

Oracle® Exchange and Oracle® Sourcing

System Operator Implementation Guide

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Primary Author: Rachel Korte

Contributing Authors: Richard Sears

Contributors: Frederick Abou-Jawad, Hema Budaraju, Joyce Fee, John Haddad, Debbie Hsu, Govindarajan Jayanth, Matthew Jones, Ben Luk, Damon May, Manish Patel, Mark Peachey, Warren Perkinson, Debbie Quezadaz, Holly Roland, Wei Shen, Veshaal Singh, Bin Tang, Karen de la Torre, Rain Tsui, David Williams, Amy Yang, June Yang

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Contents

Send Us Your Comments	ix
Preface.....	xi
Intended Audience	xi
Documentation Accessibility	xi
Structure.....	xii
Related Documents.....	xiii
Conventions.....	xiv
1 System Operator Overview	
Overview	1-1
Oracle Exchange and Oracle Sourcing	1-2
Configuration and Setup	1-3
Branding.....	1-3
Customization.....	1-3
Company and User Administration	1-4
Oracle Portal.....	1-5
Operator Accounts	1-5
Site Status.....	1-5
Intelligence Reporting and Monitoring.....	1-5
Billing	1-6
Catalog Schema Management	1-6
Multilingual, Global Support	1-7
Multiple Languages.....	1-7

Multiple Currencies.....	1-8
Time Zones	1-8
Setup Steps Checklist.....	1-9
Setting Up a Multi-Language or Multi-Currency System	1-17
Setting Up a Multi-Language System.....	1-17
Setting Up a Multi-Currency System.....	1-17

2 System Operator Setup

Administration Setup Steps.....	2-2
Prerequisites	2-2
Step 1 Set Up Additional Operator Login Account(s) (Optional)	2-2
Step 2 Set Up the Software (Required)	2-4
Step 3 Set Password Policy (Optional).....	2-9
Step 4 Create a Test Company (Optional).....	2-10
Step 5 Test Inbound Transactions (Optional)	2-12
Branding and Customization Setup Steps (Part I)	2-17
Prerequisites	2-19
Step 1 Modify the Style Sheet (Optional)	2-19
Step 2 Modify Images (Optional)	2-24
Step 3 Set Up Contact Information, and Notification Headers and Footers (Required).	2-26
Step 4 Make Terminology Changes (Optional)	2-26
Step 5 Customize Site Content (Recommended for Oracle Exchange, Required for Oracle Sourcing)	2-31
Step 6 Set up Regions Data (Required for Offers and Oracle Transportation).....	2-36
Step 7 Customize Units of Measure (Optional).....	2-43
Catalog Setup Steps.....	2-45
Step 1 Determine Catalog Authoring Activities (Required).....	2-46
Step 2 Determine the Catalog Structure (Required)	2-47
Step 3 Create the Catalog Structure (Categories, Attributes, and Category Hierarchy) (Optional)	2-48
Step 4 Check the Catalog Structure (Optional)	2-51
Step 5 Configure Catalog Options (Optional)	2-52
Step 6 Customize Catalog News (Optional)	2-55
Purchasing Setup Steps	2-56
Step 1 Choose Purchasing Configuration Options (Optional).....	2-56

Step 2 Configure Search Limits (Optional)	2-59
Step 3 Configure the Buying Home Page (Required for Oracle Sourcing)	2-60
Step 4 Configure Popular Categories List (Optional)	2-61
Negotiations Setup Steps	2-62
Step 1 Create a Negotiations Item Category (Optional)	2-62
Step 2 Define System-Wide Reusable Attribute Lists (Optional)	2-64
Oracle Transportation Setup Steps	2-66
Step 1 Customize Transportation Lookup Types (Optional)	2-67
Step 2 Create Document Definitions (Optional)	2-69
Oracle Product Development Exchange Setup Steps	2-70
Step 1 Define Values for Change and Issue Management Lookup Types (Optional)	2-71
Step 2 Create Custom Attributes (Optional)	2-73
Step 3 Create Change Management Types (Required if Using Change or Issue Management)	2-74
Step 4 Create Change Management Line Types (Required if Using Change Management)	2-75
Step 5 Create Document Categories (Optional)	2-76
Step 6 Customize Project Management (Optional)	2-77
Step 7 Create Customized Workflows (Optional)	2-78
Oracle Supply Chain Exchange Setup Steps	2-80
Step 1 Rename Order Types (Optional)	2-80
Step 2 Configure Supply Chain Intransit Carrier (Optional)	2-80
Billing Setup Steps	2-81
XML Transactions	2-82
Prerequisites	2-84
Step 1 Modify Default Billing Activity Types (Optional)	2-85
Step 2 Activate the Recording of Billing Charges (Required)	2-88
Step 3 Define a Default System Price List (Required)	2-89
Step 4 Set Up Oracle Receivables Integration (Optional)	2-93
Step 5 Select an XML Delivery Method (Optional)	2-107
Step 6 Choose System Payment Methods	2-108
Billing and Customer Export Options	2-108
Customization Setup Steps (Part II)	2-114
Step 1 Customize Job Functions (Required for Oracle Sourcing)	2-114
Step 2 Update List of Blocked Territories (Optional)	2-118
Step 3 Customize Drop-Down Menu Items (Lookup Types) (Optional)	2-119

Step 4 Set Up Intelligence Reports (Optional)	2-126
Step 5 Set Up a Default Job Functions List (Optional)	2-127
Step 6 Customize Help Files (Required for Oracle Sourcing)	2-127
Step 7 Customize the Help Logo (Recommended).....	2-135

3 Oracle Sourcing Setup

Overview	3-1
Oracle Sourcing Setup Steps	3-3
Help Edits for Oracle Sourcing	3-8

4 After Setup

System Launch.....	4-2
Step 1 Define Company-Specific Billing Price Lists (Optional)	4-3
Step 2 Manage Third-Party Authoring (Optional)	4-3
Step 3 Set Up Carrier Tracking (Optional)	4-4
Step 4 Enable Companies to Perform Item Cross Referencing (Optional).....	4-8
Ongoing Maintenance	4-8
Registration and Administration.....	4-9
Billing.....	4-13
Catalog.....	4-14
Negotiations	4-15

A Transaction Delivery Communication Methods

No Electronic Delivery	A-1
HTTP	A-2
Oracle Transport Agent using HTTP	A-2
webMethods using HTTP	A-3
HTTPS (Secure HTTP)	A-4
Oracle Transport Agent using HTTPS	A-5
webMethods using HTTPS.....	A-6
Email (SMTP).....	A-7

B Catalog Structure

Categories	B-2
------------------	-----

Category Hierarchy.....	B-3
Attributes.....	B-4
Data Types.....	B-6
Bulk Loaders.....	B-6
Overview of Third-Party Catalog Authoring.....	B-7
Different Scenarios.....	B-7
Controlled Access.....	B-8
Setup Overview.....	B-9
C Billing	
Billing Transaction Types.....	C-1
Registration and Administration.....	C-1
Purchasing.....	C-3
Negotiations.....	C-3
Supply Chain Exchange.....	C-5
Examples.....	C-6
Pricing Methods and Types.....	C-6
Price Break Examples.....	C-7
D Job Functions and System Tasks	
Job Functions Tables.....	D-2
System Tasks Tables.....	D-6
Job Function/System Task Cross-Reference.....	D-19
E Registration	
Independent Entity, Affiliate, and User Registration.....	E-2
Independent Entity (Company Registration).....	E-2
Affiliate (Company Registration).....	E-2
User Registration.....	E-3
Registration and Administration Hierarchy.....	E-3
Registration and Approval Process.....	E-4
Independent Entity Registration.....	E-4
Affiliate Registration.....	E-6
User Registration.....	E-8

Self-Service vs. Bulk Load Registration	E-9
---	-----

F Workflows

Registration	F-1
Catalog	F-2
Bulk Loading and Publishing	F-2
Buyer Pricing Approval	F-2
Third-Party Authoring	F-3
Purchasing	F-3
Order Acknowledgment	F-4
Order Approval	F-6
Negotiations	F-7
Oracle Supply Chain Exchange	F-9
Oracle Transportation	F-10
Shipment Pickup Request	F-10
Proof of Delivery	F-11
Oracle Product Development Exchange	F-11

Index

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Oracle Exchange and Oracle Sourcing System Operator Implementation Guide, Release 6.2
Part No. A95870-02

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Preface

This document describes how to set up either the Oracle Exchange product suite (Oracle Transportation, Oracle Product Development Exchange, Oracle Supply Chain Exchange, and the Buying and Selling applications) or Oracle Sourcing.

After installing or upgrading the software, the System Operator performs the setup steps described in this document for the product or products the System Operator is licensed to implement.

Intended Audience

This document is written for the System Operator, who establishes the system and is in charge of the day-to-day operation of the system site.

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Structure

This manual describes the following:

Chapter 1

This chapter provides an overview of the System Operator tasks and all setup steps.

Chapter 2

This chapter details each setup step that the System Operator performs.

Chapter 3

This chapter details the setup steps required for Oracle Sourcing.

Chapter 4

This chapter describes the steps the System Operator performs after the initial setup, including some ongoing maintenance tasks.

Appendix A - Transaction Delivery Communication Methods

This appendix describes the transaction delivery communication methods.

Appendix B - Catalog Structure

This appendix provides an overview of the catalog structure, which the System Operator controls.

Appendix C - Billing

This appendix provides descriptions of transactions that the System Operator can bill for and pricing examples.

Appendix D - Job Functions and System Tasks

This appendix provides a list of the default job functions and system tasks that the system provides.

Appendix E - Registration

This appendix provides an overview of the company and user registration process and affiliate relationships.

Appendix F - Workflows

This appendix describes the workflows used by the system.

Related Documents

Other documentation includes the following:

- *Oracle Exchange and Oracle Sourcing Company Administration Guide*—for administration setup that companies use. *
- *Online Help*—for details on specific features, such as creating negotiations or orders. Log on to the system as a registered user and click the Help icon.
- *Oracle Exchange Installation and Upgrade Guide*—for instructions on installing and upgrading to the initial Release 6.2.
- Oracle*MetaLink* at <http://metalink.oracle.com> for information on using and upgrading to the latest version of Release 6.2. (You can also access Oracle*MetaLink* via [http://www.oracle.com/support/.](http://www.oracle.com/support/))
- *Oracle Marketplace Exchange Technical Reference Manual*—for information on the data model.
- *Oracle Supply Chain Hub Technical Reference Manual*—for information on the data model for Supply Chain Exchange.
- *Oracle Transportation Technical Reference Manual*—for information on the data model for Oracle Transportation.
- *Oracle Product Development Exchange Technical Reference Manual*—for information on the data model for Product Development Exchange.
- *Oracle Product Development Exchange: Setup Guide for iFS*—available on Oracle*MetaLink*. (Access Oracle*MetaLink* via [http://www.oracle.com/support/.](http://www.oracle.com/support/))

- *Oracle Exchange Punchout Guide*—for information for companies on how to set up the punchout feature to access external suppliers' catalogs. *
- *XML Transaction Delivery Guide for Marketplace Exchange*—for detailed descriptions of XML transactions related to buying and selling. *
- *XML Transaction Delivery Reference Guide for Supply Chain Exchange*—for detailed descriptions of XML transactions used by Supply Chain Exchange. *

* Registered users who have the appropriate job functions can download these documents directly from the system.

Conventions

The following terms are used commonly in this setup guide:

Affiliate

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

Buyer (or Buying Company)

Any company registered on the system that functions as a buyer. In Oracle Exchange, a buyer's tasks include ordering items, managing price changes submitted by sellers, creating buyer auctions, and so on. In Oracle Sourcing, a buyer's tasks include creating buyer auctions and other sourcing tasks.

Catalog Author

In Oracle Exchange, the catalog author is assigned the Catalog Author job function, which enables the user to add or update a seller's catalog items or services and prices in the unified catalog.

Company Administrator

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

Independent Entity

A company that registers as an independent entity will not be associated as an affiliate (subsidiary, division, or branch) of any other company and must be

approved by the System Operator. Other companies, such as subsidiaries, divisions, or branches, can register as affiliates of the independent entity (with the independent entity's approval).

Job Functions (or Tasks)

A job function consists of one or more tasks that users can perform on the system. For example, two of the tasks that a job function called Buyer includes are *Create Buyer's Negotiation* and *View Buyer Negotiations Intelligence Reports*. A user who has been assigned this job function can perform these tasks.

Punchout (for Catalogs)

A term referring to functionality that enables people to click a link in the system that redirects their browser directly to an external site containing the supplier's own hosted catalog.

Seller (or Supplier or Selling Company)

Any company registered on the system that functions as a seller. In Oracle Exchange, a seller's tasks include adding catalog items, accepting orders created by buyers for the goods it sells, creating seller auctions, and so on. In Oracle Sourcing, a seller's tasks include responding to buyer auctions, RFQs (requests for quotations), and offers.

System Operator

The System Operator is in charge of the setup and day-to-day operation of the system, such as approving companies that register and modifying the user interface.

Unified Catalog

The unified catalog is the central catalog repository in Oracle Exchange where all sellers can add their catalog items under a basic, common catalog structure.

User

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

System Operator Overview

This chapter provides an overview of the System Operator functionality and Operator setup:

- [Overview](#) on page 1-1
- [Multilingual, Global Support](#) on page 1-7
- [Setup Steps Checklist](#) on page 1-9
- [Setting Up a Multi-Language or Multi-Currency System](#) on page 1-17

Overview

The System Operator administers the entire system and is responsible for the initial setup and configuration, such as modifying the user interface, and the day-to-day maintenance, such as approving companies that register.

Only the System Operator has access to the System Operator pages. When the System Operator logs on using the System Operator password (the System Operator gets the password from the installation team), the system displays Operator-only functions (shown in the illustration below). Additionally, the System Operator shares some administration tasks with the Company Administrators. (See [Setup Steps Checklist](#) on page 1-9.)

Note: For details about different functionality on the system, such as creating negotiations or orders, see the online Help that users see when they log on to the system.

User Interface

[Identification](#)[Customize Content](#)[Edit List of Values](#)[Customize Images](#)[Customize Text](#)[Customize Help](#)[Customize Help Logo](#)[Customize UOM Class](#)[Customize Unit of Measure](#)[Customize UOM Conversion](#)[Bulk Registration Management](#)

Configuration

[Software Setup](#)[Manage Job Functions](#)[Manage Regions](#)

Catalog

[Manage Base Attributes](#)[Create Category](#)[Edit Category](#)[Maintain Catalog Hierarchy](#)[Configure Buying Homepage](#)[Bulk Load Catalog Structure](#)[View Bulk Load Status](#)[Catalog Export](#)[Catalog Options](#)[Manage Third Party Authoring](#)

Negotiations

[Negotiations Configuration](#)[Manage Reusable Attribute Lists](#)[Cancel/Delete Negotiation](#)

Oracle Exchange and Oracle Sourcing

The license for Oracle Sourcing allows a single buying company to negotiate electronically with its suppliers. In comparison, Oracle Exchange enables many buying companies and suppliers to participate in electronic negotiations as well as many other types of buying and selling transactions, including catalog content management, catalog marketplace purchases, and Operator billing. Functionality for Oracle Exchange may be included in the media shipped for Oracle Sourcing; however, the license for Oracle Sourcing is intended for use with only one buying company and its many suppliers.

The Oracle Sourcing license is therefore restricted to the functionality that enables a single buying company to create a buyer's auction, RFQ (request for quotation), offer, or other sourcing document; solicit negotiation responses from other companies; evaluate those responses; and respond to them. Not included are catalog purchasing functionality, sell-side transactions including seller's auctions and offers to sell, and *n-tier* supplier negotiations—when a supplier initiates buy-side or sell-side transactions with its own (second-tier) suppliers.

Unless otherwise noted, the following sections discuss functionality that is available to the System Operator in both Oracle Exchange and Oracle Sourcing.

[Chapter 3](#) provides complete detail on Oracle Sourcing, including setup.

Configuration and Setup

The System Operator performs the initial configuration and setup, including the following:

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

Branding

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

- Upload images such as logos.
- Globally modify many of the text strings appearing on labels, buttons, and elsewhere in the system.
- Modify the style sheet to change fonts and colors.
- Modify slogan and contact information.
- Modify notification headers and footers.
- Customize pages such as the **Legal Notices and Terms of Use**, **Supply Chain News**, and **Welcome (Home)** pages.

Customization

Customizations the System Operator can make include the following:

- Customize the online Help files as needed.
- Customize the default job functions that the system provides to govern which users can perform certain tasks.
- Customize the drop-down menu items for fields such as Freight Terms. See setup steps related to lookup types for lists of menu items you can customize.

- Create business regions that Company Administrators can associate with addresses or use for Oracle Transportation. The offers functionality uses regions to associate the offers with companies in a particular region or regions. Oracle Transportation uses regions when defining lanes and zones.
- Set up negotiations attribute lists.

Company and User Administration

System Operator tasks related to companies and users include the following:

- The System Operator approves companies. (The System Operator can also approve affiliates and users, though normally this is performed by the parent company's Company Administrator.)
- The System Operator can view company profiles, and view and update user profiles (for example, to change a user's password when the user has forgotten it).
- Job functions enable the System Operator to control people's access to features and tasks (specifically, links and pages within the system). For example, not all users in a particular company will be allowed to bulk load items to the catalog. Only users assigned the Catalog Authoring job function can perform this task. The System Operator delegates job functions to companies. The Company Administrator in turn assigns all or a subset of those job functions to its users and affiliates. (Although normally performed by the Company Administrator, the System Operator can also assign job functions to a company's users and affiliates.) See [Appendix D](#) for a list of job functions and system tasks provided by the system.
- The System Operator can prevent individuals and companies from logging in by deactivating a company or user or placing a company on hold. When the System Operator deactivates a company, no one in that company or that company's affiliates, including the Company Administrator, can log in; when the System Operator deactivates a user, that user cannot log in. The System Operator for Oracle Exchange places a company on hold typically when there is a billing problem. When the System Operator puts a company on hold, only the Company Administrator can log in to update billing information. The System Operator can place only a company (not a user) on hold. Only the System Operator can place holds or deactivate companies or users.

Oracle Portal

Oracle Portal enables companies to provide a single point of access to critical information resources. Using Oracle Portal, you can gather *portlets* of information onto a single portal Web page, which people can customize to suit individual information needs.

You can integrate Oracle Exchange with Oracle Portal by using single sign-on capabilities, which enable people to access information from multiple systems through a single portal logon. The Exchange can be deployed with Oracle Portal in single sign-on mode in one of two ways:

- Hub mode, where the Exchange is the controlling application and retains registration and user management processes.
- Spoke mode, where the Exchange is one of several partner applications that are integrated with Oracle Portal, which takes over the registration and user management processes for all of the applications.

The user accounts for the System Operator and the Portal administrator are separate. The Portal administrator does not automatically have access to the Exchange, and the System Operator does not automatically have access to Portal.

See the Exchange documentation section of *OracleMetaLink* for details on integrating with Portal. (Access *OracleMetaLink* via [http://www.oracle.com/support/.](http://www.oracle.com/support/))

Operator Accounts

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

Site Status

The System Operator can monitor the system to see the users who are signed on—for example, who logged on within the last 24 hours—in the Site Status tab. The **User Login Record** page appears containing the *Logins for today* that displays the user's name, the date and time the user logged in, and the date and time the user signed off or the user's session expired.

Intelligence Reporting and Monitoring

The System Operator can monitor the following activities:

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

Billing

For Oracle Exchange, the System Operator can define a pricing structure to charge companies for their use of the system. The System Operator also specifies the method of communicating that billing information to an external enterprise resource planning (ERP) or other billing system. For examples and more information on billing, see [Billing Setup Steps](#) on page 2-81.

Catalog Schema Management

In Oracle Exchange, the catalog enables a designated Catalog Author in a selling company to add items to the system through online entry or bulk loading. (A company can also host its own catalog on the system.)

In Oracle Exchange, the System Operator can use categories and attributes to control the structure of the catalog, helping catalog authors structure and define catalog items:

- Create new categories, add new base attributes and category attributes, and create category hierarchies. For example, the System Operator can nest the category *Ball Point Pens* under a category called *Office Supplies*.
- Add and update categories and attributes by bulk loading them in a single XML file, or add and update categories and attributes online. (Or do both.)
- Download categories, base attributes, category attributes, and the category hierarchy in a single XML file. The System Operator can then modify or translate the file and bulk load it again.

- Set up popular category lists. Buyers on the system see this list and can browse them directly for commonly ordered items.

In Oracle Sourcing, the System Operator can create categories and category attributes for use on negotiations, if desired.

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

Multilingual, Global Support

If the system is installed with multiple languages, then these languages appear at the top of the **Home** page when people log in, as shown in the following illustration. (There is no Shopping Cart icon in Oracle Sourcing.) Only the installed languages appear. See the *Oracle Exchange Installation and Upgrade Guide* for details.



When someone selects a language at the top of the page, the fields, tabs, and buttons on the system automatically change to that language.

The following sections describe languages, currencies, and time zones as they pertain to the System Operator. For similar detail for each functional area from the perspective of companies, see the *Oracle Exchange and Oracle Sourcing Company Administration Guide*.

Multiple Languages

The language that the System Operator chooses on the **Identification** page in the Configuration tab is the default language of the system. However, once people register and are approved, they can change their personal default language on the **Edit Personal Information** page in My Profile.

Registration and Administration

Before a person's registration is approved, the e-mail notifications sent to the registrant are in the language that the registrant used to complete the registration process (the language selected on the **Home** page).

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

Branding and Customization

Customized text, such as on the **Home** page (also called the **Welcome** page), appears in a person's selected language if the System Operator translated the text into that language.

Catalog Hosting

The System Operator can bulk load catalog categories and attributes in any of the installed languages.

Multiple Currencies

The System Operator sets a default currency for the system on the **Identification** page in the Configuration tab. Companies can also specify a default currency for their company.

In Oracle Exchange, if the System Operator charges for transactions that buyers and sellers perform on the system, and those transactions are conducted in a different currency than the system's default currency, the System Operator may need to bulk load currency exchange rates. See [Setting Up a Multi-Language or Multi-Currency System](#) on page 1-17 for more information.

Time Zones

The System Operator (or the installation team) sets up the default time zone that is used by the system. The default time zone applies to each person who registers.

After registrations are approved, people can change their default time zone on the **Edit Personal Information** page in My Profile.

Setup Steps Checklist

The following tables and the steps within them show the recommended order of the setup steps. Each setup step is described in detail in [Chapter 2](#).

The last column of the tables indicates whether the step is performed for Oracle Exchange (basic Exchange functionality, including the Buying and Selling applications), Oracle Transportation, Oracle Product Development Exchange, Oracle Supply Chain Exchange, Oracle Sourcing, or a combination of these. Perform the setup steps for the product or products you are licensed to implement.

Note: If you are licensed to set up Oracle Sourcing, see [Chapter 3](#) first. Some Oracle Sourcing steps require specific modifications as described in [Chapter 3](#).

* Steps marked with an asterisk can require up-front planning, and therefore may need more of your time and thought before implementing them. Note these steps and allow time in your implementation to prepare for them. See the specific steps for more information.

Note: Although the Customize Drop-Down Menu Items (Lookup Types) and other Lookup Types steps are optional, you may still want to review them. For example, many lookup types are used by the Purchasing and the Negotiations functionality, or you may want to add a transportation equipment type to Oracle Transportation. Review these steps to see if you need to make additional customizations.

Table 1–1 Administration Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Set Up Additional Operator Login Account(s)	Optional	No	all products
2	Set Up the Software	Required	No	all products

Table 1–1 Administration Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
3	Set Password Policy	Optional	No	all products
4	Create a Test Company	Optional	No	all products
5	Test Inbound Transactions	Optional	Yes, if assigned the Test Inbound Transactions task	Oracle Exchange Oracle Transportation Oracle Supply Chain Exchange

Table 1–2 Branding and Customization Setup Steps (Part I) *

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Modify the Style Sheet	Optional	No	all products
2	Modify Images	Optional	No	all products
3	Set Up Contact Information, and Notification Headers and Footers	Required	No	all products
4	Make Terminology Changes	Optional	No	all products
5	Customize Site Content	Recommended for Oracle Exchange, Required for Oracle Sourcing	No	all products
6	Set Up Regions Data	Required for Offers and Oracle Transportation	No	Oracle Exchange Oracle Transportation Oracle Sourcing
7	Customize Units of Measure	Optional	No	Oracle Exchange Oracle Transportation Oracle Supply Chain Exchange Oracle Sourcing

Table 1–3 Catalog Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Determine Catalog Authoring Activities *	Required if hosting catalog items on the system	Yes	Oracle Exchange
2	Determine the Catalog Structure *	Required if hosting catalog items on the system	Product Development Administrator can determine and create a catalog structure	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange
3	Create the Catalog Structure (Categories, Attributes, and Category Hierarchy)	Optional	Product Development Administrator can create a catalog structure. Catalog Author in Oracle Exchange can create categories and category attributes if System Operator allows.	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Sourcing
4	Check the Catalog Structure	Optional	Yes	Oracle Exchange Oracle Product Development Exchange
5	Configure Catalog Options	Optional	No	Oracle Exchange Oracle Product Development Exchange
6	Customize Catalog News	Optional	No	Oracle Exchange

Table 1–4 Purchasing Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Choose Purchasing Configuration Options	Optional	No	Oracle Exchange
2	Configure Search Limits	Optional	No	Oracle Exchange
3	Configure the Buying Home Page	Required for Oracle Sourcing	No	Oracle Exchange Oracle Sourcing
4	Configure Popular Categories List	Optional	No	Oracle Exchange Oracle Product Development Exchange

Table 1–5 Negotiations Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Create a Negotiations Item Category	Optional	No	Oracle Exchange Oracle Product Development Exchange Oracle Transportation Oracle Sourcing
2	Define System-wide Reusable Attribute Lists	Optional	Yes, for its company, if assigned the Manage Attribute Lists task	Oracle Exchange Oracle Product Development Exchange Oracle Transportation Oracle Sourcing

Table 1–6 Oracle Transportation Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Customize Transportation Lookup Types	Optional	No	Oracle Transportation
2	Create Document Definitions	Optional	No	Oracle Transportation

Table 1–7 Oracle Product Development Exchange Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Define Values for Change and Issue Management Lookup Types	Optional	Yes	Oracle Product Development Exchange
2	Create Custom Attributes	Optional	Yes	Oracle Product Development Exchange
3	Create Change Management Types	Required if using change or issue management	Yes	Oracle Product Development Exchange
4	Create Change Line Types	Required if using change management	Yes	Oracle Product Development Exchange
5	Create Document Categories	Optional	No	Oracle Product Development Exchange
6	Customize Project Management	Optional	No	Oracle Product Development Exchange
7	Create Customized Workflows	Optional	Yes	Oracle Product Development Exchange

Table 1–8 Oracle Supply Chain Exchange Setup Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Rename Order Types	Optional	No	Oracle Supply Chain Exchange
2	Configure Supply Chain Intransit Carrier	Optional	No	Oracle Supply Chain Exchange

Table 1–9 Billing Setup Steps *

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Modify Default Billing Activity Types	Optional	No	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
2	Activate the Recording of Billing Charges	Required if setting up billing	No	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
3	Define a Default System Price List	Required if setting up billing	No	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation

Table 1–9 Billing Setup Steps *

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
4	Set Up Oracle Receivables Integration	Optional	No	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
5	Select an XML Delivery Method	Optional	No	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
6	Choose System Payment Methods	Optional	No	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation

Table 1–10 Customization Setup Steps (Part II)

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Customize Job Functions *	Required for Oracle Sourcing	Yes	all products
2	Update List of Blocked Territories	Optional	No	all products
3	Customize Drop-Down Menu Items (Lookup Types)	Optional	No (In Oracle Exchange, the supplier can designate preferred and disallowed types, but not create or modify them)	all products

Table 1–10 Customization Setup Steps (Part II)

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
4	Set Up Intelligence Reports	Optional	Yes, for its own users	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Sourcing
5	Set Up a Default Job Functions List	Optional	Yes	all products
6	Customize Help Files	Required for Oracle Sourcing	No	all products
7	Customize the Help Logo	Recommended	No	all products

Note: Although Customize Job Functions is optional for the Exchange products, you may still want to review the step to see if the default job functions the system provides are sufficient for your business needs.

Table 1–11 System Launch Steps

Step Number	Step	Required?	Can the Company Administrator Perform this Step?	Which Products Perform This Step?
1	Define Company-Specific Billing Price Lists	Optional	No	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
2	Manage Third-Party Authoring	Optional	Yes, if assigned the Manage Third Party Authoring task	Oracle Exchange
3	Set Up Carrier Tracking	Optional	No	Oracle Transportation
4	Enable Companies to Perform Item Cross Referencing	Optional	No	Oracle Supply Chain Exchange

Setting Up a Multi-Language or Multi-Currency System

See [Multilingual, Global Support](#) on page 1-7 for an overview of multi-language and multi-currency support that the system provides.

Setting Up a Multi-Language System

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

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

Setting Up a Multi-Currency System

Other than setting the Default Currency on the **Identification** page (in the Configuration tab), you do not need to do anything special to support multiple currencies on the system unless you are billing companies in Oracle Exchange. In

that case, you additionally need to upload currency conversion rates if both of the following are true:

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

See [Billing Setup Steps](#) on page 2-81 for more information. Talk to a financial representative in your organization about how often to update currency conversion rates for the purpose of billing companies that perform foreign-currency transactions.

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

System Operator Setup

This chapter describes all of the setup steps that the System Operator can or must perform:

- [Administration Setup Steps](#) on page 2-2
- [Branding and Customization Setup Steps \(Part I\)](#) on page 2-17
- [Catalog Setup Steps](#) on page 2-45
- [Purchasing Setup Steps](#) on page 2-56
- [Negotiations Setup Steps](#) on page 2-62
- [Oracle Transportation Setup Steps](#) on page 2-66
- [Oracle Product Development Exchange Setup Steps](#) on page 2-70
- [Oracle Supply Chain Exchange Setup Steps](#) on page 2-80
- [Billing Setup Steps](#) on page 2-81
- [Customization Setup Steps \(Part II\)](#) on page 2-114

Administration Setup Steps

This section describes the following setup steps:

Table 2–1 Administration Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Set Up Additional Operator Login Account(s)	Optional	all products
2	Set Up the Software	Required	all products
3	Set Password Policy	Optional	all products
4	Create a Test Company	Optional	all products
5	Test Inbound Transactions	Optional	Oracle Exchange Oracle Transportation Oracle Supply Chain Exchange

Prerequisites

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

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

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

To create another Operator login account:

1. Access the system Web site and log in as the System Operator, using the logon information provided by the installation team.

The system presents you with the Operator-only Web pages.

2. Click the Operator Account icon at the top right of the page.
3. On the **View Operators** page, click the "Create Operator" link and enter the requested information to create an additional Operator account.

Remember the user name and password you specify. If you select a country other than the United States, the page is redisplayed with address fields appropriate for that country.

Operators

[View Operators](#)

Create Operator

[Edit Operator Information](#)

Create Operator

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

* Indicates a required field

Contact Title

* First Name

Middle Name

* Last Name

Title

System prv6at

Address

4. Click Submit.
5. Create additional Operator accounts if needed.

To edit your own Operator account and password:

1. Click the Operator Account icon at the top right of the page.
2. On the **View Operators** page, click the "Edit Operator Information" link to update your own information or password.

Specify a Spreadsheet Download Language of Unicode if you are using Microsoft Office 2000 (which supports Unicode) to modify spreadsheets that you download from the Operator system. Unicode enables the system to export a file that contains different language character sets—such as both Japanese and German—in the file. Specify Unicode only if you are using Microsoft Office

2000 to modify spreadsheets. (Otherwise, you may see unusual characters when you open the file.) If you specify Native, the downloaded spreadsheet will include only data in the Language specified on the **Edit Operator Information** page.

3. Click Apply Changes.

To view other Operator accounts:

1. Click the Operator Account icon at the top right of the page.
2. On the **View Operators** page, enter the Operator's last name in the Name field and click Go.

The system performs a *begins with* search. If you do not know the beginning of the name, use a wildcard, such as the percent sign (%). For example, a search on %atters returns Patterson. (Search wildcards may not work in all languages.)

Alternatively, click one of the letter links to limit the display only to Operators whose last name begins with the selected letter.

3. In the search results table, click the Operator's name to view that Operator's contact information and user name.

Step 2 Set Up the Software (Required)

1. Access the system and log in as the Operator.

Ask the person who installed the system to provide you with this URL and with a login if you do not have an Operator account already.

2. In the Configuration tab, under Configuration, click the "Software Setup" link.
3. Make sure the fields are properly entered on the **Software Setup** page. In most cases, these fields were defined when the system was installed, and you should generally not modify them after that. However, if for some reason you need to make a change, fill in the fields as described in the following table:

Table 2–2 Software Setup Page

Name	Required	Description
System URL	Yes	The URL of the system's server (without the port number).
System Port Number	Yes	The server port number. This port number must match the port number in the actual system's URL.
Portal URL	No	This field appears if Oracle Exchange is integrated with Oracle Portal's single sign-on feature. Enter the portal server that is integrated with Oracle Exchange—for example, <code>http://host:port/pls/portal30</code> .
Return to Portal URL	No	This field appears if Oracle Exchange is integrated with Oracle Portal's single sign-on feature. Enter the URL to which people are brought when they click the Return to Portal icon at the top right of the page.
Catalog Directory	Yes	The full directory path to the location for uploaded catalogs in Oracle Exchange.
Character Set	Yes	The character set in use by the database and middle-tier server. Note: When people bulk load files to the system, some browsers will not bulk load files or browse directories whose names contain language-specific marks such as accents or umlauts, or multibyte languages (such as Chinese) if the middle-tier server character set is UTF-8 or does not support the language-specific marks.
Login Attempt Interval	Yes	Period of time in minutes during which invalid login attempts add up. For example, if the interval is 10, the system counts invalid login attempts for ten minutes. Once ten minutes pass, the system recounts invalid login attempts, starting at 1. This field is not available if you are integrated with Oracle Portal's single sign-on feature, which has its own login security setup.
Number of Strikes	Yes	Number of invalid login attempts a person can make before being locked out of the system. This field is not available if you are integrated with Oracle Portal's single sign-on feature, which has its own login security setup.
Lockout Period	Yes	Period of time in minutes a person is locked out after invalid login attempts. This field is not available if you are integrated with Oracle Portal's single sign-on feature, which has its own login security setup.

