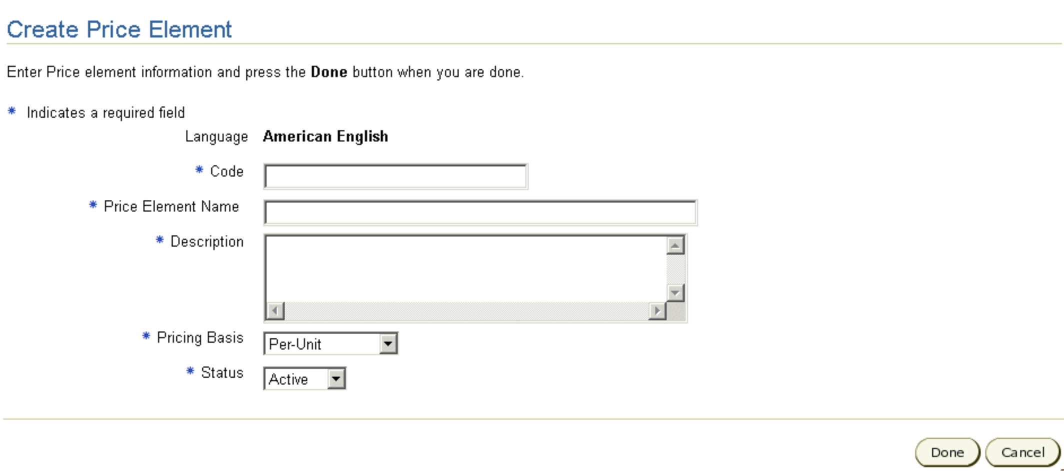
Once you create price elements for your commonly occurring additional costs, you can create lists of price elements that commonly occur together. Buyers can then apply these price element lists to negotiations to quickly identify the secondary costs that also need to be negotiated.

To define a price element:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Price Elements."



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



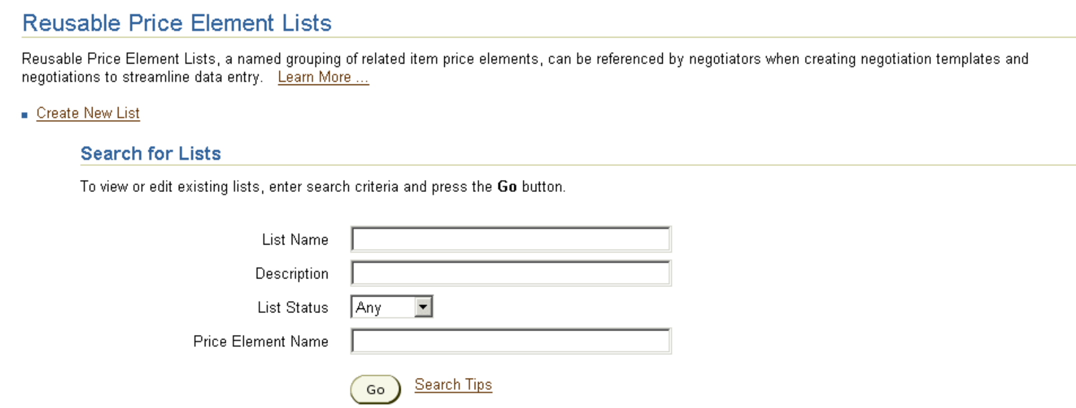
5. On the **Create Price Element** page, enter the following information:
   - A unique code (the same code can be shared between different language versions of the same price element).
   - The name of the new price element.
   - A short text description for the price element.
   - A pricing basis value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

To create an existing price element in a different language:

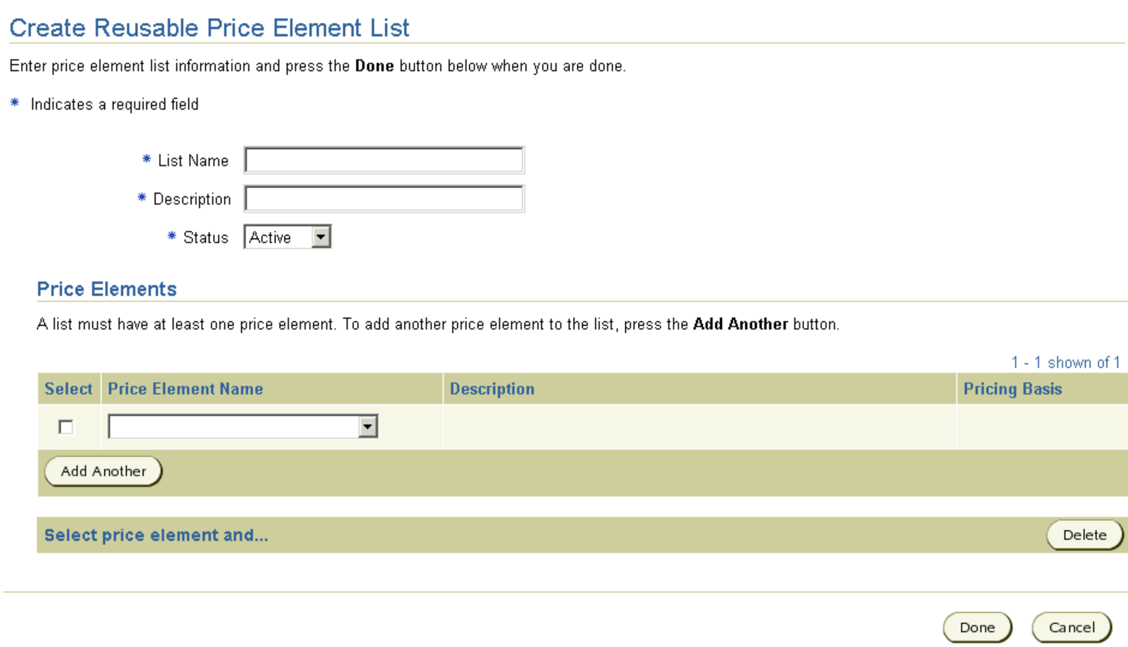
1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Price Elements."
3. Select a language for this price element.
4. Identify the price element for which you will create the new version.
5. Click Edit.
6. On the **Edit Price Element** page, enter the new information.
7. Click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

To define a price element list:

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



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



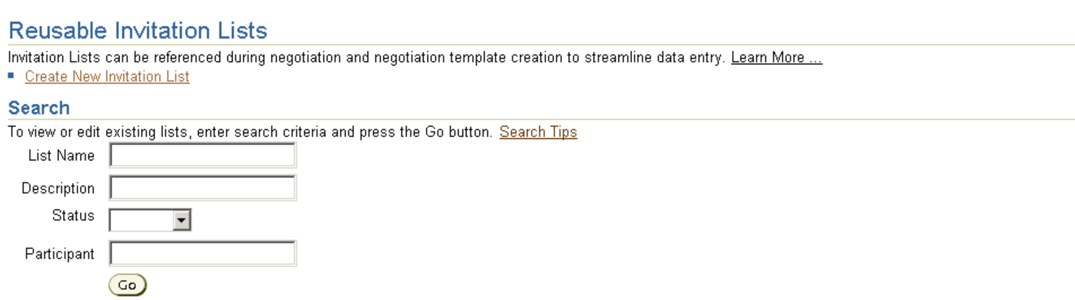
4. On the **Create Reusable Price Element List** page, enter the following information:
   - Name of the new list
   - A short text description of the new list
   - The status of the new list. Active lists can be used immediately. Inactive lists cannot be used
5. From the Price Element Name menu, select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

Step 7: Define Reusable Invitation Lists (Optional)

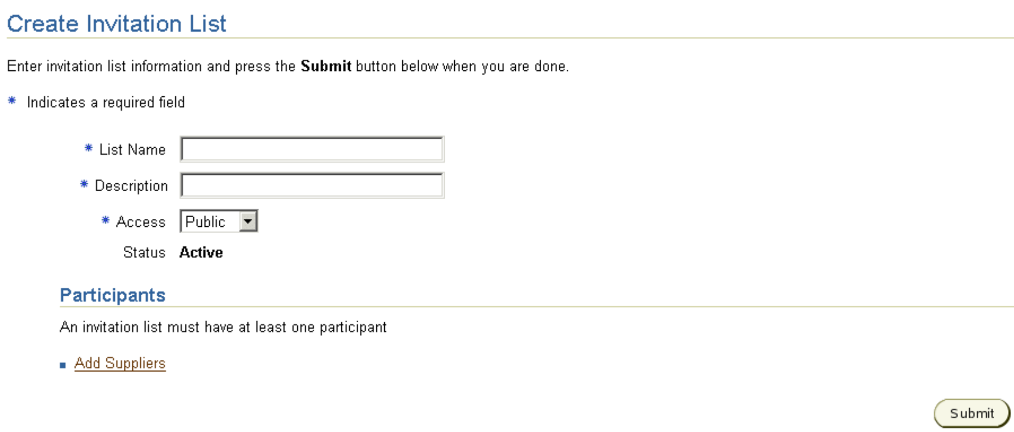
If you typically invite the same core group of suppliers to many (or all) of your negotiations, you can add these suppliers to a reusable invitation list to use with your negotiations. Using an invitation list can help standardize your business practice by ensuring that all appropriate people are invited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

To create a new invitation list:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Reusable Invitation Lists."

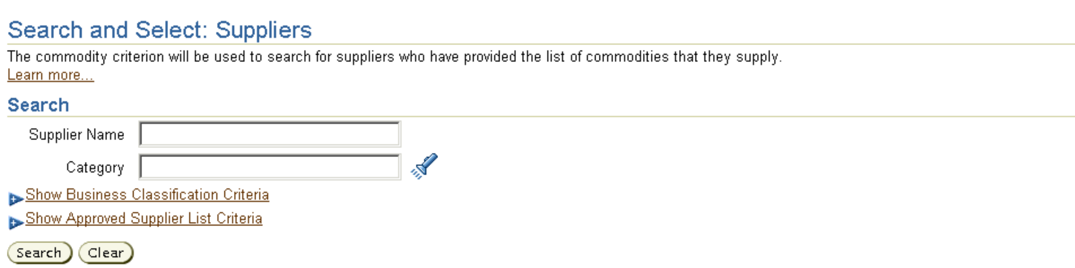


3. On the **Reusable Invitation Lists** page, click "Create New Invitation List."



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

5. Click "Add Suppliers" to search for and select suppliers to add to your invitation list. See the online help for instructions on using the search fields.



6. On the **Search and Select: Suppliers** page, select the suppliers you want to add to the list and click Invite.
7. When you have finished selecting suppliers, click Submit.

Step 8: Define Negotiation Templates (Optional)

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

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

To create a negotiation template:

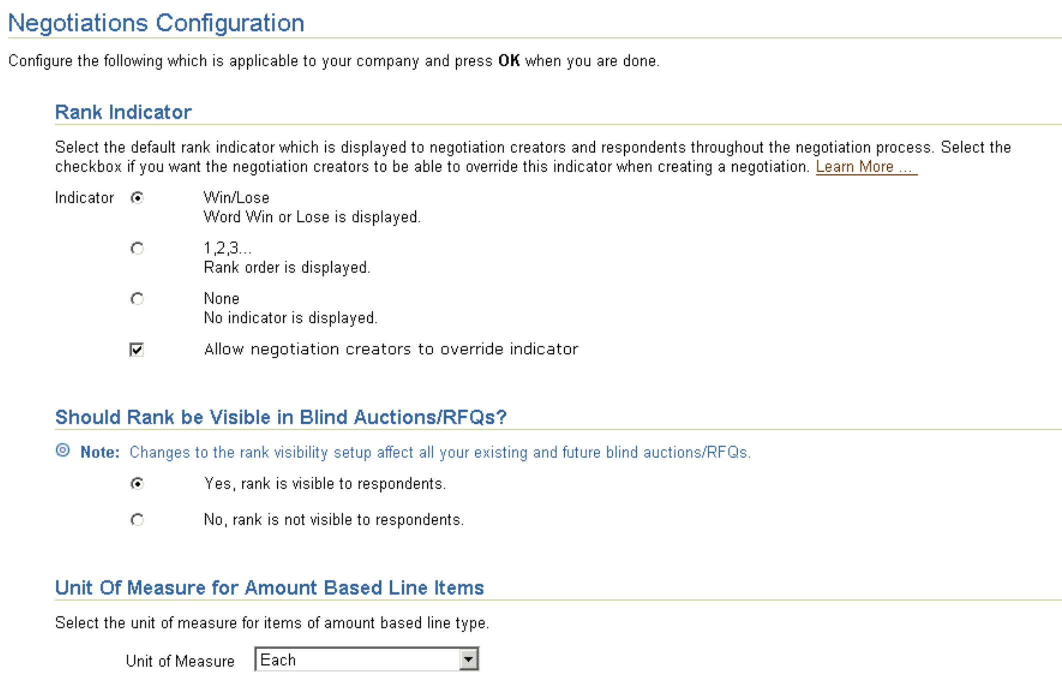
1. On the **Negotiations Home** page, click the Negotiations tab.
2. In the Templates column of the Quick Links section, click the link for the type of negotiation template you wish to create.
3. On the **Templates** page, click "Create New Template."
4. On the **Step 1: Describe Your Template** page, give your template a name and optionally a description. Be sure to accept the default Access value of Public.
5. Continue by using the instructions in the online help describing how to define templates.

Step 9: Select Rank Indicator and Define Visibility (Optional)

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

To choose a ranking indicator:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Negotiations Configuration."



3. In the Rank Indicator section of the **Negotiations Configuration** page, select a default rank indicator. This indicator is then used to display the rank of responses for negotiations created by your company.

4. If you want to allow negotiation creators to select a rank indicator other than the default when creating a negotiation, click the override checkbox.

To define a ranking visibility for blind auctions and RFQs:

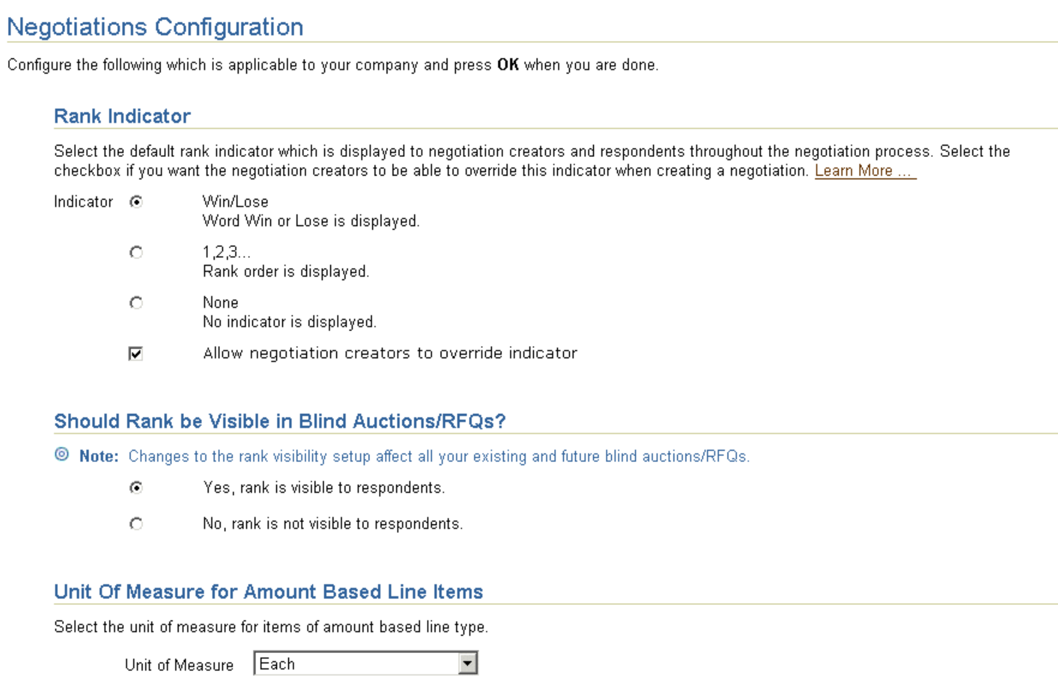
Competing suppliers' bid/quote information in RFQs and blind auctions is typically not revealed while the negotiation is taking place. However, if you choose a rank indicator (by choosing a rank indicator other than "None"), you can choose to display a bid/quote's ranking by selecting the appropriate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

Step 10: Define Default Unit Of Measure for Amount Based Line Items (Required)

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

To define a default unit of measurement:

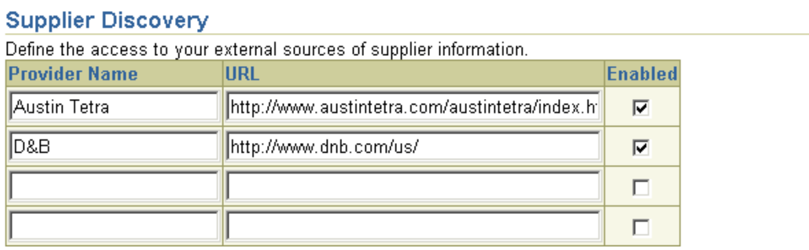
1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Negotiations Configuration."



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

Step 11: Define Supplier URLs for Supplier Discovery (Optional)

Buyers looking for alternative suppliers can now link directly to information broker sites such as D&B to assist in finding and evaluating new potential suppliers. You define the list of sources which is then available to all buyers during both negotiation and template creation.



To define URLs for Supplier Discovery:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Negotiations Configuration."
3. Scroll to the bottom of the **Negotiations Configuration** page, enter the Provider Name (this is the name used within the system. It does not have to be the supplier's official name) and the URL to the provider's site. To allow your buyers to view and use the link, click Enabled. You can control access to different sites by selecting and deselecting the Enabled flag.
4. When you are finished identifying sites, click OK.

Implementation Steps Performed in Other Oracle Applications

Most of the implementation tasks for Oracle Sourcing are performed by the Sourcing Super User using the **Negotiations Administration** page as described in the steps above. However, since Oracle Sourcing makes use of setup and reference data managed in other E-Business Suite applications, especially Oracle Purchasing there are a few implementation tasks which must be performed in other applications using different responsibilities.

All of these implementation tasks are described below. Each description highlights any Oracle Sourcing related information you should know when performing the step. Consult the table at the beginning of this chapter for the location of the product specific documentation to use when performing each step.

Step 12: Assign Sourcing Responsibilities (Required)

During this step, you assign your buyers the responsibilities they need to perform their jobs. As you assign a user a responsibility, make sure that each buyer’s profile contains a first name, last name, and email address.

See *Oracle Applications System Administration Guide* for instructions on assigning a responsibility to a user.

The Sourcing Super User, Sourcing Buyer, and Sourcing Supplier responsibilities come predefined containing most of the necessary job functions. For a complete list of the functions defined to each responsibility, see Appendix B, "Oracle Sourcing Responsibilities and Functions." The information in this appendix will help you decide whether to create a customized responsibility.

Modifying Seeded Responsibility Definitions

The following job functions come predefined to the Sourcing Super User and the Sourcing Buyer responsibilities, but for security reasons, you can create a customized responsibility that does not include them. Note that you should always create a new customized responsibility and not change a seeded responsibility.

Table 2–2 Seeded Sourcing Job Functions

Function	Description	Seeded in Super User	Seeded in Buyer
Award My Negotiations	Buyers can make award decisions for negotiations they created	Yes	Yes
Unlock Sealed Negotiations	Buyers can unlock any sealed negotiation	Yes	Yes
Unseal Sealed Negotiations	Buyers can unseal any sealed negotiation	Yes	Yes
Publish Negotiation	Buyers can publish the negotiation	Yes	Yes

The following job function is defined to the Sourcing Super User but not the Sourcing Buyer. You will need to explicitly grant it to any buyer who you wish to be able to award other buyers’ negotiations.

Table 2–3 Award Other Negotiations Job Function

Function	Description	Seeded in Super User	Seeded in Buyer
Award Others' Negotiations	Users can make award decisions for negotiations created by other users in the same company	Yes	No
Manage Draft Sourcing Documents	Users can manage draft negotiations created by someone else.	Yes	No

See *Oracle Applications System Administration Guide* for instructions on creating a customized responsibility.

Granting Collaboration Team Management Capabilities

Collaboration Teams allow groups of buyers within an organization to work together to create and manage a negotiation. The following function allows collaboration members to add and/or delete other members from the team. Users who have been defined to the team, have been assigned this function, and are not restricted to view-only access, can manage the make-up of the collaboration team. This function is seeded for the Sourcing Super User; you must explicitly grant this job function to your buyers as appropriate.

Table 2–4 Collaboration Team Management Job Function

Function	Description	Seeded in Super User	Seeded in Buyer
Manage Collaboration Team	Users can manage collaboration teams for the negotiations to which they have access.	Yes	No

For details on Sourcing responsibilities, see Appendix B, "Oracle Sourcing Responsibilities and Functions."

- Grant your buyers the Sourcing Buyer responsibility.
- Grant any users who will be maintaining the Oracle Sourcing system the Sourcing Super User responsibility.

Note: If any responsibilities have been customized, ensure that the Sourcing Supplier responsibility does not contain any functions which belong only to the Sourcing Buyer or the Sourcing Super User. For information on which functions are appropriate for the Sourcing Supplier responsibility, see Appendix B, "Oracle Sourcing Responsibilities and Functions."

Step 13: Define System Profile Options (Required)

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

- Setting the option **PO: Allow Autocreation of Oracle Sourcing Documents** to Yes enables buyers to use AutoCreate to generate draft auctions and Sourcing RFQs that can then be completed and awarded in Oracle Sourcing.
- Setting the option **PO: Display the Autocreated Document** to Yes allows Sourcing to launch automatically from Oracle Purchasing once your buyers have finished AutoCreating the draft sourcing document. Buyers must also have a responsibility that contains the Edit Draft Negotiation function.
- Setting the **PON: Sourcing Workflow Debug** to Yes causes the Sourcing workflows to log information to the database for use in debugging.
- The **PON: Character Set** identifies the character set that is used when uploading customized content for the Buying and Selling **Home** pages.
- Setting the **PON: Customize Text** profile option to Yes allows users to upload customized text.
- Setting the **Sourcing Default Responsibility for External User** profile option identifies which responsibility will be automatically defined to new supplier users.

The following profile options are no longer used and do not need to be set:

- **PON: Default Currency**
- **PON: PO Creation Resubmission Period**

- **PON: System Administrator Email**
- **PON: Help Email**
- **PON: Default Profile Timezone**

See *Oracle Applications System Administration Guide* for information on setting system profiles.

Step 14: Define Buyer Security (Optional)

Buyer Security allows buyers to have the ability to secure sourcing documents and also provides organizations extended flexibility over buyer actions. Buyers accept a default security-level or can choose to override it under special circumstances. There are three levels of possible security:

- Public: All system users can access the document.
- Private: The document owner, a designated group of users, and the subsequent approver(s) can access the document.
- Hierarchy: The document owner, a designated group of users, the subsequent approver(s), and any other individuals in the security hierarchy can access the document. This security hierarchy is shared with Oracle Purchasing.

With Private and Hierarchy security, buyers will grant explicit access for each sourcing document. Additionally, any employee can be limited to view-only access.

To set up buyer security:

- Oracle Sourcing has added new seed data to define the Sourcing document types (RFI, RFQ, and Buyer's Auction) in the PO_DOCUMENT_TYPES_ALL table. Since this table is secured by org_id (Operating Unit Id), you must run the Replicate Seed Data concurrent program for each Operating Unit. (or in Single Organization mode if you have not set up multiple operating units).

  Please see the Multiple Organizations in Oracle Applications manual for instructions on how to run the Replicate Seed Data concurrent program.

- Once the Replicate Seed Data program has been run, Oracle Sourcing will use the security level of Public as the default for all Sourcing documents. If you wish to set the default to a different level:

  1. Log into Oracle Purchasing with a responsibility that allows the update of document types.

2. Navigate to the Document Types form.
   Setup>Purchasing>Document Types
3. Perform a Query by Example using%Sourcing% as the search criteria.
4. Select the new security level (Public, Private, or Hierarchy) from the Security Level drop down menu.

- Note that if you select Hierarchy as the security level, Oracle Sourcing will use the hierarchy set up in the Purchasing Options form when granting access to this document type.

Step 15: Set up Enhanced Supplier Search Feature (Optional)

The enhanced supplier search allows users to search for suppliers based on many different criteria including business and/or commodity classifications. This classification information must be entered and maintained in the system.

Refer to the Oracle iSupplier Portal Family Pack I About document for instructions on entering supplier information.

Step 16: Set Up Workflow Options (Optional)

Once buyers have completed awarding business in a negotiation, they can choose to automatically generate the required purchase documents. Once the purchase document information has been generated, a Workflow process, the Workflow Background Process, must be run with an item type of Sourcing Create Auction to create the purchase documents. If you wish to automatically generate purchasing documents, you should schedule this process to run frequently.

See *Oracle Applications System Administration Guide* for instructions on running concurrent programs.

Step 17: Customize Online Help Files (Optional)

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

- Updating the search index
- Customizing the navigation tree

Step 18: Set up for Single Frame iHelp User Interface (Optional)

If Oracle Sourcing iHelp launches in a three-frame window instead of a single-frame window, perform the following steps:

1. Select the Applications: System Administrator responsibility.
2. Select Profile, then System.
3. In the Application field of the Find System Profile Values window, search for Oracle Sourcing.
4. Enter Help System Root in the Profile field. Click Find.
5. On the System Profile Values page, enter the value null in the Application column as the Help System Root value for Oracle Sourcing. The value in the Site column should be FND:LIBRARY.
6. Save your work.
7. Bounce the server to make your changes take effect.

3

Implementing Vendor Registration and Profiles

Prospective Vendor Registration, Profiles, and Management Groups

Prospective Vendor Registration and Supplier Profile Management ease the administrative burden faced by trading partners conducting business together.

Buying organization can allow new suppliers to register with them to indicate their interest in establishing a business relationship. Suppliers are also able to access online and update a profile of key company details. This information can be used by buyers to directly modify the suppler's details in their purchasing system. This results in a significant reduction in the volume of forms and direct contact between the two organizations.

Prospective Vendor Registration

The Prospective Vendor Registration feature allows buyer organizations to accept unsolicited registration requests through their own website from suppliers with whom the company has not previously conducted business. This self-service registration process provides prospective suppliers with an easy-to-use web page where they can complete a simple registration form and then submit it for approval by administrators at the buying company. Once a buyer administrator approves the supplier's registration request and information on the supplier has been added to the buying company's purchasing system, supplier user accounts for that supplier can be created and the supplier users can begin accessing and using the collaboration suite applications. See Chapter 4, "Implementing Supplier User Management" for information on registering supplier users.

Table 3–1 Prospective Vendor Registration Flow

Buyer Actions	Supplier Actions	Comments
	1. Supplier user navigates through the buying organization's website to the page containing the registration links.	
	2. Supplier user clicks appropriate registration link.	
	3. Supplier fills out and submits registration page.	E-mail notification is sent to appropriate buyer administrator(s) requesting registration approval.
4. Buyer Administrator approves or rejects the supplier registration request.		E-mail notification is sent to supplier user who submitted the supplier registration request with request status. If approved, prospective supplier is created, and a user account is set up for user who registered the company. User is assigned external user default responsibility.

The prospective vendor registration feature provides prospective suppliers with an easy way to communicate to the buying company their desire to conduct business. Once registered, users of that supplier can begin accessing collaboration suite applications, participate in sourcing events, and otherwise building relationships with the buying company.

Supplier Profiles

Once a supplier company's registration request has been approved by a buyer administrator, a company profile can be created for that supplier. Supplier profiles contain company information such as tax IDs and Dun and Bradstreet numbers, supplier addresses and contact names, descriptions of goods and services provided by the supplier, and other information such as ownership status (for example, minority-owned). Suppliers maintain the information, updating it as needed.

Suppliers have the responsibility for ensuring the information about their company is current and correct.

Buyer administrators can access and, if necessary, maintain the information contained in a supplier's company profile. As appropriate, buyer administrators then use this information to update the purchasing system with any new details a supplier provides. For example, a supplier may add new addresses or contact information. Buyer administrators can view this new information and use it to update any corresponding out-of-date site or site contact information in the purchasing system. A single supplier update can be applied across multiple operating units at the same time. Through the use of Supplier Management Groups, you can divide the responsibility for maintaining supplier information among several buyer administrators. See "Implementing Supplier Profile Management (Optional)" later in this chapter for more details on Supplier Management Groups.

New suppliers typically create their own profiles after they are registered. However, if you are implementing supplier profiles for existing suppliers, you will need to use the existing information already stored in your purchasing system or create profile details.

Table 3–2 Supplier Profile Creation Flow - New Supplier

Buyer Action	Supplier Action	Comments
	1. Supplier accesses self-service registration web page, completes and submits registration form.	Notification of registration request is sent to buyer administrator(s). Registration request also appears as "Pending Approval" on the Supplier User Summary page.
2. Buyer administrator views registration request and approves or rejects the request.		If approved, a user account is created for requester, and the requestor is assigned the default responsibility for newly registered user. Notification is sent to supplier with request status.
3. Buyer administrator assigns new user Supplier Profile Manager responsibility		

Table 3–2 Supplier Profile Creation Flow - New Supplier

Buyer Action	Supplier Action	Comments
	4. Supplier user can begin creating supplier profile.	Supplier specifies company summary information, defines an address book and a contact directory, and declares any appropriate business classifications or certifications (for example, minority-owned status). The supplier also identifies the goods and services the company can provide.