Table 2–2 Software Setup Page

Name	Required	Description
Server Timezone	Yes	The time zone in which the system server is running. The time zone you enter here <i>must</i> match your middle tier and database server time zones. You should not change the time zone since this is the time zone in which the system stores the data. (If you change the time zone, you would need to change the data.)
Certifying Authority Certificate Location	No	The full path to the directory containing the certification information.
Web Methods URL	No	The URL of the webMethods server you are using for XML transaction delivery, if webMethods is licensed with your system.
Billing Database SID Billing Database Connect String Billing Database User Name New Billing Database Password Retype New Billing Database Password	No	Enter Billing Attributes if you are integrating Oracle Exchange with Oracle Receivables. For instructions on entering the Billing Attributes, see Billing Setup Steps on page 2-81.
System Version	No	The system software version. This field is for display only and not modifiable.
Primary XML Messaging Service	No	Not used by the system.
XML Gateway Debug Level	No	Set this to 0 unless you are troubleshooting XML transaction delivery. Setting this to 3 produces a detailed log file for every XML transaction created in the system. (Levels 2 and 1 provide less information.) Since log files can take up disk space, keep the level set to 0 unless you are troubleshooting XML transactions.

4. If you have made changes to the **Software Setup** page, click Apply Changes.
5. In the Configuration tab, under User Interface, click the "Identification" link.
6. On the **Identification** page, fill in the requested information. (See the table below.)

The fields on this page enable you to customize and otherwise brand the system. Changes you make using this page take effect immediately. You do not have to decide now what all of the fields will be, if you do not yet know. Enter something for now and return to this page later. Some of the fields may be set

during installation and may not allow updates without contacting the installation team.

Table 2–3 Identification Page

Name	Required	Description
System Name	Yes	The name of the system that appears everywhere the system name is referenced (such as the text <i>New to [System Name]? Click here to register</i> on the logon page and <i>Your [System Name] order has been placed</i> in e-mail notification subjects). Note you should also apply this name to images used in the system. See the Modify Images step on page 2-24 and the Customize Content step on page 2-31.
Notifications e-mail address	Yes	The e-mail address of the System Operator to whom registration request notifications should go.
Help e-mail address	Yes	The e-mail address of the System Operator who receives any correspondence via the "Contact Us" link that companies see on the system.
Default Language	Yes	The language in which the system appears for users who have not specified a particular language and for unregistered users who may be browsing the site.
Default Currency	Yes	The currency in which all transactions on the system will take place unless a company specifies an alternate currency specific to the company.
Default Timezone	Yes	The time zone assigned to new users by default. Users can later change the value.
Show Web Conference Button	Yes	Indicator of whether the Web Conference button appears on the system.

Table 2–3 Identification Page

Name	Required	Description
Web Conference URL	No	The URL for Web conferences.
Show Shopping Cart Icon	Yes	Indicator of whether to display the Shopping Cart icon at the top right of the page. For Oracle Exchange, choose Yes if you will be using the shopping functionality. For Oracle Sourcing, choose No.
Display Billing and Payment During Registration	Yes	Indicator of whether to display, during registration, the information related to paying Oracle Exchange for its services. For Oracle Sourcing, choose No.
Language	Yes	The language version to which the values below apply.
Contact Information	Yes	Not used.
Notifications Header	No	A header (such as <i>Greetings from System Name</i>) placed at the top of all outgoing notifications (such as notifications that sellers receive of orders placed with their company).
Notifications Footer	No	A footer (such as <i>Thank you for doing business</i>) placed at the bottom of all outgoing notifications (such as notifications that sellers receive of orders placed with their company).

7. If you have multiple languages installed, use the Language field to change the language and define a different set of language-specific values for each of the fields in the Language Specific Settings section.
8. Click Apply Changes.

Step 3 Set Password Policy (Optional)

Use the **Password Policy** page to choose your requirements for peoples' passwords. These requirements apply to everyone's passwords, whether registered online or through bulk loading. They apply to Operator passwords as well.

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

Note: The **Password Policy** page is not available if you have set up Oracle Exchange to run in single-sign mode, using Oracle Portal. The single sign-on feature of Portal has its own password policy setup.

To set the password policy:

1. In the Configuration tab, under Configuration, click the "Password Policy" link.
2. On the **Password Policy** page, enter the following information:
 - **Minimum Password Length.** If someone enters less than this number, an on-screen error message will prompt the person to enter a longer password. (The maximum password length is 30 characters.)
 - **Password Life.** The system will prompt a person to change his or her password when the duration for which the password has been active exceeds the current password life. For example, if you set the password life to 5, anyone who now has a password older than 5 days will be prompted to change it the next time that person logs on. (Each time someone logs on, the system compares the password's creation date against the current password life.) The maximum password life you can set is 999 days.
 - **Do not allow password to be same as user name.** If you select this option, an on-screen error message will prompt the person to enter a different password than the user name if that person enters the same for both.
 - **Require password to contain at least one numeric digit.** If you select this option, an on-screen error message will prompt the person to include at least one number in the password, if that person did not include a number.
 - **Require password to contain at least one character.** If you select this option, an on-screen error message will prompt the person to include at least one

letter, if that person entered a password that is all numbers. Punctuation marks (such as !, ?, #) are not allowed.

3. Click Apply Changes.

Step 4 Create a Test Company (Optional)

You may want to register fictional or "test" companies with the system so that you can test transactions between them and periodically check that the branding, customization, and other changes you make throughout the setup look and work as intended.

Typically, you would create test companies on a test or pre-production instance of the system. Note that on a production instance of Oracle Exchange, your test company may be billed for transactions it performs (if you set up billing), and the company will display in the Trading Partner Directory to all companies who register on the system.

You cannot delete a company once it is created.

To create a test company:

1. Log off and re-access the system.
2. On the **Home** page, click the "Sign me up!" link and follow the online guidance to register your test company as an independent entity. (In Oracle Sourcing, there would be no Shopping Cart icon in the illustration below.)



Log in to prvat English • Français • 日本語

Username

Password

[Lost password?](#)

I am a new user

[Sign me up!](#)

[Check my registration status](#)

Applications

[Buying](#)
Buying

[Selling](#)
Selling

[Supply Chain Exchange](#)
Supply Chain Exchange Homepage

[Product Development](#)
Product Development

This is a placeholder area for your company's policy information and any company-specific content.

3. Log on as the System Operator and click the Companies tab.
4. Click the "Approve Companies" link, locate the company you registered, and follow the guidance on the **Approve Companies** page to approve the company.
5. When you approve the company and assign any of the default job functions that the system provides, decide how you want to test the system. For example, in Oracle Exchange, you may want to be sure to assign the company the Catalog Author job function so that you can test how your catalog structure (which you will set up later) looks on the **Catalog Authoring** pages. In Oracle Sourcing, you may want to assign the Sourcing Seller job function to test a seller's responding to a negotiation.
6. Register and approve other test companies as needed. For example, you may want to create a buying company who can perform only buyer-specific job functions on the system. See [Appendix D](#) to help you decide which job functions to assign to your test company.

Step 5 Test Inbound Transactions (Optional)

Use the **Test Inbound Transaction** page to test that inbound XML transactions that companies send to the system will work.

You can perform this step any time during the setup.

Prerequisites

- Set up a server to receive the XML transactions. This system comes with Oracle Transport Agent to send and receive XML transactions; however you can configure webMethods instead (or additionally) if you have a webMethods license with the system. If you are using Oracle Transport Agent, additional configuration is required after installation. For instructions, see the document *Oracle XML Gateway Post-Install Steps for Oracle Exchange* for your latest release on *OracleMetaLink*. (Access *OracleMetaLink* via <http://www.oracle.com/support/>.)

If you use Oracle Transport Agent for XML transaction delivery, companies can use any of the communication methods described in [Appendix A](#) to receive outbound transactions, except the webMethods options. If you have installed webMethods for transaction delivery, companies can use any of the communication methods described in [Appendix A](#) to receive outbound transactions. For inbound transactions, a company can use any messaging service to send the documents to this system, but "guaranteed once" delivery is provided only if the company uses the same communication method (Oracle Transport Agent or webMethods) as the System Operator does.

- Register two test companies (see [Step 4 Create a Test Company \(Optional\)](#) on page 2-10)—one who will send the XML transaction and the other who will receive it. Make sure the sending company has chosen a communication method for the inbound transaction on the **Transaction Delivery** page. Make sure the receiving company has chosen a communication method for the corresponding outbound transaction on the **Transaction Delivery** page. See the *Oracle Exchange and Oracle Sourcing Company Administration Guide* for instructions on accessing the **Transaction Delivery** page.
- Create an inbound XML file from the sending company. See the *Oracle Exchange XML Transaction Delivery Guide for Marketplace Exchange* for examples and descriptions of XML transactions. You can download this guide from the **Transaction Delivery** page. For information on Supply Chain Exchange transactions, download the *XML Transaction Delivery Reference Guide for Supply Chain Exchange* from the **Admin** page in the Supply Chain Exchange application.

To test inbound transactions:

1. In the Configuration tab, under Configuration, click the "Test Inbound Transaction" link.
2. On the **Test Inbound Transaction** page, enter the following information:
 - **Server Address.** (Required) Enter the Internet Protocol address or full domain name to which XML transactions are delivered to the system. If your server uses HTTP or HTTPS, use the complete URL, such as `http://www.oracle.com:5454/xml/dataReceive` or `https://www.oracle.com:5454/xml/dataReceive`. If your server uses the Oracle Transport Agent, use the complete URL in the following format: `http://<server>:<port>/servlets/oracle.apps.ecx.oxta.TransportAgentServer`. For example:
`http://www.oracle.com:80/servlets/oracle.apps.ecx.oxta.TransportAgentServer` or
`https://www.oracle.com:80/servlets/oracle.apps.ecx.oxta.TransportAgentServer`. If your server uses webMethods, enter the complete URL on this page, in the following format:
`http://<server>:<port>/invoke/Exchange.inbound/receive`. For example,
`http://www.oracle.com:80/invoke/Exchange.inbound/receive` or
`https://www.oracle.com:80/invoke/Exchange.inbound/receive`.
 - **Sender Message ID.** Unique reference number that identifies the transaction. If you are resending the same transaction, enter a different sender message ID each time. (Although optional, entering a sender message ID makes it easier to find the XML transaction in the database if you need to investigate problems.)
 - **Message Type.** (Required) Message format for the transaction. Enter XML.
 - **Message Standard.** (Required) Message format standard for the transaction. Enter OAG.
 - **Document Number.** Document number that the company uses to identify the transaction, such as a purchase order or invoice number. For example, if you are testing the Purchase Order Inbound transaction, the document number is the number in the POID tag of the XML file. (Although optional, entering a document number enables you to search specifically for that document in the Transaction Monitor or otherwise more easily find the file when you need.)
 - **Transaction Type.** (Required) Type of transaction, such as PO for Purchase Order Inbound. See [Table 2-4](#) below for the list of valid transaction types.

- Transaction Subtype. (Required) See [Table 2–4](#) below for the list of valid transaction subtypes.
 - Party ID. (Required) Trading Partner ID for the sending company as given in the Trading Partner Directory. (Log on as the company, click any application link, and click Trading Partner Directory in the Welcome tab to search for the company and obtain its Trading Partner ID.)
 - Party Type. Not used for inbound testing.
 - Protocol Type. Not used for inbound testing.
 - Protocol Address. Not used for inbound testing.
 - Username. (Required) Registered user name that the sending company's Company Administrator uses to log on to the system.
 - Password. (Required) Registered password that the sending company's Company Administrator uses to log on to the system.
 - Attribute1. Not used.
 - Attribute2. Not used.
 - Attribute3. (Required for pass-through transactions only, such as Invoice Inbound - LOAD_INVOICE_001. For a list of Oracle Exchange pass-through transactions, see the *Oracle Exchange XML Transaction Delivery Guide for Marketplace Exchange*, which companies can download from the **Transaction Delivery** page.) Trading Partner ID for the receiving company as given in the Trading Partner Directory. (Log on as the company, click any application link, and click Trading Partner Directory in the Welcome tab to search for the company and obtain its Trading Partner ID.)
 - Attribute4. Not used.
 - Attribute5. Not used.
 - Payload. Copy and paste the content of your XML file into the Payload field.
3. Click Go.
 4. To confirm that the transaction was successful:
 - Click the Site Status tab, then the "Transaction Monitor" link.
 - On the **Transaction Monitor** page, enter the information for the transaction(s) for which you want to review the status.

For example, to view the status of a Purchase Order Inbound (ADD_PO_003) transaction, you might enter the following information:

Direction: Inbound

Transaction Type: Purchase Order Inbound (ADD_PO_003)

Document ID: the document ID entered in the POID field in the XML document

Trading Partner: the company who sent the transaction

Status: All

From 07-08-2001 through 14-08-2001

- Click Go.

The following table lists the transaction type and subtype code used for each XML transaction.

Table 2–4 Transaction Types and Subtypes

Transaction	Transaction Type	Transaction Subtype
Advance Ship Notice Inbound and Outbound	ASN	ASN
Billing Activity Inbound and Outbound	LR	LR
Billing Customer Information Outbound	SC	SC
Cancel PO Inbound and Outbound	POCAN	POCAN
Cancel SO Outbound	SOCAN	SOCAN
Catalog Lane Services Inbound	LNS	LNS
Catalog Lane Tariffs Inbound	TAR	TAR
Catalog Schedules Inbound	SCH	SCH
Change PO Inbound (CHANGE_PO_002)	POCH	POCH
Change PO Outbound (CHANGE_PO_002)	POC	POC
Change SO Outbound (CHANGE_PO_002)	SOC	SOC
Change PO Inbound and Change SO Outbound (CHANGE_PO_006)	SOCP	SOCP
Demand Inbound	FCT	FCT
Inbound and Outbound Confirm BoD for Customers	CBOD	CBOD

Table 2–4 Transaction Types and Subtypes

Transaction	Transaction Type	Transaction Subtype
Invoice Inbound and Outbound (LOAD_INVOICE_001)	INV	INV
Invoice Inbound and Outbound (PROCESS_INVOICE_002)	INVP	INVP
Load Tender Request Acceptance Inbound and Outbound	LTA	LTA
Load Tender Request Cancellation Inbound and Outbound	LTC	LTC
Load Tender Request Inbound and Outbound	LTN	LTN
Load Tender Request Partial Acceptance Inbound and Outbound	LTP	LTP
Load Tender Request Rejection Inbound and Outbound	LTR	LTR
Load Tender Request Update Inbound and Outbound	LTU	LTU
Load Tender Synchronization Inbound and Outbound	LTS	LTS
Planning Schedule Inbound	Not used	
PO Acknowledgment Inbound and Outbound	POA	POA
PO from Outbound Buyer's Auction & RFQ	AUP	AUP
Proof of Delivery Inbound and Outbound	POD	POD
Purchase Order Inbound and Outbound (ADD_PO_003)	PO	PO
Purchase Order Inbound (PROCESS_PO_007) and Sales Order Outbound (PROCESS_PO_007)	SOP	SOP
Sales Order Outbound (PROCESS_PO_003)	SO	SO
Sequence Schedule Demand Inbound and Outbound	PSQ	PSQ
Shipment Schedule Delete Inbound	SSD	SSD
Shipment Status Outbound	SHS	SHS
Shipping Schedule Inbound	Not used	
Supply Inbound	SUP	SUP
Transaction Acknowledgment Outbound	ACK	ACK

Branding and Customization Setup Steps (Part I)

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

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

Also keep backup copies and records of your own customizations in case you need to reapply them. For example, for customizations you can undo, the system reverts to the original, system versions of the files, not a previous version of a customization you made.

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

This section describes the following steps:

Table 2–5 Branding and Customization Setup Steps (Part I) Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Modify the Style Sheet	Optional	all products
2	Modify Images	Optional	all products
3	Set Up Contact Information, and Notification Headers and Footers	Required	all products
4	Make Terminology Changes	Optional	all products

Table 2–5 Branding and Customization Setup Steps (Part I) Summary

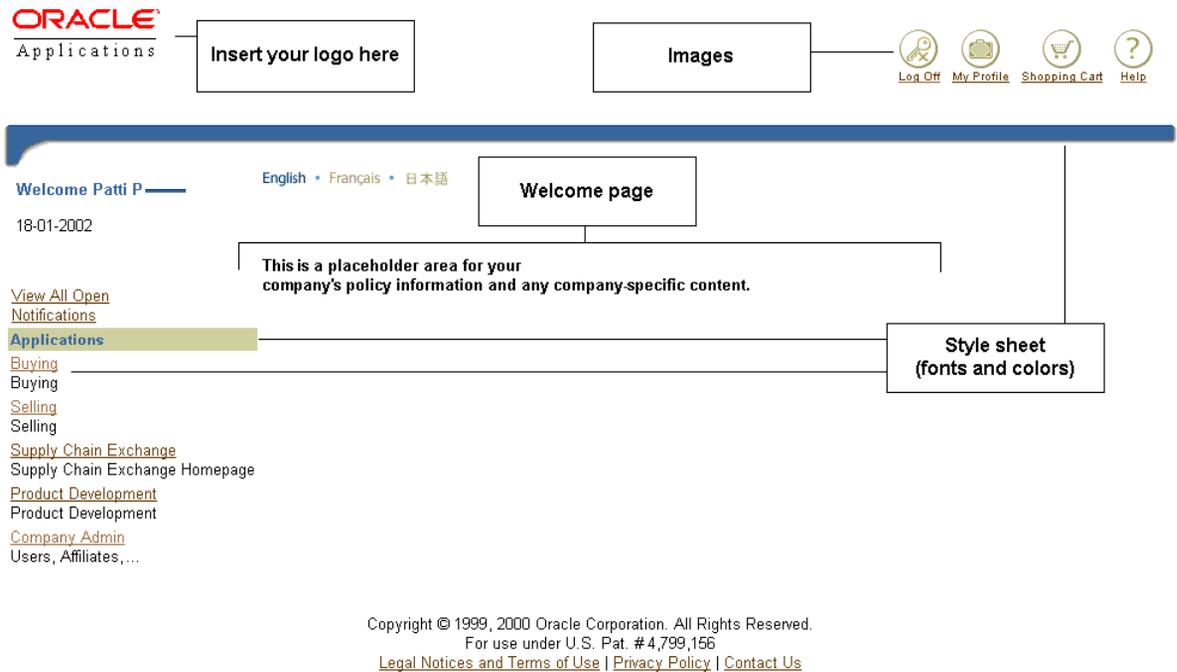
Step Number	Step	Required?	Which Products Perform This Step?
5	Customize Site Content	Recommended for Oracle Exchange, Required for Oracle Sourcing	all products
6	Set Up Regions Data	Required for Offers and Oracle Transportation	Oracle Exchange Oracle Transportation Oracle Sourcing
7	Customize Units of Measure	Optional	Oracle Exchange Oracle Transportation Oracle Supply Chain Exchange Oracle Sourcing

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

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

(In Oracle Sourcing, the illustration below would not have a Shopping Cart icon.)

Tip: Create and check your user interface and branding customizations on a test environment before applying them to a production system.



Prerequisites

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

Step 1 Modify the Style Sheet (Optional)

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

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

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

Note: Customizing colors using the style sheet does not change the color of static images, such as arrows, trash bins, and logos. (The style sheet does affect the colors of buttons; the global icons at the top right of the pages, such as My Profile; tabs; and railroad tracks—the step-by-step graphical representation of some flows, such as at the top of the registration pages). Customize static image colors by customizing the images. See [Step 2 Modify Images \(Optional\)](#) on page 2-24.

The following is an example of how one might use the style sheet to change the color scheme. In this example, the text foreground color (color of standard text on most pages) is changed to purple, using the #663399 color code:

```
<?xml version="1.0"?>
<!--$Header: custom.xss 115.5 2001/07/20 14:40:06 pkm ship $-->
<styleSheetDocument xmlns="http://bali.us.oracle.com/cabo/ocelot">

  <import href="pom.xss"/>

  <!-- The base style sheet for the Browser Look And Feel -->
  <styleSheet>

    <!-- TextForeground is the foreground color used for almost
         all text in the Browser Look And Feel -->
    <style name="TextForeground">
      <property name="color">#663399</property>
    </style>

  </styleSheet>

</styleSheetDocument>
```

The following is an example of how one might use the style sheet to change the default font family to Times and the default font size to 18:

```
<?xml version="1.0"?>
<!--$Header: custom.xss 115.5 2001/07/20 14:40:06 pkm ship $-->
<styleSheetDocument xmlns="http://bali.us.oracle.com/cabo/ocelot">

<import href="pom.xss"/>

<styleSheet>

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

</styleSheet>
</styleSheetDocument>
```

For font changes, you may need to update the font setting for the specific operating system to see the change, by *adding* the following lines to the example above, before the `</styleSheetDocument>` tag:

```
<styleSheet platforms="windows">
<style name="DefaultFontFamily">
<property name="font-family">Times</property>
</style>
</styleSheet>
```

For font size changes, you may need to update the font setting for a specific browser to see the change, by *adding* the following lines to the example above, before the `</styleSheetDocument>` tag:

```
<styleSheet platforms="windows" browsers="ie">
<style name="DefaultFont">
<property name="font-size">18pt</property>
</style>
</styleSheet>
```

See the `blaf.xss` and `using_xss.htm` files included with the style sheet that you download in the following steps for more information.

Caution: If you update a browser or operating system font setting as described above, you also override users' specific settings, which they may require for viewing Web pages.

Include all of the changes you want to make in *one* custom.xss file. For example, if you change the font size in one custom.xss file, then change the background color in another custom.xss file, your font change is lost. The system applies only the style properties it sees in a single custom.xss file; style properties not covered in the file use the default styles in the system. Since it is best to test one change at a time, simply add changes incrementally to the existing successfully changed custom.xss file.

Note: Keep backup copies of your customizations. The system can revert to the original, system versions of files you customize in case you need to undo a change, but not a previous version of a customization you made.

To download the existing style sheet:

1. In the Configuration tab, under User Interface, click the "Customize Content" link.
2. On the **Customize Content** page, select Style Sheet from the Content Type menu.
3. The Language menu does not apply to style sheets. If you want to make language-specific customizations to the style sheet, use the custom.xss file to define different behavior for different browser languages.
4. From the Template or Customization menu, select Template if you have never customized the style sheet before. Select Customization if you have already modified the style sheet once and want to download and customize that modified version.
5. Click Download Now.
6. Save the .zip file and extract the contents to a convenient directory.

The .zip file contains three style sheets and a Readme file. Two of the style sheets are used by the system and the third, custom.xss, is the file you modify. You may wish to print off the files for reference. View the Readme file for detailed instructions on how to modify the custom.xss file to create a

customized style sheet. (Note that the Language field does *not* apply to style sheets.)

To upload your modified custom.xss file:

1. Return to the **Customize Content** page.
2. In the Step 2: Load Files section, select Style Sheet from the Content Type menu.
3. The Language does not apply to style sheets. (When you upload the style sheet in one language, it is available in all system languages.)
4. Choose UTF-8 for the Character Set.
5. Click Browse to navigate to your modified custom.xss file.

The file name needs to be custom.xss.

6. Click Start Load Now.

When the upload has completed, the **Verify Content** page appears.

Note: If there is a standards violation in your style sheet, the system behaves as if you made no customizations; the system rejects your customized style sheet and uses the default style sheet.

7. If your content is acceptable, click Publish.

The **Confirmation** page appears indicating successful customization of the content type.

If you decide your content needs corrections or further modifications, click Cancel, and you are returned to the **Customize Content** page.

8. You may need to refresh or reload (or restart) your browser to see the change.

To undo custom.xss changes:

1. Return to the **Customize Content** page.
2. Click the word "here" in the sentence "If you want to undo any customization, please click here."

The **Undo Customization** page appears.

3. Choose Style Sheet from the Template menu.

4. The Language does not apply to style sheets. (When you undo a style sheet change in one language, it is undone in all system languages.)
5. Click Submit.

The system reverts to the default system styles. A **Confirmation** page appears indicating that you successfully restored the original file.

Step 2 Modify Images (Optional)

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

Note: Keep backup copies of your customizations. The system can revert to the original, system versions of files you customize in case you need to undo a change, but not a previous version of a customization you made.

Some images are generated and colorized by the system, and you cannot completely change them—for example, the Help icon at the top right of the pages. Images like these include buttons; the global icons, such as My Profile and Help, at the top right of the pages; tabs; and *train tracks*—the step-by-step graphical representation of some flows, such as at the top of the registration pages.

To customize an image or icon:

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

Some images that appear on pages that you download from the **Content Type** page can be customized only through the **Content Type** page and may not be

included in the images you download here. See [Step 5 Customize Site Content \(Recommended for Oracle Exchange, Required for Oracle Sourcing\)](#) on page 2-31.

2. In the Configuration tab, under User Interface, click the "Customize Images" link.
3. On the **Customize Images** page, select the appropriate Language.
4. Click Download Now.
5. Save the .zip file into an appropriate directory.
Some of the images are .gif files and some are .jpg files.
6. Extract the files to a convenient directory and find the image file you wish to modify.
7. Modify the image file using your favorite image editor, and save the file *using the original name and extension*. Review the *readme_customize_images.htm* file included in the .zip file for more information.

To upload your modified image file:

1. Return to the **Customize Images** page.
2. Select the appropriate Language.
You must upload to the same language version from which you downloaded the image file.
3. Click Browse and locate either a single modified image file or a .zip file containing multiple .gif or .jpg files that you modified.
4. Click Start Load Now.
A **Confirmation** page appears notifying you of a successful upload.
5. You may need to click the Refresh or Reload button on your browser to see the change.

To undo an image customization:

1. In the Configuration tab, under User Interface, click the "Customize Images" link.
2. Click the word "here" in the sentence "If you want to undo any customization, please click here."

The **Undo Image Customization** page appears.

3. Select the appropriate Language.
4. If you are undoing a single file's customization, specify the File Name. If you wish to undo all customizations, select the appropriate Language in the Undo All Image Customization section of the page.
5. Click Submit in the Undo Image Customization section of the page to undo a single image file. Click Submit in the Undo All Image Customization section of the page to undo all image file customizations.

A **Confirmation** page appears indicating that you successfully restored the original image file(s).

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

In the Configuration tab, under User Interface, click the "Identification" link. On the **Identification** page, update fields such as Notifications Header and Notifications Footer if you hadn't finalized them earlier. For example, the default notifications header and footer that the system provides are generic, and you may want to change them to better identify your system. See [Table 2-3](#) on page 2-7.

Step 4 Make Terminology Changes (Optional)

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

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 texts, 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.

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

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

Note: Create backup copies of your terminology text files. The system can revert to the original, system version of texts in case you need to undo a change, but not a previous version of a customization you made.

The following illustration shows an example of the text you can change. (The page shown in this illustration would look different in Oracle Sourcing. For example, there would not be Catalogs and Sales tabs.)



To customize text strings online:

1. In the Configuration tab, under User Interface, click the "Customize Text" link.
2. On the **Customize Text** page, select the Language.

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

3. Select the Text Type to search for text strings among existing customizations, the default text, or both.
4. Enter a search value in the Text Value field.
You do not have to enclose the string in quotes. You can enter a partial value, and you can use a wild card character (%). Searches are not case sensitive.
5. Click Go.

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.
 - **Name:** The message in which the text string appears.
6. Select the string you wish to change, or click the "Select All" link for each page of strings you are selecting.
 7. Click Customize.
 8. Enter your change in the New Text field.
 9. Click Submit.

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

To customize text strings offline:

1. In the Configuration tab, under User Interface, click the "Customize Text" link.
2. Follow the steps in the previous section, **To customize text strings online**, to search for the strings you want to customize.
3. Click Download All Searched Results.
4. When prompted, save the .zip file to a convenient directory. Note that the .zip file includes a *readme* file and a text file that can be opened as a tab-delimited file in a spreadsheet program. You will enter all of your string modifications to the spreadsheet text file.
5. Extract and print the *readme* file and follow the instructions to make your text changes.

You do not need to preserve the original file name.

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.

This should be 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.

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

To make negotiations terminology and negotiations notifications changes:

Changes made to negotiations terminology are reflected in the different negotiations pages and in the e-mail notifications that the system sends to negotiation owners and respondents. You can also use the customize text functionality to customize the entire body of negotiation e-mail notifications.

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

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

If you are customizing notifications, some of the notifications consist of more than one message text string; therefore, you may need to modify several text strings if you need to change all of the content of a notification.

3. Follow steps 6-10 above, in **To customize text strings offline**, to upload your negotiations terminology changes to the system.

To undo your text string changes:

1. Follow steps 1-6 in **To customize text strings online**, above. Choose the language in which you want to undo the change and select a Text Type of Customizations. Enter a search that will display the changes you want to undo and select the changes you want to undo.
2. Click Undo.

A **Confirmation** page appears indicating that you have successfully reversed the customization. The updated text is immediately visible in that language version.

Step 5 Customize Site Content (Recommended for Oracle Exchange, Required for Oracle Sourcing)

There are several standard pieces of text that appear throughout the system and that you can customize or update as needed, such as legal notifications, privacy policy, terms of use, and the **Welcome** pages. The Selling **Welcome** page is shown in the illustration below as an example. The Selling **Welcome** page consists of the content below the tab area. (In Oracle Sourcing, there would not be Catalogs, Sales, or Intelligence tabs. Suppliers also do not see the Trading Partner Directory.)

Overview | Trading Partner Directory | **Welcome** | Catalogs | Negotiations | Sales | Intelligence

Welcome to Selling

Oracle's selling functions allow you to achieve operational efficiencies by streamlining and automating sales functions online. There are four sections:

- Catalogs** - Load and manage your catalog content and configure a punch out to your web store
- Negotiations** - Create, manage, and participate in Auctions, RFQs, and Offers
- Sales** - Track your sales orders and manage your company's selling preferences
- Intelligence** - Analyze your organization's catalog and negotiations sales

Need help? Our [Online Help](#) system includes how-to's and step-by-step instructions.

Activity Links

- Catalogs**
 - [Bulk Load Items & Price Lists](#)
 - [View Bulk Load Status](#)
 - [View Orders](#)
- Negotiations**
 - [Respond to Auctions](#)
 - [Respond to RFQs](#)
 - [Monitor Bidding Activity](#)

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

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As another example, the System Operator can add help desk phone numbers and hours, Web sites that contain additional information, and any other additional information or fields to the **Contact Us** page. The System Operator can also

customize the **Legal Notices and Terms of Use** and **Privacy Policy** pages, the links to which are displayed at the bottom of every page, as shown in the illustration above.

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

To customize a page of content, you download the page from the system, make the modifications to the page using your favorite HTML editor, and then upload the page back to the system. If you have multiple language versions installed, content customizations are specific to a particular language version. Customizations to one language version are not seen by people using any other language version. For example, if you make a change to the French **Contact Us** text, those changes will not be seen by people using the American English language version. If you have installed the system in more than one language, customize the text in each language. Since this content is HTML-based, you can see the changes immediately after uploading the new pages. You can undo a content customization at any time.

Note: Keep backup copies of your customizations. The system can revert to the original, system version of the Template files you customize in case you need to undo a change, but not a previous version of a customization you made.

To customize the site content:

1. In the Configuration tab, under User Interface, click the "Customize Content" link.
2. Select the Content Type you wish to change.

Configuration Home > Customize Content

Customize Content

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

* Indicates a required field

Step 1: Download Templates

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

* Content Type
 * Language
 * Template or Customization

Catalog News
 Catalog News
 Contact Us
 Fee Schedule
 Legal Notices and Terms of Use
 Logo
 Buying
 Selling
 Privacy Policy
 Registration Confirmation

Download Now

Step 2: Load Files

Table 2–6 Content Types

Content Type	Use
Catalog News	News (for example, news of catalog structure changes) for catalog authors in Oracle Exchange. See Step 6 Customize Catalog News (Optional) on page 2-55.
Contact Us	The text and response form used to gather user input.
Fee Schedule	A breakdown of the fees charged by the System Operator for a company's use of Oracle Exchange. Companies can view the Fee Schedule page during company registration on the Exchange.
Legal Notices and Terms of Use	The legal usage agreement for the system. This legal agreement is accessible to users by clicking the "Legal Notices and Terms of Use" link at the bottom of the Web pages on the system or by reading the agreement during registration.

Table 2–6 Content Types

Content Type	Use
Logo	The branding image used in the system that appears at the top of every page.
Buying	The Home page used by the Buying application.
Selling	The Home page used by the Selling application.
Privacy Policy	The explanation of the privacy protections afforded by the system.
Registration Confirmation	The text that appears at the bottom of the Confirmation page upon successful registration of a company. Note: This text contains links to template or example pages. You should replace these pages to adapt them to your system (or, if preferred, remove the links to the pages).
Style Sheet	The custom.xss style sheet file used to control the general look and feel of the system’s Web pages. Modifying the style sheet was described in Step 1 Modify the Style Sheet (Optional) on page 2-19.
Supply Chain News	Supply chain news that displays in the Welcome tab in the Supply Chain application.
Supply Chain Intransit Carrier	Page used to specify carriers and carrier sites used for shipment tracking. This page appears when people click a link to a carrier site for shipment tracking purposes. See Step 2 Configure Supply Chain Intransit Carrier (Optional) on page 2-80.
Welcome	The content appearing on the Home page, including image files used on that page.