Table 3–3 Supplier Profile Creation Flow - Existing Supplier

Buyer Action	Supplier Action	Comments
1. Buyer administrator accesses the information for the existing supplier.		Supplier information must already exist in the purchasing system. For existing suppliers, a supplier profile should be created by buyer administrators before any suppliers are granted the Supplier Profile Manager responsibility (Step 4).
2. Buyer administrator usesexisting supplier site information to create entries in the supplier's Address Book.		Supplier Site information from purchasing system is used to create address name and address detail entries in the Address Book.
3. Buyer administrator uses existing site contact information to create entries in the supplier Contact Directory.		Information is obtained from supplier contacts defined in purchasing system. Contacts can be associated with additional addresses if needed.

Table 3–3 Supplier Profile Creation Flow - Existing Supplier

Buyer Action	Supplier Action	Comments
4. System Administrator grants authorized supplier user(s) the Supplier Profile Management responsibility.		
	5. Supplier users update company profile information when needed.	
6. Buyer administrator(s) view updated information and decide whether to update the information in their purchasing system.		Any new address information provided by a supplier is used to update supplier site records in the purchasing system. New contact iinformation is used to update supplier contact records.

Supplier Management Groups

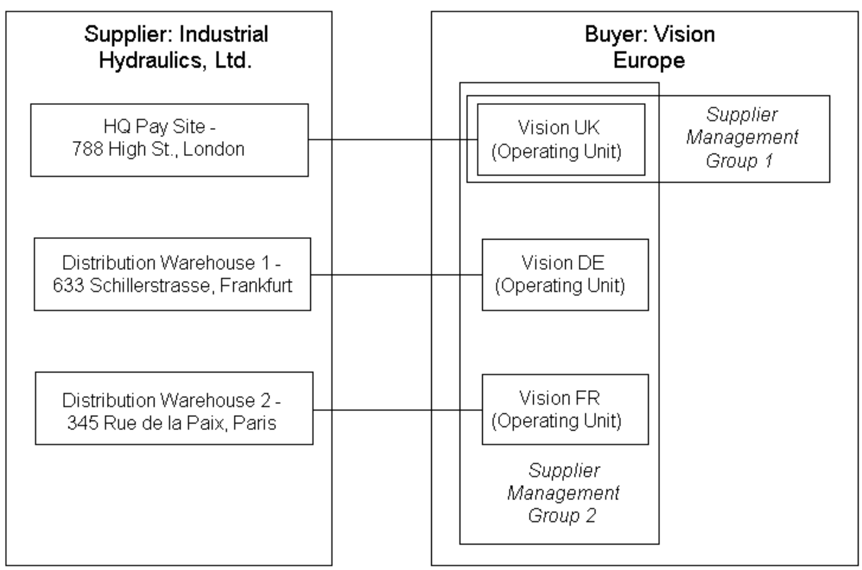
Companies frequently segregate their business operations for administrative and legal reasons, by line of business, geography or other factors. For example, a manufacturer might have several production departments, only one of which deals with distributors in Europe. Or a financial services company might have a separate division for each type of consulting service it offers. Within the eBusiness Suite, these operational organizations is modeled as operating units. While business may be divided into multiple operating units, the administration of the supply base may be organized at a more aggregated level.

Operating units are typically distinguished from one another by, among other things, the supplier sites and the supplier contacts with which the buying personnel for that operating unit interact. Supplier Management Groups allow you to combine one or more operating units into group for the purpose of administering supplier accounts. Multiple buyer administrators can then be assigned to each Supplier Management Group. This enables the physical organization of supplier administration to be modeled effectively and the balanced among several different buyer administrators,

As suppliers add or update their company information (for example, they open a new office and therefore add a new address), buyer administrators can decide whether to use the new information to update the existing purchasing system information for the operating units they administer. In this way, buyer administrators can use supplier information to keep multiple operating unit information up to date. Buyer administrators can view all supplier information, but they can only update operating units defined to their supplier management group.

When creating supplier management groups, you select which operating units comprise the group, so the make up of the different supplier management groups should be carefully planned. It is possible that more than one team of administrators could be maintaining the supplier details for the same operating unit, and therefore this operating unit could potentially be included in more than one supplier management group. However, use of such overlapping supplier management groups are not recommended.

The example below shows a typical buying organization divided into operating units. Each operating unit deals with a particular site for the supplier Industrial Hydraulics, Ltd. Additionally, two supplier management groups have been defined - one that contains the headquarters site and a second that contains the headquarters site as well as both the Birmingham and Paris sites.



Implementing Prospective Vendor Registration and Profile Management

To implement prospective vendor registration and profile features:

1. Implement Supplier Management Groups.
2. Implement the Supplier Self-Service Registration.
3. Implement Supplier Profile Management.

Implementing Supplier Management Groups

Supplier management groups are defined in terms of a buying organization's operating units. Supplier management groups allow buyer administrators to use supplier profile information for mass updates to all the operating units they administer. At least one or more buyer administrators must be assigned to each supplier management group. Using supplier management groups allows you to control which operating units a particular buyer administrator can maintain.

To implement supplier management groups:

1. Plan Your Supplier Management Groups
2. Create Your Supplier Management Groups
3. Create and Assign Customized Responsibilities for Buyer Approvers

Step 1: Plan Your Supplier Management Groups (Required)

The purpose of supplier management groups is to allow buyer administrator(s) to view supplier information and, where appropriate, use that information to simultaneously update all of the operating unit(s) they administer.

Each supplier management group consists of one or more operating units. How you allocate your company's operating units among your supplier management groups is a design decision that will be based on the business practices and physical organization your company uses to maintain its supply base.

For example, company A has a centralized service center for all its suppliers and has a single supplier management group that contains all operating units for the company. Company B, however, distributes control over suppliers regionally and so has multiple supplier management groups, each containing only the operating units appropriate for that region.

In some cases, the same operating unit may be contained in multiple supplier management groups. This is not recommended, however, since it can lead to confusion between the overlapping groups during the update process.

Before defining your supplier management groups you should:

- Identify all the operating units within your enterprise and assign each to (ideally a single) supplier management group.
- Determine how you will divide up your operating units and compile lists of units for each group.
- Determine a unique name for each management group you will create.
- Determine the unique name for each customized responsibility you will create to access each supplier management group.
- Identify the buyer administrators for each supplier management group.

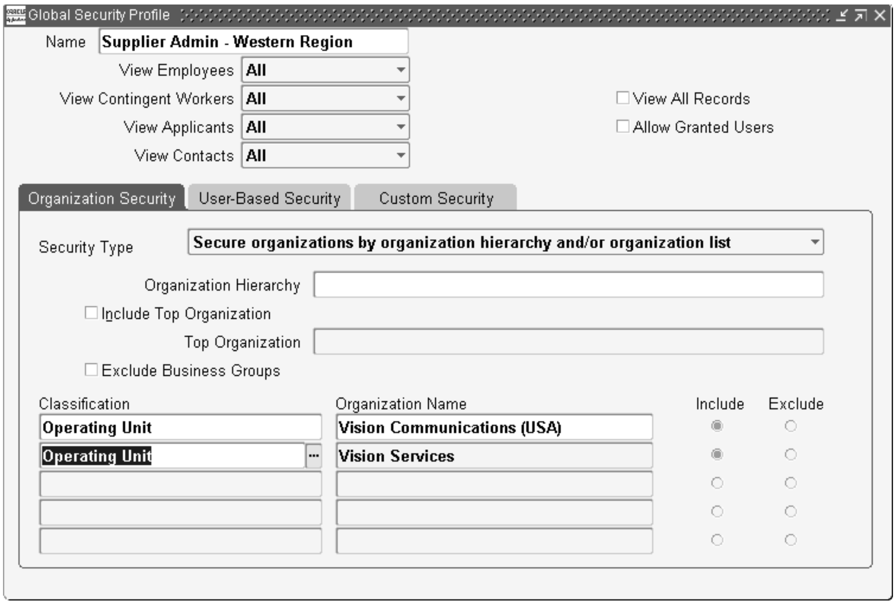
Use the information you gather to implement your supplier management groups as detailed in the instructions in the subsequent steps.

Step 2: Create Your Supplier Management Groups (Required)

Each Supplier Management Group is distinguished by the HR Security Profile it is assigned.

To create Supplier Management Groups defined by Operating Unit:

1. Access the SuperHRMS Manager responsibility.
2. Select Security, then Global Profile.



3. On the Global Security Profile form, enter a name. This is the unique name for your supplier management group that you identified during your planning phase above.

4. Accept the defaults for the remaining fields.

5. On the Organization Security tab, select "Secure organizations by organization hierarchy and/or organization list" as Security Type.

6. Use the multi-row table to specify all the operating units that comprise this supplier management group.

   - Enter Operating Unit as the Classification.

   - Select the operating unit from the Organizations menu.

7. Continue until you have defined all the operating units for this group.

8. Save your work.

To create Supplier Management Groups defined by Business Group:

If your supplier profile management assignments will mirror your business group structure, you can create security profiles tied to business groups and then assign the security profile to the appropriate responsibility.

1. Access the Human Resources responsibility.
2. Select Security, Define Security Profile, Security Profile
3. Select a business group and continue creating your security profile.
4. Save your work.

See the *Implementing Oracle HRMS* manual for information on security profiles.

Step 3: Create Customized Responsibilities for Buyer Approvers (Required)

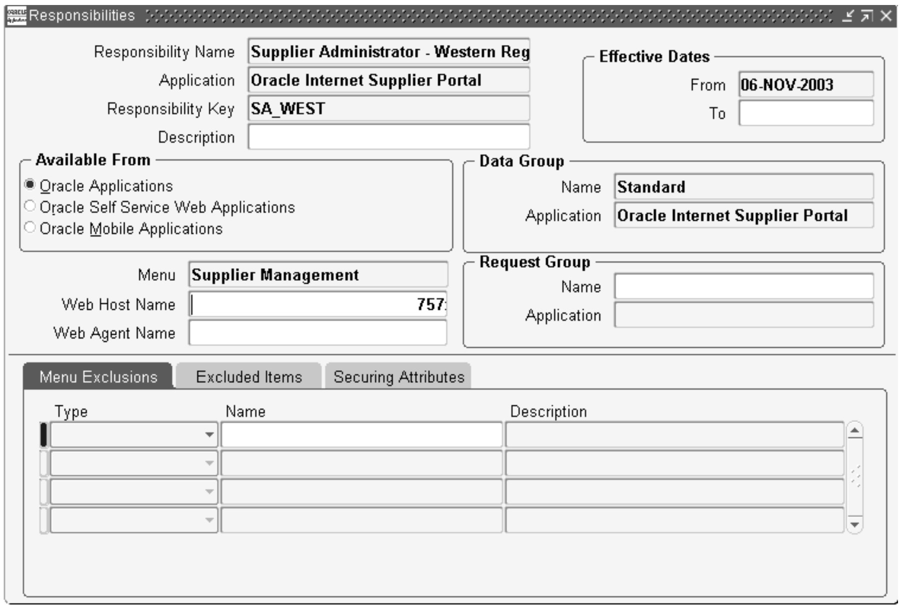
A supplier management group can only be assigned a single responsibility, so if you have multiple supplier management groups, you must create a customized responsibility for each. Each customized responsibility is then assigned to the users who will be the buyer administrators for that group.

You will use the Supplier Profile Administration responsibility as the model for each of these customized responsibilities. Once you have created your responsibilities, you assign them to the appropriate buyers (Step 4). These buyers can then approve registration requests as well as maintain supplier profiles.

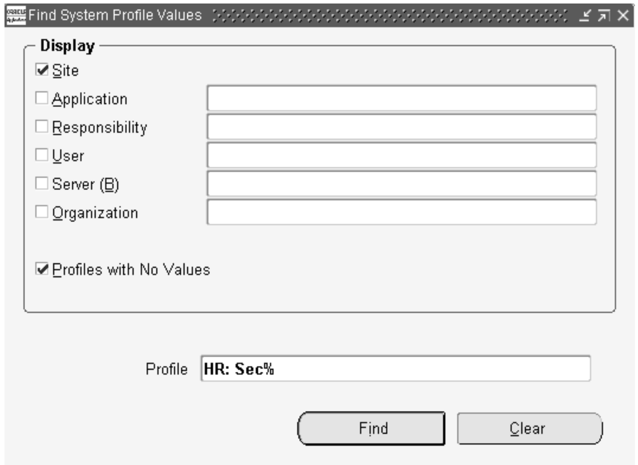
To create a customized responsibility:

1. Access the System Administrator responsibility.
2. Select Security, then Responsibility, then Define.
3. On the Responsibilities form, enter the following:
   - a name for your new responsibility (for example, Supplier Profile Administrator - Western Region).
   - a unique ID for your new responsibility.
   - Oracle Internet Supplier Portal as the Application.
   - Standard as the Data Group
   - Oracle Internet Supplier Portal as the Data Group application
   - Supplier Management as the Menu value.

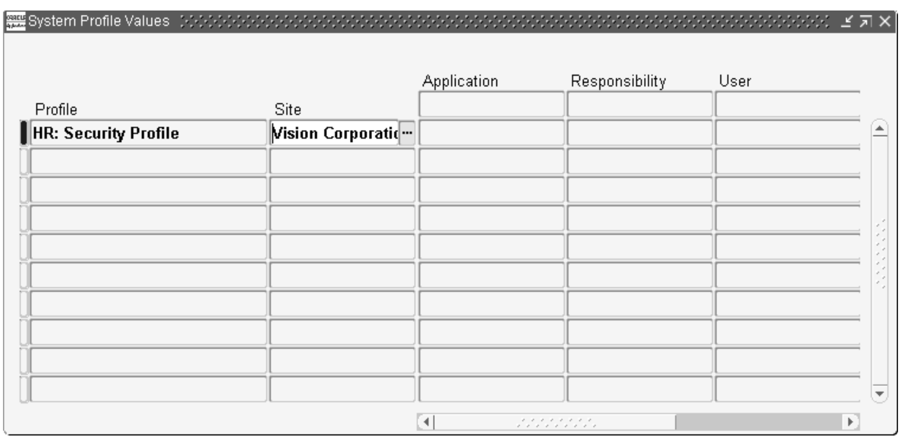
- When you finish entering your responsibility definition, your form should look similar to the following:



4. Save your work.
5. Return to the Responsibility navigator.
6. Select Profile, then System.



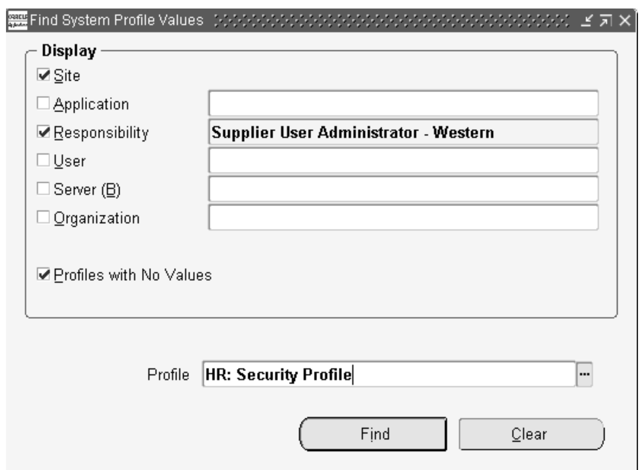
7. On the Find System Profile Values form, enter **HR: Security Profile** (or just **HR: Sec%**) in the Profile search field. Click Find.



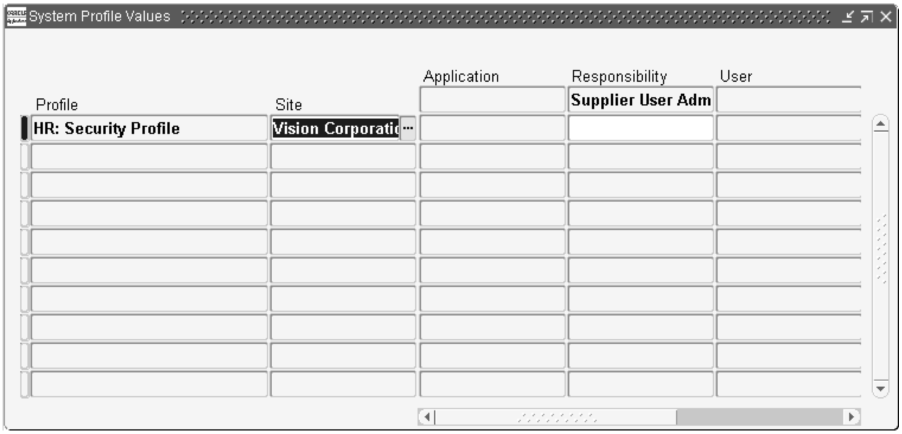
8. The System Profile Values display shows the default site value for **HR:Security Profile**. If there is no value, search for and select a Security Profile for the site default.

> **Warning:** If you do not set a default site level for **HR: Security Profile** and a user is given a responsibility that is not associated with a security profile, the user has administrative access to all operating units in the company.

9. To assign a security profile to a particular responsibility return to the Find System Profile Values form. Leave **HR: Security Profile** in the Profile search field.



10. Check the Responsibility checkbox. In the Responsibility search field query up the responsibility to which you want to assign a security profile. Click Find.



11. When the System Profile Values form redisplays, there will be an unprotected field at the intersection of the Profile row and the Responsibility column. Click in that field and search the resulting display for the security code (this is the name of the supplier management group) you wish to assign to the responsibility.

12. When you have assigned the correct security code to this responsibility, save your work.

See the *Oracle Applications System Administration Guide* for instructions on setting system profile options.

Step 4: Assign Customized Responsibilities to Users (Required)

Once you have created the required responsibilities and assigned them their appropriate security profiles, you must assign the appropriate responsibilities to your buyer administrators. A buyer administrator may be assigned multiple responsibilities (and can therefore administer multiple supplier management groups) and multiple administrators can share the same responsibility (and therefore manage the same supplier management group).

See the *Oracle Applications System Administration Guide* for instructions on assigning responsibilities to user.

Implementing Prospective Vendor Registration (Optional)

The Prospective Vendor Registration feature allows a buying organization to establish links from its own website(s) to a registration page where suppliers can register their primary company details. The Prospective Vendor Registration feature provides the flexibility to allow multiple business groups within the buying organization to accept and process separate registration requests.

Table 3–4 Prospective Vendor Registration Flow

Buyer Action	Supplier Action	Comments
	1. Supplier user navigates through the buying organization's website to the page containing the registration links	
	2. Supplier user clicks registration link on buyer's web site.	Registration link contains encrypted ID and associates the user with a particular operating unit.
	3. Supplier fills out and submits registration page.	E-mail notification is sent requesting registration approval. The request is viewableby the buyer administrator in the system in pending status. Any buyer administrator whose supplier management group includes the operating unit ID encrypted in the link to the registration page used by the supplier receives a notification of the request. There is no hierarchy of approvers.

Table 3–4 Prospective Vendor Registration Flow

Buyer Action	Supplier Action	Comments
4. Buyer Administrator whose supplier management group includes the operating unit approves or rejects the supplier registration request.		E-mail notification is sent to supplier user who submitted the supplier registration request with request status. If approved, prospective supplier is created, and a user account is set up for user who registered the company. User is assigned external user default responsibility.

The registration process automatically:

- Uses the address name provided in the registration request information to create a supplier site.
- Uses the address details to create the site details.
- Validates the information supplied against existing supplier information to prevent duplication of information. If duplicate information is found, a rejection notification is sent to the user who submitted the registration request.
- Creates a user account for the person submitting the registration request. An approval notification including a temporary password is sent to the supplier user who submitted the registration request. The user uses the temporary password to initially access the system and is prompted to create a new password during the first sign on.
- Uses the customized registration link to associate the supplier company with one of the buyer's operating units (and by extension with each supplier management group that includes that operating unit).

To implement the Self-Service Registration feature you must:

1. Install the FPI TCA and HR Patchsets
2. Create Striped Registration Page Links

Step 1: Install FPI Patchset (Required)

To implement the Prospective Vendor Registration feature, you must first apply the TCA and HR patches for FPI.

Step 2: Create Striped Registration Page Links (Required)

The buying organization may want to associate its registered suppliers with different organizations within the company, thus ensuring that the supplier's details are propagated only to a distinct subset of operating units. Typically this occurs because different parts of the business attract different types of suppliers (for example, metal processing for the manufacturing division versus contract services for the consulting division). Such divisions are achieved by creating multiple registration page links from the buying organization's website. Each link contains an encrypted reference to a single operating unit that can be used to uniquely identify the supplier management group that needs to be notified about the registration request. When a buyer administrator for that group approves the request, the supplier's details are updated into all the operating units within that buyer administrator's supplier management group.

To implement the Prospective Supplier Registration feature, you must create at least one link from the buyer's website the registration page. These links should be striped according to operating unit IDs as described below. When a supplier user clicks a particular registration link on the buying organization's web site and completes the registration page, the supplier company is automatically associated with the operating unit that corresponded to that registration link

To create registration page links striped by operating unit:

1. Use PL/SQL or some other SQL tool to execute the following query against the system for each operating unit.

```
SELECT organization_id
FROM hr_operating_units
WHERE name  = <operating unit name>
```

2. Make notes of the IDs retrieved.

3. Run the following script:
$APPL_TOP/pos/11.5.0/patch/115/sql/get_org_hash.sql
When prompted, enter one of the organization IDs you obtained in the prior step.

4. The encryption string for that operating unit ID will be displayed or an error message is displayed if the operating unit ID is not valid. Note the encrypted ID.

5. Continue generating and noting encrypted IDs for the remaining operating unit IDs.

6. Create customized hyperlinks from the home page to the registration page. There should be one hyperlink for each encrypted operating unit ID. The hyperlink format is:

   <A HREF=
   "http or https://host:port/OA_
   HTML/jsp/pos/suppreg/SupplierRegister.jsp?**ouid=<encrypted operating unit ID>">***registration link text***</A>**

Implementing Supplier Profile Management (Optional)

By using Supplier Profile Management, buying organizations can allow suppliers to enter and maintain information on their company. This enables the supplier to be responsible for adding new information and ensuring that existing information is up to date. Through profile management, suppliers can provide the buying organization with key details about their company such as site and contact information, major business classifications, and category information about the goods and services they provide. Allowing suppliers to enter and update this information eases the administrative burden of maintaining the business relationship information for both the buyer and supplier companies. Supplier profiles consist of:

- Supplier Summary Information
- Supplier Address Book
- Supplier Contact Directory
- Business Classification/Certification Information
- Product and Services Listing

As suppliers enter new information or change existing information, buyer administrators are notified of the changes and the status of the profile information is updated. They can review the details and then use that information to update the purchasing system information. When using details of the supplier's profile to update the purchasing system, updates are only applied to the operating units in the supplier management group administered by the buyer administrator. Supplier address details are used to create/update site records in the purchasing system. Contact Directory entries are used to create/update site contact records.

The update process creates links between the supplier's profile and the details stored in particular operating units in the purchasing system. These links are used to ensure that when a change is made to an address/contact in the supplier's profile, the system knows which records to update when the buyer administrator promotes the changes to the purchasing system. If the supplier's details are used in multiple operating units that are covered by multiple supplier management groups, any updates by buyer administrators only use the subset of links applicable to their supplier management group.

Establishing these links is particularly important for existing suppliers who have details in different operating units in the purchasing system but do not yet have a supplier profile. Tools are provided that allow buyer administrators to use the details from the purchasing system to create and link to the appropriate Address Book and Contact Directories entries. This ensures that when existing suppliers subsequently change any of their profile details, the relevant records in the purchasing system can be updated based on the links previously established. If instead, the existing suppliers are allowed to create their own Address Book and Contact Directory, these will not be linked to any corresponding records in the purchasing system, and buyer administrators will need to create the links manually.

To implement the Supplier Profile Maintenance feature, you must:

1. Install FPI Patchset (Required)
2. Define Business Classifications List of Values (Optional)
3. Set Up Products and Services Menu (Optional)
4. Create Address Books for Existing Suppliers (Required)
5. Create Contact Directory for Existing Suppliers (Required)
6. Assign Supplier Profile Management Responsibility to Appropriate Supplier Users (Required)

Steps 1-3 are only performed once. Steps 4-6 are performed once for each existing supplier.

Step 1: Install FPI Patchset (Required)

To implement the Supplier Profile Maintenance feature you must first install the TCA and HR patches for patchset FPI. Note that if you previously implemented the

Supplier Self-Service Registration feature, you have already installed these patches and do not need to install them again.

Step 2: Define Business Classifications List of Values (Required)

You can define a list of business classifications that you would like new and existing suppliers to use to classify themselves. For example, you may have legal requirements to which you must adhere to differentiate between types of suppliers, or that a particular supplier must be certified. Business types and certification statuses can then be tracked in the Supplier Profile.

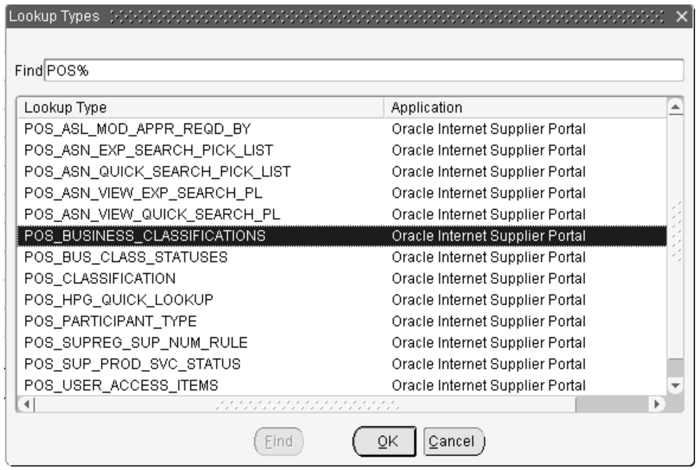
The system comes preseeded with the following values:

- Minority-Owned
- Woman-Owned
- Small Business
- Hubzone
- Veteran Owned
- Service Disabled Veteran Owned

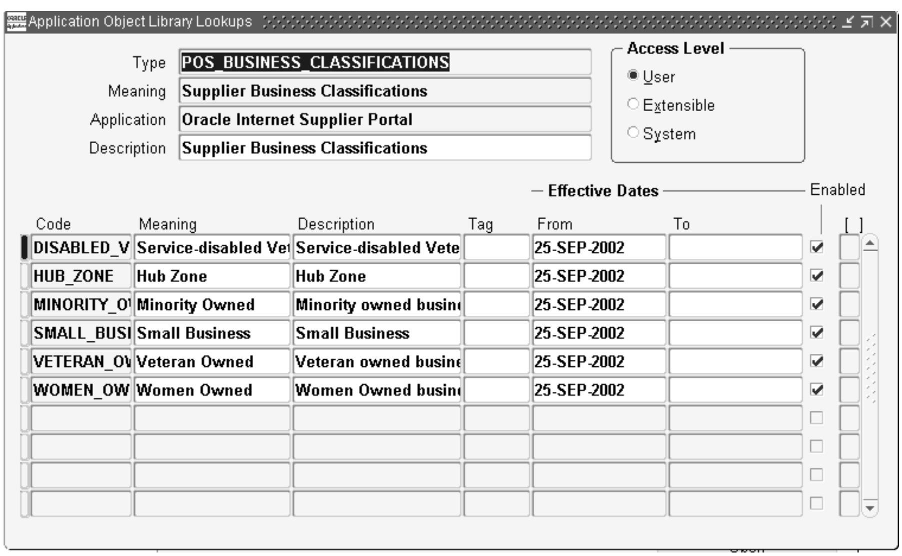
The Minority-Owned, Woman-Owned, and Small Business values cannot be updated or deleted, but you can remove or update the other values, and you can add additional values as needed.

To define the classifications available to your suppliers:

1. Access the Application Developer responsibility.
2. Select Application, then Lookups.
3. Select Application Object Library.
4. Search the Type field for POS_BUSINESS_CLASSIFICATIONS.



5. Click OK to display the existing business classifications.



6. Edit the list to include your new classifications. Deselect the Enabled checkbox to remove any existing classifications. Add a new row to the table to include any new classification.
7. Save your work.

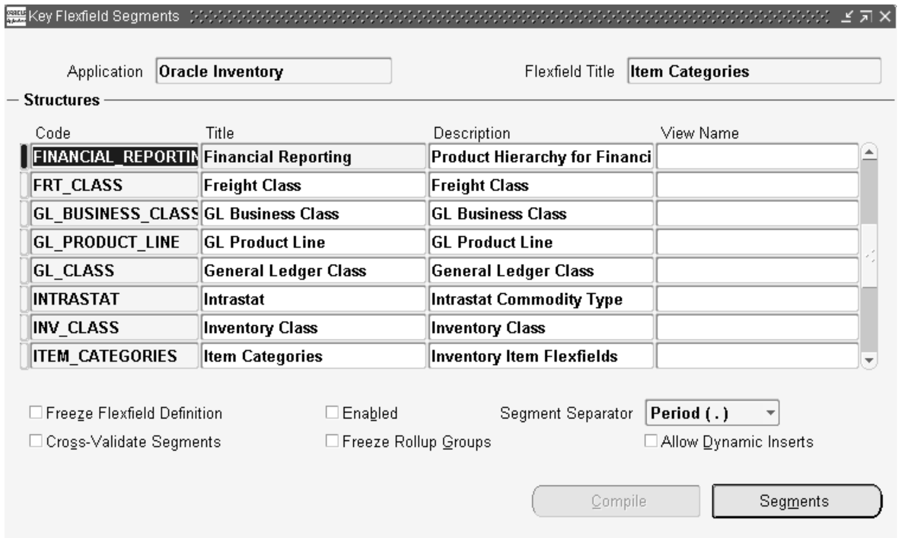
Step 3: Set Up the Products and Services Classifications (Required)

You can use the values available from the Item Categories flexfield to set up a hierarchy of products and service categories by which you would like your suppliers to classify themselves. This gives the buying organization the opportunity to gather much more detailed information than can be determined only from the supplier's SIC code or similar information. Once you have identified the appropriate categories, suppliers can classify themselves in their profiles.