3. Select the Language version you wish to customize.

Your customization will only affect the content type for that language. Similar content types for other language versions are unaffected. If you have installed the system in more than one language, customize the content in each language. (Changes to the language version selected as the Default Language on the **Identification** page are seen by people using that language, by people who do not otherwise select an available language version, and by any unregistered people who may be browsing the system.)

4. From the Template or Customization menu, select Template if this content has never been customized or Customization if this content type has been customized before, and you wish to update the customization.
5. Click Download Now.

6. When the Save window appears, click the "Save it to disk" radio button and save the .zip file to a convenient directory.

The .zip file contains the HTML (.html) file(s) for the chosen content type. Depending on the content type, there may also be a Readme file included.

7. Navigate to the directory in which you saved the .zip file. Open the .zip file, and extract the .html file you wish to update.
8. Open the .html file and make the necessary changes using an HTML editor.

If there is a Readme file for the content type, be sure to read the instructions inside. Once you have updated the .html file, save your modifications. Be sure to save the updated file with the original name and extension.

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

9. Return to the **Customize Content** page.
10. Scroll to the bottom section of the page labeled Step 2: Load Files.
11. Select the appropriate Content Type. Be sure you upload your file as the same content type that you downloaded.
12. Select the appropriate Language version. Be sure you upload to the same language version from which you downloaded.
13. The Character Set defaults for you, depending on which language you chose. For example, if you chose French, the Character Set menu displays Cp1252 and UTF-8 as character set options. Choose the default character set for that language. For example, for French choose Cp1252. Choose UTF-8 if you created and saved the file using a UTF-8 editor. For more information on character sets, see the *Oracle Exchange Installation and Upgrade Guide*.
14. Use the Browse button to locate the updated .html file (or the .zip file containing it).
15. Click Start Load Now.

When the upload has completed, the **Verify Content** page appears.

16. Click Preview.

The page containing the content type appears displaying the updated text. Use this display to verify that your uploaded content is correct. If after previewing the new text, you decide your content needs corrections or further modifications, click Cancel, and you are returned to the **Customize Content** page.

17. If your content is acceptable, click Publish.

A **Confirmation** page appears indicating successful customization of the content type.

18. You may need to click the Refresh or Reload button on your browser to see the change.

To undo your content changes:

1. In the Configuration tab, under User Interface, click the "Customize Content" link.
2. On the **Customize Content** page, click the link in the sentence "If you want to undo any customization, please click here."
3. On the **Undo Customization** page, select the content type whose customization you wish to undo by selecting a value from the Template menu.
4. Select the Language version of the content type whose customization you wish to undo.
5. Click Submit. A **Confirmation** page appears indicating successful reversal of the customization.

Step 6 Set up Regions Data (Required for Offers and Oracle Transportation)

Regions data is used by the offers functionality and by Oracle Transportation. When someone creates an offer on the system, the offer owner can associate the offer with a region or regions and limit counteroffers and commitments to come only from respondents in a particular region or regions. In Oracle Transportation, regions are used when shippers and carriers define lanes and zones. The system provides default regions for people to pick from. As the System Operator, you can upload or modify these regions, or add ones of your own.

Regions enable a company to limit the scope within which a transaction is considered applicable. For example, some companies are not capable or are simply

not willing to conduct business with other companies that are not in the physical vicinity. In particular, geographical considerations play a critical role in determining shipping costs. Such costs can significantly influence business decisions, and many companies would like to be able to control for such costs at the time a transaction is created.

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

Table 2–7 Example Regions and Sub-Regions

Country Region	State Sub-Region	City Sub-Region	Postal Code Sub-Region
United States	California		
United States	California	San Jose	
United States	California	Foster City	94404

Once the System Operator provides region values for the system, a Company Administrator can associate a company address with the appropriate region in which it wants to do business. Note that the region can be as broad or as narrow as is necessary, as shown in [Table 2–7](#) above.

For example, when creating an offer, the offer creator can choose to incorporate a region with each price: the offer price for anyone in the United States is 35 USD and for anyone in California, 45 USD. A company with an address that is assigned a business region of (or within) California, sees both the 35 USD and 45 USD offer (as long as California is defined as a region belonging to the United States). A company with an address that is assigned a business region of Pennsylvania sees only the 35 USD offer (as long as Pennsylvania is defined as a region belonging to the United States). A company with an address that is assigned a business region outside the United States does not see the offer at all. (Offer creators do not have to create regional pricing, but one cannot create an offer unless assigned to a regional address.)

To avoid requiring you to document most standard geographic data, the system comes with default values for current international country, state, and city combinations. This data is based on United Nations location codes and ISO standards. If these values are appropriate for the processing needs of your system, you can upload this ISO data to the system to provide a complete collection of

geographic regions to any system applications that may use them. See **To use the default regions that the system provides**, below.

If, however, the ISO/UN values are not sufficient for the needs of applications running on your system (for example, the ISO/UN codes may not provide a sufficient level of detail for your needs), you can create and upload your own custom geographic values. See **To upload your own geographic regions**, below.

To use the default regions that the system provides:

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

The system creates a special job for the process. You can check the progress of the job by returning to the **Manage Regions** page and clicking the "View Upload Jobs" link. The **View Region Jobs** page appears. If your upload was unsuccessful, the Job Status column contains a link for your job that allows you to access the **Job Errors** page to view your errors.

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

To upload your own geographic regions:

If you wish to create your own customized region values, in addition to or instead of the values that the system provides, you can download a text-based spreadsheet or XML file in which you can define the geographic region values you wish to use. (You can edit or add regions, but not delete regions.)

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

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

To upload geographic regions:

1. In the Configuration tab, under Configuration, click the "Manage Regions" link.
2. Click the "Download Region Template" link.
3. Select the type of template (spreadsheet or XML) you wish to download, and click Download Now.
4. When prompted, save the .zip file and extract the contents to a convenient directory.
5. Enter the information in the file, specifying ADD to add the region or SYNC (or UPDATE) to update the region.

SYNC adds the region if it is new and updates the region if it already exists. UPDATE always updates the information for the given region code. The region codes uniquely identify a region; the codes never change, and they are the same across all languages. For example, to change a country's name, provide the Country_Code and your updated name.

The table below details all the possible elements you can specify for your region definition. The Country and Country_Code at a minimum are required. Some elements are applicable to some regions but not others.

Table 2–8 Region Definition Elements

Element Name	Contents
Country	Name of the country
Country_Code	ISO/UN country code. You can find a list of the ISO/UN country codes at Web sites such as ftp://ftp.ripe.net/iso3166-countrycodes .
State	Name of the state
State_Code	ISO/UN state code
City	Name of the city
City_Code	ISO/UN city code

Table 2–8 Region Definition Elements

Element Name	Contents
Postal_Code_From	Postal code value. For example, to include all postal codes from 94086-0001 through 94086-0004, enter 94086-0001 as the Postal_Code_From and 94086-0004 as the Postal_Code_To. To specify a single postal code, enter the same values for both Postal_Code_From and Postal_Code_To.
Postal_Code_To	Postal code value (See Postal_Code_From above.)
County	Not used
Latitude	Region's latitude
Longitude	Region's longitude
Timezone	Timezone in which this region is located
Alternate_Name	Alternate name for this region
Port_Flag	Whether this region contains a port facility. Enter Y to indicate a port facility. Otherwise, enter N or leave the field blank.
Airport_Flag	Whether this region contains an airport. Enter Y to indicate an airport. Otherwise, enter N or leave the field blank.
Road_Terminal_Flag	Whether this region is a major transportation terminus. Enter Y to indicate a major transportation terminus. Otherwise, enter N or leave the field blank.
Rail_Terminal_Flag	Whether this region is a major rail terminus. Enter Y to indicate a major rail terminus. Otherwise, enter N or leave the field blank.
State_Postal_Code_Start	No longer used. This field has been replaced by Postal_Code_From.
State_Postal_Code_End	No longer used. This field has been replaced by Postal_Code_To.

To provide language-specific edits to regions, such as Country name, reload the regions specifying the ISO language and territory code, such as FR-FR, at the beginning of the file and use the SYNC action. Some regions data, such as Airport Flag, are the same across all languages (they cannot be changed for a specific language).

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

9. Click Start Load Now.

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

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

To edit geographic region values online:

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

1. In the Configuration tab, under Configuration, click the "Manage Regions" link.
2. On the **Manage Regions** page, click the "Edit Regions" link.
3. Select the Country that owns the region you wish to edit. (You can also directly enter the State or Province and City if you wish to edit a particular state or city).
4. Once you have entered as many search values as you need, click Search.

Depending on the number of search fields you entered, you may see many entries on the resulting page.

5. If the region you wish to modify is not displayed, access it by clicking the parent region's links.
 - To edit a region, select it and click Edit.
 - To add a new region, select the parent region and click Add Sub-Region.
6. Enter values in the appropriate fields or click the appropriate checkboxes. Note that not all parameters are required or applicable for all types of regions.

Table 2–9 Region Parameters

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

7. Click Submit to update the region definition.

If you want to provide language-specific edits to the region name, follow these steps:

1. Click the Operator Account icon in the top-right corner of the page.
2. Click the "Edit Operator Information" link.
3. Select the Language in which you wish to add or edit the region.
4. Click Apply Changes.

The system now displays pages in the language version you selected.

5. Return to the **Manage Regions** page, and do the following:
 - Search for the region that owns the sub-region you wish to edit.
 - Select the sub-region.
 - Click Add Sub-Region to create the region in that language, with your language-specific edits. (You must first create the region specifically in that language, if you haven't already.)

Some regions data, such as Airport Flag, are the same across all languages (they cannot be changed for a specific language).

Step 7 Customize Units of Measure (Optional)

The system comes with the UN standardized units of measure. Companies view this unit of measure (UOM) list on the system wherever a unit must be selected. As the System Operator, you can add to or edit this list.

You can also create new UOM classes or add units of measure to a class. (All units of measure must belong to a class. A unit of measure can belong to only one class.) UOM classes represent groups of units of measure with similar characteristics. For example, Volume and Length are two UOM classes that the system provides. The class Volume contains UOMs such as Cubic centimeter, Cubic foot, and Gallon.

You can also define conversions between units of measure in the same class. The system uses the base unit of measure, which is defined for each class, to perform the conversions. For example, the base unit of measure for the class Area is the Square Foot. You can define the conversion between a Square Meter and the base unit Square Foot as 10.7639.

The system performs conversions automatically only for those features that use it. For example, in Oracle Transportation a shipping UOM may be pounds, but the price list is set up in kilograms. UOM conversion removes the requirement that the price list UOM match that of the shipment.

To create or edit UOM classes:

1. In the Configuration tab, under User Interface, click the "Customize UOM Class" link.
2. On the **Unit of Measure Classes** page, do any or all of the following:
 - Edit the Class name or Description as desired. These edits are for your purposes as the System Operator only. The unit of measure classes are not displayed to companies on the system.
 - Create a new UOM class by filling in the following fields at the bottom of the page and clicking Add:

Class. Name of the class, such as Length.

Description. Class description.

Base Unit Name. Unit of measure used to perform conversions between units of measure in the class. The base unit of measure should be representative of the other units of measure in the class, and generally one of the smaller units. For example, Square Foot is the base unit of measure

for the class called Area. You cannot use another class's base unit of measure.

Base Unit Code. Code for the Base Unit Name, such as FTK for Square Foot.

3. Click Apply Changes.

To create or edit units of measure:

1. In the Configuration tab, under User Interface, click the "Customize Unit of Measure" link.
2. On the **Units of Measure** page, select a Class to view or edit just the units of measure in that class. Or choose Show All to view all units of measure.
3. Do either of the following:
 - Edit the Internal UOM Name or Description of an existing unit of measure. The Description is what companies see at the Unit field on the system. (The system creates the Internal UOM by copying the Description when you first create the UOM. The Internal UOM is the same across all languages, if the system is installed in more than one language.)

Note: The Base Unit column uses Y for Yes or N for No to indicate whether the unit is a base unit of measure for its class.

- Create a UOM by clicking Add Units of Measure and providing the following information:

UOM Name. Internal name for the unit of measure.

UOM Code. Code for the unit of measure, such as EA for Each.

Description. The unit of measure Description is what companies see at the Unit field on the system.

Class. Select a class to which the unit of measure belongs.
4. Click Apply Changes.

To enter UOM conversions:

1. In the Configuration tab, under User Interface, click the "Customize UOM Conversion" link.

2. On the **UOM Conversions** page, select a class to view just the units of measure in that class, or choose Show All to view all units of measure. Click Go.
3. Enter or change the Conversion as needed. All conversions are performed using the base UOM.

You cannot change a class's base UOM.

Catalog Setup Steps

This sections consists of the following steps:

Table 2–10 Catalog Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Determine Catalog Authoring Activities	Required if hosting catalog items on the system	Oracle Exchange
2	Determine the Catalog Structure	Required if hosting catalog items on the system	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange
3	Create the Catalog Structure (Categories, Attributes, and Category Hierarchy)	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Sourcing
4	Check the Catalog Structure	Optional	Oracle Exchange Oracle Product Development Exchange
5	Configure Catalog Options	Optional	Oracle Exchange Oracle Product Development Exchange
6	Customize Catalog News	Optional	Oracle Exchange

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

User Interface

[Identification](#)[Customize Content](#)[Edit List of Values](#)[Customize Images](#)[Customize Text](#)[Customize Help](#)[Customize Help Logo](#)[Customize UOM Class](#)[Customize Unit of Measure](#)[Customize UOM Conversion](#)[Bulk Registration Management](#)

Configuration

[Software Setup](#)[Manage Job Functions](#)[Manage Regions](#)

Catalog

[Manage Base Attributes](#)[Create Category](#)[Edit Category](#)[Maintain Catalog Hierarchy](#)[Configure Buying Homepage](#)[Bulk Load Catalog Structure](#)[View Bulk Load Status](#)[Catalog Export](#)[Catalog Options](#)[Manage Third Party Authoring](#)

Negotiations

[Negotiations Configuration](#)[Manage Reusable Attribute Lists](#)[Cancel/Delete Negotiation](#)

Step 1 Determine Catalog Authoring Activities (Required)

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

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

Consider the following:

- Is the default Catalog Authoring job function sufficient or does a specialized job function need to be created for various suppliers? See [Job Functions Tables](#) in [Appendix D](#). If you need to customize the job function, see [Step 1 Customize Job Functions \(Required for Oracle Sourcing\)](#) on page 2-114 and return here.
- Is a third-party content provider necessary or desired? You can appoint several third-party catalog content providers and let individual suppliers choose which third parties to use. Or you can appoint one third-party content provider for the

entire system. For a complete discussion of your options, see [Overview of Third-Party Catalog Authoring](#) in [Appendix B](#).

Step 2 Determine the Catalog Structure (Required)

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

The catalog structure is made up of two kinds of categories, browsing and item categories, which work together to create a category hierarchy. The catalog structure also consists of attributes used to help describe items. As the System Operator, you create and modify the categories, category hierarchy, and attributes that suppliers and buyers see on the system.

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

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

- What categories and attributes are needed? How should the categories be structured?
- Will you let companies bulk load their own categories and category attributes? The option that controls whether companies can load their own categories and category attributes is described in [Step 5 Configure Catalog Options \(Optional\)](#) on page 2-52.
- If you create your own category attributes or base attributes, you define them using attribute properties. Decide how to set the attribute properties, such as how many and which attributes are searchable or whether an attribute displays on the **Search Results** page when buyers search for items. Making too few attributes searchable can limit the number of search "hits." However, the more attributes you make searchable, the longer it takes for the system to conduct searches that buyers or catalog authors perform. (Also, if you make long values like description searchable, the accuracy of the search is diluted, and if you make attributes that are not displayed searchable, buyers and catalog authors will not understand why a particular item was included in their search results.) Making too many attributes visible on the **Search Results** page can make a

buyer's search results hard to analyze. (For example, they may need to scroll too far horizontally to see all of the items' attributes.)

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

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

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

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

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

1. In the Configuration tab, under Catalog, click the following links:
 - Click the "Create Category" link to create new item categories and category attributes. Enter the following information for the category:
 - Category Name. The name of the category that displays to companies. It must be unique. Limit = 250 characters.
 - Category Key. An internal identifier for the category. It must be unique. Companies can use the category key or name to identify a category when they upload their catalogs. The key can be the same as the name. Or you can use any identifier you want. The key never changes. (To change it, you would delete the category and recreate it using another key.) Limit = 250 characters.

-
- **Category Description (Optional).** A description, for your own purposes as the System Operator. Limit = 2,000 characters.

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

- **Create Category Attribute.** You can create category attributes when you first create the category or later, by editing the category. On the **Create Category** page, click **Create Category Attribute** to add category attributes specific to that category. For descriptions of the fields (called attribute properties) used to create attributes, see the Readme file that appears when you click **Download Now** on the **Bulk Load Catalog Structure** page.
- Click the "Maintain Catalog Hierarchy" link to create a browsing category. Also use this link to create a hierarchy of categories for buyers' and suppliers' easy online browsing. To associate an item category with a parent category, create the item category first, using the "Create Category" link.

Note: You cannot search for item categories on the **Maintain Category Hierarchy** page. If you want to move an item category from one parent to another, and you do not know to which parent category it belongs, use your own records to find out or log on to the system as a company and use the **Catalog Structure** page to identify the item category's parent category. (In the Selling application, click the Catalogs tab, then the "Review Catalog Structure" link.) Search for the parent category on the **Maintain Category Hierarchy** page, then search for item categories to add or remove.

When you display a parent category on the **Maintain Category Hierarchy** page, the system displays its current sub-categories. Only the first sub-category level is displayed. You do not see any sub-categories below that, if there are any. You see only one sub-category level at a time. And when you move a sub-category,

all the sub-categories below it are moved as well. (Moving a sub-category requires clicking Remove to remove it from its current parent, then searching for and adding it to another parent category. You can also add the sub-category to more than one parent category.)

Any category you create using the **Maintain Category Hierarchy** page is a browsing category only—it can contain other categories, but not items. To create item categories, which are the lowest-level categories that contain items, click the "Create Category" link.

- Click the "Manage Base Attributes" link to create new base attributes or edit existing base attributes if desired. You cannot delete any of the default base attributes that the system provides.

Note: Deleted categories and attributes are purged from the database. The system does not maintain the deleted records.

2. For detailed descriptions of categories and attributes, including base attribute properties that you can and cannot modify and the impact of making catalog structure changes after sellers add items to the catalog, see the Readme file that appears when you click Download Now on the **Bulk Load Catalog Structure** page.
3. Click the "View Bulk Load Status" link to view the status of your changes. When you change categories or attributes, the system creates a job to process the changes. The job completes in the background while you perform other tasks.

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

1. In the Configuration tab, under Catalog, click the "Bulk Load Catalog Structure" link.
2. On the **Bulk Load Catalog Structure** page, click Download Now to download a .zip file.

A Readme file in the downloaded .zip file contains detailed instructions on, including examples of, preparing an XML file for creating, updating, changing, or translating categories and attributes.

3. After you upload your file, click the "View Bulk Load Status" link to check that the contents have uploaded successfully. If there are errors, correct them in your XML file and upload the XML file again.

To download your catalog structure:

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

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

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

Step 4 Check the Catalog Structure (Optional)

Using the test company you created earlier, log on to the system and make sure the structure looks how you intended. Your test company needs to be assigned the Catalog Author job function to see the structure from the catalog author's perspective, a Buyer job function to see the structure from a buyer's perspective, and the Product Development Administrator job function to see the structure within Oracle Product Development Exchange.

If you want to download your categories and category attributes to view them in a spreadsheet hierarchy format, use the **Catalog Structure** page. Log on as your test company. On the **Home** page, click the "Selling" link, the Catalogs tab, then the "Export Catalog Structure" link and follow the guidance online. (For other Exchange products, you may be able to verify your catalog structure in other ways, through those products' applications links.) The **Export Catalog Structure** page downloads a

spreadsheet text file so that you can view all the categories, sub-categories, and category attributes in a hierarchy format.

Step 5 Configure Catalog Options (Optional)

The system comes with default catalog options that you can change if desired.

If you are setting up Oracle Product Development Exchange, note that the Image Load, Third Party Catalog Authoring, and Search Results options do not apply to Oracle Product Development Exchange.

To check the default settings and change them if desired:

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

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

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

Note: If you allow catalog authors to create new categories, the catalog authors must use both the category name and category key to specify the new categories.

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

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

Note: For both of the *How many days until files are deleted?* options (Catalog Load and Catalog Export), the system deletes the jobs by submitting a purge job to the bulk loader job queue every 12 hours. When the loader processes the purge job, the loader deletes any jobs older than the number of days you specify here.

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

When suppliers or buyers download a supplier's catalog items from the system, a two-step process occurs: the system creates the file and stores it (which can take a while for large catalogs), then the supplier or buyer selects the file and clicks Export to save the file to a local directory. Use this option to control how long the catalog file remains displayed and accessible for exporting on the **Export Catalog** page for buyers and suppliers. For example, if the supplier wants to export the same file again the next day or a week later, it will still be available if you choose 8 days.

- Image Load - Can companies load images?

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

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

If you choose Yes to allow image hosting, companies can upload images. Choose how many megabytes (MB) of disk space you want to allow each company. The MB number applies to all companies on the system. For

example, if you enter 10 MB, every company on the system has 10 MB available to it for hosting images. (If you enter 0 MB, the **Bulk Load Images** and **Maintain Images Online** pages will be available to the company or companies, but they won't be able to upload images.)

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

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

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

The **Catalog Options** page displays text showing you the total number of registered companies and total current disk space usage for loaded images. The "total current disk space usage" refers to image disk space used so far.

To determine how much total disk space you can make available to companies, contact your system administrator.

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

Choose how many days online activity data is kept for the Review Third Party Activities report. For example, if you enter 7 days, suppliers can review third parties' online catalog authoring activity within the last seven days.

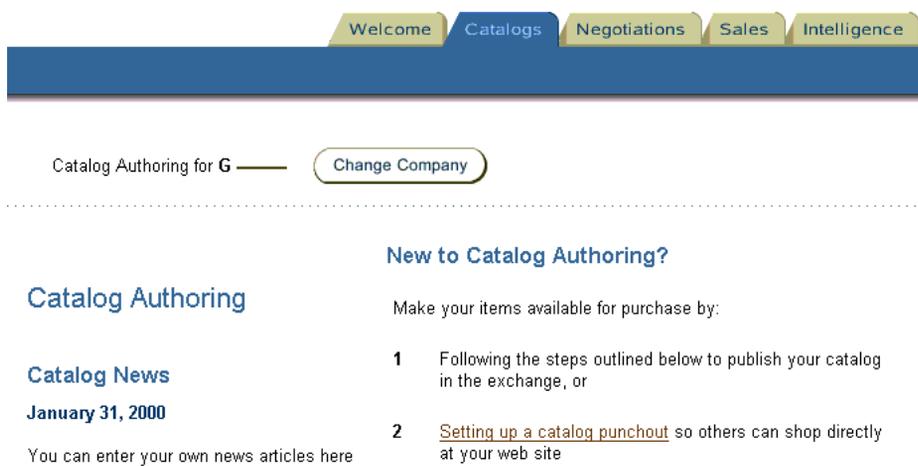
- Search Results - Should buyers be able to view prices that are effective on a future date?

Indicate whether buyers can view future-effective prices. All buyers on the system can see prices with current or no effective dates attached to prices; however, buyers can also view future-effective prices, if you choose Yes for this option. (No buyer can see past-effective prices on the system.)

3. Click Apply Changes.

Step 6 Customize Catalog News (Optional)

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



To customize the catalog news:

1. In the Configuration tab, under User Interface, click the "Customize Content" link to open the **Customize Content** page.
2. From the Content Type menu, select Catalog News.
3. For detailed instructions on using the Customize Content page, see [Step 5 Customize Site Content \(Recommended for Oracle Exchange, Required for Oracle Sourcing\)](#) on page 2-31.

Purchasing Setup Steps

This section consists of the following steps:

Table 2–11 Purchasing Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Choose Purchasing Configuration Options	Optional	Oracle Exchange
2	Configure Search Limits	Optional	Oracle Exchange
3	Configure the Buying Home Page	Required for Oracle Sourcing	Oracle Exchange Oracle Sourcing
4	Configure Popular Categories List	Optional	Oracle Exchange Oracle Product Development Exchange

Other setup steps in this chapter, such as [Step 3 Customize Drop-Down Menu Items \(Lookup Types\) \(Optional\)](#) on page 2-119, also affect buying activities on the system.

Step 1 Choose Purchasing Configuration Options (Optional)

The **Purchasing Configuration** page contains the following setup options, described below:

- Cancellation Approval
- Change Allowed Flag
- Reminder Notification Frequency
- Workflow Item Types

Cancellation Approval

In the following cases, order or line cancellation always requires approval; the status changes to Pending Cancel until approved:

- The supplier cancels an order or line. (Buyer approval is required.)
- The buyer cancels an order or line when the order or line status is anything but Pending Approval or Requires Acknowledgment, and the System Operator requires supplier approval.

In the following cases, order or line cancellation never requires approval, and the status changes directly to Cancelled:

- A buyer cancels an entire order in a Pending Approval status.
- A buyer cancels an order when all lines on the order are in Requires Acknowledgment status (the supplier has not yet acknowledged the order), or cancels a line that is in Requires Acknowledgment status (the supplier has not yet acknowledged the line).
- A buyer cancels a line or order, and the System Operator does not require supplier approval.

Therefore, the System Operator chooses whether buyer cancellations of orders or lines in a New, Acknowledged, Buyer Change, or Supplier Change status require supplier approval. See **To set the purchasing configuration options**, below.

Change Allowed Flag

The System Operator can choose whether suppliers are allowed to prevent changes to an order line.

If permitted by the System Operator, suppliers can prevent further changes to a line by updating the Future Changes (also called the Change Allowed) field when changing an order line on the system or by using the FREEZEFLAG tag in the Change PO Inbound XML transaction. (By default buyers can change lines with a New or Accepted status until the supplier disallows it. Company Administrators can also prevent other companies from changing their company's orders.)

See **To set the purchasing configuration options**, below.

Reminder Frequency

The System Operator can choose whether and how often to remind buyers and suppliers to respond when the following events occur:

- The buyer requires supplier acknowledgment by specifying an acknowledge-by date on an order. For example, if the acknowledge-by date is December 31, 2001, the respond-by date that the system specifies on the order and related notifications to the supplier is December 31, 2001. If the reminder frequency is two days, the system sends reminder notifications every two days after December 31 until the supplier responds, if the supplier has not yet responded. Neither the respond-by nor the acknowledge-by date changes from the original acknowledge-by date; however, the supplier continues to receive reminder notifications (in this example, every two days) until it responds.

- A buyer or supplier changes or cancels an order. For example, if the order changed on December 15, 2001 and the reminder frequency is two days, the respond-by date to approve the change is December 17, 2001. The Respond By date does not change once it is set, even if the date has passed without a response; however, buyers and suppliers continue to receive reminder notifications until they respond.

The reminder is sent at midnight (00:00:00 hours) on the reminder day.

See **To set the purchasing configuration options**, below.

Workflow Item Types

The **Purchasing Configuration** page contains two workflow item type fields:

- Workflow Item Type for Approval. This workflow controls the order approval process within the buyer's company, if the buying Company Administrator has established an approval hierarchy for orders on the system.
- Workflow Item Type for Acknowledgment. This workflow controls the entire order acknowledgment and change process between the buyer and supplier. For example, if the buyer specified an acknowledge-by date on the order, this workflow reminds the supplier to respond by that date and lets the buyer know the supplier's response. If either the buyer or supplier change or cancel the order or an order line, this workflow sends the appropriate notifications regarding those changes and cancellations.

If you have created your own customized workflows, enter those workflows' item type names in the above fields on the **Purchasing Configuration** page. See **To set the purchasing configuration options**, below.

For additional workflow details, see [Purchasing](#) in [Appendix F](#).

To set the purchasing configuration options:

1. In the Configuration tab, under Purchasing, click the "Purchasing Configuration" link to open the **Purchasing Configuration** page.
2. In the Order Cancellation Approval section, choose whether buyer cancellations of orders or lines in a New, Acknowledged, Buyer Change, or Supplier Change status require supplier approval.

If you require approval of these orders, their status changes to Pending Cancel until the supplier responds. If you do not require approval of these orders, their status changes directly to Cancelled without supplier approval. The system notifies the supplier in both cases.

3. In the Change Allowed Flag section, select Yes to permit suppliers to control the change allowed option on order lines (to freeze a line and prevent future changes to it) or No to not permit suppliers to control this option.
4. In the Reminder Notification Frequency section, choose your reminder frequency for late acknowledgments and change responses.
You must enter a frequency, and it must be greater than zero (0).
5. In the Workflow Item Type for Approval section, enter the workflow item type name of your own customized workflow for buyer hierarchy approval of orders.
Leave this field blank to accept the default workflow that the system provides.
6. In the Workflow Item Type for Acknowledgment section, enter the internal item type name of your own customized workflow for acknowledgment, changes, and cancellations of orders.
Leave this field blank to accept the default workflow that the system provides.
7. Click Apply Changes.

Step 2 Configure Search Limits (Optional)

The system places a sorting and filtering limit on search results to ensure consistent performance. As the System Operator, you can change the default limit that the system provides. For example, if the limit is 2500 items and a person's search results are greater than 2500 items, the system will display a message when the person selects the *Sort by* or *Filter* option, preventing sorting or filtering and asking the person to narrow the search to fewer than 2500 search results in order to sort or filter the results. The larger the limit, the slower the sorting and filtering performance on the system.

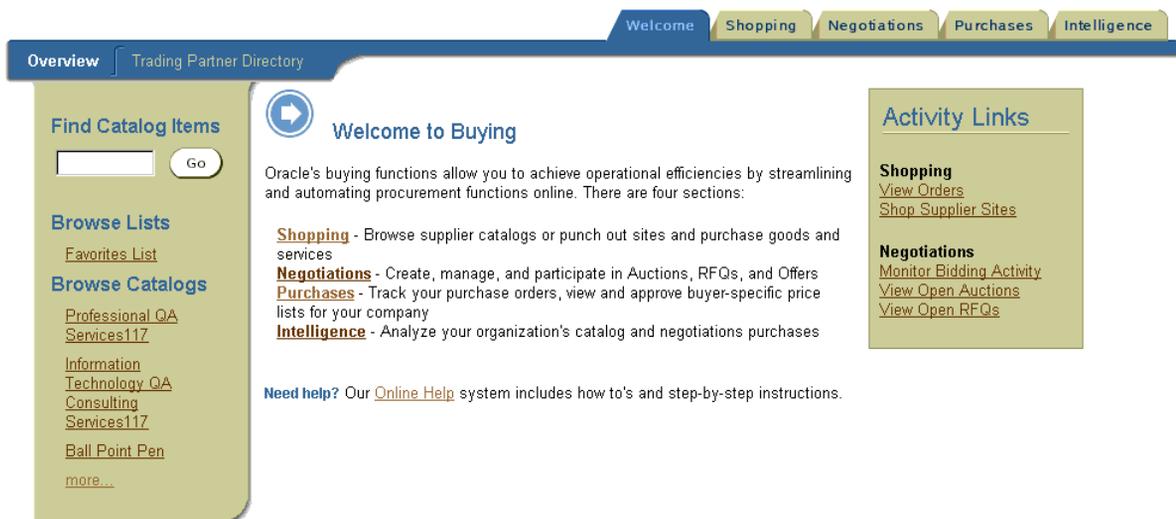
To set the search limits:

1. In the Configuration tab, under Configuration, click the "Search Configuration" link.
2. On the **Search Configuration** page, specify the desired limit.
3. Click Apply Changes.

Note: After you change the search limits, you must stop and restart the middle tier for the change to take effect. Stop and restart the middle tier using scripts provided in the *Oracle Exchange Installation and Upgrade Guide*.

Step 3 Configure the Buying Home Page (Required for Oracle Sourcing)

The Buying home page that companies see when they click the "Buying" link on the system comes with a Find Catalog Items and Browse box, shown on the left below, where buyers can enter a key word to search for items they want to order or to browse categories. (In Oracle Sourcing, there would not be Shopping or Purchases tabs in this illustration.)



[Welcome](#) | [Shopping](#) | [Negotiations](#) | [Purchases](#) | [Intelligence](#)

The Buying home page also contains other tabs, such as Negotiations, which enables buying companies to create auctions, RFQs, and offers. If you do not want the Find Catalog Items and Browse box to display on the **Buying** home page, you can hide it. For example, if you are setting up the system solely for the purpose of creating negotiations (not for searching for catalog items and adding them to orders), you can hide the Search box by configuring the **Buying** home page.

To configure the Buying home page:

1. In the Configuration tab, under Catalog, click the "Configure Buying Homepage" link.
2. On the **Configure Buying Homepage** page, choose whether to display or hide the Find Catalog Items and Browse box.

Note: The Configure Popular Categories section is described in [Step 4 Configure Popular Categories List \(Optional\)](#), below.

3. Click Apply Changes.

Step 4 Configure Popular Categories List (Optional)

You can display up to 10 item categories or browsing categories that are most commonly used for ordering. This list displays on the **Product Development** and **Buying** home pages.

To configure popular categories:

1. In the Configuration tab, under Catalog, click the "Configure Buying Homepage" link.
2. On the **Configure Buying Homepage** page, follow the guidance in the Configure Popular Categories section to list and order your top categories.

Note: If you hide the search and browse box, as described in [Step 3 Configure the Buying Home Page \(Required for Oracle Sourcing\)](#) above, the popular categories list will not display on the **Buying** home page.