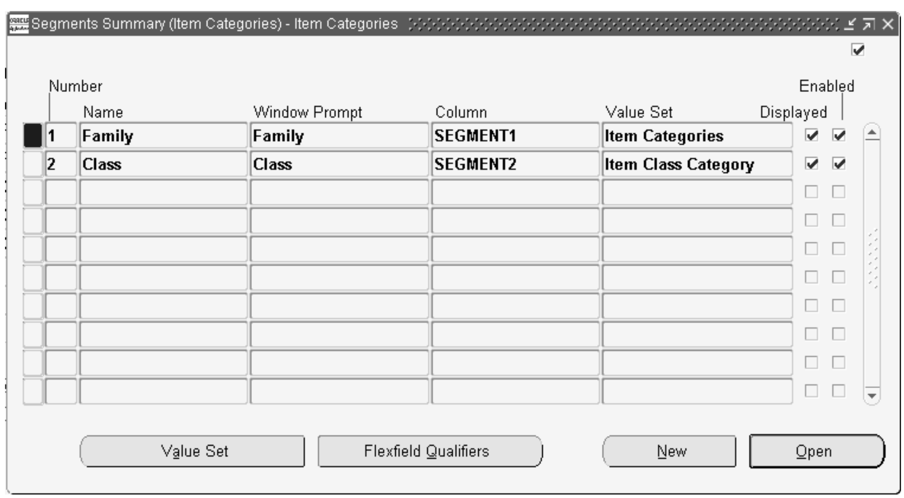
You define the POS:Product and Service Segment Definition system profile option to identify which Item Categories flexfield segments have the values you want to use.

To view the segments of the Item Categories flexfield:

1. Access the System Administrator responsibility.
2. Select Application, then Flexfield, then Key.
3. On the Key Flexfield Segment form, you can query up the flexfield definition by searching the Application field for Oracle Inventory and then selecting Item Categories.
4. On the Key Flexfield Segments form, scroll until you see the Item Categories structure.



5. Highlight the structure and click Segments.



6. On the Segments Summary form, the table displays the segments that comprise this flexfield structure. Note the segments whose values you want to display to your suppliers.

To define the POS:Product and Service Segment Definition profile option:

1. Access the System Administration responsibility.
2. Select Profile, then System
3. On the Find System Profile Values form, enter POS: Product and Service Segment Definition in the search field and click Find.
4. On the System Profile Values form, enter the segments whose values you wish to use when making up your menu display. Enter segment numbers s in descending order, separated by a periods.

> **Note:** The POS: Product and Service Segment Definition option can only reference segments with a validation type of Independent, Dependent, Translatable Independent, Translatable Dependent, and/or Table. Segments with any other validation type cannot be used. Also, segments with a validation type of Table cannot have blank variables in any of the table columns or the WHERE/ORDER BY fields.
>
> If you wish to use segments whose validation types don't follow the rules above, you must either change the validation type, or define a new segment with a proper validation type.

To filter out unnecessary product/service values:

Not all the category values in the Item Categories flexfield may be appropriate for selection by your suppliers. You can filter category values so they are not visible to suppliers and thus cannot be selected for categorization.

1. Access the Purchasing Super User or the Purchasing Manager associated with the operating unit you wish to update.
2. Select Setup, then Items, then Categories, then Default Category Sets.
3. Find and note the category set used for the Purchasing Functional Area.
4. Close this form and select Category Sets.
5. Find the Operating Unit for which you wish to filter the item display. (Note the search field searches on Operating Unit code not name.)
6. On the Category Sets form, search for the category set identified above.
7. Note the Flex Structure value.
8. Close the form and select Category Codes.

9. On the Find Structures form, enter the flex structure name identified above. Click Find.
10. On the Categories form, deselect the "Viewable by Supplier" checkbox for any categories you wish to hide from your suppliers.
11. Save your work.

Step 4: Create Address Books for Existing Suppliers (Required)

For each supplier's profile, there is one Address Book. This book contains the address names and address details for all that supplier's locations.

If the supplier already exists in your purchasing system, it will already have site name/site detail information in particular operating units. When you implement the supplier profile feature, you use this existing supplier information to create entries in the supplier's Address Book. You should create Address Book entries using existing information before you allow existing supplier users access to their profiles. This way, you can ensure that the links between the existing supplier site information and the new supplier profile are created correctly. Creating links between existing site records and the supplier Address Book ensures that future updates to addresses will be processed correctly, and the appropriate site information in the purchasing system will be updated when new information is added or existing information is changed in the supplier profile. If you allow suppliers to create entries in their Address Book before you have created the links between the Address Book and the existing site information, you (or a buyer administrator) will have to manually link any new address information to the existing site information.

Creating Address Book Entries Using Existing Site Record Information

Your existing suppliers will most likely have sites divided among several of your buying organization's operating units, and there may be discrepancies between the data stored in the different operating units. When you create the supplier's Address Book, you want to consolidate as much of this location information as possible. The Supplier Profile Management feature provides tools that simplify the creation of Address Book entries using existing site information. These tools allow you to select common site records in multiple operating units and use their details to create a single address record. You can also identify potentially conflicting or inconsistent site information across operating units and modify the information as needed to allow for the creation of a correct address.

For example, there may be site records in different operating units that share a common name but have inconsistent details, or sites that have the same details but different names. Once you have begun using site records to create address entries, you may have sites that can no longer be used because they would conflict with the newly created address names or details.

Rules for Handling Site and Address Inconsistencies

When creating addresses, buyer administrators can only view and use existing details for sites in the operating units defined to their supplier management group. They can review site information and then select multiple site records to use to create address entries. Inconsistencies or conflicts in the site records they have selected will result in error or warning messages to the buyer administrator.

For example, assume your buying organization has two operating units, each having a site called HQ with one having a site detail of 507 5th Ave., New York, and the other having a site detail of 567 Market St., San Francisco. You can select both sites and try to create addresses, but a warning will be generated since the system will not be able to determine which is the "correct" HQ combination to use. In this case, you will need to choose which site to use to proceed with the creation of the address.

When the system detects conflicting site name/details information between sites you have selected for address creation, you receive a message and can choose from the following options:

- If you have selected sites that have duplicate site names but different site details, you receive an error message and should do one of the following:
  - Deselect one of the conflicting entries and continue generating addresses.
  - Cancel and modify the site details of one of the entries to mirror the details of the other before attempting to create addresses again. This modification must be made in the purchasing system.
- If there are duplicate site details but different site names, you receive a warning message asking you whether you wish to create separate addresses that share the same details. In this case you should:
  - Deselect one of the conflicting entries and continue generating the addresses.
  - Cancel and modify the site details of one of the entries to mirror the details of the other. This modification must be made in the purchasing system.

- Continue with both site/address combinations to create multiple address entries.

Address Book Creation Example

The following example shows how existing supplier site information can be used by buyer administrators to create the supplier's Address Book.

Assume that a supplier exists in your purchasing system with six site records. These sites are divided up among the four operating units as shown in the table below. Also, assume that there are two supplier management groups (Group 1 and Group 2) that each contain two of the operating units.

Table 3–5 Example Site Information for Existing Supplier

Management Group	Operating Unit	Site Name	Site Details
Management Group 1	Vision Europe	HQ	4558 High St., London
Management Group 1	Vision Europe	South	674 Via DeVinci, Milan
Management Group 1	Vision France	HQ	324 Rue de la Paix, Paris
Management Group 2	Vision Consulting	HQ	4558 High St., London
Management Group 2	Vision Consulting	Central	4558 High St., London
Management Group 2	Vision Consulting	Southeast	345 Via Verdi, Rome
Management Group 2	Vision Services	Central	324 Rue de la Paix, Paris
Management Group 2	Vision Services	North	455 Sveagatan, Stockholm
Management Group 2	Vision Services	South	345 Via Verdi, Rome
Management Group 2	Vision Services	HQ	567 Banhofstrasse, Zurich
Management Group 2	Vision Services	East	345 Via Verdi, Rome

When the buyer administrator for management group one accesses the Create Address from Site Details page, the addresses shown in the table below are listed as available for address creation. At this point, no addresses actually exist in the Address Book, so all the site entries (site name/site details combinations) defined for his operating units are available for address creation.

Step 1: Buyer Administrator for Group One Creates Address Book Entries

Table 3–6 Creation Step 1: Buyer Administrator (Group 1) Creates Address Book Entries: Before

Address Book Entries	Addresses Available	Addresses Not Available
	HQ - 4558 High St., London	
	South - 674 Via DeVinci, Milan	
	HQ - 324 Rue de la Paix, Paris	

The buyer administrator knows that the London site represents the supplier's HQ and that the Paris site needs to be renamed to something more appropriate, so he selects only the London and the Milan sites for address creation. The addresses for London and Milan are created in the address book, and the Paris HQ site becomes unavailable for address creation (since its site details now conflict with those for an existing HQ address).

At this point, the buyer administrator for supplier management group one has created all the addresses possible.

Table 3–7 Creation Step 1: Buyer Administrator (Group 1) Creates Address Book Entries: After

Address Book Entries	Addresses Available	Addresses Not Available
HQ - 4558 High St. London		HQ - 324 Rue de la Paix, Paris
South - 674 Via DeVinci, Milan		

Step 2: Buyer Administrator for Group Two Creates Address Book Entries

Now the buyer administrator for management group two starts creating entries for the address book.

When she initially accesses the Create Addresses from Site Details page, she sees six sites available for address creation out of the eight possible sites defined in the operating units which she administers. Two of the possible sites (HQ and South) are already unavailable since their site names conflict with the two existing addresses previously created by the buyer administrator for management group one.

She also notices that the site entry, HQ/4558 High St., London shows up as available for address creation. This is because its name and details exactly match the

HQ address record previously created by the administrator for supplier management group one. If it is selected for address creation, it is simply linked to the existing address.

Table 3–8 Creation Step 2: Buyer Administrator (Group 2) Creates Address Book Entries: Before

Address Book Entries	Addresses Available	Addresses Not Available
HQ - 4558 High St. London	HQ - 4558 High St., London	South - 345 Via Verdi, Rome
South - 674 Via DeVinci, Milan	Central - 4558 High St., London	HQ - 567 Banhofstrasse, Zurich
	Central - 324 Rue de la Paix, Paris	
	North - 455 Sveagatan, Stockholm	
	Southeast - 345 Via Verdi, Rome	
	East - 345 Via Verdi, Rome	

If the buyer administrator for supplier management group two selects all the available sites shown in the table above and tries to create addresses, the system will return an error message because two of the entries share the same site name (Central) but different details. (Note this error always precedes the similar warning message that is raised if a site selected for address creation shares the same details as an existing address but has a different name - the Central site in the Vision Consulting operating unit shares the same details as the new HQ address).

The buyer administrator can choose to modify the details for one site to make it match the other or deselect one of the conflicting sites. In this example, she , selects the Central/324 Rue de la Paix, Paris site to be known as Central.

She also receives the similar warning message that two of the site entries have the same site details but different names. This is only a warning. Two addresses can have the same address details as long as they have differing names. In our example, the buyer administrator deselects the Southeast site entry and continues creating addresses.

Once the buyer administrator for group two has resolved all the conflicting site information, the final address book for the supplier contains the addresses shown below.

Table 3–9 Creation Step 2: Buyer Administrator (Group 2) Creates Address Book Entries: After

Address Book Entries	Addresses Available	Addresses Not Available
HQ - 4558 High St. London		HQ - 324 Rue de la Paix, Paris
South - 674 Via DeVinci, Milan		Central - 4558 High St., London
Central - 324 Rue de la Paix, Paris		Southeast - 345 Via Verdi, Rome
North - 455 Sveagatan, Stockholm		
East - 345 Via Verdi, Rome		

Managing Site Details

Once you have created all the addresses, there may be additional sites that for some reason have become unavailable for address creation. As discussed in the example above, there were several site that could not be used to create an address because they conflicted with existing addresses. For these sites, one of the options is to modify the site in the purchasing system.

Supplier sites that are unavailable must be modified in the purchasing system. To determine which sites conflict with an existing address

1. Access the address book and click the Manage Site Details icon for the existing address.
2. On the **Manage Site Details** page, select the radio button "Supplier sites similar to the Address that cannot be linked," and click Go.
3. The **Site Details** page for that supplier address shows any sites which share similarities with address details. It also shows the operating unit containing the site.
4. Use this information to access the purchasing system and modify the site to remove the conflict.

To Create Site Addresses Using Existing Supplier Information

1. Access the Supplier Profile Administrator responsibility.
2. On the **Supplier Profile Management** page, search for the supplier whose site information you wish to use to create entries in the Address Directory.
3. When the search results display, select the supplier and click the View Details icon.
4. On the **Supplier Details** page, click Address Book.

5. On the **Address Book** page, click Create from Sites.
6. The **Create Address from Site Details** page, by default, displays all sites within the operating units you administer that are available for address creation. If necessary, you can enter values in the Site Name and/or Operating Unit and requery to reduce the number of search results.

   To see any site entries unavailable to you (because the site name conflicts with existing address names), click the View radio button to "Sites not available to create an Address."
7. Select the site(s) for which you wish to create an address, and click Create Address. If there are conflicts between the addresses you are trying to create, you must correct them as discussed in the section above.
8. The **Confirmation** page notifies you the address was created successfully.

Additional Methods of Creating Addresses

When a new supplier registers with the system, an address is automatically created in the Address Book using the address name provided by the supplier during registration. Also, supplier profile administrators (on the buying side) and supplier profile managers (on the supplier side) can create new addresses at any time. These addresses can be updated by the supplier and managed by the buyer. The buyer can incorporate the new supplier address information into the purchasing system by navigating to the **Address Book** page, selecting the address, and clicking Update to Sites.

Step 5: Create the Contact Directory for Existing Suppliers (Required)

Each supplier's profile also contains a Contact Directory. This directory contains the names and communication details for all of the contacts at the supplier that are appropriate for conducting business with the buying organization.

If the supplier already exists in your purchasing system, it will already have contact details in one or more of your operating units. When you create the supplier profile, you must use this existing site contact information to create the entries in the supplier's Contact Directory. These should be created before you allow existing supplier profile managers access to their profiles. This ensures that the links between the existing supplier site contact information and the new supplier profile are created correctly. Creating links between existing site contact records and the supplier contact directory ensures that future updates to contacts will be processed correctly and the appropriate site contact information in the purchasing system will be updated when new information is added or existing information is changes in the supplier profile. If you allow suppliers to create entries in their contact directory before you create the links between the contacts and the existing site contact information, you will have to manually link any new contact information to the existing site contact records.