Negotiations Setup Steps

This section consists of the following steps:

Table 2–12 Negotiations Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Create a Negotiations Item Category	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Transportation Oracle Sourcing
2	Define System-wide Reusable Attribute Lists	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Transportation Oracle Sourcing

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

Step 1 Create a Negotiations Item Category (Optional)

You can select an item category to appear as the "generic" category used in negotiations. When someone creates a new negotiation or negotiation template, that person must select a category for each item added to the negotiation. If you have created and set a category, such as *Miscellaneous*, as the generic category for negotiations, people have the option to select that category without searching the catalog structure for a specific item category. The option to select the generic item category appears (with the name of the category that you have selected as the generic item category) at the Category field while creating a negotiation, as shown in the following illustration.

[1. Describe Your Auction](#)

[2. Enter Business Terms & Conditions](#)

3. Add Items

[4. Select Bid Controls](#)

[5. Invite Bidders](#)

[6. Review and Submit](#)

Enter Item Information

Enter item information and press the **OK** button below.

* Indicates a required field

Item Description

* Item Description

* Category 

Don't want to select a specific Category? Click here for [Miscellaneous](#).

Manufacturer

Manufacturer Item

- [Enter New Item Attributes](#)
- [Apply Predefined Attribute Lists](#)

For the negotiations item category, you must select a category that you already created in [Step 3 Create the Catalog Structure \(Categories, Attributes, and Category Hierarchy\) \(Optional\)](#) on page 2-48.

To configure the generic item category:

1. In the Configuration tab, under Negotiations, click the "Negotiations Configuration" link.
2. On the **Generic Item Category** page, enter the name of the generic item category you want assigned to miscellaneous or generic items during new negotiation creation. You can also click the Flashlight icon at the Category field to search for your desired generic item category.

Your generic item category must already exist in the catalog structure created in [Step 3 Create the Catalog Structure \(Categories, Attributes, and Category Hierarchy\) \(Optional\)](#) on page 2-48.

3. Click Done.

The system will validate your generic item category. You will receive an error message if you have entered an invalid category. Make a new selection, then click Done.

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

Step 2 Define System-Wide Reusable Attribute Lists (Optional)

You can create attribute lists that are available to all companies that create negotiations or negotiation templates on the system.

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

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

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

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

To create a new attribute list:

1. In the Configuration tab, under Negotiations, click the "Manage Reusable Attribute Lists" link.
2. On the **Negotiation Attribute Lists** page, click the "Create New List" link.
3. On the **Create Attribute List** page, enter a List Name and brief Description for your attribute list.
4. Choose the Status.
 - An Active list can be used immediately.
 - An Inactive list will be stored in the system, but will not be available for use unless you edit the list and change its status to Active.
5. To add attributes to your attribute list, click the "Add Attributes" link.

An attribute list must include at least one attribute.
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 this attribute to be required (all participants must enter a value for this attribute when responding), select Required. If you want this attribute to be optional (participants are not required to enter a value for this attribute when responding), select Optional. If you want this attribute to be displayed to the participant without allowing any response, select Display Only. If you want to score responses to the attribute, you must make it required.
- Value Type. Select the type of value that participants should enter for this attribute when bidding. Participants may enter *Text* (letters, words, digits, and so on), *Numbers* (digits with decimals allowed), *Dates* (numbers in date format), or *URLs* (Web site addresses that begin with a valid URL protocol, such as <http://>, <https://>, and <ftp://>; only values with a *URL* type display as links; for example, a Web site address entered in a *Text* type will display simply as text). The value type you select also governs the value you can enter in the Negotiation Value field. *Text* is the most flexible value type. If you select *Text*, participants will be allowed to enter letters as well as numbers. If you select *Number*, participants will only be allowed to enter digits; if you select *Date*, participants will only be allowed to enter numbers in date format. If you select *URL*, the text must begin with a valid URL protocol, such as <http://>. If you want to score responses to the attribute, choose *Text*, *Number*, or *Date*.
- Negotiation Value. If desired, set your item specifications by entering a target value for the item (for example: "Fewer than twelve thousand miles per vehicle" or "Fewer than eight defects per million parts manufactured" for a text value type). The value must be of the Value Type you selected above.
- Display Value to Participants. If you want participants to see the Negotiation Value, select Yes. If you do not want participants to see the Negotiation Value, select No.
- Score. Click the Score button to enter a score (between 0 and 100) for each response value. Participants in the negotiation can select one of the response values you enter. For example, if the text value type of "Fewer than 12,000 miles" is the most desirable response, enter 100 for the score. For text value types, respondents must choose one of your response values. For date and number value types, respondents can choose one of your response values or enter their own. If the respondent enters a date or

number that is out of the range of your response values, the response automatically receives a score of 0.

For number value types, assign a score to a single number or a range of numbers. To specify a single number, enter that number in both the From and To fields. To specify a delimited range, enter the beginning number in the From field and the ending number in the To field. Range values are inclusive. To specify an open-ended range, enter the limiting number in either the From or To field. For example, to include all numbers less than 1000, enter nothing (or 0) in the From field and 1000 in the To field. To include all numbers greater than 5000, enter 5000 in the From field and nothing in the To field. Do not overlap values.

For date value types, enter a valid date. Date values obey the same rules as number values. You can score a specific date, a delimited range of dates, or an open-ended range of dates.

The acceptable response values for text types have a character limit of 30. Click OK when you are finished.

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

Oracle Transportation Setup Steps

This section consists of the following steps:

Table 2–13 Oracle Transportation Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Customize Transportation Lookup Types	Optional	Oracle Transportation
2	Create Document Definitions	Optional	Oracle Transportation

Perform these steps if you wish to configure Oracle Transportation.

Step 1 Customize Transportation Lookup Types (Optional)

As the System Operator, one of your primary tasks is to establish transportation lookup types. Transportation lookup types establish the values for transportation commodities, equipment, freight class, and service types. The system provides Transportation lookup types that you can modify to meet specific needs.

You can modify the following transportation lookup types:

- Transportation commodities values
- Transportation equipment values
- Transportation freight class values
- Transportation parcel services values
- Transportation services values

Transportation Commodities Values

Transportation commodities values are used to describe the various commodities available for transport between an origin and destination. For example, a carrier may have restrictions on the types of commodities that can be accepted on a particular lane.

Transportation commodities values can also be used to determine the freight rates between an origin and destination. Carriers may establish freight rates based on the commodity that is being transported. For example, a commodity that is perishable will usually cost more to transport than a commodity that is non-perishable.

There are 98 separate commodity classifications provided by the system. The transportation commodities are customizable, allowing you to change commodity values and descriptions. You can also add new values to the list of provided transportation commodity types. The following table shows some example commodities values.

Table 2–14 Commodity Values

Code	Transportation Commodities Values	Description
17	Sugars and sugar confectionery	Sugars and sugar confectionery
21	Miscellaneous edible preparations	Miscellaneous edible preparations

Transportation Equipment Values

Equipment type values are used to describe the various equipment types available for transport between an origin and destination. For example, the ocean freight industry uses a standard equipment type known as a twenty-foot equivalent unit (TEU). Carriers may also have requirements on the type of equipment supported on a lane of transport.

Equipment types can also be used to determine freight rates between an origin and destination. Carriers may establish rates based on the equipment used to transport a shipment. Ocean carriers will typically charge freight rates based on the size of the equipment being used.

Transportation equipment types are customizable, allowing you to change equipment type values and descriptions. You can also add new values to the list of provided transportation equipment types.

Transportation Freight Class Values

Freight class values are used for the purpose of rating shipments within the Less than Truckload industry. There are 18 separate freight classes that the system provides. The freight classes used are based on the National Motor Freight Classification (NMFC).

Freight classes are customizable, allowing you to change freight class values and descriptions. You can also add new values to the list of provided transportation freight classes.

Transportation Parcel Services Values

Transportation parcel services are used to describe parcel carriers and the available services they offer, such as Next Day Delivery, Two Day Delivery, and Ground Delivery.

The transportation parcel services values are customizable, allowing you to change service levels and descriptions. You can also add new values to the list of provided transportation parcel services.

Transportation Services Values

Transportation services values are used to describe the various transportation service levels available between an origin and destination. For example, a carrier may publish services on a lane such as Door-to-door, Port-to-port, or Door-to-port.

Transportation service values can also be used to determine freight rates between an origin and destination. If a carrier offers multiple service levels on a lane, it can publish rates specific to the service level.

The transportation services values are customizable, allowing you to change service levels and descriptions. You can also add new values to the list of provided transportation services.

To customize transportation lookup types:

1. In the Configuration tab, under Transportation, click the "Lookup Types" link.
2. On the **Edit Transportation Lookup Types** page, select the lookup type (such as Transportation Commodities) that you want to customize, then click Edit.

If you see a Contact Title lookup type, it is the same as the Contact Title lookup type on the **Edit List of Values** page. Any edits you make to the Contact Title, either here or on the **Edit List of Values** page, are made to the Contact Title wherever it appears on the system.

3. On the **Customize** page that appears, select the values that you will accept for that lookup type or edit existing values and descriptions.
4. If you want, add new values by completing the code, meaning, and description. The value you enter for the Meaning is the value that appears in the drop-down menu on the system; it must be unique. The Description is optional. The value you enter for the Code is used when creating any XML documents that use this lookup type. Do not enter characters such as spaces, single quotes, or double quotes in your Code. Once you have defined your new value, click Add.
5. If you are satisfied with your values, click Apply Changes.

Step 2 Create Document Definitions (Optional)

As the System Operator, you can select a document type allowing you to create transportation related documents. After selecting the shipping document type, you can assign a document name. For example, to create a bill of lading, you can select shipping documents and enter bill of lading in the document name text field. When you select Add New, a new document definition is created. The following steps enable you to create, update, and delete document definitions.

To create a document definition:

1. In the Configuration tab, under Transportation, click the "Document Setup" link.

2. On the **Document Definition Setup** page, select a document type and enter a document name.

Note: You cannot create a document definition with a type and name that has already been used.

3. Click Add New.

To update and delete a document definition:

1. On the **Document Definition Setup** page, select a document type in the Document Definition List.
2. Click Update to change the document name, then click Update. Click Delete to delete the document.
3. To upload an XSL document stylesheet, click Add Document Stylesheet, select a document name, select a valid XSL stylesheet and output format, and enter a short description. Click Add New.

Note: After a stylesheet is loaded, you can update or delete it in the same manner as updating or deleting a document definition.

Oracle Product Development Exchange Setup Steps

This section consists of the following steps:

Table 2–15 Oracle Product Development Exchange Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Define Values for Change and Issue Management Lookup Types	Optional	Oracle Product Development Exchange
2	Create Custom Attributes	Optional	Oracle Product Development Exchange
3	Create Change Management Types	Required if using change or issue management	Oracle Product Development Exchange

Table 2–15 Oracle Product Development Exchange Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
4	Create Change Line Types	Required if using change management	Oracle Product Development Exchange
5	Create Document Categories	Optional	Oracle Product Development Exchange
6	Customize Project Management	Optional	Oracle Product Development Exchange
7	Create Customized Workflows	Optional	Oracle Product Development Exchange

Step 1 Define Values for Change and Issue Management Lookup Types (Optional)

Product Development Exchange comes with the following predefined lookup types and values, to which you can add values:

Reasons

Cost Reduction

Quality Improvement

Customer Requested

Miscellaneous

Priorities

Low

Medium

High

Scope

Small

Medium

Large

Change/Issue Management Status

Open

Submitted for Approval

Approved

Rejected

Cancelled

Implemented

Completed

Project Phases

Business Requirements

High Level Design

Detail Design

Unit Testing

System Testing

Production

To define new values for a predefined lookup type:

1. In the Configuration tab, under Change Management, click the "Lookup Types" link.
2. On the **Change Management Lookups** page, select the lookup type for which you want to create new values, then click Edit.
3. On the **Customize Values** page, select the language in which you are making the change. For example, if you change the name or description of a lookup type, you may want to translate the change in each installed language.
4. If necessary, customize existing values and descriptions for lookup types and click Apply Changes.
5. In the Add New Value section, enter a code name, meaning, and description for a new lookup type and click Add to add a new value for a particular lookup type.

The Meaning is the value that appears in the drop-down menu on the system; it must be unique. The Description is optional. The Code is used when creating any XML documents that use this lookup type. Do not enter characters such as spaces, single quotes, or double quotes in your Code.

6. Click Apply Changes to save changes and add the new lookup type.

The lookup type and values appear in the menu lists found in the Product Development application.

Step 2 Create Custom Attributes (Optional)

Product Development Exchange enables you to define custom attributes for projects, project associations, tasks, issues, and changes. You can define custom attribute groups to aggregate sets of custom attributes. You can associate these custom attribute groups with objects such as projects and items so that they appear on create, edit, and detail pages in the Product Development application. For example, you may want to collect certain attributes specific to your business based on project or issue type. For each custom attribute, you can specify the data type and optionally a value set.

To create a value set:

1. In the Configuration tab, under Custom Attributes, click the "Manage Custom Attributes" link.
2. Click one of the "Maintain Attribute Groups" links—for example, "Maintain Change Attribute Groups."
3. Click Value Sets in the task bar directly below the tabs.
4. On the **Value Sets** page, click Create.
5. Enter a Value Set Name, Data Type, and Maximum Size.
6. Select a Validation Type for your valid list of values. You can choose between a list of values or a database table.
7. Enter valid value ranges (a Minimum and Maximum value).
8. Click Done.

To create an attribute group:

1. In the Configuration tab, under Custom Attributes, click the "Manage Custom Attributes" link.
2. Click one of the "Maintain Attribute Groups" links—for example, "Maintain Change Attribute Groups."
3. On the **Attribute Groups** page, click Create.
4. On the **Create Attribute Group** page, enter the required fields.

5. Click Add Attributes to add custom attributes to your attribute group.
6. On the **Create Attribute** page enter the required fields. You can optionally choose a value set to specify the validation rules.
7. When you are finished creating attributes, click Done.

Step 3 Create Change Management Types (Required if Using Change or Issue Management)

You need to configure types for change orders, change requests, issues, requirements, and RFIs in the Change Management area depending on which of these features you will be using. For example, you will need to set up RFI types if you are using the RFI functionality. Identify the features you want to use in Change Management. You will need to configure types for the features that you use.

To create change management types:

1. In the Configuration tab, under Change Management, click a link for a change management type, such as "Issue Types."
2. On the page (such as **Issue Types**) that appears, click Add.
3. On the page (such as **Create Issue Type**) that appears, enter the required information and click Continue.
4. On the page (such as **Configure Issue Type**) that appears, select the user interface elements you want to include on the page (such as the **Create Issue** and the **Issue Summary** pages).
5. Click Done.

The types you configure will appear on the appropriate pages in the Product Development application.

To delete a change management type:

1. In the Configuration tab, under Change Management, click a link for a change management type, such as "Issue Types."
2. On the page (such as **Issue Types**) that appears, select a type and click Delete.

To enable or disable a change management type:

1. In the Configuration tab, under Change Management, click a link for a change management type, such as "Issue Types."

2. On the page (such as **Issue Types**) that appears, select a type and click Edit.
3. On the page (such as **Edit Issue Type**) that appears, enter an End Date to disable the type after that date, or change or remove the End Date to enable the type.
4. Click Continue, then Done.

Step 4 Create Change Management Line Types (Required if Using Change Management)

Configuring change line types is required if you are using the change order or change request functionality.

Decide which change line types you want to configure. For example, you may want to set up line types for the following:

- Changed Item - item to be changed
- Changed Document - document to be changed
- Changed Project - project to be changed
- Related Item - item related to a change request
- Related Document - document related to a change request
- Related Project - project related to a change request

To create a line type:

1. In the Configuration tab, under Change Management, click the "Change Line Types" link.
2. On the **Change Line Types** page, click Add.
3. On the **Create Change Line Type** page, enter the required information and click Continue.
4. On the **Configure Change Line Type** page, select the sections and fields you want to appear.
5. If necessary, click Add to select additional status values and priorities to include.

These values were defined in [Step 1 Define Values for Change and Issue Management Lookup Types \(Optional\)](#).

6. Click Done.

Your new line type appears on the **Change Line Types** page and in the Product Development application.

To delete a line type:

1. In the Configuration tab, under Change Management, click the "Change Line Types" link.
2. On the **Change Line Types** page, select the line type and click Delete.

To enable or disable a line type:

1. In the Configuration tab, under Change Management, click the "Change Line Types" link.
2. On the **Change Line Types** page, select the line type and click Edit.
3. On the **Edit Change Line Type** page, enter an End Date to disable the type after that date, or change or remove the End Date to enable the type.
4. Click Continue, then Done.

Step 5 Create Document Categories (Optional)

Product Development Exchange allows you to define additional document categories for the Document Management area.

The predefined categories include the following:

- Marketing
- Technical
- Functional
- Schedule
- Requirements
- Drawing
- Setup Instruction
- Assembly Instruction
- Test Specification
- Installation Instruction
- User Guide

- Press Releases
- Brochure
- Survey
- Flyer
- Proposal
- Specification
- Meeting Minutes
- Project Plan
- Statement of Work
- Status Report

Decide which document categories you need to set up.

To create document categories:

1. In the Configuration tab, under Document Management, click the "Create Document Category" link.
2. On the **Create Document Category** page, enter the an internal name and display name. Click Add Another to create another document category.
Enter only one word with no spaces, as in "specdoc" in the Internal Name field.
3. Click Done to add the new document category.
The document category will appear in the Product Development application.

Step 6 Customize Project Management (Optional)

Product Development Exchange enables you to define your own lookup types for projects including project categories, task categories, and reporting classifications. The following are examples of project reporting classifications you may want to define:

- Minor Product Revision
- Major Product Revision
- Minor Product Introduction
- Major Product Introduction

- New Platform Introduction
- New Product Line
- Product Line Revision
- Platform Revision
- Technology Integration

Decide which additional project reporting classifications you need to set up.

To create project reporting classifications:

1. In the Configuration tab, under Projects, click the "Lookup Types" link.
2. Select a lookup type such as Task Categories and click Edit.
3. On the **Customize Values** page, select the language in which you are making the change. For example, if you change the name or description of a lookup type, you may want to translate the change in each installed language.
4. If necessary, customize existing values and descriptions for lookup types and click Apply Changes.
5. In the Add New Value section, enter the code name, meaning, and description for a new project reporting classification and click Add.

You cannot enter blank spaces in the Code field.

6. Click Apply Changes to save changes and add the new lookup type.

The new lookup type and values appear in the Product Development application.

Step 7 Create Customized Workflows (Optional)

You can customize and upload Product Development Exchange workflows to create custom extensions for entities such as processes, notifications, and messages. After uploading the custom workflow file, it will be available in the corresponding functional area. Product Development Exchange comes with predefined workflows that can be customized to fit your business needs, including the following:

- Change Management Workflow
- Project/Task Date Change Notification to Dependents Workflow

To customize a seeded workflow, you must download the appropriate workflow, modify the workflow file in the Workflow Builder, and upload the custom workflow to the system.

Prerequisite

- Oracle Workflow Builder 2.6 to customize workflows

To create a customized workflow:

1. In the Configuration tab, under Workflow Management, click the "Download Custom Workflow File" link.
2. On the **Workflow Download** page, click Create Workflow File.
3. Select an Item Type from the list, then click Create File. Sample item types are:
 - IPD: Issue
 - IPD: Change Request
 - IPD: Change Order
 - IPD: Change Line
4. After you have a file in Completed file creation status, select and download it.
5. In the Workflow Builder, open the workflow file you downloaded.

You can create customer extensions for entities like processes, notifications, or messages. These new entities should be named using a standard, such as a prefix of `_C<Company Id>_`. This naming convention helps you avoid conflicts among custom extensions across companies.
6. After you finish modifying the workflow file in the Workflow Builder, return to the system.
7. In the Configuration tab, under Workflow Management, click the "Upload Custom Workflow File" link.
8. Select the workflow file that you want to upload, then click Start Load Now.
9. A job number is created. You can check the status by clicking the "View Load Status" or "View Workflow Upload Status" link under the Workflow Management section of the **Configuration** page.

Oracle Supply Chain Exchange Setup Steps

This section consists of the following steps:

Table 2–16 Oracle Supply Chain Exchange Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Rename Order Types	Optional	Oracle Supply Chain Exchange
2	Configure Supply Chain Intransit Carrier	Optional	Oracle Supply Chain Exchange

Step 1 Rename Order Types (Optional)

In Supply Chain Exchange, you can rename order types to better suit your particular business needs, for everyone on the system to view and use. You only need to rename order types if those that Supply Chain Exchange provides do not meet your business requirements.

To rename order types:

1. In the Configuration tab, under Supply Chain, click the "Supply Chain Customizations" link.
2. Select Order Type and click Edit.
3. On the **Customize Order Type Values** page, select an order type value and rename it. You also can customize the description.
4. Click Apply Changes.

As soon as you apply changes, everyone using the system can view and use the new order types. If information is entered using an old order type and then a change is made, that information is now available using the new renamed order type.

Step 2 Configure Supply Chain Intransit Carrier (Optional)

In Supply Chain Exchange, you can provide people with the ability to link out to carrier tracking sites. Using this functionality, people can track the status of a shipment by directly navigating from the Supply Chain Exchange to the Web site of the carrier handling a particular shipment.

To configure the supply chain intransit carrier:

1. In the Configuration tab, under User Interface, click the "Customize Content" link.
2. Select Supply Chain Intransit Carrier as the Content Type.
3. Follow the steps in [Step 5 Customize Site Content \(Recommended for Oracle Exchange, Required for Oracle Sourcing\)](#) on page 2-31 for instructions on downloading, customizing, and uploading content templates.

The Supply Chain Intransit Carrier template contains existing pointers to carrier sites. Include any new carrier sites that you want to support.

Billing Setup Steps

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

Table 2–17 Billing Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Modify Default Billing Activity Types	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
2	Activate the Recording of Billing Charges	Required if setting up billing	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
3	Define a Default System Price List	Required if setting up billing	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation

Table 2–17 Billing Setup Steps Summary

Step Number	Step	Required?	Which Products Perform This Step?
4	Set Up Oracle Receivables Integration	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
5	Select an XML Delivery Method	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
6	Choose System Payment Methods	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation

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

XML Transactions

The billing functionality comes with the following XML transactions for importing and exporting billing and customer information between the Exchange and an external enterprise resource planning (ERP) or other system:

Billing Activity Inbound

Use this XML transaction to import billing information from an external system into the Exchange. For example, you might have an external system in which the actual activity for which a fee is incurred occurs, but the billing is performed by the

Exchange. In such cases, use the Billing Activity Inbound transaction to import the information to the Exchange. Associate the billing activity from the external system with a billing activity type—either a billing activity type provided by the Exchange (see [Appendix C](#)) or a user-defined billing activity type that you create (see [To create a user-defined billing activity type](#): on page 2-87).

The Billing Activity Inbound transaction uses the Open Applications Group, Inc. (OAGI) XML business object document called LOAD RECEIVABLE. For descriptions of the LOAD RECEIVABLE XML tags, see the Readme file that is downloadable from the **Transfer Billable Activities** page in the Billing tab. This Readme describes the Billing Activity Outbound transaction, which also uses the LOAD RECEIVABLE business object document. For additional information, see the OAGI Web site at <http://www.openapplications.org>.

If you use the Billing Activity Inbound transaction, you must specify the *internal* name (called the transaction type) in the <ITEM> tag for the billing activity type that you associate with the external transactions. (Optionally, you can also specify the billing activity type ID in the <ITEM_TYPE> tag.) [Table 2–18](#) below provides the internal, transaction type names for each billing activity type.

Table 2–18 Billing Activity Type Internal Names

Billing Activity Type Name	Billing Activity Type Internal Name (Transaction Type)	Billing Activity Type ID
Award Buyer Auction	AWARD_BID	4
Award Request for Quote	RFQ_AWARD_QUOTE	17
Commitment to Buying Offer	COMMIT_BUYING_OFFER	21
Commitment to Selling Offer	COMMIT_SELLING_OFFER	22
Company Subscription	COMPANY_SUBSCRIPTION_FEE	10
Demand Planning	DEMAND_PLANNING	13
Production Sequencing	PROD_SEQUENCING	14
Publish Buyer Auction	PUBLISH_AUCTION	2
Publish Offer to Buy	PUBLISH_BUYING_OFFER	19
Publish Offer to Sell	PUBLISH_SELLING_OFFER	20
Publish Request for Quote	PUBLISH_RFQ	18
Publish Seller Auction	PUBLISH_SELLER_AUCTION	8

Table 2–18 Billing Activity Type Internal Names

Billing Activity Type Name	Billing Activity Type Internal Name (Transaction Type)	Billing Activity Type ID
Seller Auction - Award Bid	SELLER_AWARD_BID	9
Spot Purchase	PURCHASE	1
Supply Planning	SUPPLY_PLANNING	12
Transaction Delivery	TXN_DELIVERY	5
User Subscription	USER_SUBSCRIPTION_FEE	11
User-defined billing activity type	USER_DEFINED	(none)
Vendor/Customer Managed Inventory	VMI_CMI	15

Companies referenced in the Billing Activity Inbound transaction must be registered on the system.

Billing Activity Outbound

Use this XML transaction to export billing information from this system to an external system. See [Step 5 Select an XML Delivery Method \(Optional\)](#) on page 2-107 for instructions on setting up this functionality.

Billing Customer Information Outbound

Use this XML transaction to export customer information from this system to an external system, to associate fees with a company name and other company information. See [Step 5 Select an XML Delivery Method \(Optional\)](#) on page 2-107 for instructions on setting up this functionality.

Prerequisites

- Determine a billing strategy—for example, how much you want to charge companies for their use of the system and whether you want to charge different fees for different companies.
- Select a default currency for the system on the **Identification** page in the Configuration tab. (Generally, you should not change this currency once you start pricing transactions.)
- Decide how to export billing information to your system. See [Billing and Customer Export Options](#) on page 2-108.

Step 1 Modify Default Billing Activity Types (Optional)

The system offers default billing activity types that you can use to charge companies for certain transactions that they perform. These billing activity types are listed and described in [Billing Transaction Types](#) in [Appendix C](#).

You can change the names of these default billing activity types to better suit your needs, and you can change the bill-to party they use. For example, Seller Auction - Award Bid charges the originator of the transaction (the seller), but you could change this to charge the buyer. The default bill-to parties that the system provides (until you change them) are as follows:

Table 2–19 Default Bill-To Parties

Billing Activity	Bill To Party
Award Buyer Auction	Originator
Award Request for Quote	Originator
Commitment to Buying Offer	Originator
Commitment to Selling Offer	Originator
Company Subscription *	Partner
Demand Planning *	Originator
Production Sequencing *	Originator
Publish Buyer Auction *	Originator
Publish Offer to Buy *	Originator
Publish Offer to Sell *	Originator
Publish Request for Quote *	Originator
Publish Seller Auction *	Originator
Seller Auction - Award Bid	Originator
Spot Purchase	Partner
Supply Planning *	Originator
Transaction Delivery	Partner
User Subscription *	Partner
Vendor/Customer Managed Inventory *	Originator

* **ATTENTION:** Do not modify the bill-to parties of these billing activity types. See the Note below.

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

Note: Billing activity types with a default Pricing Method and Type of Amount and Fixed should not have their bill-to party changed because the Exchange can only bill one party for these billing activity types. For example, Publish Buyer Auction bills the company who published the auction. If you change the bill-to party of Publish Buyer Auction, the system will return no billing data. Billing activity types whose bill-to party should not be modified are marked with an asterisk in [Table 2-19](#) above.

To change a billing activity type name:

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

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

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

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

4. Click Submit to save your changes.

To translate an edit to a billing activity type:

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

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

1. Click the Operator Account icon in the top-right corner of the page.
2. Click the "Edit Operator Information" link.
3. Select the Language in which you wish to add or edit the billing activity type.
4. Click Apply Changes.

The system now displays pages in the language version you selected.

5. Click the Billing tab, and make your edit in that language.

To create a user-defined billing activity type:

Typically, the user-defined billing activity type is used for the Billing Activity Inbound transaction. When importing billing information into this system, you may need to create your own billing activity type for those transactions that originate outside this system.

To create a user-defined billing activity type:

1. In the Billing tab, click the "Manage Billing Activity Types" link.
2. On the **Manage Billing Activity Types** page, click the "Create a user defined billing activity type" link.
3. Enter a Name and Description for your billing activity type.
4. Select a Bill To Party:
 - Transaction Originator. The company who originates the transaction gets charged.
 - Transaction Partner. The company who receives the transaction gets charged.
5. Click Submit.

To create a manual charges billing activity type:

You can define multiple different manual charge types to track additional miscellaneous charges against a company. There is a default manual charge type, called Miscellaneous Charge, that you can use, or you can define your own manual charge types.

To create your own manual charges billing activity type:

1. In the Billing tab, click the "Manage Billing Activity Types" link.
2. On the **Manage Billing Activity Types** page, click the "Create a manual charge billing activity type" link.
3. Enter a Name and Description for your manual charge type.
4. Click Submit.

When you enter manual charges for a company, you can now either choose the Miscellaneous Charge type provided by the system, or the charge type you just created. See the Billing section in [Ongoing Maintenance](#) on page 4-8 for instructions on entering manual charges for companies.

Step 2 Activate the Recording of Billing Charges (Required)

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

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

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

3. Click Submit.

You will return to this page later.

Step 3 Define a Default System Price List (Required)

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

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

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

To create a default price list:

1. In the Billing tab, on the **Price Lists** page, click the "Create New Price List" link.
2. Enter a List Name and any Description you want.

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

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

For a default price list, the Effective To date must be blank.

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

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

In the following illustration, the System Operator has created a fee schedule that starts February 1, 2002 and lasts indefinitely.



Create New Price List

Enter Price List Information and press the **Apply Changes** button below to create or modify your price list.

* Indicates a required field

Your changes have been saved successfully

- * List Name **Initial Prices**
- * Description **Initial Prices - RLK**
- * Currency **USD**

Fee Schedule 1

A price list can have several fee schedules; however, effectivity dates may not overlap and must be contiguous.

* Effective From **01-02-2002 00:00 PST**

Effective To

Price Lines

Click a Billing Activity link below to specify pricing for all related transactions.

Billing Activity Type	Pricing Method	Pricing Type
Award Buyer Auction	Amount	Fixed
Award Request for Quote	Amount	Fixed
Commitment to Buying Offer	Amount	Fixed
Commitment to Selling Offer	Amount	Fixed
Company Subscription	Amount	Fixed
Demand Planning	Amount	Fixed
Production Sequencing	Amount	Fixed
Publish Buyer Auction	Amount	Fixed
Publish Offer to Buy	Amount	Fixed
Publish Offer to Sell	Amount	Fixed

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

5. Select each Billing Activity Type at the bottom of the screen to define your pricing rules.

See [Billing Transaction Types](#) in [Appendix C](#) for descriptions of the billing activity types.

If you do not want to bill for a particular type, such as Publish Buyer Auction, do not select that type and do not enter information for it. Each type defaults to a method and type of Amount and Fixed, with a charge of 0, unless you change it.

After you finish entering information for one billing activity type, click Done to save your changes, return to the **Price List** line page, and select the next billing activity type.

6. Select a Pricing Method and Pricing Type.

Definitions of the pricing method and pricing type options, along with examples, are provided in the [Examples](#) in [Appendix C](#).

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

7. (Optional) Enter a Minimum Fee and Maximum Fee. (For a pricing method and type of Amount and Fixed, which charges per transaction, a minimum and maximum fee are not used.)

8. Click the "Add Price Break" link to enter one or more price breaks. For examples of price breaks, see [Examples](#) in [Appendix C](#).

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

Enter only the Break From value. The system defaults the Break To value. For example, if you want a price break that breaks from 0 to \$2,000, click "Add Price Break" and enter 2,000 (do not use a currency symbol) in the next Break From.

9. After you enter billing information for the activity types you want to charge for, click Done and return to the **Price Lists** page.
10. On the **Price Lists** page, select Default List.
11. Click Apply Changes. (You need to click Apply Changes only when you change the Default List, not when you add a new price list.)

Step 4 Set Up Oracle Receivables Integration (Optional)

Complete the following steps to integrate the system with Oracle Receivables to process invoices and payments. Integrating with Receivables using a database link enables companies to view invoices and payments online on the system.

Alternatively, you can export billable activities to Receivables using XML, or export billable activities to your own ERP system. (Companies cannot view invoices, payments, or credits online on the system if you integrate with Receivables using XML or export billable activities to your own ERP system.)

The Oracle Receivables instance needs to be installed in a separate instance from the Exchange.

To integrate directly with Receivables using a database link, perform the steps in the following sections below:

- To set up Oracle Receivables Integration using a database link
- To run Receivables import programs

To integrate with Receivables by exporting billable activities through XML, perform the steps in the following section below:

- To export billing information to Receivables using XML

To export billable activities to your own ERP system, see [Billing and Customer Export Options](#) on page 2-108.

To set up Oracle Receivables integration using a database link:

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

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

```
CREATE DATABASE LINK <name> CONNECT TO <user name> IDENTIFIED BY
```

```
<password> USING <connect string>
```

For example:

```
CREATE DATABASE LINK ar_oex_dblink CONNECT TO <ORACLE user name for APPS  
super user> IDENTIFIED BY <ORACLE password for APPS super user> USING  
<name of target database for this system>
```

3. Install the "Exchange Billing Interface" Oracle Receivables (AR) patch.

The patch set can be downloaded from external-ftp.us.oracle.com or *tcpatch*, or *OracleMetaLink*. (Access *OracleMetaLink* via <http://www.oracle.com/support/>.) The corresponding bug and patch number is 1966026.

4. Set up an Oracle Receivables instance.

For information about creating an Oracle Receivables instance, see the *Oracle Receivables User's Guide*. This instance needs to be able to communicate with the Exchange instance via a database link for the integrated Receivables option to work.

Note: Currently, Oracle does not support database links when Receivables is hosted on Oracle Business OnLine.

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

- **Set the AR: Oracle Exchange Database Link Name profile option.** To complete the database link started in the previous step, set this profile option to the same value that you used to create the database link. In the example in the previous step, the database link name is `ar_oex_dblink`. In this example, you would enter `ar_oex_dblink` as the value for this profile option.
- **Define the Transaction Flexfield Structure.** To use AutoInvoice to import invoices, define the following descriptive flexfields and segments within them:

Table 2–20 Invoice Transaction Flexfield Context

Code	Name	Description
EXCHANGE INVOICES	Exchange Invoices	Exchange Invoices

Table 2–21 Invoice Transaction Flexfield Segments

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

Table 2–22 Line Transaction Flexfield Context

Code	Name	Description
EXCHANGE INVOICES	Exchange Invoices	Exchange Invoices

Table 2–23 Line Transaction Flexfield Segments

Name	Column	Value Set	Displayed
Billing Party ID	INTERFACE_LINE_ATTRIBUTE1	30 characters	No
Billing Site Use ID	INTERFACE_LINE_ATTRIBUTE2	30 characters	No
Billing Interface Request ID	INTERFACE_LINE_ATTRIBUTE3	30 characters	No
Billing Period	INTERFACE_LINE_ATTRIBUTE4	30 characters	No
Billing Activity Type Name	INTERFACE_LINE_ATTRIBUTE5	30 characters	No

- **Define an AutoInvoice line ordering rule for the transactions.** Order the invoice lines by Activity Type ID as follows:

- Name: Exchange Invoice Line Ordering Rule
- Description: Exchange Invoice Line Ordering Rule

Order by the following:

- Sequence: 1
- Transaction Attribute: INTERFACE_LINE_ATTRIBUTE5
- Type: Ascending

INTERFACE_LINE_ATTRIBUTE5 corresponds to the Activity Type Name descriptive flexfield segment.

- **Define an invoice grouping rule for the transactions.** Define the rule as follows:
 - Name: Exchange Invoice Grouping Rule
 - Line Ordering Rule: Exchange Invoice Line Ordering Rule
 - **Define auto-accounting.**
 - **Define transaction types for the transactions.** Name the transaction type for invoices as follows: Exchange Invoice. Name the transaction type for credit memos as follows: Exchange Credit. Make sure Tax Calculation is unchecked for both transaction types.
 - **Define a transaction batch source.** Define the batch source as follows:
 - Name: Exchange Import
 - Description: Invoices Imported from Exchange
 - Type: Imported
 - Active: Enabled
 - Automatic Batch Numbering: Enabled, Last Number: 1
 - Automatic Transaction Numbering: Enabled, Last Number: 1
 - Standard Transaction Type: Exchange Invoice
- For the AutoInvoice options, enter the following:
- Grouping Rule: Exchange Invoice Grouping Rule
 - Invalid Line: Reject Invoice
 - Allow Sales Credit: No

For the customer information, enter the following:

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

For the accounting information, enter the following:

- Payment Terms: Value

For other information, enter the following:

- Transaction Type: Value
- Memo Line Rule: Value

- **Define receipt classes and payment methods as follows:**

- Receipt Class Name: Exchange Manual Payment
- Creation Method: Manual
- Remittance Method: Select a method based on your business needs.
- Notes Receivable: No
- Require Confirmation: No
- Payment Method Name: Exchange Manual Payment
- Printed Name: Exchange Manual Payment

- Receipt Class Name: Exchange Credit Card Payment
- Creation Method: Automatic
- Remittance Method: Standard, Factoring, or Standard and Factoring
- Notes Receivable: No
- Require Confirmation: No
- Payment Method Name: Exchange Credit Card Payment
- Receipt Maturity Date Rule: Earliest
- Lead Days: 0

- Payment Type: Credit Card
 - Merchant ID: Enter the customer merchant ID

 - Receipt Class Name: Exchange EFT
 - Creation Method: Automatic
 - Remittance Method: Standard
 - Notes Receivable: No
 - Require Confirmation: No
 - Payment Method Name: Exchange EFT
 - Printed Name: Electronic Funds Transfer
 - Number of Receipts Rule: One per Invoice
 - Receipt Maturity Date Rule: Earliest or Latest (choose either)
 - Lead Days: 0
 - Payment Type: Enter any value except credit card.
 - **Set up document sequencing.** If you are using automatic receipts in Oracle Receivables, set up document sequencing for the payment methods Exchange Credit Card Payment and Exchange EFT that you defined above.
 - **Create standard memo lines.** Create one standard memo line for each billing activity type.
 - Name: Use the exact same billing activity type name, such as Spot Purchase, for each standard memo line.
 - Line Type: Line
 - Unit of Measure: Each
- Enter other values, such as the tax code required by the tax authority, as suit your business needs.
5. Enter data into the following fields on the **Software Setup** page in the Configuration tab to provide the database integration information:
 - Billing Database SID. Oracle system identifier (SID) of the Oracle Financials database.

- Billing Database Connect String. Java Database Connectivity string to specify how this system connects to Oracle Receivables.
 - Billing Database Username. ORACLE user name for the APPS super user in the Financials database.
 - New Billing Database Password. ORACLE password for the APPS super user in the Financials database.
 - Retype New Billing Database Password.
6. In the Billing tab, click the "Billing Parameters" link and enter the following information on the **Billing Parameters** page:
- Organization Name. Enter the organization name exactly as you entered it in Oracle Receivables. If the organization you specify does not exist in Oracle Receivables, you will receive an error message when you click Submit. You must fix the problem before you can continue.
 - Payment Terms. Enter a Payment Term exactly as it was defined in Oracle Receivables. All companies who choose the invoice payment method will be billed using this payment term. For example, a payment term named 1/10 Net 30 indicates that the invoice is due in 30 days, but companies get a 1% discount if they pay within 10 days. (The payment terms for credit card and electronic funds transfer payment methods are always immediate.)
 - Integrate with Oracle Receivables. Set this to Yes.
 - Click Submit.

To run Receivables import programs:

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

You do not need to run the Receivables import programs if you are using XML to export the data to Receivables. See **To export billing information to Receivables using XML**, below.

Run the following programs in Receivables, in this order:

1. Oracle Exchange Customer Import request set. This request set transfers customer data to the Receivables interface tables and then to customer tables within Receivables. This request set includes these programs:

- Oracle Exchange Customer Data Feeder program, which extracts data from this system and stores it in the customer interface tables in Receivables.
- Oracle Receivables Customer Interface program, which validates the data and converts it into Receivables customer information.

Customer information that is imported into Receivables includes the following:

- Customer name and address
 - Customer profile
 - Customer contact
 - Customer bank account and payment method
2. Oracle Exchange Invoice Import request set. This request set transfers to Receivables information about the fees charges to registered companies, and then runs AutoInvoice to create the invoices and credit memos. Invoices are created for any company who has not been billed for the last month. Invoices are created for the previous full month.

This request set includes these programs:

- Oracle Exchange Invoice Data Feeder program, which extracts data from this system and stores it in the interface tables in Receivables.
- Oracle Receivables AutoInvoice program

Select the following parameters in AutoInvoice:

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

Select the following information in the Receipt Batches window:

- Batch Type: Automatic
- Currency: If you enter a foreign currency, enter exchange rate information for this batch.
- Batch Date: Enter any date.
- GL Date: Since the receipt classes for the Exchange EFT and Exchange Credit Card Payment payment methods do not require confirmation, you must enter a General Ledger date. The default is the batch date. The date must fall within an open or future accounting period.
- Payment Method: Enter either Exchange EFT or Exchange Credit Card Payment.
- After you choose Create: Select the Approve and Create checkboxes.

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

The invoicing and payment activities resulting from running these programs are reflected in this system. Company Administrators (or anyone in the company who is assigned the Account Manager job function) can view these invoices and payments by clicking the "View Invoices" and "View Payments" links in the Billing tab in the Company Administration application. (If you create receipts manually, the invoicing and payment information is also visible on the system.)

To export billing information to Receivables using XML:

The following steps describe how to set up Receivables to receive XML transactions from this system.

1. In the Billing tab, click the "Billing Parameters" link and enter the following information on the **Billing Parameters** page:
 - Organization Name. Enter the organization name exactly as you entered it in Oracle Receivables. If the organization you specify does not exist in Oracle Receivables, you will receive an error message when you click Submit. You must fix the problem before you can continue.
 - Payment Terms. Enter a Payment Term exactly as it was defined in Oracle Receivables. All companies who choose the invoice payment method will be billed using this payment term. For example, a payment term named 1/10 Net 30 indicates that the invoice is due in 30 days, but companies get a 1% discount if they pay within 10 days. (The payment terms for credit card and electronic funds transfer payment methods are always immediate.)

- Integrate with Oracle Receivables. Set this to No.
 - Export Billing Activities through XML. If you choose Yes, each billable activity incurred on the system is sent immediately, in "real time," through XML to your own system. If you choose No, you can still export billable activities later, by date range, using the **Transfer Billable Activities** page. See [Billing and Customer Export Options](#) on page 2-108.
 - Export Customer Information through XML. If you choose Yes, any change to customer information, such as a new company's registering on the system or an existing company's changing its information, is sent immediately through XML to your own system. If you choose No, you can still export customer information later, by date range, using the **Transfer Customer Information** page. See [Billing and Customer Export Options](#) on page 2-108.
2. In the Billing tab, click the "Delivery Methods" link. Choose one of the Oracle Transport Agent communication methods for the Billing Activity Outbound transaction and one of the Oracle Transport Agent communication methods for the Billing Customer Information Outbound transaction. (They can be different Oracle Transport Agent methods, or the same Oracle Transport Agent method.) See [Appendix A](#) for detailed descriptions of the Oracle Transport Agent communication methods.

For the Server User ID and Password, enter the Oracle Applications logon user name and password.

3. Apply patch 2009620 to your Receivables instance. You can download the patch from [OracleMetaLink](#). (Access [OracleMetaLink](#) via <http://www.oracle.com/support/>.)

When you apply this patch, the patch also installed the following flexfields, so you do not need to define these:

Table 2–24 Invoice Transaction Flexfield Context

Code	Name	Description
EXCHANGE_XML_ INVOICES	Exchange Import	Exchange Import

Table 2–25 Invoice Transaction Flexfield Segments

Name	Column	Value Set	Displayed
Bill-to Party ID	INTERFACE_HEADER_ATTRIBUTE1	(null)	Yes

Table 2–26 Line Transaction Flexfield Context

Code	Name	Description
EXCHANGE_XML_INVOICES	Exchange Import	Exchange Import

Table 2–27 Line Transaction Flexfield Segments

Name	Column	Value Set	Displayed
Bill-to Party ID	INTERFACE_LINE_ATTRIBUTE1	(null)	Yes
Billing Site Use ID	INTERFACE_LINE_ATTRIBUTE2	(null)	Yes
Billing Interface Request ID	INTERFACE_LINE_ATTRIBUTE3	(null)	Yes
Billing Period	INTERFACE_LINE_ATTRIBUTE4	(null)	Yes

4. Define a location in Receivables that corresponds to this system, using the Locations window.

Defining a location is a requirement for the XML Gateway setup described in later steps.

You must also enter address information for this location.

5. Set the following profile options to Yes:
 - HZ: Generate Party Number.
 - HZ: Generate Party Site Number.
6. Make sure the following two options are selected (checked) in the System Options window:
 - Automatic Customer Numbering

- Automatic Site Numbering
7. Follow the steps from **Define an AutoInvoice line ordering rule for the transactions** through **Create standard memo lines** in the section [To set up Oracle Receivables integration using a database link](#): on page 2-93, with one exception. When you define the AutoInvoice line ordering rule, order the invoice lines differently than described in these steps; instead, order them as follows:
- Sequence: 1
 - Transaction Attribute: INTERFACE_LINE_ATTRIBUTE2
 - Type: Ascending

INTERFACE_LINE_ATTRIBUTE2 corresponds to the Billing Activity Type ID descriptive flexfield segment.

8. Download patch 1776702 from *OracleMetaLink* and follow the instructions with the patch to install and configure Oracle XML Gateway, Oracle Workflow Business Events System, and Oracle Transport Agent. Access *OracleMetaLink* via <http://www.oracle.com/support/>.

The following steps are the steps in XML Gateway that require specific values to receive and process XML documents; for the complete XML Gateway setup steps, see the *Oracle XML Gateway User's Guide*:

- When you set up transactions, define the customer transaction as follows:
 - Party Type: Internal
 - Transaction Type: CUSTOMER
 - Transaction Sub Type: NEW
 - Transaction Description: Enter your own description
 - Customer External Transactions:
 - Standard Code: OAG
 - Direction: IN
 - External Transaction Type: SCO
 - External Transaction Sub Type: SYNC
 - Queue: APPS.ECX_IN_OAG_Q
- When you set up transactions, define the invoice transaction as follows:

Party Type: Internal

Transaction Type: INVOICE

Transaction Sub Type: NEW

Transaction Description: Enter your own description

Invoice External Transactions:

Standard Code: OAG

Direction: IN

External Transaction Type: LRO

External Transaction Sub Type: LOAD

Queue: APPS.ECX_IN_OAG_Q

- When you set up trading partners, create an internal trading partner that corresponds to this system by defining the following trading partner information:

Trading Partner Type: Internal

Trading Partner Name: Select the location you defined above using the Locations window in Receivables.

Trading Partner Site: Enter the address of the location you defined above using the Locations window in Receivables.

Company Admin Email: Enter the e-mail address of the administrator who should receive e-mails regarding warnings or errors.

Trading Partner Details for the customer transaction:

Transaction Type: Choose the transaction you created above when you defined the customer transaction.

Transaction Sub Type: A value should default after you choose the Transaction Type.

Standard Code: A value should default after you choose the Transaction Type.

External Transaction Type: A value should default after you choose the Transaction Type.

External Transaction Sub Type: A value should default after you choose the Transaction Type.

Direction: A value should default after you choose the Transaction Type.

Map: 007_sync_customer_003

Source Trading Partner Location Code: Enter the System Operator identifier (ID) for this system. Contact the operations or installation team for this ID.

Trading Partner Details for the invoice transaction:

Transaction Type: Choose the transaction you created above when you defined the invoice transaction.

Transaction Sub Type: A value should default after you choose the Transaction Type.

Standard Code: A value should default after you choose the Transaction Type.

External Transaction Type: A value should default after you choose the Transaction Type.

External Transaction Sub Type: A value should default after you choose the Transaction Type.

Direction: A value should default after you choose the Transaction Type.

Map: 007_load_receivable_004

Source Trading Partner Location Code: Enter the System Operator identifier (ID) for this system. Contact the operations or installation team for this ID.

9. Export the XML customer and billing information to Receivables.

If the Export Customer Information through XML and Export Billing Activities through XML options are set to Yes on the **Billing Parameters** page, the customer and billing information is transferred automatically as the customer and billing changes occur. If these options are set to No, use the **Transfer Customer Information** and **Transfer Billable Activities** pages to manually export the information. See [Billing and Customer Export Options](#) on page 2-108.

Note: If transferring manually, transfer customer information before the billing activities, to ensure that the billing activities use the latest customer information.

10. Complete the export of billing information to Receivables by running the AutoInvoice program.

Select Exchange Import as the Invoice Source.

Step 5 Select an XML Delivery Method (Optional)

If you decide to export billing information to an external ERP system using XML, rather than integrating directly with Oracle Receivables, follow these steps:

1. In the Billing tab, click the "Delivery Methods" link. The system offers several XML communication methods to choose from. Choose one method for the Billing Activity Outbound transaction type, for delivering billing XML information, and one method for the Billing Customer Information Outbound transaction type, for delivering customer XML information. (They can be different methods, or the same method.) See [Appendix A](#) for descriptions of the delivery communication methods.

If you are exporting the XML billing or customer information to Oracle Receivables, see [To export billing information to Receivables using XML](#): on page 2-101 for the complete list of steps required.

2. In the Billing tab, click the "Billing Parameters" link to open the **Billing Parameters** page.
3. Choose No in the drop-down menu next to the Integrate with Oracle Receivables field. Choose Yes or No for the following options:
 - Export Billing Activities through XML. If you choose Yes, each billable activity incurred on the system is sent immediately, in "real time," through XML to your own system. If you choose No, you can still export billable activities later, by date range, using the **Transfer Billable Activities** page. For a complete discussion of your options, see [Billing and Customer Export Options](#) on page 2-108.
 - Export Customer Information through XML. If you choose Yes, any change to customer information, such as a new company's registering on the system or an existing company's changing its information, is sent immediately through XML to your own system. If you choose No, you can still export customer information later, by date range, using the **Transfer Customer Information** page. For a complete discussion of your options, see [Billing and Customer Export Options](#) on page 2-108.

Step 6 Choose System Payment Methods

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

To choose the accepted system payment methods:

1. In the Configuration tab, under User Interface, click the "Edit List of Values" link to open the **Choose Lookup** page.
2. Select the Billing Types lookup type and click Edit.
3. Select the values you will accept from companies as their system payment method.

See [Step 3 Customize Drop-Down Menu Items \(Lookup Types\) \(Optional\)](#) on page 2-119 for more information on editing lists of values.

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

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

Billing and Customer Export Options

You can choose how you want to export billing and customer information to an external ERP system:

- Integrate with Oracle Receivables. If you integrate this system with Oracle Receivables using a database link, you receive this system's billing and customer information directly into your Oracle Receivables system, and companies can also view their invoices, payments, and credits online in the system. Alternatively, you can use XML to export the billing and customer information to Oracle Receivables. See [Step 4 Set Up Oracle Receivables Integration \(Optional\)](#) on page 2-93.

- Integrate with an external ERP application. If you integrate with your own or a third-party application, there are several ways to export billing or customer information to your system, described below. Customer information includes new companies that register and changes that existing companies make to their information.

Note: If transferring data manually (by date range, as described below), transfer customer information before the billing activities, to ensure that the billing activities use the latest customer information.

Transfer billable activities as they occur, directly to your system

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

To transfer billable activities as they occur, do the following:

1. Set up your system to receive the data. Use the information in the Readme file downloadable from the **Transfer Billable Activities** page to help you understand the data that is sent and the XML format that is used, so that you can determine what is required in your system to receive the data.

To access the Readme file, click the Billing tab, then the "Transfer Billable Activities" link. Click the "Download a Readme file" link.

Note: The **Transfer Billable Activities** page is not the page you use to transfer the data in real time. It is the page used to transfer the data manually and the page from which the Readme file describing the XML data is available. The XML data is the same whether transferring it in real time or manually.

2. See [Step 5 Select an XML Delivery Method \(Optional\)](#) on page 2-107 and, for the Export Billing Activities through XML option on the **Billing Parameters** page, choose Yes.

Transfer billable activities by date range, directly to your system

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

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

1. Set up your system to receive the data. Use the information in the Readme file downloadable from the **Transfer Billable Activities** page to help you understand the data that is sent and the XML format that is used, so that you can determine what is required in your system to receive the data.

To access the Readme file, click the Billing tab, then the "Transfer Billable Activities" link. Click the "Download a Readme file" link.

2. See [Step 5 Select an XML Delivery Method \(Optional\)](#) on page 2-107 and, for the Export Billing Activities through XML option on the **Billing Parameters** page, choose No.
3. In the Billing tab, click the "Transfer Billable Activities" link.
4. On the **Transfer Billable Activities**, choose the dates within which to include the billing activities that you will be sending to your system.

If you want to transfer all billing activities that have occurred to date, leave the From and To fields blank. Otherwise, specify a From date, a To date, or both.

5. From the Transfer menu, choose which billable activities you want to include:
 - Activities Not Yet Transferred. This option sends only billable activities that have not already been transferred to your system through XML. (If you already downloaded activities in this date range to a spreadsheet, those are considered not yet transferred in XML.)
 - Transferred Activities. This option sends only billable activities that have already been transferred to your system through XML. (If you already downloaded activities in this date range to a spreadsheet, those are not considered transferred in XML.) This option is helpful if you need to re-transfer activities.
 - All Activities. This option transfers to your system all billable activities in the date range you specify, including activities you may have already transferred through XML.
6. Click Transfer.

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

Download billable activities to a spreadsheet text file

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

1. In the Billing tab, click the "Download Billable Activities" link.
2. On the **Download Billable Activities** page, enter the date parameters for the billable activities you want to download.
 - In the From field, enter the date of the oldest activities you want to view.
 - In the To field, enter the most recent activities you want to view.
3. From the Download menu, choose which billable activities you want to include:
 - **Activities Not Yet Downloaded.** This option downloads only billable activities that have not yet been downloaded to a spreadsheet. (If you have already downloaded billable activities within this date range using XML, those activities are considered not yet downloaded to spreadsheet.)
 - **Already Downloaded Activities.** This option downloads only billable activities that have already been downloaded to a spreadsheet. (If you already transferred billable activities within this date range using XML, those activities are not considered already downloaded to a spreadsheet.) This option is helpful if you need to re-download the activities.
 - **All Activities.** This option downloads all billable activities in the date range you specify, including activities you may have already downloaded to a spreadsheet.
4. Click Download to Spreadsheet.

5. You will be prompted to save the Billable Activities file. (If you see an Unknown File Type window, click the Save File... button.) Save the file to the drive or location of your choice.

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

Transfer customer updates as they occur, directly to your system

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

To transfer customer updates as they occur, do the following:

1. Set up your system to receive the data. Use the information in the Readme file downloadable from the **Transfer Customer Information** page to help you understand the data that is sent and the XML format that is used, so that you can determine what is required in your system to receive the data.

To access the Readme file, click the Billing tab, then the "Transfer Customer Information" link. Click the "Download a Readme file" link.

Note: The **Transfer Customer Information** page is not the page you use to transfer the data in real time. It is the page used to transfer the data manually and the page from which the Readme file describing the XML data is available. The XML data is the same whether transferring it in real time or manually.

2. See [Step 5 Select an XML Delivery Method \(Optional\)](#) on page 2-107 and, for the Deliver Customer Information through XML option on the **Billing Parameters** page, choose Yes.

Transfer customer updates by date range, directly to your system

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

format, as the XML data that is sent to your system if you chose to transfer customer updates as they occur, as described above.

To transfer customer updates by date range, do the following:

1. Set up your system to receive the data. Use the information in the Readme file downloadable from the **Transfer Customer Information** page to help you understand the data that is sent and the XML format that is used, so that you can determine what is required in your system to receive the data.

To access the Readme file, click the Billing tab, then the "Transfer Customer Information" link. Click the "Download a Readme file" link.

2. See [Step 5 Select an XML Delivery Method \(Optional\)](#) on page 2-107 and, for the Deliver Customer Information through XML option on the **Billing Parameters** page, choose No.
3. On the **Transfer Customer Information** page, choose the dates within which to include the customer updates that you will be sending to your system.

If you want to transfer all customer updates that have occurred to date, leave the From and To fields blank. Otherwise, specify a From date, a To date, or both.

4. From the Transfer menu, choose which customer information you want to include:
 - Updates Not Yet Transferred. This option sends only new and changed customer information that has not yet been transferred to your system through XML. (If you already downloaded customer information in this date range to a spreadsheet, that is considered not yet transferred in XML.)
 - Already Transferred Updates. This option sends only new and changed customer information that has already been transferred to your system through XML. (If you already downloaded customer information in this date range to a spreadsheet, that is not considered already Transferred in XML.) This option is helpful if you need to re-transfer the information.
 - All Updates. This option transfers to your system all new and changed customer information in the date range you specify, including customer information you may have already transferred through XML.

5. Click Transfer.

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

Download customer information to a spreadsheet text file

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

Follow the same steps as described in [Download billable activities to a spreadsheet text file](#) on page 2-111, except choose the "Download Customer Information" link.

Customization Setup Steps (Part II)

This section consists of the following steps:

Table 2–28 Customization Setup Steps (Part II) Summary

Step Number	Step	Required?	Which Products Perform This Step?
1	Customize Job Functions	Required for Oracle Sourcing	all products
2	Update List of Blocked Territories	Optional	all products
3	Customize Drop-Down Menu Items (Lookup Types)	Optional	all products
4	Set Up Intelligence Reports	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Sourcing
5	Set Up a Default Job Functions List	Optional	all products
6	Customize Help Files	Required for Oracle Sourcing	all products
7	Customize the Help Logo	Recommended	all products

Step 1 Customize Job Functions (Required for Oracle Sourcing)

The system provides job functions that you can use to control the access that companies have to certain functions. You can customize these job functions to create new types of roles and security for companies. A job function consists of one or more tasks that people can perform. For example, two of the tasks that a job function called Buyer includes are *Create Buyer's Negotiation* and *View Buyer Negotiations Intelligence Reports*. Anyone who has been assigned this job function can

perform these tasks. Someone who has not been assigned a job function that contains these tasks cannot perform these tasks.

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

Note: It is recommended that, instead of customizing existing job functions, you copy them and modify the copies. This way, if you upgrade in the future, the upgrade will update the original job functions, preserving your customized ones.

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

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

To determine whether customizations are needed:

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

1. Make a high-level inventory of the business processes that the system will provide. For example, some of these business processes might be industry-specific.

2. Identify the roles and responsibilities of the people who will support these processes.
3. Think of the job functions that you would need to cover these roles and responsibilities.
4. Look at the default job functions that the system provides to ensure that there is not an existing job function you can use. Map these to the job functions that you need. Create new job functions if needed. You should not duplicate existing job functions.

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

To view a list of all of the job functions and tasks that the system provides, see [Appendix D](#).

Alternatively, to view job functions and tasks online, follow these steps:

1. In the Configuration tab, under Configuration, click the "Manage Job Functions" link.
2. Search by job function name or description and click Go. You can enter any part of the name or description to find all matching entries. Or leave these fields blank and click Go to see all job functions.



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

Manage Job Functions

Job Functions are the mechanism for granting users access to System Tasks

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

Search

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

Job Function Name

Description

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

The table on the **Manage Job Functions** page lists the job functions and a high-level description of each.

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

To customize or create a new job function:

1. In the Configuration tab, under Configuration, click the "Manage Job Functions" link.
2. On the **Manage Job Functions** page, do either of the following:
 - To create your own job function out of existing tasks, click the "Create a new Job Function" link at the top of the **Manage Job Functions** page.
 - To add or remove tasks from a job function, search for the job function and click Go. You can enter any part of the name or description to find all matching entries. Then click the "Update" link for the job function.
3. Enter or update the Name and Description of the job function. Since Company Administrators can also create job functions, give your new job function a distinctive name and description so that it will not possibly conflict with any functions created by Company Administrators.

If the system is installed in multiple languages, edit the job function name and description in each installed language. Select the language from the Language menu on the **Update Job Functions** page, change the name or description, and click Review and Submit. Do this for each language in the Language menu. You only need to do this if you are changing the name or description, so that the change is made in all languages.

Note: The "Manage anonymous access" link lets you control (by modifying the Unknown User job function) what people can see on the **Home** page before logging in. Do not assign the Unknown User job function to companies. It already applies to everyone by default. For example, everyone can see the Buying, Selling, Supply Chain Exchange, and Product Development application links on the **Home** page before logging on, because these are included as tasks in the Unknown User job function. Once people log in, the features they can access are a combination of the Unknown User job function and the job functions they have been assigned.

You cannot control the Help icon through the Unknown User job function; the system is designed to display the Help icon only after login.

If you modify the Unknown User job function, reapply those modifications after any patch of the Exchange or Oracle Sourcing that modifies job functions.

4. Add system tasks to the job function either individually or by copying an existing job function. Follow the guidance online to search for the task or job function.
 - If you are adding tasks individually, select the system task(s) you want to add to your job function, then click Add to Job Function.
 - If you are copying tasks from an existing job function, select the job function(s) from which you want to copy the system tasks, then click Copy System Tasks.
 - To delete a system task from this job function, click the "Remove" link for the task.
5. When you have finished editing your job function, click Review and Submit. Review your job function. Use your browser's Back button to make changes as necessary.
6. When you are satisfied with your job function, click Submit.

Step 2 Update List of Blocked Territories (Optional)

United States Export Control laws govern all exports of commodities and technical data from the United States. In accordance with these regulations, people registered

on the system may be restricted from conducting business with companies located in certain countries. The system enforces these restrictions by maintaining a list of restricted countries and blocking any reference to a company located in a blocked country.

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

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

To update the list of blocked countries:

1. In the Configuration tab, under Configuration, click the "Block / Unblock Territories" link.

The **Blocked Territories** page appears showing you the countries that are currently blocked.

2. To remove a country's block, select the country and click Submit.
3. To block a country, select the country from the Block this Territory menu and click Submit.

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

Throughout the system, drop-down menus are used to provide people with a list of approved options from which to select. These lists are called *lists of values* or *lookup types*. The system comes with typical values already predefined for these lists, listed in the table below. The System Operator can modify most of these.

The Company Administrator cannot modify, add, or delete lookup type values; however, for some lookup types, the selling Company Administrator in Oracle Exchange (not Oracle Sourcing) can choose the values it wants to default on transactions conducted by people in the company and can deselect values it will not accept.

For most lookup types, the System Operator can modify values, add new values, or delete existing values. (The values that cannot be modified will be apparent on the **Customize Values** page when the System Operator customizes the lookup types.)

Tip: Establish a process for capturing lists of values requirements from companies who participate on the system and for getting approval to include these values, since these are values that will be seen by all companies on the system. For example, if your system spans multiple industries, industry-specific lists of values may not apply to all participants.

Table 2–29 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Billing Automatic Payment Types	Not used	
Billing Spreadsheet Download Type	Not used	
Billing Types	<p>Billing payment methods approved for paying the System Operator for the system’s services:</p> <ul style="list-style-type: none"> ■ BILL_ME - Invoice. ■ CREDIT_CARD - Credit Card ■ EFT - Electronic Funds Transfer 	Billing
Billing XML Transfer Type	Not used	
Contact Title	Abbreviation (such as Ms. or Mr.) used in notification salutations.	Registration Administration
Counteroffer Limit	Number of counteroffers that the creator of an offer is willing to accept from participants	Negotiations
Credit Card Types	Credit cards approved for paying the system for its services. These are the credit card types that appear when a company registers and chooses its system payment method and when the company Account Manager (in the Billing tab) changes its system payment method.	Registration Administration
Customer Spreadsheet Download Type	Not used	
Customer XML Transfer Type	Not used	

Table 2–29 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
FOB Terms *	<p data-bbox="472 296 1025 383">Point at which the supplier’s responsibility for the goods ceases and the buyer takes title of the goods purchased:</p> <ul style="list-style-type: none"> <li data-bbox="472 392 1025 557">■ CFR - Cost and Freight. Supplier pays the cost and freight to bring the goods to the named port of destination, but the risk of loss/damage to the goods transfers from supplier to buyer once the goods pass the ship’s rail in the port of shipment. <li data-bbox="472 565 1025 678">■ CIF - Cost, Insurance, and Freight. Supplier must pay the costs, insurance, and freight necessary to bring the goods to the specified port of destination. <li data-bbox="472 687 1025 774">■ CIP - Carriage and Insurance Paid To. Supplier pays the freight and cargo insurance for the carriage of the goods to the named destination. <li data-bbox="472 782 1025 861">■ CPT - Carriage Paid To. Supplier pays the freight for the carriage of the goods to the named destination. <li data-bbox="472 869 1025 1034">■ DAF - Delivered at Frontier. Supplier’s obligation ceases when the goods have been made available, or cleared for export, at the named point and place at the frontier, but before the customs border of the adjoining country. <li data-bbox="472 1043 1025 1161">■ DDP - Delivered Duty Paid. Supplier fulfills obligation to deliver when the goods have been made available at the named place in the country of importation. 	Purchasing Negotiations

Table 2–29 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
FOB Terms * (continued)	<ul style="list-style-type: none"> <li data-bbox="429 296 979 401">■ DDU - Delivered Duty Unpaid. Supplier’s obligation ceases when the goods have been made available at the named place in the country of importation. <li data-bbox="429 418 979 548">■ DEQ - Delivered Ex Quay. Supplier’s obligation ceases when the goods have been made available to the buyer on the quay (wharf) at the named port of destination, cleared of importation. <li data-bbox="429 565 979 696">■ DES - Delivered Ex Ship. Supplier’s obligation ceases when the goods have been made available to the buyer on board the ship uncleared for import at the named port of destination. <li data-bbox="429 713 979 765">■ DEST - Destination. Supplier’s responsibility for goods ceases upon acceptance by buyer. <li data-bbox="429 782 979 861">■ EXW - Ex Works. Supplier’s responsibility ceases when the goods become available to the buyer at the supplier’s premises. <li data-bbox="429 878 979 982">■ FAS - Free Alongside Ship. Supplier responsibility ceases when the goods have been placed alongside the vessel on the quay or in lighters at the named port of shipment. <li data-bbox="429 999 979 1104">■ FCA - Free Carrier. Supplier’s responsibility ceases when the supplier has handed over the goods, cleared for export, to the buyer’s designated carrier at the named place or point. <li data-bbox="429 1121 979 1199">■ FOB - Free on Board. Supplier’s obligation to deliver ceases when the goods have passed over the ship’s rail at the named port of shipment. <li data-bbox="429 1216 979 1269">■ ORIG - Origin. Supplier’s responsibility for goods ceases upon transfer to carrier. <li data-bbox="429 1286 979 1376">■ OTHER - Other (See Notes). If Other is selected, the buyer will be directed to enter a text note explaining FOB terms in the Additional Information - Notes field. 	Purchasing Negotiations

Table 2–29 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Freight Carrier *	Carrier chosen to transport the goods to the buyer: <ul style="list-style-type: none"> ■ DHL01 - DHL Worldwide Express ■ FE03 - FedEx 2 Day ■ FE04 - FedEx Freight Services ■ FE05 - FedEx International ■ FE06 - FedEx International Economy Freight ■ FE02 - FedEx Overnight ■ FE01 - FedEx Same Day ■ OTHER - Other (enter details in the Notes field) ■ UPS02 - UPS 2nd Day ■ UPS03 - UPS Ground ■ UPS01 - UPS Next Day ■ UPS04 - UPS Worldwide Express ■ PS01 - United States Postal Service 	Purchasing Negotiations
Freight Terms *	Provisions for freight payment: <ul style="list-style-type: none"> ■ ALD - Allowed. Supplier reimburses buyer for freight. ■ DUE - Due. Buyer pays freight. ■ OTHER - Other. If Other is selected, the buyer will be directed to enter a text note explaining freight terms in the Additional Information - Notes field. ■ PAD - Paid. Supplier pays freight. ■ PPD - Pre-paid. Supplier pays freight and invoices buyer. 	Purchasing Negotiations
Iteration Limit	Number of counteroffer iterations that the offer creator is willing to accept from a single participant	Negotiations
Months	All available months (for example, the Month drop-down menu when entering credit card expiration dates)	Registration and Administration

Table 2–29 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Payment Method *	<p>Preferred method of payment for a seller’s goods or services. These are the credit card types that appear when a buyer chooses a credit card type on orders and when a supplier in Oracle Exchange uses the Trading Partner Preferences page to choose the credit card types it will accept:</p> <ul style="list-style-type: none"> ■ AE - American Express ■ COD - Cash on Delivery ■ DC - Diner's Club ■ DI - Discover ■ IA - Invoice Account ■ MC - MasterCard ■ OTHER - Other (enter details in the Notes field) ■ VS - Visa 	<p>Administration Purchasing</p>
Payment Terms *	<p>Provision for paying for the goods or services ordered:</p> <ul style="list-style-type: none"> ■ IM - Immediate. The balance of the transaction is due immediately (on the transaction date). ■ N15 (or N30, N45, or N60) - Net 15 (or 30, 45, or 60). The balance of the transaction is due within 15 (or 30, 45, or 60) days of the invoice date. ■ IN30 (or IN45 or IN60) - 1/10 Net 30 (or 45 or 60). The buyer will receive a one percent discount if payment is received within 10 days of the invoice date. The balance of the transaction is due within 30 (or 45 or 60) days of the invoice date. ■ 2N30 (or 2N45 or 2N60) - 2/10 Net 30 (or 45 or 60). The buyer will receive a two percent discount if payment is received within 10 days of the invoice date. The balance of the transaction is due within 30 (or 45 or 60) days of the invoice date. ■ OTHER - Other (See Notes). If Other is selected, the buyer will be directed to enter a text note explaining payment terms in the Additional Information - Notes field. 	<p>Purchasing Negotiations</p>

Table 2–29 Drop-Down Menus (Lists of Values)

Look Type (List of Values)	Explanation	Functional Area
Shipping Methods	Arrangements by which the goods are delivered from the supplier to the buyer	Purchasing Negotiations
Shipping Terms	Party responsible for paying for shipping the goods	Purchasing
Trading Partner Types	Principal business activity of a company	Registration Administration
Transportation Method	Method used to deliver the goods ordered	Oracle Transportation Negotiations

* In Oracle Exchange, the selling Company Administrator can select preferred or unaccepted values for these lists of values.