Creating Contact Directory Entries Using Existing Site Contact Record Information

As with addressees, existing suppliers will most likely have site contacts defined for multiple sites across several of your buying organization's operating units, and there may be discrepancies between the data stored in the different sites and/or operating units. When you create the supplier's Contact Directory, you want to consolidate as much of this contact information as possible.

The process for using site contact details to create Contact Directory entries is simpler than that for creating addresses from sites since the system only checks for exact matches between site contact records (using both name and phone number) before creating or linking to a Contact Directory entry. There is no check for similar site contact records. However, since site contacts are defined for specific sites, the address entry for that site must exist before the contact can be used to create an entry in the Contact Directory.

Creating the Contact Directory using Existing Information

You can use existing site contact information to create a Contact Directory for the supplier.

1. Access the Supplier Profile Administrator responsibility.
2. On the **Supplier Profile Management** page, search for the supplier whose site information you wish to use to create entries in the Contact Directory.
3. When the search results display, select the supplier and click the View Details icon.
4. On the **Supplier Details** page, click Contact Directory.
5. On the **Contact Directory** page, click "Create from Site Contacts."
6. On the **Create Contact Directory Entries from Site Contacts** page, select the contacts you wish to create and click Create Contact Directory Entry.

Associating Additional Addresses with a Site Contact

When you use the existing supplier information to create entries in your Contact Directory, an entry is created for each site/contact combination you select. However, in addition to the contact/address combination created by the system, you may wish to associate a particular contact with additional addresses in the supplier's Address Book.

To associate a contact with an additional address:

1. Access the **Contact Directory** page to display all the contacts you have defined for this supplier.
2. Click the Manage Address Details icon, to display the **Manage Address Details** page for that contact.
3. Select the "Addresses available to be linked to the contact" radio button, and click Go. The **Manage Address Details** page redisplays with any additional supplier addresses to which the contact can be linked.
4. Select the address(es) and click Add Link to Contact. This creates an new link between the contact and the address.

Creating Additional Contacts

After the system has been implemented, suppliers can create new contacts and associate them with addresses. Buyer administrators can choose to accept these new contacts and, additionally, choose to incorporate the new information back into their core system by selecting the new entries and clicking the Update to Site Contacts button.

Managing Site Contacts

Similarly to the **Manage Site Details** page, you can use the **Manage Site Contacts** page to administer the links between an entry in the Contact Directory and its associated site contact record.

You can remove the link between the Contact Directory entry and its associated site contact record, and/or you can associate additional site contact records with the selected Contact Directory entry.

Step 6: Assign Supplier Profile Management Responsibility to Appropriate Supplier Users. (Required)

Once you have the supplier profile successfully implemented, you should assign the appropriate supplier users the Supplier Profile Management responsibility. This enables them to access and update their supplier profiles.

See the *Oracle Applications System Administration Guide* for instructions on assigning responsibilities.

Any update performed by a Supplier Profile Manager triggers a notification to the Supplier Profile Administrator(s). The administrators can access the profile, accept the changed details, and, if applicable, promote the addition/change back into the procurement system.

4

Implementing Supplier User Management

Overview of the Supplier User Management

Supplier User Registration

Before supplier users can access any of the collaboration network applications, they each need to be provided with a user account. Typically, user account creation is a function performed by system administrators, but the Supplier User Management feature allows designated users within the buying organization to create and manage 'external' user accounts. These buyers can register new supplier user accounts and update user details to alter the supplier user's profile and access rights. Supplier User Management allows the buying teams to respond directly to the suppliers they are dealing with on a daily basis rather than having to process account requests through their IT department. Supplier User Management can only be used to create and manage external accounts; it cannot be used to access and manage 'internal' employee accounts.

The registration process within Supplier User Management is now the only way in which supplier user accounts can be created - it ensures that the supplier user's account is designated as 'external' and is directly linked to the supplier with whom the user is associated. Supplier users can no longer be created using the User form in the regular eBusiness Suite

Supplier user accounts can only be created for suppliers that are already defined to the purchasing system

The supplier user registration process is designed to be simple, flexible, and to give buyers control over the registration process. There are three ways buyers can register supplier users:

- A Supplier User Administrator can invite the supplier user to register. The supplier user uses the URL included in the invitation notification to access the registration page and complete the registration form. The Supplier User Administrator who initially sent the registration invitation receives a notification that the supplier user has completed the registration form. The Supplier User Administrator then either approve or reject the registration request. If approved, the supplier user can start accessing the collaboration network applications.

- If Sourcing Buyers know the supplier users' e-mail addresses, they can invite them while creating negotiations. When a negotiation is published, the invited supplier users are sent notifications containing a URL with details about the negotiation and a URL pointing to the registration page. Once the supplier users have completed and submitted the registration request, the Sourcing Buyer receives a notification. The Sourcing Buyer can then approve or reject the registration requests.
- If Supplier User Administrators know all the required information, they can register supplier users directly. A notification is sent to the new supplier user containing the URL for the buying company's home page, the supplier user's signing and system generated password (the user will be prompted to change the password upon first access).

Once their registration requests are approved by the buying organization, supplier users have access to whichever applications the buying organization has granted them access.

Table 4–1 Supplier User Registration Flow

Buyer Actions	Supplier User Actions	Comments
1. Supplier User Administrator sends registration invitation to supplier user, or Sourcing Buyer sends registration invitation to supplier user, or Sourcing Buyer invites supplier user to register during sourcing event, or Supplier User Administrator fully registers supplier user.		E-mail notification is sent to supplier user containing the URL for the registration page, an initial userid and system generated password. or E-mail notification is sent containing the URL for the registration page as well as details on the sourcing event. If Supplier User Administrator registers (as opposed to merely inviting) supplier user, no further action is required.
	2. Supplier user accesses the URL included in the notification, completes the registration page, and then submits the registration request.	E-mail notification is sent to Supplier User Administrator or Sourcing Buyer indicating the registration request needs approving.
3. Supplier User Administrator or Sourcing Buyer approves or rejects the registration request.		Notification is sent to supplier user indicating registration status.
	4. If approved, supplier user begins accessing collaboration network applications.	

Supplier User Profiles

When supplier users register with the system, they provide information to create their own profiles. Buyers having the Supplier User Administrator responsibility can both update supplier user profiles and make changes to the users' access rights. This includes both the responsibilities the supplier users can access and any securing attributes associated with those responsibilities.

Implementing Supplier User Management

To implement supplier user registration:

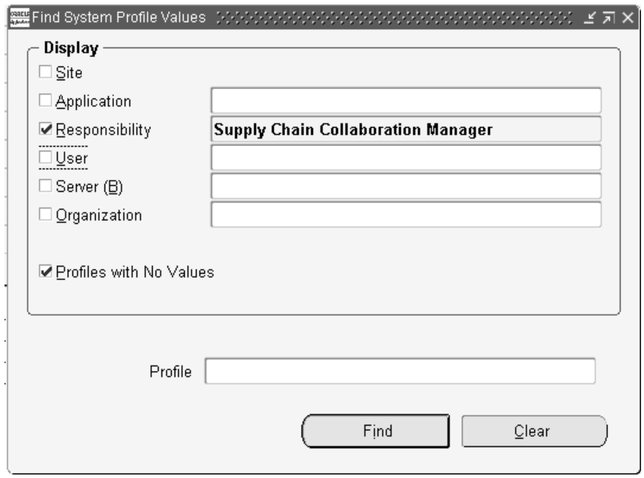
1. Flag External Responsibilities (Required)
2. Set Default Application Responsibilities (Required)
3. Set Up Web Server URLs (Required)
4. Create Customized Responsibilities for Supplier User Administrators (Optional)
5. Assign Responsibilities to Buyer Administrators of Supplier Users (Required)

Step 1: Flag External Responsibilities (Required)

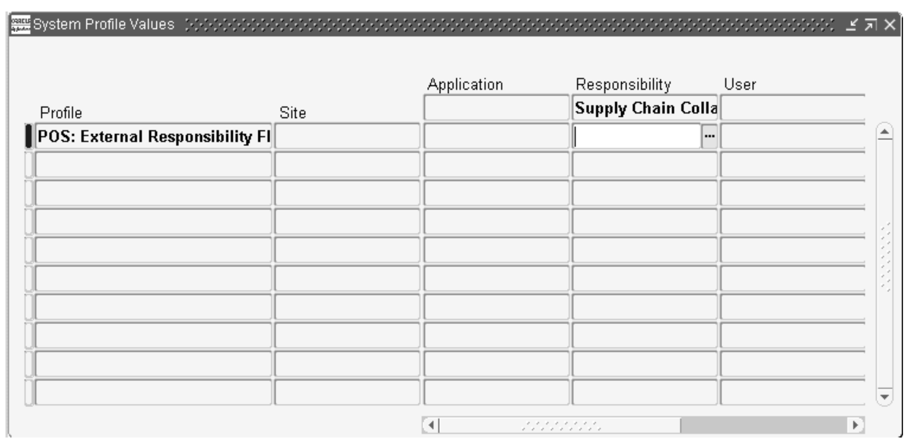
When you create your supplier user accounts, you must select the responsibilities to which that user is granted access. For a responsibility to be available for granting through Supplier User Management, it must be flagged as an external responsibility. External Responsibilities are listed on the Approve/Reject Supplier User page. From this list, the buyer administrator selects the applications to grant to the new supplier user.

To flag external responsibilities:

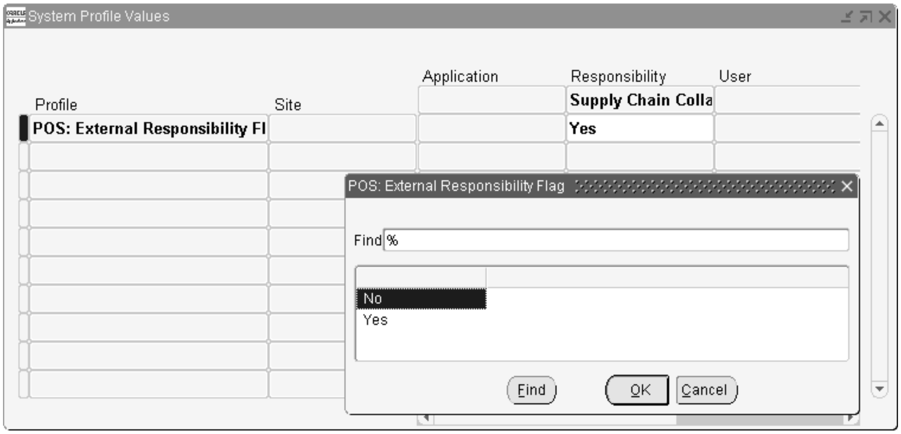
1. Access the System Administrator responsibility.
2. Select Profile, then System.
3. On the Find System Profile Values form, deselect the Site checkbox, select the Responsibility checkbox, and enter the name of the responsibility you wish to flag as external (clicking the ellipses at the end of the field places you in a search window where you can search for the responsibility name). The following example shows the Supply Chain Collaboration Manager responsibility.



4. In the Profile field, enter **POS: External Responsibility Flag.** Click Find.



5. When the System Profile Values form redisplays, you see an open field at the intersection of the row for the profile option **POS: External Responsibility Flag** and the column for the responsibility you chose.



6. Click in this field and set the option either to Yes, to flag this responsibility to be externally grantable, or No to keep this responsibility internal only.

7. Save your work.

8. Continue flagging any additional responsibilities by querying up the responsibility definition and setting the **POS:External Responsibility Flag** to Yes.

   See *Oracle Applications System Administration Guide* for instructions on setting system profile options.

Step 2: Set Default Application Responsibilities (Required)

To simplify the registration process, you can set a default responsibility for each collaboration suite application. Then when Sourcing Buyers or Supplier User Administrators invite supplier users to register, they can pre-select the applications to be granted to each user.

At approval time (once the supplier user has completed and submitted the registration request) the default responsibilities associated with the applications that were previously selected appear on the approval page. The approver can accept these default responsibility selections or modify them as needed. The defaults can be deselected and/or additional external responsibilities can be granted. Note that default responsibilities must be flagged as external responsibilities using the instructions in the previous step.

To define default responsibilities:

1. Access the System Administrator responsibility.
2. Select Profile, then System.
3. On the Find System Profile Values form, enter one of the following in the Profile search field:
   - Sourcing Default Responsibility.
   - iSP Default Responsibility for External User.
   - Collaborative Planning Responsibility.
4. For each profile, define a default responsibility. Typical defaults include:
   - **Sourcing Supplier** for Sourcing Default Responsibility.
   - **Supplier Portal Full Access** for iSP Default Responsibility for External User.
   - **Supply Chain Collaboration Planner** for Collaborative Planning Responsibility.

See *Oracle Applications System Administration Guide* for instructions on setting system profile options.

Step 3: Set the Web Server URLs (Required)

To ensure that supplier users can register, log into the system, and receive notifications, you must set up the necessary server URL addresses.

1. Access the System Administrator responsibility.
2. Select Profile, then System.
3. On the Find System Profile Values form, enter POS% in the Profile field, and click Find.
4. The System Profile Values form shows all profiles beginning with POS.
   - Set the **POS: External URL** to http or https://<external web server machine>:<port>/oa_servlets
   - Set the **POS: Internal URL** to http or https://<internal web server machine>:<port>/oa_servlets

5. Return to the Find System Profile Values form. Deselect the Site checkbox and select the Responsibility checkbox.
6. Enter **POS: Supplier Guest Value** in the Responsibility search field.
7. Enter **Application Framework Agent** in the Profile field.
8. Click Find.
9. When the System Profile Values form redisplays, set the POS: Supplier Guest User responsibility level to the external web server value: http or https://<external web server machine>:<web port>

See *Oracle Applications System Administrator's Guide* for instructions on setting system profile options.

Step 4: Assign Supplier User Administrator Responsibility (Required)

All buyers who will be in charge of managing supplier users must be assigned the Supplier User Administration responsibility. Your purchasing organization can identify the users who are involved with your company's supply base management.

See *Oracle Applications System Administrator's Guide* for instructions on assigning responsibilities.

5

Maintaining and Administering Oracle Sourcing

Your Oracle Sourcing system requires maintainence to account for changing business information. This chapter identifies areas of maintenance such as This are not an exhaustive list of ongoing activities you should perform, and your company may have its own list that better suits your business practices. This chapter simply gives you an idea of typical ongoing activities.

Registration

At regular intervals, you may want to invite new supplier users to register. As new supplier users register with the system, you must approve their registration requests before they can participate in your negotiations.

See instructions in Chapter 4, "Implementing Supplier User Management" for details on implementing supplier registration. See the online help for instructions on registering and approving supplier users.