To edit lists of values:

1. In the Configuration tab, under User Interface, click the "Edit List of Values" link to open the **Choose Lookup** page.
2. Select the lookup type you wish to modify and click Edit.
The **Customize Values** page for that lookup type appears, displaying all existing entries for that lookup type.
3. Choose the Language. This is the language for which you are making the change. For example, if you change the name or description of a lookup type, you may want to translate the change in each installed language.
4. To edit existing values, change the Meaning and Description fields. The value you enter for the Meaning is the value that appears in the drop-down menu on the system; it must be unique. The Description is optional.
5. To add new values to a lookup type, scroll to the bottom of the page and fill in the fields to create your new lookup type, then click Add.
Not all lookup types let you add new values. These lookup types do not provide an Add button.
The value you enter for the Code is used when creating any XML documents that use this lookup type. Do not enter characters such as spaces, single quotes, or double quotes in your Code.
6. Select your new value to enable it for use, if it is not selected already.
7. Click Apply Changes.

To disable a lookup type value:

1. In the Configuration tab, under User Interface, click the "Edit List of Values" link to open the **Choose Lookup** page, select the lookup type for which you wish to disable a value, and click Edit.
2. Click the checkbox to the left of the value to remove the check. This deselects the value.
3. Click Apply Changes.

The value is now disabled and will not appear in any menu on the system.

Step 4 Set Up Intelligence Reports (Optional)

By default, most of the main job functions in a product area contain the corresponding Intelligence system tasks; however, to enable people to access the Intelligence reports, make sure that the tasks in [Table 2–30](#) below are included in those job functions that you assign. (Anyone assigned the Oracle Transportation Manager job function can view Transportation Intelligence reports.) See [Step 1 Customize Job Functions \(Required for Oracle Sourcing\)](#) on page 2-114 for instructions on modifying job functions.

Table 2–30 Intelligence Tasks

Task	Description
Engineering Intelligence	View Product Development reports
Inventory Management	User can view Supply Chain intelligence reports.
Supply Chain Analysis	User can analyze Supply Chain performance report.
View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
View Selling Activities in Buyer Negotiations Intelligence Reports	User can view awarded bids and committed offers summary reports, and selling activities in detail buyer negotiation intelligence reports.
View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)

Table 2–30 Intelligence Tasks

Task	Description
View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.

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

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

To create a default job functions list:

1. In the Configuration tab, under Configuration, click the "Manage Job Functions" link.
2. On the **Manage Job Functions** page, click the link "Set default Job Function to delegate when approving independent companies."
3. Do any of the following:
 - Click the "Select and add existing job functions" link to add job functions to the default job functions list.
 - Click "Create and assign a new job function" if you want to create a new job function for the default job functions list. See [Step 1 Customize Job Functions \(Required for Oracle Sourcing\)](#) on page 2-114 for instructions.
 - Click the "Remove" link to remove a job function from the default job functions list.
4. When you are finished creating the default job functions list, click Review and Submit.
5. Use your browser's Back button to make additional changes if necessary. If you are satisfied with the changes, click Submit.

Step 6 Customize Help Files (Required for Oracle Sourcing)

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

The Help pages are .htm files, and the Help tree (the Help contents displayed to the left of the Help pages) is an .ldt file. You can also modify the Help logo that appears

on the top left of the Help pages, as described in [Step 7 Customize the Help Logo \(Recommended\)](#) on page 2-135. The following illustration shows a Help .htm page on the right, the Help tree (.ldt file) on the left, and the Help logo in the top left:



Help files are stored in their specific application area. Oracle Transportation Help files are stored in the FTE area, Product Development Help files are stored in the IPD area, and the Buying and Selling and Supply Chain Exchange files are stored in the POM area. When you download the Help files for customization, you download them from a specific area.

Note: Keep backup copies of your customizations. The system can revert to the original, system versions if you need to undo a change, but not a previous version of a customization you made. The system also reverts *all* changes within the application you choose. (You cannot undo changes to just one .htm file, for example.)

For the Help requirements for Oracle Sourcing, see [Chapter 3](#).

Help Tree

The tree is the table of contents for the online Help. The tree contains topics (called nodes) ranging from the topmost Help branch to the lowest-level nodes that link to a Help (.htm) file. In the previous illustration, the lowest-level node is Creating Negotiations, which links to a .htm file, which itself contains links to other .htm files.

The base Help tree is stored in the POM area. For example, if you want to change the order of the Help tree topics (called nodes) that exist directly under the topmost Help node of the tree, choose Help Navigation Tree and Marketplace & Supply Chain Exchange when downloading the files, to download the pom.ltd file:

- Help
 - Registration
 - Buying and Selling
 - Product Development Exchange
 - Supply Chain Exchange
 - Oracle Transportation
 - My Profile

The Help tree is partitioned as follows:

- To modify the Help tree nodes that exist under Oracle Transportation, download the Help Navigation Tree from the Transportation Exchange area (the fte.ltd file).
- To modify the Help tree nodes that exist under Product Development Exchange, download the Help Navigation Tree from the Product Development Exchange area (the ipd.ltd file).
- All other nodes on the tree exist in the pom.ltd file (choose the Marketplace & Supply Chain Exchange when downloading the Help Navigation Tree).

You need to modify the Help tree only when you need to edit a tree node's name (or the file that it links to), delete a tree node, add a tree node, or reorder tree nodes. You do not need to modify the tree if you are editing content in a .htm file.

If you delete a topic reference from the Help tree or a Help file, you do not also have to delete the corresponding Help .htm file from the system; however, to ensure that the file is not accessible by searching, download the file, delete its contents, and upload the blank file with the same name.

Multiple Languages

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

To download the Help files:

1. In the Configuration tab, under User Interface, click the "Customize Help" link.
2. On the **Customize Help** page, under Step 1: Download Files, choose a Content Type:
 - Help Content Files. Downloads the .htm files containing the Help content.
 - Help Navigation Tree. Downloads the .ldt file containing the Help tree.
3. Choose the Language in which you want to download the files or tree.
The system downloads the files in the language you choose.
4. Choose an Application:
 - Transportation. Downloads the Help files (.htm or .ldt) for Oracle Transportation (FTE) only.
 - Product Development. Downloads the Help files (.htm or .ldt) for Product Development Exchange (IPD) only.
 - Marketplace & Supply Chain Exchange. Downloads the Help files (.htm or .ldt) for the Buying and Selling applications and Supply Chain Exchange (POM).
5. Select Template if this content has never been customized or Customization if this content type has been customized before, and you wish to update the customization.
6. Click Download Now and save the .zip file to the directory of your choice.

To identify Help file names:

If you need to make a lot of customizations to an application's Help files, you may decide to open and review every Help (.htm) file that you download. Sometimes, however, it may be easier to determine a specific file name to customize:

1. Log on to the system as a registered company's user.
2. Click the Help icon and find the Help topic you want to customize.
3. When the Help topic is displayed, right-click the Help page and choose View Source.

The file name is displayed at the top of the page in the Source and File fields. For example:

```
<!-- Generated: 1/6/101, Original HTML, htm2ihelp.pl v. 1.1
      Source: CreateNegNav.htm
      File: CreateNegNav.htm
      Context: nil
      Tiers: ALWAYS
      Pretrans: YES
      Label: After 115.1 -->
```

To customize the Help files:

1. Open the .zip file you downloaded from the **Customize Help** page and extract the files into the directory of your choice.

If you downloaded the Help Content Files, the .zip file contains all of the .htm files in the application you chose.

If you downloaded the Help Navigation Tree, the .zip file contains the .ldt file for the application you chose and a Readme file.

Read the Readme file for instructions on modifying the .ldt file.

2. Open the .htm files in an HTML editor of your choice and modify them as needed. Open the .ldt file in a text-only editor (such as WordPad) and modify it as described in the Readme file that comes with the .ldt file.

Note: Do not change the name of the .ldt file. The system looks specifically for pom.ldt, ipd.ldt, or fte.ldt.

To make future maintenance of the Help files easier, you should not change the names of existing .htm files. Technically, you can change the .htm file names; the Help system does not link to file names but to anchors within files. Preserving the original file names, however, makes your own customization management easier. If you are deleting a file by reuploading it blank (so that it does not appear during a search of the Help), do preserve the file name.

When you edit or create new hypertext links in the .htm files, note that the system uses the convention shown in the following example:

```
@browsecatonline#browsecatonline
```

In this example, the Help system links to an anchor called `browsecatonline` in a .htm file. You must use the this convention for links in the Help system: @ symbol, anchor name, # symbol, repeated anchor name.

To upload customized Help files:

1. In the Configuration tab, under User Interface, click the "Customize Help" link.
2. On the **Customize Help** page, under Step 2: Load Files, choose a Content Type:
 - Choose Help Content Files to upload .htm files. You can upload an .htm or .ldt file itself, or zip up several .htm files and load the .zip file. (The .zip file can be any name.)
 - Choose Help Navigation Tree to upload .ldt files. You can upload the .ldt file itself or zip it up and load the .zip file. (The .zip file can be any name.)

3. Choose the Language in which you want to upload the files or tree.

Typically, this is the same language in which you downloaded the files. Your customizations are seen by people logged into that language version of the system.

4. Choose an Application:
 - Choose Transportation to upload Transportation .htm files or fte.ldt.
 - Choose Product Development to upload Product Development .htm files or ipd.ldt.
 - Choose Marketplace & Supply Chain Exchange to upload .htm files for the Buying and Selling applications or Supply Chain Exchange or to upload pom.ldt.

Note: Upload those files that belong to that application. Links from the tree (.ldt file) to .htm files won't work if the system cannot find the file in its application area. If you upload an .ldt file to the wrong application, you won't see your change to the file.

5. The Character Set defaults for you, depending on which language you chose. For example, if you chose French, the Character Set menu displays Cp1252 and UTF-8 as character set options. Choose the default character set for that language. For example, for French choose Cp1252. Choose UTF-8 if you created and saved the file using a UTF-8 editor. For more information on character sets, see the *Oracle Exchange Installation and Upgrade Guide*.
6. Enter the full path name of the file you are uploading, or click Browse to locate and select the file.
7. Click Start Load Now.
8. On the **Verify Content** page confirming that your file has loaded successfully, click the Publish button to apply the changes to the system.

The **Help Customization Status** page appears. See **To check the status of loaded Help customizations**, below.

When the status changes to Success, your changes have been applied to the system.

9. You may need to close and restart your browser to see the changes on the system.
10. To enable your new or customized files to appear in the search results when people conduct a search of the Help system, ask your system administrator to run loadhelp.sh.

To check the status of loaded Help customizations:

1. In the Configuration tab, under User Interface, click the "Customize Help" link.
2. On the **Customize Help** page, click the link in the sentence "To check on customization load status, please click here."

The **Help Customization Status** page appears, showing you the status of your loaded files and the job number the system has assigned to the upload. Status readings include:

- Waiting. The job is pending processing.

- Started. The job is being processed.
- Success. The job completed successfully.
- Failure. The job failed. Try uploading the files again, or re-review the instructions in this section.

To undo a Help customization:

When you undo a Help customization, you revert to the original versions of the Help files that came with the system.

1. In the Configuration tab, under User Interface, click the "Customize Help" link.
1. On the **Customize Help** page, click the link in the sentence "If you want to undo any customization, please click here."
2. Choose Help Content Files to undo changes to .htm files. Choose Help Navigation Tree to undo changes to an .ldt file.
3. Select the Language.

The system undoes changes only in the language you choose.

4. Choose an application:
 - Choose Transportation to undo all changes made to the selected content type (Help Content Files or Help Navigation Tree) in Oracle Transportation.
 - Choose Product Development to undo all changes made to the selected content type (Help Content Files or Help Navigation Tree) in Product Development Exchange.
 - Choose Marketplace & Supply Chain Exchange to undo all changes made to the selected content type (Help Content Files or Help Navigation Tree) in the Buying and Selling applications and Supply Chain Exchange.

For the specified content type, the system reverts *all* changes to the *original* system file versions within the application you choose. (You cannot undo changes to just one .htm file, for example.)

5. Click Submit.

A **Confirmation** page appears indicating that you successfully undid the changes.

Step 7 Customize the Help Logo (Recommended)

The Help logo defaults to the standard Oracle Applications Help logo, unless you change it following the steps below.

The system does not keep a copy of the original logo once you change it. In case you need to revert to the original system logo, follow these steps:

1. Log into the system as a registered company user and click the Help icon.
2. When the Help system appears, right-click the logo that displays in the upper-left corner and choose Save Image As
3. Save the image to a your own backup directory.

The new image must be in either .jpg or .gif format and approximately 75 pixels wide and 40 pixels tall. You do not have to preserve the original file name. To upload your own Help logo:

1. In the Configuration tab, click the "Customize Help Logo" link.
2. On the **Customize Help Logo** page, click Browse to navigate to your customized logo.
3. Click Start Load Now.

A **Confirmation** message appears confirming the logo change.

4. You may need to click the Refresh or Reload button on your browser, or close and restart your browser, to see the change.

Oracle Sourcing Setup

This chapter describes what the System Operator needs to do to set up Oracle Sourcing:

- [Overview](#) on page 3-1
- [Oracle Sourcing Setup Steps](#) on page 3-3
- [Help Edits for Oracle Sourcing](#) on page 3-8

Overview

The license for Oracle Sourcing allows a single buying company to negotiate electronically with its suppliers. In comparison, Oracle Exchange enables many buying companies and suppliers to participate in electronic negotiations as well as many other types of buying and selling transactions, including catalog content management, catalog marketplace purchases, and Operator billing. Functionality for Oracle Exchange may be included in the media shipped for Oracle Sourcing; however, the license for Oracle Sourcing is intended for use with only one buying company and its many suppliers.

The Oracle Sourcing license is therefore restricted to the functionality that enables a single buying company to create a buyer's auction, RFQ (request for quotation), offer, or other sourcing document; solicit negotiation responses from other companies; evaluate those responses; and respond to them. Not included are catalog purchasing functionality, Operator billing, sell-side transactions including seller's auctions and offers to sell, and *n-tier* supplier negotiations—when a supplier initiates buy-side or sell-side transactions with its own (second-tier) suppliers.

A buyer implements Oracle Sourcing to do the following:

- Create auctions, RFQs, and offers, and invite suppliers to register and respond to these negotiations.

- Monitor and evaluate suppliers' responses, and award business to the appropriate suppliers.
- View Intelligence reports related to negotiations.
- Maintain user and company accounts and profiles, including functionality within the Company Administration application.
- Access other functionality such as the My Profile page and the online Help that facilitate the process of creating and managing buyer's negotiations.

A supplier's role in Oracle Sourcing consists of the following:

- Register on the buyer-owned system.
- Respond to the buyer's negotiations.
- Maintain user and company accounts and profiles, including functionality within the Company Administration application.
- Access other functionality such as the My Profile page and the online Help that facilitate the process of responding to a buyer's negotiations.

Implementing Oracle Sourcing requires the System Operator to grant sourcing job functions to companies and users and to modify some setup steps to follow the Oracle Sourcing model.

The Oracle Sourcing job functions available to the buying company are as follows:

- Sourcing Buyer. Allows users to create and award buyer's negotiations, and view buyer intelligence reports.
- Sourcing Buying Company Admin. Manage the company, including approving and managing users, and assigning and customizing roles.

The Oracle Sourcing job functions available to selling companies are as follows:

- Sourcing Seller. Allows users to respond to buyer's negotiations.
- Sourcing Selling Company Admin. Manage the company, including approving and managing users, and assigning and customizing roles.

Note: In compliance with the Oracle Sourcing model, do not assign the sourcing buyer and sourcing seller job functions to the same company or user.

Oracle Sourcing setup steps are described in the next section. It is the System Operator's responsibility to implement Oracle Sourcing as described by the Oracle Sourcing license.

Attention: Although the system permits companies to register as affiliates, the Oracle Sourcing license does not support affiliate relationships. Oracle Sourcing license holders should not approve affiliate registrations.

Oracle Sourcing Setup Steps

The following tables list each of the steps the System Operator performs for Oracle Sourcing. For example, for Oracle Sourcing the System Operator does not perform billing setup steps or most of the purchasing and catalog setup steps. See [Chapter 2](#) for the instructions on performing each step in the tables below. The last column of the tables describes special setup requirements for Oracle Sourcing, if any, that differ from the instructions in [Chapter 2](#).

* Steps marked with an asterisk can require up-front planning, and therefore may need more of your time and thought before implementing them. Note these steps and allow time in your implementation to prepare for them. See the specific steps for more information.

Table 3–1 Administration Setup Steps for Oracle Sourcing

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
1	Set Up Additional Operator Login Account(s) on page 2-2	Optional	(none)
2	Set Up the Software on page 2-4	Required	<p>On the Identification page, you must choose No for the Show Shopping Cart Icon field to hide the Shopping Cart icon at the top right of the page and No for the Display Billing and Payment During Registration option to hide registration information related to paying Oracle Exchange for its services.</p> <p>You may also need to edit the default values that the system provides in the Notifications Header and Notifications Footer fields on the Identification page to better suit a sourcing (rather than exchange) system.</p> <p>Although the Catalog Directory field is required on the Software Setup page, you do not have to maintain this field for Oracle Sourcing.</p>
3	Set Password Policy on page 2-9	Optional	(none)
4	Create a Test Company on page 2-10	Optional	There is one XML transaction used in Oracle Sourcing: PO from Outbound Buyer's Auction & RFQ. The system generates this transaction for the buying company if the buying company selects a communication method for it. If you want to test this transaction, do so after creating your test buying company. See the <i>Oracle Exchange and Oracle Sourcing Company Administration Guide</i> .

Table 3–2 Branding and Customization Setup Steps (Part I) for Oracle Sourcing*

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
1	Modify the Style Sheet on page 2-19	Optional	(none)
2	Modify Images on page 2-24	Optional	(none)
3	Set Up Contact Information, and Notification Headers and Footers on page 2-26	Required	(none)

Table 3–2 Branding and Customization Setup Steps (Part I) for Oracle Sourcing*

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
4	Make Terminology Changes on page 2-26	Optional	(none)
5	Customize Site Content on page 2-31	Required	<p>Modify the Buying home page to remove links and references to shopping, purchases, and catalog Intelligence.</p> <p>Modify the Selling home page to remove links and references to sales, Intelligence, and the catalog.</p> <p>Modify the Registration Confirmation page to remove the links to the template or example pages describing Exchange-specific functionality—or replace these pages with your own.</p> <p>Ignore the content types that do not apply to Oracle Sourcing: Catalog News, Fee Schedule, and (unless you also have a license for Oracle Supply Chain Exchange) Supply Chain News and Supply Chain Intransit Carrier.</p>
6	Set Up Regions Data on page 2-36	Required for Offers	(none)
7	Customize Units of Measure on page 2-43	Optional	(none)

Table 3–3 Catalog Setup Steps for Oracle Sourcing

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
3	Create the Catalog Structure (Categories, Attributes, and Category Hierarchy) on page 2-48	Optional	You only need to create a category if you want to use it as a generic category for negotiations. Additionally, if you want to create category attributes for the generic category that will be included with the item information on negotiations, create category attributes as described in this step. (Specifying a generic category for negotiations is described in the later step, Create a Negotiations Item Category.)

Table 3–4 Purchasing Setup Steps for Oracle Sourcing

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
3	Configure the Buying Home Page on page 2-60	Required	For Oracle Sourcing, you must hide the search and browse box.

Table 3–5 Negotiations Setup Steps for Oracle Sourcing

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
1	Create a Negotiations Item Category on page 2-62	Optional	(none)
2	Define System-wide Reusable Attribute Lists on page 2-64	Optional	(none)

Table 3–6 Customization Setup Steps (Part II) for Oracle Sourcing

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
1	Customize Job Functions on page 2-114 *	Required	<p>In Oracle Sourcing, you can assign buyers only the following job functions:</p> <ul style="list-style-type: none"> ■ Sourcing Buyer ■ Sourcing Buying Company Admin <p>You can assign sellers only the following job functions:</p> <ul style="list-style-type: none"> ■ Sourcing Seller ■ Sourcing Selling Company Admin <p>Therefore, if you customize job functions, customize only these (or create additional ones using only these job functions' tasks).</p> <p>Attention: In compliance with the Oracle Sourcing model, do not assign system tasks that belong to the sourcing buyer job functions to the sourcing seller job functions, and vice versa.</p> <p>In addition, remove the following tasks from the Unknown User job function:</p> <ul style="list-style-type: none"> ■ View Purchases tab ■ View Sales tab ■ View Shopping tab ■ View Catalog tab ■ View Intelligence tab <p>The Unknown User job function controls what people can see on the Home page before logging in. Removing these tasks from the Unknown User job function prevents people from seeing links to buying, ordering, and supplier Intelligence at any time, including before login.</p> <p>Attention: Perform these modifications to the Unknown User job function after every patch you receive of Oracle Sourcing that updates job functions.</p>
2	Update List of Blocked Territories on page 2-118	Optional	(none)
3	Customize Drop-Down Menu Items (Lookup Types) on page 2-119	Optional	If desired, you need to review only lookup types related to registration, administration, and negotiations.

Table 3–6 Customization Setup Steps (Part II) for Oracle Sourcing

Step Number	Step	Required?	Notes or Requirements for Oracle Sourcing
4	Set Up Intelligence Reports on page 2-126	Optional	<p>In Oracle Sourcing, the Catalog Sales and Catalog Purchases reports are not relevant; these reports are based on orders created in Oracle Exchange. Therefore, make sure that <i>only</i> the following tasks are included in the Sourcing Buyer job function. (The Sourcing Seller job function does not have access to Intelligence reports.) By default, the Sourcing Buyer job function includes only these Intelligence tasks, but if you customize the job functions, be sure that Sourcing Buyer still contains only these Intelligence tasks:</p> <ul style="list-style-type: none"> ■ View Buyer Negotiations Intelligence Reports. User can view negotiations intelligence reports for buying activity. ■ View Intelligence Page. User can view the Intelligence tab.
5	Set Up a Default Job Functions List on page 2-127	Optional	<p>If setting up a default job functions list, recall that you can assign companies and users only the following job functions or your own job functions that use these job functions' tasks:</p> <ul style="list-style-type: none"> ■ Sourcing Buyer ■ Sourcing Seller ■ Sourcing Buying Company Admin ■ Sourcing Selling Company Admin
6	Customize Help Files on page 2-127	Required	See the next section below for recommended Help edits for Oracle Sourcing.
7	Customize the Help Logo on page 2-127	Recommended	(none)

Help Edits for Oracle Sourcing

The online Help contains information for both Oracle Sourcing and Oracle Exchange. The table below lists the topics that you should edit or delete to adapt the Help to the Oracle Sourcing system.

Note: You may find that you need to make additional edits to the Help system beyond what the table covers below.

In [Table 3–7](#) below, *Topic* refers to the topic that should be edited or deleted. *Branch or File?* indicates whether the Topic is a branch in the tree (the change requires

editing the Help tree file, pom.ltd) or a .htm file (the change requires editing the indicated .htm file). *Section* refers to the location of the topic. For example, Help > Buying and Selling > Getting Started means you can find the topic by expanding the Buying and Selling, then the Getting Started, branch of the Help tree.

You can find and edit the files referenced in [Table 3-7](#) by choosing the Marketplace & Supply Chain Exchange option when downloading the Help files.

Instructions for customizing Help files are provided in [Step 6 Customize Help Files \(Required for Oracle Sourcing\)](#) on page 2-127.

Table 3-7 Listed Help Edits for Oracle Sourcing

Topic	Branch or File?	Section	Delete or Edit?	Notes
Registration	Multiple branches and files	Help > Registration	Edit	Various topics or Help files in Registration may need to be edited or deleted. For example, Oracle Sourcing does not require payment, and the Payment for Fees topics and references to payment should be removed.
What should I do first?	File (DoFirst.htm)	Help > Buying and Selling > Getting Started > New to Buying and Selling?	Edit	Remove references to creating orders and seller's negotiations.
What are the benefits of registering and participating in this system?	File (BenefitsExchange.htm)	Help > Buying and Selling > Getting Started > Frequently Asked Questions	Edit	You may want to edit this file to suit your system.
How do I pay for my purchases?	File (GsFAQNav.htm)	Help > Buying and Selling > Getting Started > Frequently Asked Questions	Edit	Delete this topic's link from the GsFAQNav.htm file.

Table 3–7 Listed Help Edits for Oracle Sourcing

Topic	Branch or File?	Section	Delete or Edit?	Notes
Negotiations	Multiple files	Help > Buying and Selling	Edit	Various Help files in the Negotiations section need to be edited to remove information about creating seller's negotiations. You may also want to create two sections: one for buyers, who create negotiations (a section about creating negotiations), and one for sellers, who respond to negotiations (a section about responding to negotiations).
Catalog Authoring	Branches and files	Help > Buying and Selling	Delete	Oracle Sourcing does not include catalog items.
Shopping and Managing Orders	Branch	Help > Buying and Selling	Delete	None of the topics related to searching for or ordering items pertains to Oracle Sourcing.
Intelligence Reports	Multiple files	Help > Buying and Selling	Edit	Remove references to the Catalog Purchases and Catalog Sales reports. Remove references to all seller negotiations reports (such as Seller Auction Gains). Remove references to the Awarded Bids Summary and Committed Offers Summary reports. (Since sourcing buyers can obtain the same information from the Awarded Bids Detail and Committed Offers Detail reports, these summary reports are not available to the Sourcing Buyer.)
What kinds of notifications will I receive?	File (NotifsList.htm)	Help > My Profile	Edit	Delete the references to buyer, supplier, and approver notifications, since these relate to orders.
How do I update my password, language and date format preferences, and other profile options?	File (UpdateProfile.htm)	Help > My Profile	Edit	Delete the references to the user's default billing information and order approval authority, since these relate to creating orders.

4

After Setup

This chapter describes what the System Operator needs (or may need) to do after the setup:

- [System Launch](#) on page 4-2
- [Ongoing Maintenance](#) on page 4-8

System Launch

Be sure you have completed the steps in [Chapter 2](#) (for Oracle Exchange) or [Chapter 3](#) (for Oracle Sourcing) before you make the system public and start registering companies. Decide whether to allow online registration or to bulk load registrants. See [Self-Service vs. Bulk Load Registration](#) in [Appendix E](#).

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

Table 4–1 System Launch Steps Summary

Step Number	Step	Required?	Which Products Can Perform This Step?
1	Define Company-Specific Billing Price Lists	Optional	Oracle Exchange Oracle Product Development Exchange Oracle Supply Chain Exchange Oracle Transportation
2	Manage Third-Party Authoring	Optional	Oracle Exchange
3	Set Up Carrier Tracking	Optional	Oracle Transportation
4	Enable Companies to Perform Item Cross Referencing	Optional	Oracle Supply Chain Exchange

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

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

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

To create and assign company-specific price lists:

1. In the Billing tab, on the **Price Lists** page, click the "Create New Price List" link.
2. Follow steps 2 through 9 in [Step 3 Define a Default System Price List \(Required\)](#) on page 2-89.
3. After you enter billing information for the activity types you want to charge for, click Done and return to the **Price Lists** page.
4. Click the "Assign Price Lists" link to assign the price list to a specific company.

You can assign only Active price lists to companies. Active price lists are price lists with effective dates that include today.

Step 2 Manage Third-Party Authoring (Optional)

If you decided to control third-party catalog authoring for the system, read [Overview of Third-Party Catalog Authoring](#) in [Appendix B](#), register and approve the third-party provider, then perform the steps below.

To manage third-party authoring:

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

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

3. Click Grant System Tasks to grant the content provider catalog authoring tasks that it can perform for suppliers.

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

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

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

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

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

Step 3 Set Up Carrier Tracking (Optional)

As the System Operator, you can configure carrier tracking pages for use with Oracle Transportation. To configure a carrier tracking page, you need to view the carrier requirements needed to access the carrier's tracking page. Carrier tracking pages consist of a number of separate components. To call the tracking page, you need to define the base URL for the carrier site. The carrier may also require a number of tracking parameters required to directly access tracking information. The carrier company needs to be registered on the system.

Establishing a carrier's site for tracking purposes is usually a one-time process. The only time changes are needed is when the carrier defines new tracking parameters, or edits or deletes existing parameters.

The following steps enable you to set up carrier tracking sites accessible from Oracle Transportation:

- Set up carrier tracking pages
- Set up tracking page parameters
- Set up tracking page parameter values

The Company Administrator for Oracle Transportation (someone assigned both the Company Administrator and Oracle Transportation Manager job functions) can use the carrier tracking pages that you set up.

The following illustration shows an example tracking page setup:

The screenshot shows the Oracle Transportation Configuration page for Tracking Page Setup. The breadcrumb trail is Configuration Home > Tracking Page Setup. The page title is Tracking Page Setup. The Company Name is set to "Customer Service Division, USA (AF52M)".

Tracking Pages

Select	Base URL	Description	Request Method
<input checked="" type="radio"/>	http://wwwurl/tracking/tracking.cgi	container-level tracking	GET

Buttons: New, Edit, Delete

Tracking Page Parameters

Select	Parameter Name	Default Value	Lookup Data
<input checked="" type="radio"/>	HTML Version	4.0	-
<input type="radio"/>	InquiryNumber1	-	X

Buttons: New, Edit, Delete

Tracking Page Parameter Values

Select	Parameter Name	Value Table	Value Column	Static Value
<input checked="" type="radio"/>	HTML Version			4.0
<input type="radio"/>	InquiryNumber1	Shipment Detail Information	Carrier Tracking Number	-

Buttons: Edit, Delete

To set up carrier tracking pages:

1. In the Configuration tab, under Transportation, click the "Tracking Page Setup" link.
2. On the **Tracking Page Setup** page, select a company name.
3. Under Tracking Pages, click New.

4. On the **Edit Tracking Pages** page, enter a base URL.

The carrier company tracking page is accessed through the carrier's base URL provided on the carrier's Web site. The base URL is the absolute URL for the tracking page, without parameters—the tracking URL up to, but not including, the question mark (?) in the URL. Include the full URL up to that point, including the protocol—for example, `http://wwwurl/tracking/tracking.cgi`.

5. Select a Request Method of GET or POST.

These are HTTP protocol request methods used to request the tracking page from its remote site. Obtain the appropriate request method from the carrier.

6. Enter a Description of the page.
7. If you are satisfied with your entries, click **Save Changes**. If not, click **Cancel Changes**.

To set up tracking page parameters:

1. In the Configuration tab, under Transportation, click the "Tracking Page Setup" link.
2. Under Tracking Page Parameters, click **New**.
3. On the **Tracking Page Parameter Setup** page, complete the following fields:
 - Parameter Name
 - Default Value
 - Description

Tracking page parameters are required to directly access the results of a tracking request. For example, the URL of a tracking request completed for a shipment may look like this:

```
http://wwwurl/tracking/tracking.cgi?tracknums_
displayed=5&TypeOfInquiryNumber=T&HTMLVersion=4.0&InquiryNumber1
=1zx681610450580328&InquiryNumber2=&InquiryNumber3=&InquiryNumber
4=&InquiryNumber5=&track.x=0&track.y=0
```

In this example, the first parameter is the HTML version, and its default value is version 4.0. The second parameter, `InquiryNumber1`, represents the carrier's tracking number.

4. Select a Lookup Data value:

- **Lookup.** The system retrieves the parameter value by looking it up. For example, some carriers require a destination postal code when conducting a tracking request. When you define the parameter *destination postal code* as a lookup, the carrier's system retrieves the postal code from (for example) a table called Shipment Information, from a column in that table called Destination Warehouse Postal Code.

In the example above, the parameter InquiryNumber1 is a lookup data value because the value is unique to each individual tracking request.

- **Static.** People must enter the parameter value. For example, some carriers require the shipper account number when conducting a tracking request. The carrier assigns this account number to the shipper, and the account number is a static value that does not change. When tracking the shipment, the shipper enters the account number for the account number parameter.

In the example above, the HTML version is always 4.0. Since it remains constant for each tracking request, it is a static value.

5. Click Save Changes, or Save Changes and Add Another Parameter, or Cancel Changes.

To set up tracking page parameter values:

1. In the Configuration tab, under Transportation, click the "Tracking Page Setup" link.
2. Under Tracking Page Parameter Values, click New.
3. On the **Edit User Parameter Values** page, select a Parameter Name.

This is a parameter you defined in **To set up tracking page parameters**, above.

4. Select a Value Table and Value Column.

Establishing tracking page parameter values enables you to assign particular table and column references to the carrier tracking page. In the example given in **To set up tracking page parameters** above, InquiryNumber1 was defined as a lookup value. If the carrier looks up InquiryNumber1 from the table Shipment Detail Information and the column Carrier Tracking Number in Oracle Transportation, you would select these as the table and column names.

For static values, you do not have to enter a table and column value.

The screenshot shows a navigation bar with tabs for Home, Companies, Billing, Configuration (selected), Site Status, and Intelligence. Below the navigation bar, the breadcrumb path is Configuration Home > Tracking Page Setup. The main heading is Edit User Parameter Values.

The form displays the following fields and controls:

- Company Name: "Customer Service Division, USA (AF52M)"
- Parameter Name: InquiryNumber1 (dropdown menu)
- Value Table: Shipment Detail Information (dropdown menu)
- Value Column: Carrier Tracking Number (dropdown menu)
- Static Value: (empty text input field)
- Buttons: Save Changes, Save Changes and Add Another Parameter, Cancel Changes

5. Enter a Static Value.

If the parameter is static, enter the static value. In the example given in **To set up tracking page parameters** above, the HTML version parameter had a static value of 4.0.

6. Click Save Changes, Save Changes and Add Another Parameter, or Cancel Changes.

Step 4 Enable Companies to Perform Item Cross Referencing (Optional)

To enable a company in Oracle Supply Chain Exchange to establish item cross referencing to their trading partners' items, assign the company a Product Development job function. (See [Ongoing Maintenance](#) below for information about approving and assigning job functions to companies.)

Ongoing Maintenance

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

Registration and Administration

Registration and administration tasks include the following:

- If you allow companies to register online, click the Companies tab and the "Approve Companies" link to check for new registration requests that need to be approved. (The system also sends you e-mail notifications of new registration requests.)
- Add new lists of values as needed. See [Step 3 Customize Drop-Down Menu Items \(Lookup Types\) \(Optional\)](#) on page 2-119.
- Assign job functions as needed. The registration approval process online guides you through assigning job functions when you approve companies; however you can also assign job functions later. You can also approve and assign job functions to users in a company if the situation requires.

Note: If you assign job functions *while* approving a company, the Company Administrator can automatically perform the tasks in the job functions. If you assign job functions to a company *after* you approve it, users in the company (including the Company Administrator) cannot perform the tasks in that job function until you or the Company Administrator also assigns the job function to the users. (Someone who is not assigned the Company Administrator job function cannot assign the Company Administrator job function to himself.) See **To assign job functions to users**, below.

Default Company Administrator

Every company that registers designates a default Company Administrator, who receives all registration requests for the company and is the single point of contact for administrative tasks. For example, a "contact your Company Administrator" link on the system will provide the e-mail address of the default Company Administrator. Although anyone in the company who is assigned the Company Administrator job function can perform Company Administrator tasks, such as approve a registration request, only the default Company Administrator receives Company Administrator notifications (such as registration requests).

To approve companies or users online:

In the Companies tab, click the "Approve Companies" link and follow the guidance on the page to check for and approve or reject new registration requests.

To assign job functions to companies:

1. In the Companies tab, click the "Registered Companies" link.
2. Search for the company and click Go.

The system performs a *begins with* search. If you do not know the beginning of the name, use a wildcard, such as the percent sign (%). For example, a search on %reem returns Kareem Corporation. (Search wildcards may not work in all languages.)

3. On the **Company Search Results** page, identify the company and click its "Delegate Job Functions" link.
4. On the **Delegate Job Functions** page, click the link "Select and add existing job functions."

You can also click the "Remove" link to remove the job function from the company.

5. On the **Select Job Functions** page, search by job function name or description and click Go.

Note: Do not assign the Unknown User job function. (The Unknown User job function controls what people can see on the **Home** page before logging on.) The Unknown User job function already applies to everyone by default. For example, everyone can see the Buying, Selling, Supply Chain Exchange, and Product Development application links on the **Home** page before logging on, because these are included as tasks in the Unknown User job function. Once people log in, the features they can access are a combination of the Unknown User job function and the job functions they have been assigned.

6. Select the job function and click Assign to Company.
7. Click Review and Submit.
8. On the **Review Delegation Changes** page, click Submit.

To assign job functions to users:

1. Assign the job function to the user's company first. See **To assign job functions to companies**, above.
1. In the Companies tab, click the "Registered Users" link.

2. Search for the person by last name and click Go.

The system performs a *begins with* search. If you do not know the beginning of the name, use a wildcard, such as the percent sign (%). For example, a search on %atters returns Patterson. (Search wildcards may not work in all languages.)

3. Select the correct row for the person in the search results table and click Assign Job Functions.

4. On the **Assign Job Functions** page, click the link "Select and add existing job functions."

You can also click the "Remove" link to remove the job function from the company.

5. On the **Select Job Functions** page, search by job function name or description and click Go.

As mentioned in the note above for companies, do not assign the Unknown User job function.

6. Select the job function and click Assign to User.

7. Click Review and Submit.

8. On the **Review Assignment Changes** page, click Submit.

To bulk load companies or users:

1. In the Configuration tab, under User Interface, click the "Bulk Registration Management" link.
2. Click the "Download Instructions" link for information on bulk loading companies and users.

The "Download Company Information" link lets you download and modify existing company and user information, including passwords. Using bulk loading, you can also change multiple passwords, change password expiration dates, or expire passwords immediately. Password management through bulk loading is not available if you are integrated with Oracle Portal's single sign-on feature in spoke mode. You can use the password bulk load feature if the installation team configured the system to allow it. See the Readme file that is provided by the "Download Instructions" link for more information.

Note: If you are integrating with Oracle Portal using the spoke mode configuration (where this system is one of many products in a single sign-on system), make sure all of the users you bulk load are already registered in the Portal login server.

To place a company on hold:

1. In the Companies tab, click the "Registered Companies" link.
2. Enter a search value for the company.

The system performs a *begins with* search. If you do not know the beginning of the name, use a wildcard, such as the percent sign (%). For example, a search on %reem returns Kareem Corporation. (Search wildcards may not work in all languages.)

3. Choose a Hold Status:
 - Active. Search among all companies that have not been deactivated.
 - Inactive. (You cannot place deactivated companies on hold. To reactivate a company, search for Inactive companies and click Activate.)
 - Pending Hold. (Not used.)
 - On Hold without Update. (These are companies you have already placed on hold that have not yet responded to the hold.)
 - On Hold with Update. (These are companies you have already placed on hold that have responded to the hold by updating their billing information.)
4. Click Go.
5. Select the company and click Place on Hold.
6. Choose a Hold Reason that displays to the Company Administrator when attempting to log in.
 - Your automatic payment request was denied.
 - No billing account information is available.
7. Enter additional Comments, if desired, to display to the Company Administrator when attempting to log in.
8. Click Submit.

While placed on hold, the company's users cannot log in. Only the Company Administrator can log in to update billing information.

To deactivate a company or user:

Follow the steps above, except choose Deactivate instead of Place on Hold. To deactivate a company, click the "Registered Companies" link. To deactivate a user, click the "Registered Users" link.

Once a company is deactivated, no one in that company or that company's affiliates, including the Company Administrator, can log in. Once a user is deactivated, that user cannot log in.

Companies that you deactivate or place on hold are still charged monthly fees if you are using the Company Subscription or User Subscription billing activity types.

Billing

The following tasks pertain to products that use billing. These tasks do not apply to Oracle Sourcing.

- Check the **Pricing Exceptions** page (in the Billing tab) for errors. The **Pricing Exceptions** page displays transactions that could not be priced for some reason. The page provides descriptions of errors and instructions for resolving them. After you fix the problem, click Reprice to price the transaction. When you click Reprice, the system finds the erred transaction, locates the price list that was active at the time the transaction occurred, and prices the transaction.

If you receive an error that a currency conversion rate is not available, upload the currency conversion rate as described below.

- If you are integrated with Oracle Receivables, check the **Billing Exceptions** page for errors, fix the problems described by the errors, and run the appropriate import concurrent programs. See [Step 4 Set Up Oracle Receivables Integration \(Optional\)](#) on page 2-93.
- Upload currency conversion rates if and as needed by clicking the Billing tab, then the "Load Currency Exchange Rates" link. A downloadable Readme file provides detailed information on loading currency conversion rates. You need to upload currency conversion rates if *both* of the following are true:
 - You are using a Percent pricing method or a Step Direct or Step Cumulative pricing type. This method and types charge companies based on transaction amounts.

- You are billing companies who are creating foreign-currency transactions (transactions in a currency other than the Default Currency selected on the **Identification** page, which is the currency in which companies are billed).

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

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

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

- To enter manual charges for companies, click the Billing tab, then the "Enter Manual Charges" link. Search for and select the company. Click Enter Charges. Follow the guidance on the **Enter Manual Charges** page. The system provides a Manual Charge Type of Miscellaneous Charge. You can define additional charge types as described in [Step 1 Modify Default Billing Activity Types \(Optional\)](#) on page 2-85.

Catalog

Perform any of the following tasks related to catalog management as needed. Except for creating categories or category attributes, these tasks do not apply to Oracle Sourcing.

- Update catalog categories, attributes, and category hierarchy if necessary.

- Create Catalog News as necessary, especially when you make a change that affects existing catalog content.
- The system uses bulk loaders to bulk load catalog files. If a catalog author contacts you with problems such as the following, see the *Oracle Exchange Installation and Upgrade Guide* for instructions on how to troubleshoot the catalog bulk loader:
 - Catalog authors get a Service Unavailable error when bulk loading.
 - Bulk load jobs complete with unexpected errors that the catalog author cannot resolve.
 - Small bulk load jobs take over an hour to complete.
 - Bulk load jobs are staying in a Pending status.
- If you let suppliers include their own categories and attributes in their bulk loads, you may want to log on to the system and review the category structure periodically.

Negotiations

As the System Operator, you can cancel or delete a negotiation that someone created on the system. For example, either you or the negotiation creator can cancel a negotiation if there were too few responses, the terms of the responses were not acceptable, or the items are no longer needed. (The negotiation creator can still view the cancelled negotiation.) Further deleting a negotiation removes it permanently from the database.

To cancel or delete a negotiation:

1. In the Configuration tab, under Negotiations, click the "Cancel/Delete Negotiation" link.
2. Enter the exact number of the negotiation you want to cancel or delete and click Go.

You must enter the full, exact number.

3. Click Cancel Negotiation or Delete Negotiation.

If the negotiation was already cancelled by the negotiation creator or Company Administrator, the option available is Delete Negotiation. Click Delete Negotiation if you want to permanently remove the negotiation from the database. If the negotiation was not already cancelled and you want to delete it,

click Cancel Negotiation, re-query the negotiation number, and click Delete Negotiation. A negotiation must be cancelled before it can be deleted.

Transaction Delivery Communication Methods

The transaction delivery communication methods you have to choose from are listed and described in this appendix:

- [No Electronic Delivery](#) on page A-1
- [HTTP](#) on page A-2
- [Oracle Transport Agent using HTTP](#) on page A-2
- [webMethods using HTTP](#) on page A-3
- [HTTPS \(Secure HTTP\)](#) on page A-4
- [Oracle Transport Agent using HTTPS](#) on page A-5
- [webMethods using HTTPS](#) on page A-6
- [Email \(SMTP\)](#) on page A-7

If you will be importing or exporting information using XML, you must choose an XML delivery (or communication) method. The System Operator chooses a communication method using the **Delivery Methods** page in the Billing tab. The Company Administrator chooses a communication method using the **Transaction Delivery** page in the Application Setup tab.

No Electronic Delivery

If you choose No Electronic Delivery, no electronic delivery to your system will take place. You can use No Electronic Delivery with both outbound and inbound transactions.

HTTP

If you choose to have your transactions delivered electronically, you can select the HTTP communication method to have your transactions delivered to your company domain server. You must provide the following information:

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

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

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

Oracle Transport Agent using HTTP

If you use Oracle Transport Agent to receive XML documents, select the Oracle Transport Agent using HTTP communication method to have your transactions delivered to your company domain server.

The receiving server must have Oracle Transport Agent installed, configured, and running on a server accessible through the Internet, or it must use a servlet that adheres to the Oracle Transport Agent protocol. For installation and configuration instructions, including documentation on the Oracle Transport Agent protocol, see or search the XML Gateway area of Oracle *MetaLink* at <http://metalink.oracle.com/>.

You must provide the following information:

- **Server Address** (full URL where the system can post the data). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as <http://www.oracle.com:5454/xml/dataReceive>. If you are sending the

transactions to an Oracle Transport Agent receiving server, the server address must be in the following format: `http://<receiving domain>:<port>/servlets/oracle.apps.ecx.oxta.TransportAgentServer`. For example:
`http://www.oracle.com:80/servlets/oracle.apps.ecx.oxta.TransportAgentServer`.

- **Server User ID.** You must provide the user ID that the system can use to access your company domain server.
- **Server Password.** You must provide the server password that will allow the system access into your company domain server.

Note the following business considerations when selecting Oracle Transport Agent using HTTP as the transmission method:

- There is no encryption on the message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- Messages transmitted using the Oracle Transport Agent method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

webMethods using HTTP

If you choose to have your transactions delivered electronically, you can select the webMethods using HTTP communication method to have your transactions delivered to your company domain server.

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

Note: Not all systems come with the webMethods option. If you do not see the webMethods option and want to use it, contact the System Operator for more information. If the system does not already come with the webMethods option, the System Operator must customize the system to provide the webMethods option.

You must provide the following information:

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

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

- There is no encryption on the message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- Messages transmitted using the `webMethods` method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

HTTPS (Secure HTTP)

If you choose to have your transactions delivered electronically, you can select the HTTPS communication method to have your transactions delivered through a secure connection to your company domain server. You can use HTTPS with both outbound and inbound transactions. You must provide the following information:

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

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

- There is no guaranteed delivery. Due to the inherent nature of the Internet, once the message is sent from the sending server, there is no way to ensure that the intended recipient actually received the message.

Oracle Transport Agent using HTTPS

If you use Oracle Transport Agent to receive XML documents, select the Oracle Transport Agent using HTTPS communication method to have your transactions delivered to your company domain server.

The receiving server must have Oracle Transport Agent installed, configured, and running on a server accessible through the Internet, or it must use a servlet that adheres to the Oracle Transport Agent protocol. For installation and configuration instructions, including documentation on the Oracle Transport Agent protocol, see or search the XML Gateway area of *Oracle MetaLink* at <http://metalink.oracle.com/>.

You must provide the following information:

- **Server Address** (full URL where the system can post the data). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as `https://www.oracle.com:5454/xml/dataReceive`. If you are sending the transactions to an Oracle Transport Agent receiving server, the server address must be in the following format: `https://<receiving domain>:<port>/servlets/oracle.apps.ecx.oxta.TransportAgentServer`. For example:
`https://www.oracle.com:80/servlets/oracle.apps.ecx.oxta.TransportAgentServer`.
- **Server User ID**. You must provide the user ID that the system can use to access your company domain server.
- **Server Password**. You must provide the server password that will allow the system access into your company domain server.

Note the following business considerations when selecting Oracle Transport Agent using HTTPS as the transmission method:

- Messages transmitted using the Oracle Transport Agent method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

webMethods using HTTPS

If you choose to have your transactions delivered electronically, you can select the webMethods using HTTPS communication method to have your transactions delivered through a secure connection to your company domain server.

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

Note: Not all systems come with the webMethods option. If you do not see the webMethods option and want to use it, contact the System Operator for more information. If the system does not already come with the webMethods option, the System Operator must customize the system to provide the webMethods option.

You must provide the following information:

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

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

- Messages transmitted using the webMethods method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

Email (SMTP)

If you choose to have your transactions delivered electronically, you can select the SMTP communication method to have your transactions delivered by e-mail. The transaction will be sent as inline text in the e-mail. You must provide the following information:

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

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

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

Catalog Structure

This appendix provides information on the following topics:

- [Categories](#) on page B-2
- [Category Hierarchy](#) on page B-3
- [Attributes](#) on page B-4
- [Data Types](#) on page B-6
- [Bulk Loaders](#) on page B-6
- [Overview of Third-Party Catalog Authoring](#) on page B-7

The system offers sellers two ways of providing catalogs. They can set up a link on the system to their own Web catalog site, or they can use the unified catalog. This appendix describes the unified catalog, the structure of which the System Operator can control. Instructions for sellers on linking to their own Web catalog site are available when they click the "Selling" link, the Catalogs tab, then the "Configure Catalog Punchout" link. Supplier-hosted catalogs do not have to follow the unified catalog structure.

The unified catalog provides a basic structure with which sellers can classify their items. The System Operator can create categories, a category hierarchy, and attributes with which sellers can classify and describe items. Using the unified catalog, buyers can rapidly search for and compare items based on common criteria.

When sellers load their catalog items to the unified catalog, they must classify their items in a category the System Operator created (unless the Operator allows sellers to include their own categories in their catalog uploads; see [Step 5 Configure Catalog Options \(Optional\)](#) on page 2-52), and sellers must specify all attributes that the Operator makes required.

Catalog authors can easily observe the System Operator’s catalog structure on the system, as shown in the following illustration:

The screenshot displays the Oracle Sourcing System Operator interface. At the top, there is a navigation bar with icons for Home, Log Off, My Profile, Shopping Cart, Conference, and Help. Below this is a secondary navigation bar with tabs for Welcome, Catalogs (selected), Negotiations, Sales, and Intelligence. The main content area is titled 'Catalogs > Catalog Structure'. On the left, there is a section for 'Catalog Structure' with links for 'View Base Attributes' and 'View Pricing Attributes'. Below these links is a search box and a 'Go' button. On the right, there is a 'Quick Tutorial' section with two articles: 'Why review the structure?' and 'What are attributes?'. The 'What are attributes?' article explains that attributes express items' characteristics and lists three kinds of attributes: Base Attributes, which apply to all items regardless of how they are categorized (e.g., Item Description), and some base attributes required for items to be published in the oracle.com catalog.

The categories and attributes enable catalog authors to fully describe their items or services to buyers. If a catalog author needs additional categories and attributes other than those specified in the system to correctly describe and categorize their items and services, the catalog author should contact the System Operator.

For instructions on creating the catalog structure, see [Catalog Setup Steps](#) on page 2-45.

Categories

The catalog structure is made up of two kinds of categories:

- Browsing categories, also known as navigation or parent categories, contain sub-categories, but not items.

- Item categories, also known as genus categories, are the lowest-level categories that contain items. They can contain only items and not other sub-categories. Item categories are always found at the lowest level of the category structure, and they can also be associated with category attributes, such as Ink Color or Barrel Size for the category Pens.

Note: An item cannot be in more than one item category.

When catalog authors (sellers or third-party content providers) add items to the catalog, they must classify their items by associating them with item categories.

For example:

```
Office Supplies <-- browsing category
  Desk Furniture <-- browsing category
    Writing Instruments <-- browsing category
      Ball Point Pens <-- item category
        BIC224Blue
        BIC998Red
      Fountain Pens <-- item category
        FTHRBlack
```

The System Operator creates the browsing categories and item categories that companies see on the system.

Category Hierarchy

Browsing categories and item categories make up the category hierarchy in the catalog. (The System Operator does not have to create browsing categories. If the System Operator creates only item categories and no browsing categories, buyers will not be able to find items by browsing a list of categories; they can only search for items. Likewise, sellers will not be able to find item categories by browsing a list of categories; they can only search for the item category to help them classify their items. Browsing categories enable buyers and sellers to browse for items and categories.)

The System Operator does not have to create the same number of levels within a browsing category. For example, the System Operator can place the item category Calendars directly under the topmost browsing category Office Equipment, Accessories, and Supplies:

```
Office Equipment, Accessories, and Supplies
```

Calendars

In this same browsing category, the System Operator can also place the item category Appointment Books two levels down:

Office Equipment, Accessories, and Supplies
Office and Desk Accessories
Appointment Books

Sellers can easily view the category attributes of an item category online, or download a spreadsheet text file to view all of the categories, sub-categories, and category attributes in a hierarchy format.

Attributes

The catalog structure also includes attributes to describe items:

- Base attributes, such as Supplier and Supplier Item, apply to all items or services in the catalog. The system provides a core list of base attributes, but the System Operator can add to this list or even change the names and requirements of some base attributes.
- Pricing attributes, such as Price and Unit, provide pricing information for the item or service. Catalog authors can specify a list price, a buyer price, or both for items. (They can also specify no price or a To Be Determined price. Sellers should specify a To Be Determined price if they want the buyer to contact them for the latest price or to purchase an item through negotiation.)

Note: If a seller specifies a To Be Determined price, the buyer can search for and find the item and add it to the shopping cart; however, the buyer cannot complete an order for the item. Instead, from the **Shopping Cart Contents** page, the buyer can begin the negotiation process for the To Be Determined priced item by clicking the Add to Negotiation button.

If a seller specifies no price at all (neither a list nor buyer price), the item is not visible to buyers in the catalog, but the seller or third-party catalog content provider can still search for and edit the item

The System Operator cannot update pricing attributes. They are fixed by the system.

- Category attributes apply only to items within a specific category. Ink Color is an example of a category attribute for the category Ball Point Pens. Category attributes vary from one category to another. The System Operator creates all category attributes. The System Operator can specify category attributes only for item categories.

Some base attributes and pricing attributes are required. Whether a category attribute is required depends on which category it is in. For example, the category attribute Color may exist in many categories, from Cars to Chairs, but the System Operator may choose to make Color a required attribute only for Cars. Catalog authors can see which attributes are required by viewing them online, via the **Catalog Structure** page, shown in the following illustration:

The screenshot shows a web interface with a navigation bar at the top containing 'Welcome', 'Catalogs', 'Negotiations', 'Sales', and 'Intelligence'. Below the navigation bar is a breadcrumb trail: 'Catalogs > Catalog Structure > Catalog Base Attributes'. The main heading is 'Catalog Base Attributes'. Below the heading is a paragraph: 'Base attributes apply to all items in the oracle.com catalog regardless of category.' Another paragraph follows: 'Click a column header link for a description of the attribute property. Click an attribute name link for a detailed attribute description.' Below this is a sorting section: 'Sort by' followed by a dropdown menu set to 'Name', radio buttons for 'Ascending' (selected) and 'Descending', and a 'Go' button. To the right of the sorting section are navigation links: 'Previous', '1 - 25 shown of 46', 'Next', and a right arrow. Below the sorting section is a table with the following data:

Name	Key	Type	Search Visible	Details Visible	Sequence	Searchable	Required
Alias	ALIAS	Translatable Text	No	No	6.0	Yes	No
Attachment URL	ATTACHMENT_URL	URL	No	Yes	9.0	No	No

Base attributes and category attributes are also used on negotiations. If a negotiation owner adds items to the negotiation from the catalog, the item category, and the Description, Manufacturer, Manufacturer Item, and Unit of Measure base attributes associated with that item are automatically carried over to the negotiation, and the negotiator can further modify them on the negotiation if necessary. If the category that the negotiator chooses on the negotiation has category attributes associated with it, those are carried over to the negotiation, and the negotiator can further modify them if needed.

Data Types

The System Operator controls what data type each attribute must be. For example, Lead Time is a Number data type. If a seller enters *four* instead of *4* for Lead Time, the system will give an error.

The data types are as follows:

- Text. Values for this attribute must be text or numbers only. The values cannot be translated; they will always display the same in all languages.
- Translatable Text. Values for this attribute (text or numbers) can be translated; the system allows you to display different values for this attribute in different languages.
 - **Online Help:** Help icon > Buying and Selling > Catalog Authoring > Frequently Asked Questions > Can I load my items to the catalog in multiple languages?
- Number. Values for this attribute must be a number only. The values can contain decimals (such as .86). Except for Price and Lead Time, the number can be negative.
- Date. Values for this attribute must use the canonical date format of YYYY/MM/DD when bulk loading catalog items. (On the system, the date will display in each person's preferred date format, in the **Edit Personal Information** page in My Profile. But when bulk loading catalog items, you must use the canonical date format.)
- URL. Values for this attribute must be a Web site address, such as <http://www.company.com/images/pict1.gif>. They must begin with a valid URL protocol, such as <http://>, <https://>, and <ftp://>. Only attributes with a URL Type display as links in the system. For example, a Web site address entered in a Translatable Text type attribute will display simply as text.

The System Operator also controls whether a base attribute or category attribute that a seller specifies for an item will display in the catalog when buyers shop for or view the items.

Bulk Loaders

The system uses bulk loaders to bulk load catalog files. If a seller encounters the following problems while bulk loading, the System Operator will need to help:

- Catalog authors get a Service Unavailable error when bulk loading.

- Bulk load jobs complete with unexpected errors that the catalog author cannot resolve.
- Small bulk load jobs take over an hour to complete.
- Bulk load jobs are staying in a Pending status.

For instructions on how to troubleshoot the catalog bulk loader, see the *Oracle Exchange Installation and Upgrade Guide*.

Overview of Third-Party Catalog Authoring

A seller can use a third-party catalog content provider to add the seller's items to the catalog. The third-party provider uses catalog authoring tasks (such as bulk loading or online editing) that have been assigned to it by the System Operator or the seller.

A third-party content provider company must first register. (The company can register as an independent entity or as an affiliate of another company.) If the third-party company registers as an independent entity, the System Operator must approve the company specifically as a third-party content provider by assigning it the Third Party Catalog Author job function. If the company registers as an affiliate, the Company Administrator of the parent company must approve the company specifically as a third-party content provider.

The System Operator can create any one of the following scenarios:

Different Scenarios

Approve several third-party content providers and let sellers choose

The System Operator approves several third-party content providers and lets each seller choose the third-party content provider(s) it wants, using the **Manage Third Party Authoring** page. Each seller also uses this page to choose the specific catalog authoring tasks that it will allow the third-party content provider to perform for it. For example, a seller can allow a third party to bulk load catalog items for it but not edit the items online.

Approve one third-party content provider for the entire system

The System Operator approves one third-party content provider for the entire system. The System Operator still lets each seller use the **Manage Third Party**

Authoring page to choose the specific catalog authoring tasks that the seller will allow the third party to perform for it.

Approve one third-party content provider and not let sellers choose

The System Operator approves a third-party content provider for the entire system and does not permit the seller to manage the third party's access to catalog authoring activities. Instead, the System Operator uses a **Manage Third Party Authoring** page in the Operator system (see [Step 2 Manage Third-Party Authoring \(Optional\)](#) on page 4-3) to choose the catalog authoring tasks that the provider can perform for all sellers on the system. All sellers—if they're using a third-party provider—must use only this provider to perform their catalog authoring tasks. Alternatively, the System Operator can control a third-party's access for some sellers and not others.

Approve one catalog author for the entire system

The System Operator approves a third-party content provider for the entire system and does not let anyone, except for that content provider, perform catalog authoring. That is, the System Operator does not grant catalog authoring tasks to any seller, only to the designated third-party content provider. Sellers must use this provider to perform all of their catalog authoring tasks.

Controlled Access

Sellers can choose and grant access to third-party content providers if they are assigned the Manage Third Party Authoring task. If sellers are assigned this task, they can use the **Manage Third Party Authoring** page to select and manage a third party's authoring privileges. (See [Step 2 Manage Third-Party Authoring \(Optional\)](#) on page 4-3.)

The third-party content provider cannot perform catalog authoring for somebody else until it is assigned the Third Party Catalog Author job function. The third party still cannot perform any of the tasks in that job function for a particular seller until that seller (or, depending on the scenarios above, the System Operator) also grants these tasks using the **Manage Third Party Authoring** page. (By default, an approved third-party content provider is automatically assigned only the Bulk Load Catalog task, until the seller assigns it other tasks. If, however, the seller itself was never assigned the Bulk Load Catalog task, then the default task assigned to that third party, for that seller, is the View Item task. Still, the third party cannot perform either of these tasks until the supplier appoints the third party.)

Note: If the System Operator decides to manage third-party authoring and also allows the sellers to manage this, too, for themselves, any tasks the System Operator assigns to or removes from a third party on the **Manage Third Party Authoring** page can be revoked by the seller in the seller’s **Manage Third Party Authoring** page.

A seller cannot assign a third party more catalog authoring tasks than the seller itself has been assigned. For example, if the System Operator does not allow a seller to delete items from the catalog online, this seller cannot assign online item deletion to a third party.

A third-party catalog content provider cannot perform more catalog authoring tasks than it has been assigned. In the following example, the third-party company has assigned four tasks to employees (catalog authors) in its company: View Catalog Resources, Bulk Load Catalog, Add and Update Item Online, and Delete Item Online. For Seller A, however, catalog authors in the third-party company can only view catalog resources and add and update items online because these are the tasks Seller A has allowed using the Manage Third Party Authoring page. But for Seller B, the third-party company can perform all of these tasks except for deleting items online, because these are the tasks Seller B has allowed using the Manage Third Party Authoring page.

Table B–1 Example Third-Party Tasks

Third Party employees’ assigned tasks:	Seller A grants these tasks:	Seller B grants these tasks:
View Catalog Resources	View Catalog Resources	View Catalog Resources
Bulk Load Catalog	--	Bulk Load Catalog
Add and Update Item Online	Add and Update Item Online	Add and Update Item Online
Delete Item Online	--	--

Setup Overview

The steps for setting up third-party catalog authoring are as follows:

Register

The third-party content provider company registers as an independent entity or affiliate. The System Operator (or, in the case of an affiliate, the Company

Administrator of the parent company) approves the third party specifically as a third-party content provider. The seller or third-party content provider can ask that this company requests to be approved as a third-party content provider. Or the System Operator can grant the third-party job function to everyone and let individual sellers choose who has access to their catalog items.

Approve

The third party's registration is approved and the third party is assigned the Third Party Catalog Author job function.

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

As an approved company, the third-party content provider will have its own logon to the system and, if assigned additional tasks, can even perform other tasks on the system such as selling its own items or buying items. With its own logon and third-party content provider approval, the third-party content provider can manage catalogs for multiple sellers while still maintaining itself as a separate entity from the sellers it works for.

Assign tasks to third-party company

Depending on which scenario the System Operator chooses (as described above), either the System Operator or the seller chooses which catalog authoring tasks to allow the third party to perform, using the **Manage Third Party Authoring** page. A designated third-party content provider cannot perform specific catalog authoring tasks until the tasks are explicitly assigned to it.

Assign tasks to third-party employees

Finally, the third-party content provider needs to assign the Third Party Catalog Author job function to the employee(s) in its company who will log on to the system and perform the catalog authoring tasks. The employee(s) also need to be assigned the catalog authoring tasks that the System Operator or the seller granted to the company. (See [Table B-1](#) above.)

This appendix includes the following topics:

- [Billing Transaction Types](#) on page C-1
- [Examples](#) on page C-6

Billing Transaction Types

The system can charge for the transaction types described in this section.

Registration and Administration

Charges related to registration and administration include the following transaction types:

Company Subscription

This billing transaction type specifies a flat monthly fee for the company. The Company Subscription billing activity type defaults a pricing method and type of Amount and Fixed because you specify one flat monthly fee. The fee is not charged until the System Operator uses the **Charge Subscription Fees** page to submit the charges for a given calendar month. (Note that if the System Operator submits subscription fees for a past month, the **Charge Subscription Fees** page uses the current price list assigned to a company to determine the subscription fee charges even if the current price list is different than last month's price list.)

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

User Subscription

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

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

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

Manual charge types

The System Operator can define multiple different manual charge types to track additional miscellaneous charges against a company. Charge information for such charge types must be entered manually against a company. There is a default manual charge type called Miscellaneous Charge which the System Operator can use, or the Operator can define specific manual charge types.

User-defined billing activity type

The System Operator can create his or her own billing activity type. The System Operator can use this billing type to integrate with other systems. For example, the actual activities (such as an auction or spot purchase) might occur outside this system, but the billing is performed by this system. In such cases, the System Operator can map the external activities to any of the billing activity types described here or to the System Operator's own defined billing activity type.