Administration

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

- Merging suppliers
- Deactivating a supplier contact
- Deactivating a supplier site
- Putting a supplier’s purchase order on hold
- Canceling or deleting a negotiation

- Creating and managing sourcing events
- Unlocking a draft negotiation

Performing a Supplier Merge

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

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

Invitees

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

Quotes and Bids

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

Templates and Reusable Lists

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

Invitations, Pending Registrations and Supplier Users

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

Deactivating a Supplier Contact

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

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

Deactivating a Supplier Site

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

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

Putting a Supplier Purchase Order on Hold

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

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

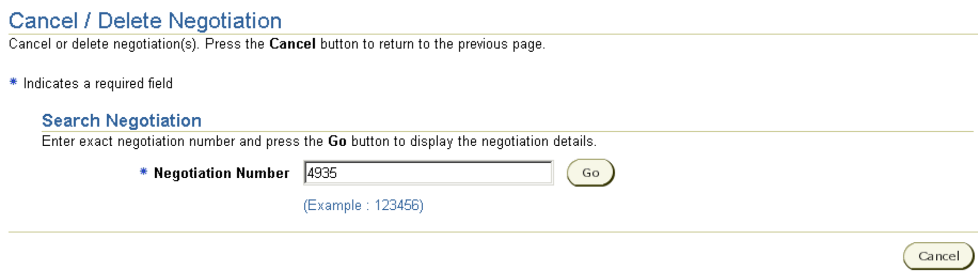
Canceling or Deleting a Negotiation

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

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

To cancel a negotiation in progress:

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



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

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

To delete a negotiation:

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

Using Sourcing Events

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

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

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

Sourcing events can be in one of three statuses:

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

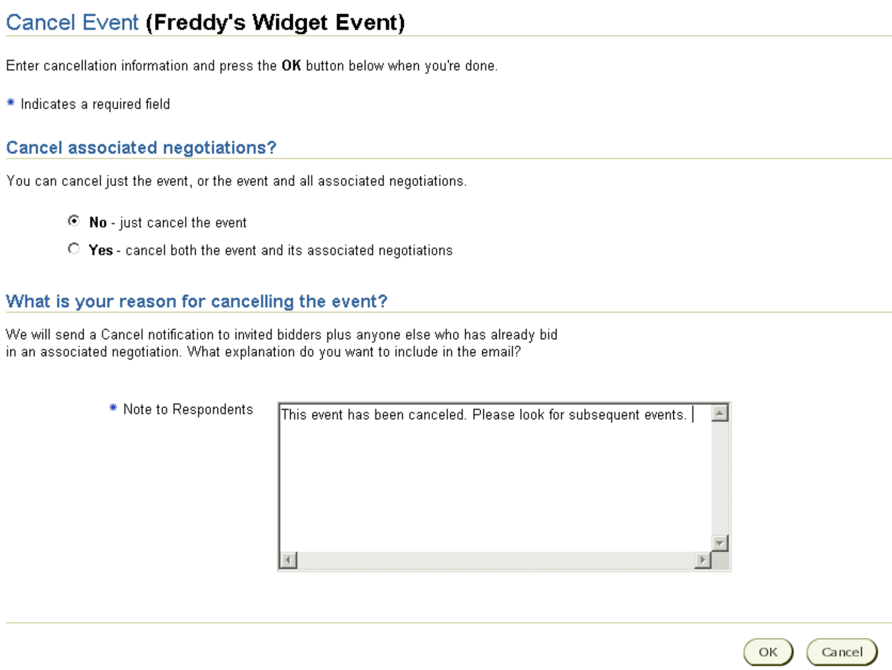
To create a sourcing event:

1. Click "Create" under the Events column of the Quick Links section of the Buyer **Home** page.
2. On the **Create Event** page, enter a title, description, and start date and time (which must be later than the current date and time). All negotiations associated with this sourcing event must open on or after the event start date and time. After the event start date and time has passed, you will not be able to associate new auctions with this event.

3. Click OK.

To cancel a sourcing event:

1. Click "Manage" under the Events column of the Quick Links section of the Buyer **Home** page.
2. On the **All Events** page, search for and select the event you wish to cancel.
3. Click Cancel.



4. On the **Cancel Event** page, you can choose to cancel all the negotiations associated with this event, or just cancel the event itself.

5. If you chose to cancel both the event and its associated negotiations in the previous step, supply an explanation of why the event is being cancelled. This explanation is sent to all invitees and anyone else who may have responded to one of the event notifications.

6. Click OK.

Unlocking Draft Negotiations

There may be times when buyers cannot finish creating a negotiation in a single session, or the creation process involves collaboration between several buyers. Or possibly a buyer needs to create a negotiation but not actually submit it until sometime in the future. In each of these cases, buyers can create a draft and save it for later editing or submission.

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

To unlock a draft:

1. From the Negotiations **Home** page, click "Manage" under the Drafts column of the Quick Links section.
2. On the **Manage Draft Negotiations** page, search for and select the locked draft.
3. Click Unlock to release the draft.

Applications Setup

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

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

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

A

Implementing E-Business Suite for Oracle Sourcing

Oracle Sourcing makes use of setup and reference data stored and maintained by several E-Business Suite applications especially Oracle Purchasing. This means that portions of several E-Business Suite applications must be implemented for Oracle Sourcing to function. This includes implementing portions of the following applications:

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

The tables below list implementation steps performed in other E-Business Suite applications.

The first table identifies the implementation steps performed in E-Business Suite applications that are required for Oracle Sourcing to run.

Table A–1 E-Business Suite Implementation Steps Required by Oracle Sourcing

Step Number	Step Name	Information Source
1	Set up System Administrator	*Oracle Applications System Administration Guide*

Table A–1 E-Business Suite Implementation Steps Required by Oracle Sourcing

Step Number	Step Name	Information Source
2	Set Up Calendars, Currencies, and Set of Books	*Oracle General Ledger User's Guide*
3	Define Human Resources Key Flexfield	*Oracle Applications Flexfields Guide*
4	Define Locations	*Using Oracle HRMS*
5	Define Organizations and Organization Relationships	*Using Oracle HRMS*
6	Define Inventory Key Flexfield	*Oracle Applications Flexfields Guide*
7	Define Units of Measure	*Oracle Inventory User's Guide*
8	Define Categories	*Oracle Inventory User's Guide*
9	Set Up Personnel	*Managing Your Workforce Using Oracle HRMS*
10	Set Up Oracle Workflow	*Oracle Workflow Guide*
11	Define Line Types	*Oracle Purchasing User's Guide*
12	Start the Purchasing Database Administrator	*Oracle Purchasing User's Guide*
13	Define Financial Options	*Oracle Payables User's Guide*
14	Define Transaction Reasons	*Oracle Purchasing User's Guide*
15	Define Receiving Options	*Oracle Purchasing User's Guide*
16	Set Up Transaction Managers and Resubmission Levels	*Oracle Applications System Administration Guide*
17	Define Suppliers	*Oracle Payables User's Guide*
18	Set Up Workflow Options	*Oracle Workflow Guide*
19	Submit Workflow-Related Processes	*Oracle Payables User's Guide*
20	Define Descriptive Flexfields	*Oracle Applications Flexfields Guide*
21	Set Up Automatic Sourcing	*Oracle Purchasing User's Guide*
22	Perform Additional System Administration Setup	*Oracle Applications System Administration Guide*

Table A–1 E-Business Suite Implementation Steps Required by Oracle Sourcing

Step Number	Step Name	Information Source
23	Define Manufacturing System and User Profile Options	*Oracle Purchasing User's Guide*

Table A–2 Optional E-Business Suite Implementation Steps

Step Number	Step Name	Information Source
24	Convert to Multi-Org	*Oracle Purchasing User's Guide* using the information below
25	Define Freight Carriers	*Oracle Purchasing User's Guide* using the information below
26	Define Payment Terms	*Oracle Purchasing User's Guide* using the information below
27	Define Approval Information	*Oracle Purchasing User's* Guide using the information below
28	Define Lookup Codes	*Oracle Purchasing User's Guide* using the information below

Step 24: Convert to Multi-Org

If you wish to segregate negotiations by organization within your company, use this step to set up your company's organizational structure.

Step 25: Define Freight Carriers

If you wish to restrict your negotiation terms to a list of approved freight carriers, use this step to define your freight carriers.

Step 26: Define Payment Terms

If you wish to restrict the payment terms available to your negotiations, use this step to define the list of approved terms.

Step 27: Define Approval Information

If you wish to use the Collaboration Team feature of Oracle Sourcing, use this step to define the approval hierarchies.

Step 28: Define Lookup Codes

If you wish to restrict the FOB terms available to a negotiation, use this step to define the approved FOB terms.

B

Oracle Sourcing Responsibilities and Functions

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

Oracle Sourcing Responsibilities

The following responsibilities come installed with the system.

Table B–1 Responsibilities Installed with Oracle Sourcing

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

Responsibility/Function Cross-Reference

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

Table B–2 Oracle Sourcing Super User Functions and Menus

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

Table B–2 Oracle Sourcing Super User Functions and Menus

Function/Menu	Descriptions
Customize Text	Users can customize the text of messages and notifications.
Delete Negotiations	Users can delete negotiations.
Disqualify Responses	Users can disqualify responses submitted to any negotiations.
Edit Draft Sourcing Documents	Users can directly edit the AutoCreated draft sourcing documents in Oracle Sourcing.
General Preferences	Set personal information including password and language.
Invite Supplier User to Register Menu	Users can invite external supplier users to register with the system.
Manage Attribute Lists	Users can create, edit, and manage any attribute lists.
Manage Collaboration Team	Users can manage collaboration teams for the negotiations they can access.
Manage Draft Sourcing Documents	Users can edit, delete, and publish any draft sourcing documents.
Manage Invitation Lists	Users can create, edit, and manage both public and private invitation lists.
Manage Sourcing Document Templates	Users can create, edit, and manage both public and private sourcing document templates.
Publish Negotiation	Users can publish the negotiation.
Set Up Negotiation Terms and Conditions	Users can set up negotiation terms and conditions.
Set Up Negotiations Configurations	Users can access the Negotiations Configurations page.
Set Up System	Users can set up the system: name, default language, and timezone.
Unlock Draft Sourcing Documents	Users can unlock any draft sourcing documents.
Unlock Sealed Negotiations	Users can unlock any sealed negotiations.
Unseal Sealed Negotiations	Users can unseal any sealed negotiations.
View Administration Tab	Users can view the Administration tab. (Separate tasks control the users' access to functions within the tab.)

Table B–2 Oracle Sourcing Super User Functions and Menus

Function/Menu	Descriptions
View Buyer's Negotiation Intelligence Reports	Users can view negotiation intelligence reports for buying activity.
View Buying Home Page	Users can view buying welcome home page.
View Contact Information	Users can view the Contact Information page.
View Edit Profile Options Page	Users can access the Edit Profile Options page for buyers.
View Events	Users can view details of any events.
View Intelligence Tab	Users can view the Intelligence tab. (Separate tasks control the users' access to functions within the tab.)
View My Company Negotiations	Users can view details of any negotiations.
View Negotiations Tab	Users can view the Negotiations tab. (Separate tasks control the users' access to functions within the tab.)
View Other Company Responses	"Users can view quotes and bids created by other companies."
View Welcome Tab	Users can view the Welcome tab. (Separate tasks control the users' access to functions within the tab.)

Table B–3 Oracle Sourcing Buyer Functions and Menus

Function/Menu	Description
Access Threaded Discussions	Users can access threaded discussions.
Advanced Workflow Worklist	Advanced workflow worklist incorporating the new look and feel.
Approve or Reject Supplier User Registration Menu	Users can approve or reject supplier user’s registration requests.
Award My Negotiation	Users can make award decisions about negotiations they have created.
Create Buyer's Negotiations	Users can create, edit, copy, unlock, unseal, cancel, and award their negotiations. Users can create private templates and invitation lists.

Table B–3 Oracle Sourcing Buyer Functions and Menus

Function/Menu	Description
Create Events	Users can create negotiation events.
Edit Draft Sourcing Documents	Users can directly edit the AutoCreated draft sourcing documents in Oracle Sourcing.
General Preferences	Set personal information including password and language.
Publish Negotiation	Users can publish the negotiation.
Sourcing Buyer Registration Menu	Users can access the menu containing the supplier registration tasks.
Unlock Locked Negotiations	Users can unlock the negotiation
Unlock Sealed Negotiations	Users can unlock sealed negotiations
Unseal Sealed Negotiations	Users can unseal the negotiation
View Buyer's Negotiation Intelligence Reports	Users can view negotiation intelligence reports for buying activity.
View Buying Home Page	Users can view buying welcome home page.
View Contact Information	Users can view the Contact Information page.
View Edit Profile Options Page	Users can access the Edit Profile Options page for buyers.
View Events	Users can view details of any events.
View Intelligence Tab	Users can view the Intelligence tab. (Separate tasks control the users' access to functions within the tab.)
View My Company Negotiations	Users can view details of any negotiations.
View Negotiations Tab	Users can view the Negotiations tab. (Separate tasks control the users' access to functions within the tab.)
View Other Company Responses	Users can view quotes and bids created by other companies.
View Welcome Tab	Users can view the Welcome tab. (Separate tasks control the users' access to functions within the tab.)

Table B–4 Oracle Sourcing Supplier Functions

Function	Description
Access Threaded Discussions	Users can access threaded discussions.
Advanced Workflow Worklist	Advanced workflow worklist incorporating the new look and feel.
General Preferences	Set personal information including password and language.
Respond to Buyer's Negotiations	Users can respond to buyer's negotiations.
View Contact Information	Users can view the Contact Information page
View Edit Personal Information Page	Users can access the Edit Personal Information page for supplier users.
View My Company Responses	Users can view quotes and bids created by their company.
View Negotiations Tab	Users can view the Negotiations tab. (Separate tasks control the users' access to functions within the tab.)
View Other Company Negotiations	Users can view details of buyer's negotiations.
View Selling Home Page	Users can view selling welcome home page.
View Welcome Tab	Users can view the Welcome tab. (Separate tasks control the users' access to functions within the tab.)

C

Oracle Sourcing Notifications

Introduction

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

For each notification, the following details are covered:

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

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

Modifying Notifications Text

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

Summary of Negotiation Notifications

Table C–1 Oracle Sourcing Notifications

Title	Event	Recipient	Action
RFx/Auction Requires Your Approval	Submit for Approval	All approvers on the Collaboration Team	Appove or reject the sourcing document being created
RFx/Auction Requires Your Approval - Reminder	Approval Reminder	Any approver who has not yet approved or rejected the sourcing document	Approve or reject the sourcing document being created
RFx/Auction Has Been Approved	Approval Status Approved	All approvers	For information
RFx/Auction Has Been Rejected	Approval Status Rejected	All approvers	For information
RFx/Auction Creation Confirmation	Creation Confirmation	Auctioneer (Buyer)	For information
RFx/Auction Invitation - Supplier Contact	Invitation to Participate	Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
RFx/Auction Invitation - Supplier Additional Contact	Invitation to Participate	Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate
RFx/Auction Early Close	Early Close	All invitees and respondents	For information
RFx/Auction Extend	Extend	All invitees and respondents	For information
RFx/Auction Disqualification - Respondent with Bid/Quote Disqualified	Bid/Quote Disqualification	Respondent with disqualified response	For information
RFx/Auction Bid Disqualification - All Invitees and Respondents	Bid/Quote Disqualification	All invitees and Respondents	For information
RFx/Auction Canceled	Cancellation	All invitees and respondents	For information

Table C–1 Oracle Sourcing Notifications

Title	Event	Recipient	Action
RFx/Auction Award	Award	All invitees and respondents	For information
RFx/Auction Additional Round Invitation - Only Invitees/Supplier Contact	Additional Round	Invitee/Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
RFx/Auction Additional Round Invitation - Only Invitees/Additional Contact	Additional Round	Invitee/Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate
RFx/Auction Additional Round Invitation - Non-Invitees	Additional Round	Non-invitees	For information
RFQ/Auction Allocation Failed	Allocation (Split) Failed	Buyer who submitted the allocation process	Review the requisition allocation and resubmit the purchase order creation process
RFQ/Auction Purchase Creation Status	Purchase Order Creation Status	Buyer who submitted the purchase order creation process	Review the requisition and resubmit the purchase order creation process
RFx/Auction Acknowledgement Reminder - Supplier Contact	Acknowledgement Reminder	Supplier contact	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
RFx/Auction Acknowledgement Reminder - Additional Contact	Acknowledgement Reminder	Supplier additional contact	Enter Oracle Sourcing to acknowledge intent and participate

RFx/Auction Requires your Approval

Summary of E-mail notification

- Recipient: All approvers on the collaboration team
- When: Negotiation is submitted for approval
- Possible Action: Approve or reject negotiation creation

Next Steps: None

E-mail text

Subject: Auction 293 requires your approval

Date: Tue., Aug. 200x 215:58:37 - 0700 (PDT)

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

To: approver@enterprise.com

Auctioneer: Pat Stock

Auction Title: Bridge Construction Project

Auction Number: 293

Auction Open: Aug. 14, 200x 11:30 am America/Los_Angeles

Auction Close: Aug. 27, 200x 12:00 pm America/Los_Angeles

Note to Approvers: Please approve this auction at your earliest convenience.

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

To view the details for this auction, please go to http://system.enterprise.com:5555/jsp/pon/auctions/preview.jsp?auctionHeaderId=11472&app=buying

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

Decision: Approve Reject

RFx/Auction Requires your Approval - Reminder

Summary of E-mail notification

- Recipient: All approvers on the collaboration team who have not yet approved the negotiation
- When:
- Possible Action: Approve or reject negotiation creation
- Next Steps: None

E-mail text

Subject: Auction 293 requires your approval

Date: Tue., Aug. 200x 215:58:37 - 0700 (PDT)

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

To: approver@enterprise.com

This email is to remind you to approve the following auction:

Auctioneer: Pat Stock

Auction Title: Bridge Construction Project

Auction Number: 293

Auction Open: Aug. 14, 200x 11:30 am America/Los_Angeles

Auction Close: Aug. 27, 200x 12:00 pm America/Los_Angeles

Note to Approvers: Please approve this auction at your earliest convenience.

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

To view the details for this auction, please go to http://system.enterprise.com:5555/jsp/pon/auctions/preview.jsp?auctionHeaderId=11472&app=buying

RFx/Auction Has Been Approved

Summary of E-mail notification

- Recipient: Buyer who submitted the negotiation for approval
- When: When the negotiation is approved
- Possible Action: Publish the negotiation
- Next Steps: None

E-mail text

Subject: Auction 293 has been approved

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

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

To: buyer@enterprise.com

Auctioneer: Stock, Ms. Pat

Auction Title: Bridge Construction Project

Auction Number: 293

Auction Open: Opens immediately after publish

Auction Close: Aug. 27, 200x 07:30 pm America/Los_Angeles

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

To publish this auction, please go to http://system.enterprise.com:5555/OA_HTML/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11472&app=buying

RFx/Auction Has Been Rejected

Summary of E-mail notification

- Recipient: Buyer who submitted the negotiation for approval
- When: When the negotiation is rejected

- Possible Action: Modify the negotiation an resubmit for approval
- Next Steps: None

E-mail text

Subject: Auction 293 has been rejected

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

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

To: buyer@enterprise.com

Auctioneer: Stock, Ms. Pat

Auction Title: Bridge Construction Project

Auction Number: 293

Auction Open: Opens immediately after publish

Auction Close: Aug. 27, 200x 07:42 pm America/Los_Angeles

Note to buyer: Item need-by dates are not inline with latest project plan.

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

To publish this auction, please go to http://system.enterprise.com:5555/OA_HTML/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11472&app=buying

RFx/Auction Creation Confirmation

Summary of E-mail notification

- Recipient: auctioneer (buyer)
- When: at the time of auction ready for preview/bidding or quoting after a buyer has submit an auction or RFQ. It is sent out, either at the time of auction opening for preview or at the time of auction or RFQ opening for bidding/quoting if the preview date is not specified.
- Possible Action: none (for information only)
- Next Steps: none (for information only).

E-mail text

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

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

To: user@company.com

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

Pat Stock:

This auction is now available.

Auctioneer: Pat Stock

Auction Title: test auction 5

Auction Number: 11472

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

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

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

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

RFx/Auction Invitation - Supplier Contact

Summary of E-mail notification

- Recipient: potential bidders/suppliers
- When: a buyer creates a Buyer's RFQ/Auction and invites suppliers to participate.
- Possible Action: reply to e-mail with intent to participate or if the negotiation is available online, enter Oracle Sourcing and acknowledge intent before the time specified in the notification.
- Next Steps: preview or submit bid(s)/quote(s) within Oracle Sourcing for the specified auction (if preview/opening time is immediate; otherwise await preview/opening time)

E-mail text

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

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

To: user@company.com

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

Supplier:

Odyssey Corp invites Supplier to participate in an Auction.

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction

Auction Number: 10732

Auction Open: May 23, 200x 01:40 pm America/Los_Angeles

Auction Close: July 22, 200x 05:00 pm America/Los_Angeles

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

To acknowledge your intent to participate, please go to

http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction_id=10732&app=selling

To view auction details and place a bid on this auction, please go to http://system.enterprise.com:5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=10688&app=selling

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

Does your company intend to participate?: Yes No

RFx/Auction Invitation - Supplier Additional Contact

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company.com

Supplier:

Odyssey Corp invites Supplier to participate in an Auction.

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction 001

Auction Number: 10732

Auction Open: May 23, 200x 03:28 pm America/Los_Angeles

Auction Close: July 22, 200x 04:00 pm America/Los_Angeles

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

To acknowledge your intent to participate, please go to http://system.enterprise.com:5555/auctions/Acknowledge.jsp?auction_id=10732&app=selling

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

http://system.enterprise.com:5555/auctions/bidViewAuction.jsp?auction_id=10732&app=selling

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

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

RFx/Auction Early Close

Summary of E-mail notification

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

E-mail text

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

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

To: user@company.com

Reply-to: name@sourcing.oracle.com

Subject: Auction 10732 has been closed early.

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

RFx/Auction Extend

Summary of E-mail notification

- Recipient: all invitees and respondents

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

E-mail text

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

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

From: "Enterprise Purchasing Department"

To: user@company.com

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

RFx/Auction Bid/Quote Disqualification - Respondent with Bid/Quote Disqualified

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company.com

Supplier:

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

Auctioneer: Odyssey Corp

Auction Title: Goods

Auction Number: 9589

Auction Open: May 20, 200x 12:40 pm America/Los_Angeles

Auction Close: July 22, 200x 08:00 pm America/Los_Angeles

Disqualified Bid Number: 4512

Reason for Disqualification: Your price is too high.

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

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

RFx/Auction Bid Disqualification - All Invitees and Respondents

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company.com

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

Auction Summary:

Auction Title: Buyer's Auction 001

Auctioneer: Odyssey Corp

Disqualify Time: May 24, 200x 12:36 am America/Los_Angeles

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

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

RFx/Auction Canceled

Summary of E-mail notification

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

E-mail text

Subject: Auction 293 "Bridge Construction Project" canceled

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

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

To: user@company.com

Auction 293 has been canceled by Pat Stock.
All current bids are rendered null and void, and no new bids are being accepted for this auction.

The owner of this auction, Pat Stock, has offered the following explanation for its cancellation.

Auction Title: Bridge Construction Project

Auction Owner: Pat Stock

Auction Open: Aug. 14, 200x 01:04 pm America/Los_Angeles

Auction Close: Aug. 27, 200x 12:00 pm America/Los_Angeles

Cancellation Reason:

RFQ/Auction Award

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company.com

Supplier Contact:

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

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction

Auction Number: 10732

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

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

Your Bid Number: 3443

Items awarded on or rejected from your bid

Number of item(s) Awarded: 1

Number of item(s) Rejected: 1

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

You may look for bid 3443 at http://system.enterprise.com/5555/jsp/pon/auctions/myWonBids.jsp?app=selling&docTypeId=2 to see which items you won, and at http://system.enterprise.com/5555/jsp/pon/auctions/myLostBids.jsp?app=selling&docTypeId=2 to see which items you lost.

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

RFx/Auction Additional Round Invitation - Only Invitees/Supplier Contact

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company

Supplier:

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

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction

Auction Number: 11699-2

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

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

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

To acknowledge your intent to participate, please go to

http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=11700&app=selling

To place a bid on this Auction, please go to

http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11700&app=selling.

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

Does your company intend to participate?: Yes No

RFx/Auction Additional Round Invitation - Only Invitees/Additional Contact

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company.com

Supplier:

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

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction 001

Auction Number: 11699-2

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

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

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

To acknowledge your intent to participate, please go to

http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=11700&app=selling

To place a bid on this Auction, please go to

http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=11700&app=selling.

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

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

RFx/Auction Additional Round Invitation - Non-Invitees

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company.com

Supplier:

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

Auctioneer: Odyssey Corp

Auction Title: Buyer's Auction 001

Auction Number: 11699-2

RFx/Auction Acknowledgement Reminder - Supplier Contact

Summary of E-mail notification

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

E-mail text

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

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

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

To: user@company.com

Supplier:

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

Auctioneer: Pat Stock

Auction Title: Buyer's Auction

Auction Number: 10762

Auction Open: May 23, 200x 4:49 pm America/Los_Angeles

Auction Close: July 22, 200x 03:30 pm America/Los_Angeles

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

To acknowledge your intent to participate, please go to

http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=10762&app=buying

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

http://system.enterprise.com/5555jsp/pon/auctions/bidViewAuction.jsp?auction_id=10762&app=buying

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

Does your company intend to participate?: Yes   No

RFx/Auction Acknowledgement Reminder - Additional Contact

Summary of E-mail notification

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

- Possible Action: enter Oracle Sourcing and acknowledge intent to participate by the time specified in the notification. If not previously registered, enter application to register.
- Next Steps: none

E-mail text

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

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

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

To: user@company.com

Supplier:

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

following auction.

Auctioneer: Pat Stock

Auction Title: Buyer's Auction 001

Auction Number: 10762

Auction Open: May 23, 200x 04:49 pm America/Los_Angeles

Auction Close: July 22, 200x 03:30 pm America/Los_Angeles

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

To acknowledge your intent to participate, please go to

http://system.enterprise.com/5555/jsp/pon/auctions/Acknowledge.jsp?auction_id=10762&app=buying

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

http://system.enterprise.com/5555/jsp/pon/auctions/bidViewAuction.jsp?auction_id=10762&app=buying

If this is your first time using the system, then we need to create a user for you. Please go to http://system.enterprise.com/5555/html/jsp/pos/registration/RegistrationReply.jsp?registrationKey=B9BAF14FB

RFQ/Auction PO Creation Notification

Summary of E-mail notification

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

E-mail text

Mr. Kareem Benjamin,

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

Auction Title: Spare Parts Auction

Auction Number: 6050

Organization: Headquarters

Number of purchase order(s) created: 2

Bid: 66961

Supplier: Rohn Metals, Inc.

Supplier Site: New York

Buyer: Ronda Wider

Purchase Order: 234-A

Bid: 66892

Supplier: Schmidt, GmbH

Supplier Site: Berlin Warehouse

Buyer: Richard Burg

Purchase Order: 235-A

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

Number of purchase order(s) not created: 2

Bid: 66971

Supplier: PWX Corp.

Supplier Site: San Francisco

Buyer: Mary Jones

Error: Purchase Order 234-A: duplicate PO Number

Bid: 66996

Supplier: Wiley Bros.

Supplier Site: SD

Buyer: Jim Frantic

Error: System Error

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

Would you like to restart purchase order creation? - Yes

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

RFQ/Auction Allocation Failed

Summary of E-mail notification

- Recipient: Buyer who submitted the purchase order creation process.
- When: When the requisition process fails
- Possible Action: Review the requisition allocation and resubmit the purchase order creation process.
- Next Steps: None

E-mail text

Subject: Auction 293 Bridge Construction Project

Date: Tue., 7 Aug. 200x 16:40:38 -0700 (PDT)

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

To: buyer@company.com

Pat Stock,

This email is notifying you that the allocation process has failed and no Standard Purchase Orders have been created.

Auction Title: Bridge Construction Project

Auction Number: 293

Organization: Vision Services

Error:

Your manual allocations have been saved, and you can update allocations, if desired.

If the allocation process failed due to system error, please contact your system administrator to correct the problem.

Thank you!

You can modify allocations and restart the document creation from the RFQ details page: http://ap6071rt.us.oracle.com:8001/OA_HTML/jsp/auctions/bidViewAuction.jsp?auction_id=978&app=buying

RFQ/Auction Purchase Order Creation Status

Summary of E-mail notification

- Recipient: Buyer who submitted the purchase order creation process.
- When: When the requisition process finishes
- Possible Action: Review the requisition allocation and resubmit the purchase order creation process.
- Next Steps: None

E-mail text

Subject: Auction 293 Bridge Construction Project

Date: Tue., 7 Aug. 200x 16:40:38 -0700 (PDT)

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

To: buyer@company.com

Pat Stock,

This email is notifying you that the purchase order creation process has completed.

Auction Title: Bridge Construction Project

Auction Number: 293

Organization: Vision Services

Number of purchase order(s) created: 1

Bid: 335

Supplier: Construction Corp.

Supplier Site: S1 Santa Clara

Buyer: Stock, Mrs.Pat

Purchase Order: 50011

Details of up to 10 created purchase orders will be displayed. To view details of all created purchase orders, please go to the Award Summary page or the Allocation Summary page.

Thank you!

Reminder Notifications

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

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

Timing of Reminder Notifications

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

Table C–2 Reminder Notification

Available Time	Reminder e-mail
Equal or less than 24 hours.	Preview/Open Date + 1 hour
More than 24 hours & less than week	Preview/Open Date + 1 day
Equal or longer than 1 week	Preview/Open Date + 3 days

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

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