Purchasing

Charges related to purchases include the following transaction types:

Spot Purchase

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

Transaction Delivery

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

- Purchase Order Outbound (ADD_PO_003). The buyer is charged for the purchase order XML transaction delivery.
- Sales Order Outbound (PROCESS_PO_003). The seller is charged for the sales order XML transaction delivery.
- PO Acknowledgment Outbound. The buyer is charged for XML transaction delivery of the seller's acknowledgment of the purchase order.

Negotiations

Charges related to negotiations include the following transaction types:

Publish Buyer Auction

This billing transaction type specifies the charges to be incurred by the buyer for each buyer auction that gets published. (Once the auction is published, the charges cannot be credited back even if the auction is canceled.) The Publish Buyer Auction type defaults a pricing method and type of Amount and Fixed. This is because there is no transaction amount (for example, no auction award amount) associated with publishing a buyer auction. Therefore, the charge, if specified, is for each published buyer auction.

Award Buyer Auction

This billing transaction type specifies the charges to be incurred by the buyer for each buyer auction that is awarded once the buyer accepts a bid.

Publish Seller Auction

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

Seller Auction - Award Bid

This billing transaction type specifies the charges to be incurred by the seller for each seller auction that is awarded once the seller accepts a bid.

Publish Request for Quote

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

Award Request For Quote

This billing transaction type specifies the charges to be incurred by the buyer for each request for quotation (RFQ) that is awarded once the buyer accepts a quote.

Publish Offer to Buy

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

Commitment to Buying Offer

This billing transaction type specifies the charges to be incurred by the buyer once the commitment to the original offer to buy or a related counteroffer to buy is finalized. The commitment may optionally be finalized upon the buyer's approval. This charge will be reversed if the commitment is cancelled.

Publish Offer to Sell

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

Commitment to Selling Offer

This billing transaction type specifies the charges to be incurred by the seller once the commitment to the original offer to sell or a related counteroffer to sell is finalized. The commitment may optionally be finalized upon the seller's approval. This charge will be reversed if the commitment is cancelled.

Supply Chain Exchange

Charges related to the Supply Chain Exchange application include the following transaction types:

Supply Planning

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

Demand Planning

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

Production Sequencing

This billing transaction type specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to production sequencing. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the

transaction can be charged using this transaction type. The Production Sequencing billing activity type defaults a pricing method and type of Amount and Fixed.

Vendor/Customer Managed Inventory

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

Examples

The following examples show how the price breaks work for each of the possible Pricing Method and Pricing Type options.

Pricing Methods and Types

Pricing Method

The pricing method specifies what is entered for a Rate or Amount for the price breaks:

- **Percent.** Charges by percent of the transaction amount. For example, the price breaks can charge 25% for a transaction amount between \$0 and \$5,000 and 10% for a transaction amount of \$5,000 or more. In this example, the company is charged \$500 for \$5,000 of activity (10% of \$5,000 = \$500). (Note: The entered value is treated exactly as a percentage. For example, 25 means 25% and .025 means .025%.)
- **Amount.** Charges a single amount for each price break. For example, the price breaks can charge \$10.00 for a transaction amount between \$0 and \$500.
- **Multiple.** Currently used for the User Subscription billing transaction type, this pricing method multiplies the rate or amount by the break from/to value. For example, using Multiple/Fixed pricing, the system can charge a flat \$5 per user per month. In this example, if 12 users in that company are registered with the system that month, the total charge is \$60 (12 x \$5).

Pricing Type

The pricing type specifies how the Break From and Break To ranges are broken down:

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

Minimum and Maximum Fees

The system may also charge minimum or maximum fees:

- Minimum Fee. For any transaction amount greater than 0, this minimal amount is charged. For example, if a company incurred only \$15 for a spot purchase, but the minimum charge is 20, the company will be charged \$20.
- Maximum Fee. No matter what the transaction amount is, the system will not charge more than this amount for any transaction.

Price Break Examples

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

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

Break From	Break To	Amount
0		10.00

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Break From	Break To	Rate
0		10.00

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

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

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

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

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

Break From	Break To	Rate
0	1,000	10.00
1,000	10,000	5.00
10,000		2.00

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

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

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

This appendix provides information on the job functions and system tasks that are initially provided by the system. This includes tables showing which job functions and system tasks are installed with each application. Separate tables identify the 6.2.2 changes for job functions and system tasks. Finally, there is a table displaying each job function and the system tasks of which it is composed.

This appendix consists of the following tables:

- [Job Functions Tables](#) beginning on page D-2
 - [Table D-1 Installed Job Functions for Oracle Sourcing and Oracle Exchange](#) on page D-2
 - [Table D-2 Oracle Sourcing and Oracle Exchange 6.2.2 Job Function Changes](#) on page D-3
 - [Table D-3 Installed Job Functions for Oracle Product Development Exchange](#) on page D-5
 - [Table D-4 Installed Job Functions for Oracle Transportation Exchange](#) on page D-5
 - [Table D-5 Installed Job Functions for Oracle Supply Chain Exchange](#) on page D-6
- [System Tasks Tables](#) beginning on page D-5
 - [Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange](#) on page D-6
 - [Table D-7 Oracle Sourcing and Oracle Exchange 6.2.2 System Task Changes](#) on page D-14
 - [Table D-8 Installed System Tasks for Oracle Supply Chain Exchange](#) on page D-15

- [Table D–9 Installed System Tasks for Oracle Transportation](#) on page D-16
- [Table D–10 Installed System Tasks for Oracle Product Development Exchange](#) on page D-18
- [Job Function/System Task Cross-Reference](#) beginning on page D-19

Job Functions Tables

The following job functions come installed with the system. The System Operator decides which job functions are granted to a registered company. That company's Company Administrator then decides which of the authorizations granted to the company are assigned to a particular user.

Note that the System Operator can customize job functions before assigning them to a company.

See [Oracle Sourcing and Oracle Exchange 6.2.2 Job Function Changes](#) on page D-3 for details on changes with 6.2.2.

Table D–1 Installed Job Functions for Oracle Sourcing and Oracle Exchange

Job Function Name	Description	6.2.2 Status
Account Manager	Manage billing activity.	Updated
Buyer	Purchase any item, link out to supplier catalogs to purchase items, bid in seller negotiations, and create buyer negotiations.	Updated
Buyer with Restricted Pricing View	Purchase only those items with buyer-specific pricing	Updated
Buying Professional	Purchase any item, link out to supplier catalogs to purchase items, bid in seller negotiations, create buyer negotiations, export supplier catalogs, and view buyer intelligence reports.	Updated
Catalog Author	Maintain and publish catalogs.	No change
Company Administrator	Manage the company account, including approving and managing users and affiliate companies, and assigning, delegating, and customizing roles.	Updated
Purchasing Manager	Export suppliers' catalogs, manage pricing changes submitted by suppliers, and view buyer intelligence reports.	Updated

Table D–1 Installed Job Functions for Oracle Sourcing and Oracle Exchange

Job Function Name	Description	6.2.2 Status
Seller	Sell items, acknowledge orders from buyers, bid in buyer negotiations, create seller negotiations, and view seller intelligence reports.	Updated
Sourcing Buyer	Allows users to create and award buyer's negotiations, and view buyer intelligence reports.	No change
Sourcing Buying Company Admin	Manage the company, including approving and managing users, and assigning, delegating, and customizing roles.	New
Sourcing Selling Company Admin	Manage the company, including approving and managing users, and assigning, delegating, and customizing roles.	New
Sourcing Seller	Allows users to respond to buyer's negotiations.	No change
Third Party Catalog Author	Maintain and publish third party catalogs.	No change
Transaction Manager	Manage XML transactions.	No change
Unknown User	Allow a certain set of tasks that a user can perform before logging on to the system.	No change

Table D–2 Oracle Sourcing and Oracle Exchange 6.2.2 Job Function Changes

Job Function Name	Change for 6.2.2
Account Manager	<ul style="list-style-type: none"> ■ Added task View My Company Negotiations ■ Added task View Other Company Negotiations ■ Added task View My Company Responses ■ Added task View Other Company Responses ■ Added task View Billing Tab ■ Added task View Selling Activities in Buyer Negotiations Intelligence Reports

Table D-2 Oracle Sourcing and Oracle Exchange 6.2.2 Job Function Changes

Job Function Name	Change for 6.2.2
Buyer	<ul style="list-style-type: none"> ■ Added task View My Company Negotiations ■ Added task View Other Company Negotiations ■ Added task View My Company Responses ■ Added task View Other Company Responses ■ Added task View Selling Activities in Buyer Negotiations Intelligence Reports
Buyer with Restricted Pricing View	<ul style="list-style-type: none"> ■ Added task View Buying Link ■ Added task View Checkout Button and Messages ■ Added task View Sales Tab ■ Added task View Shopping Page
Buying Professional	<ul style="list-style-type: none"> ■ Added task View My Company Negotiations ■ Added task View Other Company Negotiations ■ Added task View My Company Responses ■ Added task View Other Company Responses ■ Added task View Selling Activities in Buyer Negotiations Intelligence Reports
Company Admin	<ul style="list-style-type: none"> ■ Added task View My Company Negotiations ■ Added task View Other Company Negotiations ■ Added task View My Company Responses ■ Added task View Other Company Responses ■ Added task View Billing Tab
Purchasing Manager	<ul style="list-style-type: none"> ■ Added task View Purchases Tab ■ Added task View Sales Tab ■ Added task View Shopping Page ■ Added task View Billing Tab ■ Added task View Selling Activities in Buyer Negotiations Intelligence Reports

Table D–2 Oracle Sourcing and Oracle Exchange 6.2.2 Job Function Changes

Job Function Name	Change for 6.2.2
Seller	<ul style="list-style-type: none"> ■ Added task View My Company Negotiations ■ Added task View Other Company Negotiations ■ Added task View My Company Responses ■ Added task View Other Company Responses
Sourcing Account Manager	Removed
Sourcing Buying Company Admin	Added
Sourcing Company Admin	Removed
Sourcing Professional	Renamed to Buying Professional
Sourcing Selling Company Admin	Added

Table D–3 Installed Job Functions for Oracle Product Development Exchange

Job Function Name	Description	6.2.2 Status
Extensible Attribute Administrator	Extensible attribute administrator	No change
Product Development Administrator	Product development administrator	No change
Product Development Executive	Product development executive	No change
Product Development User	Product development user	No change

Table D–4 Installed Job Functions for Oracle Transportation Exchange

Job Function Name	Description	6.2.2 Status
Oracle Transportation Manager	User can perform any activity related to Transportation Exchange	No change

Table D-5 Installed Job Functions for Oracle Supply Chain Exchange

Job Function Name	Description	6.2.2 Status
Supply Chain Administrator	The user can create and modify supply and demand data, and create and manage Collaboration Management functions.	No change
Supply Chain Planner	The user can create and modify supply and demand data.	No change
Supply Chain Reviewer	The user can view supply and demand data.	No change

System Tasks Tables

The following tables list the system tasks that come installed with the designated application.

Note that some tasks are shared between applications. See [Job Function/System Task Cross-Reference](#) on page D-19 for a breakdown of the system tasks which comprise each job function.

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
Accept or Reject Order Cancellation or Change Requests	User can accept or reject the order cancellation or change requests.	New
Access Threaded Discussions	User can access threaded discussions.	New
Access To Do List	User can access personalized To Do List.	No update
Access Trading Partner Directory	User can access the Trading Partner Directory.	No update
Acknowledge Orders	User can acknowledge orders placed with the user's company.	No update
Add Invitees to Open Negotiations	Users can add invitees to any in-progress negotiation created by their company.	No update
Administer for Affiliate Companies	User can perform administrative tasks (in the Admin tab) for affiliate companies.	No update

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
Administer Registration	User can approve registration of other users in the company and of affiliate companies, assign roles to the users, delegate roles to the affiliate companies, and customize roles.	No update
Award Negotiations	User can make an award decision for any negotiation created by their company.	No update
Bulk Load Users and Companies	User can access the bulk loading functionality to create or update users and affiliate companies.	No update
Cancel Event	Users can cancel any negotiation event created by their company.	No update
Cancel Negotiations	Users can cancel any negotiation event created by their company.	No update
Cancel or Request Order Cancellation	User can cancel or request for order cancellation.	No update
Catalog Authoring - Add and Update Item Online	User can add and update items online.	No update
Catalog Authoring - Add and Update Pricing Online	User can add and update pricing online.	No update
Catalog Authoring - Bulk Load Catalog	User can bulk load catalog data.	No update
Catalog Authoring - Configure Catalog Punchout	User can configure catalog punchout.	No update
Catalog Authoring - Configure Item Availability	User can configure item availability.	No update
Catalog Authoring - Control Buyer Catalog Exports	User can control catalog load.	No update
Catalog Authoring - Control Catalog Load	User can control catalog load	No update
Catalog Authoring - Delete Item Online	User can control catalog load.	No update

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
Catalog Authoring - Delete Pricing Online	User can delete pricing online.	No update
Catalog Authoring - Export My Catalog	User can export my catalog.	No update
Catalog Authoring - Image Load	User can load image.	No update
Catalog Authoring - Manage Third Party Authoring	User can manage third party authoring.	No update
Catalog Authoring - Perform Third Party Authoring	User can perform third party authoring.	No update
Catalog Authoring - Review and Publish Bulk Load Jobs	User can review and publish bulk load jobs.	No update
Catalog Authoring - View Catalog Resources	User can view catalog resources.	No update
Catalog Authoring - View Item	User can view items.	No update
Catalog Authoring - View Pricing	User can view pricing.	No update
Change Negotiations' Close Date	Users can change the close date of any negotiation created by their company.	No update
Change Order	User can change order.	New
Check Availability	User can check item availability while shopping.	New
Control Pricing Approval	User can set up pricing approval rules for pricing changes submitted by suppliers	No update
Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.	No update
Create Buyer's Negotiation	Users can create buyer's negotiations, private templates and invitation lists. They can also copy, unlock, unseal, cancel and award the negotiations they have created.	No update

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.	No update
Create Seller's Negotiation	Users can create seller's negotiations and publish them to buyers. They can create private templates, invitation lists and also copy, unlock, unseal, cancel and award the negotiations they have created.	No update
Define Custom Purchase Order Templates	User can define custom purchase order templates for the user's company and affiliate companies.	No update
Disqualify Responses	Users can disqualify responses submitted to any negotiation created by their company.	No update
Edit Business Regions	User can create and edit Business Regions for the company.	No update
Edit Geographical Regions	Operator can create and edit Regions	No update
Export Supplier Catalogs	User can export supplier catalogs	No update
Get Password Assistance	User can get password assistance.	No update
Log On	User can access the Log On page.	No update
Manage Attribute Lists	Users can manage attribute lists for the entire company.	No update
Manage Bidders Lists	Users can manage both public and private invitation lists. If not authorized with this function, they can create and manage only their own private invitation lists.	No update
Manage Draft Negotiations	User can edit, delete, and publish draft negotiations.	No update
Manage Negotiation Templates	User can manage negotiation templates. If not authorized with this function, users can create and manage only their own private templates.	No update
Manage Punchout Access	Manage Punchout Access	No update
Manage Regional Addresses	User can view and update current assignments to company regional addresses.	No update

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
Punch Out to Supplier Sites	User can link to supplier sites, shop, and bring back a purchase order from that site to the system.	No update
Receive Orders	User can acknowledge receipt of items the user ordered.	No update
Receive XML Failure Messages	Receive e-mail and notification messages in the event of a failure of an XML message.	No update
Receive XML Success Messages	Receive e-mail and notification messages in the event of a success of an XML message.	No update
Register	User can register and check the status of the registration.	No update
Respond to Buyer's Negotiation	As a seller, a user can respond to any buyer's negotiation.	No update
Respond to Seller's Negotiation	As a buyer, a user can respond to any seller's negotiation.	No update
Review and Approve Price Changes	User can approve or reject pricing changes submitted by suppliers.	No update
Test Inbound Transactions	User can test the inbound transaction of XML documents.	No update
Unknown User	Allow a certain set of tasks that a user can perform before logging on to the system.	No update
Unlock Draft Negotiations	User can unlock draft negotiations.	New
Unlock Sealed Negotiations	Users can unlock any sealed negotiation created by their company.	No update
Unseal Sealed Negotiations	Users can unseal any sealed negotiation created by their company.	No update
View About Page	User can view the About page.	No update
View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)	No update
View All Charges	User can view the charges for the user's company activity.	No update
View All Items	User can search and review all catalog items. (Separate tasks control whether the user can purchase the items.)	No update

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
View Billing Activity	User can view billing activity, such as invoices, for the user's company if these are displayed on the system.	Renamed
View Billing Tab	User can view the Billing tab.	New
View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.	No update
View Buying	User can view buying welcome page.	No update
View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)	New
View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.	New
View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.	New
View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)	Renamed
View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.	No update
View Company defined Currency Exchange Rates	View Company defined Currency Exchange Rates.	No update
View Company Information	User can access the View Company Information page to view the user's company information.	No update
View Events	Users can view details of any event created by their company.	No update
View Home Page	User can view the Home page.	No update
View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)	No update
View Items with Buyer-Specific Pricing	User can search and review only those catalog items with buyer-specific pricing. (Separate tasks control whether the user can purchase the items.)	Renamed

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
View Company Administration Guide	User can view the <i>Company Administration Guide</i> .	New
View My Charges	User can view the charges for the user's own activity.	No update
View My Profile Page	User can view the My Profile page. (Separate tasks control the user's access to functions within the page.)	Renamed
View My Company Negotiations	User can view details of negotiations created by user's company.	Renamed.
View My Company Responses	User can view the bids, quotes, commitments, and counteroffers created by the user's company.	Renamed.
View Other Company Negotiations	User can view details of negotiations created by other companies.	Renamed.
View Other Company Responses	User can view the bids, quotes, commitments, and counteroffers created by other companies.	Renamed.
View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.	No update
View Orders - Buyer	User can view history of own orders.	No update
View Orders - Manager	User can view the history of all orders of the company.	No update
View Orders - Supplier	User can view the history of orders placed with the user's company.	No update
View Price List	User can view the pricing for services	Renamed
View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)	No update
View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)	New
View Registered Companies	User can view profile information for registered affiliate companies	No update
View Registered Users	User can view profile information for registered users in own company and in affiliate companies.	No update
View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)	New

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.	Renamed
View Selling	User can view selling welcome page.	No update
View Selling Activities in Buyer Negotiations Intelligence Reports	User can view awarded bids and committed offers summary reports, and selling activities in detail buyer negotiation intelligence reports.	New
View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)	New
View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)	New
View Supplier Price Lists	User can View the details of any price lists created for the user's company, including searching and reviewing individual price lines.	No update
View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)	No update
View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)	No update
View/Update Approval Controls	User can view and update Order Approval Controls for the user's own company.	No update
View/Update Company Address Book	User can view and update the user's own company Address Book.	No update
View/Update Company Profile	User can view and update the user's own company profile.	No update
View/Update Data Mapping	User can view and update Data Mapping settings for the user's own company.	No update
View/Update Exchange Rates	User can view and update the currency conversion rates for the user's own company.	No update
View/Update Payment Method	User can view and update payment method information for the user's company.	No update
View/Update Personal Information	User can view and update own personal information	No update

Table D-6 Installed System Tasks for Oracle Sourcing and Oracle Exchange

System Task Name	Description	6.2.2 Status
View/Update Selling Preferences	User can view and update Selling Preferences for the user's own company	No update
View/Update Trading Partner Keywords	User can view and update trading partner keywords.	No update
View/Update Transaction Delivery	User can view and update Transaction Delivery settings for the user's own company.	No update
View/Update User Address Book	User can view and update their User Address Book.	No update

Table D-7 Oracle Sourcing and Oracle Exchange 6.2.2 System Task Changes

System Task Name	Change for 6.2.2
Accept or Reject Order Cancellation or Change Requests	Added
Access Threaded Discussions	Added
Approve or Reject Order Cancellation Requests	Removed
Change Order	Added
Check Availability	Added
Unlock Draft Negotiations	Added
View Billing Activity	Renamed from View Exchange Billing Activity
View Billing Tab	Added
View Buying Link	Added
View Catalog Purchases Intelligence Reports	Added
View Catalog Sales Intelligence Reports	Added
View Catalog Tab	Renamed from View Catalogs Page
View Checkout Button and Messages	Added

Table D-7 Oracle Sourcing and Oracle Exchange 6.2.2 System Task Changes

System Task Name	Change for 6.2.2
View Company Administration Guide	Added
View Items with Buyer-Specific Pricing	Renamed from View Only Items with Buyer-Specific Pricing
View My Company Negotiations	Added
View My Company Responses	Added
View My Profile Page	Renamed from View My Exchange Page
View Negotiations	Removed
View Other Company Negotiations	Added
View Other Company Responses	Added
View Price List	Renamed from View Exchange Price List
View Purchases Tab	Added
View Sales Tab	Added
View Seller Negotiations Intelligence Reports	Renamed from View Seller Intelligence Reports
View Selling Activities in Buyer Negotiations Intelligence Reports	Added
View Selling Link	Added
View Shopping Page	Added

Table D-8 Installed System Tasks for Oracle Supply Chain Exchange

System Task Name	Description	Status for 6.2.2
Base User	User can view Supply Chain Exchange menu.	No change
Order Pegging	User can view order pegging.	No change

Table D-8 Installed System Tasks for Oracle Supply Chain Exchange

System Task Name	Description	Status for 6.2.2
Order Tracking	User can track Orders.	No change
Production Sequencing	User can view Production Sequences and Supply Chain Bills.	No change
Supply Chain Analysis	User can analyze Supply Chain performance.	No change
Supply Chain Bill Import	User can import Supply Chain Bills into Supply Chain Exchange.	No change
Supply Chain Collaboration Management	User can manage collaboration activities.	No change
Supply Chain Export	User can export data from Supply Chain Exchange.	No change
Supply Chain Import	User can import data into Supply Chain Exchange.	No change
Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.	No change
Supply Chain User Preferences	User can manage user preferences.	No change
Supply Chain Workbench	User can view the Supply Chain Workbench including Bucketed Views as well as the Vertical listing views.	No change
View Exceptions	User can view Exceptions.	No change
View Plans	User can view plan information.	No change

Table D-9 Installed System Tasks for Oracle Transportation

System Task	Description	Status for 6.2.2
Administer Document Setup	User can set up and maintain document setup.	No change
Administer Lane Responsibilities	User can set up and maintain lane restriction rules.	No change
Administer Notification Routing Setup	User can set up and maintain rules routing notification rules.	No change

Table D–9 Installed System Tasks for Oracle Transportation

System Task	Description	Status for 6.2.2
Bulk Loads	User can bulk load (lanes, schedules, price lists, zones,\ regions) and see the bulk load status.	No change
Catalog Pricing Estimates	User can do pricing estimate on the selected service lanes.	No change
Create or Edit Lane	User can define or edit Lanes.	No change
Create or Edit Load Zone	User can maintain zones	No change
Create or Edit Price Lists	User can maintain price lists	No change
Create or Edit Region	User can define or edit regions	No change
Create or Edit Schedule	User can define or edit schedules	No change
Define or Edit Shipments	User can create new shipments and modify existing shipments created, tendered, and pending. User can view shipment history and details.	No change
Download Shipments	User can download the shipment.	No change
Download Templates	User can download templates	No change
Maintain Shipments Pickup Requests by Shipper	User (Shipper) can maintain shipment pickup requests	No change
Maintain SPR by Transportation Provider	User (Transportation Provider) can maintain shipment pickup requests	No change
Negotiation	User can define negotiations (RFQs, and auctions).	No change
Setup for Shipment Pickup Request Workflow - Carrier	User (carrier) can set up parameters for the Shipment Pickup Request Workflow.	No change
Setup for Shipment Pickup Request Workflow - Shipper	User (shipper) can set up parameters for the Shipment Pickup Request Workflow.	No change
Transportation Welcome Page	User can view the Transportation Welcome Page.	No change
Upload Shipments	User can upload shipments.	No change

Table D–9 Installed System Tasks for Oracle Transportation

System Task	Description	Status for 6.2.2
View and Generate Documents	User can view and generate documents.	No change
View Orders	User can view orders , order details and history.	No change

Table D–10 Installed System Tasks for Oracle Product Development Exchange

System Task	Description	Status for 6.2.2
Bulk Load Catalog Structure	User can bulk load catalog structure.	No change
Bulk Load Items	User can bulk load items.	No change
Change Administration	Change Administration	No change
Change Creation	User can create a change.	No change
Change Management	User can manage a change.	No change
Create or Edit extensible attributes	Create or edit extensible attributes.	No change
Document Creation	User can create a document.	No change
Document Management	User can manage a document.	No change
Engineering Intelligence	Engineering Intelligence.	No change
Group Administration	User can administer a group.	No change
Group Creation	User can create a group.	No change
Issue Creation	User can create an issue.	No change
Issue Management	User can manage an issue.	No change
Item Base Attributes Management	User can create and manage item base attributes.	No change
Item Category Management	User can create and manage item base attributes.	No change
Item Creation	User can create an item.	No change

Table D–10 Installed System Tasks for Oracle Product Development Exchange

System Task	Description	Status for 6.2.2
Item Management	User can manage an item.	No change
Override Data Security	User can override data security.	No change
Product Planning	User can plan a product.	No change
Program Management	User can manage a program.	No change
Project Creation	User can create a project.	No change
Project Management	User can manage projects.	No change
Role Creation	User can create a role.	No change
Role Management	User can manage a role.	No change
View or Edit extensible attributes	View or edit extensible attributes.	No change
View Role Description	User can view a role description	No change

Job Function/System Task Cross-Reference

The following table shows which system tasks are initially defined to which job functions. Since the System Operator can customize a job function before granting it to a company, the tasks a company sees in a job function may be different than listed here.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Account Manager	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Account Manager	Get Password Assistance	User can get password assistance.
Oracle Exchange	Account Manager	Register	User can register and check the status of the registration.
Oracle Exchange	Account Manager	View About Page	User can view the About page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View All Charges	User can view the charges for the user's company activity.
Oracle Exchange	Account Manager	View Billing Activity	"User can view billing activity, such as invoices, for the user's company if these are displayed on the system."
Oracle Exchange	Account Manager	View Billing Tab	User can view the Billing Tab.
Oracle Exchange	Account Manager	View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Account Manager	View Buying	User can view buying welcome page.
Oracle Exchange	Account Manager	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Account Manager	View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Account Manager	View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Account Manager	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Account Manager	View Home Page	User can view the Home page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Account Manager	View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Account Manager	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Account Manager	View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Account Manager	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Account Manager	View Orders - Manager	User can view the history of all orders of the company.
Oracle Exchange	Account Manager	View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Account Manager	View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Exchange	Account Manager	View Price List	User can view the pricing for services.
Oracle Exchange	Account Manager	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Account Manager	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Account Manager	View Selling	User can view selling welcome page.
Oracle Exchange	Account Manager	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Account Manager	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Account Manager	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Buyer	@Receive Orders	User can acknowledge receipt of items the user ordered.
Oracle Exchange	Buyer	Accept or Reject Order Cancellation or Change Requests	User can accept or reject the order cancellation or change requests.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	Access Threaded Discussions	User can access threaded discussions.
Oracle Exchange	Buyer	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Buyer	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Buyer	Cancel or Request Order Cancellation	User can cancel or request for order cancellation.
Oracle Exchange	Buyer	Change Order	User can change order.
Oracle Exchange	Buyer	Check Availability	User can check item availability while shopping.
Oracle Exchange	Buyer	Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.
Oracle Exchange	Buyer	Create Buyer's Negotiation	"Users can create buyer's negotiations, private templates and invitation lists. They can also copy, unlock, unseal, cancel and award the negotiations they have created."
Oracle Exchange	Buyer	Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Exchange	Buyer	Get Password Assistance	User can get password assistance.
Oracle Exchange	Buyer	Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Exchange	Buyer	Punch Out to Supplier Sites	"User can link to supplier sites, shop, and bring back a purchase order from that site to the system."
Oracle Exchange	Buyer	Register	User can register and check the status of the registration.
Oracle Exchange	Buyer	Respond to Seller's Negotiation	"As a buyer, a user can respond to any seller's negotiation."
Oracle Exchange	Buyer	View About Page	User can view the About page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	View All Items	User can search and review all catalog items. (Separate tasks control whether the user can purchase the items.)
Oracle Exchange	Buyer	View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Buyer	View Buying	User can view buying welcome page.
Oracle Exchange	Buyer	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Buyer	View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Buyer	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.
Oracle Exchange	Buyer	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Buyer	View Events	Users can view details of any event created by their company.
Oracle Exchange	Buyer	View Home Page	User can view the Home page.
Oracle Exchange	Buyer	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	View My Charges	User can view the charges for the user's own activity.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Buyer	View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Buyer	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Buyer	View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Buyer	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Buyer	View Orders - Buyer	User can view history of own orders.
Oracle Exchange	Buyer	View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Buyer	View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Exchange	Buyer	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Buyer	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Buyer	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Buyer with Restricted Pricing View	@Receive Orders	User can acknowledge receipt of items the user ordered.
Oracle Exchange	Buyer with Restricted Pricing View	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Buyer with Restricted Pricing View	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Buyer with Restricted Pricing View	Cancel or Request Order Cancellation	User can cancel or request for order cancellation.
Oracle Exchange	Buyer with Restricted Pricing View	Check Availability	User can check item availability while shopping.
Oracle Exchange	Buyer with Restricted Pricing View	Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.
Oracle Exchange	Buyer with Restricted Pricing View	Get Password Assistance	User can get password assistance.
Oracle Exchange	Buyer with Restricted Pricing View	Register	User can register and check the status of the registration.
Oracle Exchange	Buyer with Restricted Pricing View	View About Page	User can view the About page.
Oracle Exchange	Buyer with Restricted Pricing View	View Buying	User can view buying welcome page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer with Restricted Pricing View	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Buyer with Restricted Pricing View	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.
Oracle Exchange	Buyer with Restricted Pricing View	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Buyer with Restricted Pricing View	View Home Page	User can view the Home page.
Oracle Exchange	Buyer with Restricted Pricing View	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View Items with Buyer-Specific Pricing	User can search and review only those catalog items with buyer-specific pricing. (Separate tasks control whether the user can purchase the items.)
Oracle Exchange	Buyer with Restricted Pricing View	View My Charges	User can view the charges for the user's own activity.
Oracle Exchange	Buyer with Restricted Pricing View	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Buyer with Restricted Pricing View	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Buyer with Restricted Pricing View	View Orders - Buyer	User can view history of own orders.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer with Restricted Pricing View	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Buyer with Restricted Pricing View	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Buying Professional	@Receive Orders	User can acknowledge receipt of items the user ordered.
Oracle Exchange	Buying Professional	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Buying Professional	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Buying Professional	Check Availability	User can check item availability while shopping.
Oracle Exchange	Buying Professional	Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	Create Buyer's Negotiation	"Users can create buyer's negotiations, private templates and invitation lists. They can also copy, unlock, unseal, cancel and award the negotiations they have created."
Oracle Exchange	Buying Professional	Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Exchange	Buying Professional	Export Supplier Catalogs	User can export supplier catalogs.
Oracle Exchange	Buying Professional	Get Password Assistance	User can get password assistance.
Oracle Exchange	Buying Professional	Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Exchange	Buying Professional	Punch Out to Supplier Sites	"User can link to supplier sites, shop, and bring back a purchase order from that site to the system."
Oracle Exchange	Buying Professional	Register	User can register and check the status of the registration.
Oracle Exchange	Buying Professional	Respond to Seller's Negotiation	"As a buyer, a user can respond to any seller's negotiation."
Oracle Exchange	Buying Professional	View About Page	User can view the About page.
Oracle Exchange	Buying Professional	View All Items	User can search and review all catalog items. (Separate tasks control whether the user can purchase the items.)
Oracle Exchange	Buying Professional	View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Buying Professional	View Buying	User can view buying welcome page.
Oracle Exchange	Buying Professional	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Buying Professional	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.
Oracle Exchange	Buying Professional	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Buying Professional	View Events	Users can view details of any event created by their company.
Oracle Exchange	Buying Professional	View Home Page	User can view the Home page.
Oracle Exchange	Buying Professional	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View My Charges	User can view the charges for the user's own activity.
Oracle Exchange	Buying Professional	View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Buying Professional	View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Buying Professional	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Buying Professional	View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Buying Professional	View Orders - Buyer	User can view history of own orders.
Oracle Exchange	Buying Professional	View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Buying Professional	View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Exchange	Buying Professional	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Buying Professional	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	View/Update Personal Information	User can view and update own personal information.

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Catalog Author	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Catalog Author	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Catalog Author	Catalog Authoring - Add and Update Item Online	User can add and update items online.
Oracle Exchange	Catalog Author	Catalog Authoring - Add and Update Pricing Online	User can add and update pricing online.
Oracle Exchange	Catalog Author	Catalog Authoring - Bulk Load Catalog	User can bulk load catalog data.
Oracle Exchange	Catalog Author	Catalog Authoring - Configure Catalog Punchout	User can configure catalog punchout.
Oracle Exchange	Catalog Author	Catalog Authoring - Configure Item Availability	User can configure item availability.
Oracle Exchange	Catalog Author	Catalog Authoring - Control Buyer Catalog Exports	User can control buyer catalog exports.
Oracle Exchange	Catalog Author	Catalog Authoring - Control Catalog Load	User can control catalog load.
Oracle Exchange	Catalog Author	Catalog Authoring - Delete Item Online	User can delete items online.
Oracle Exchange	Catalog Author	Catalog Authoring - Delete Pricing Online	User can delete pricing online.
Oracle Exchange	Catalog Author	Catalog Authoring - Export My Catalog	User can export my catalog.
Oracle Exchange	Catalog Author	Catalog Authoring - Image Load	User can load image.
Oracle Exchange	Catalog Author	Catalog Authoring - Manage Third Party Authoring	User can manage third party authoring.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Catalog Author	Catalog Authoring - Review and Publish Bulk Load Jobs	User can review and publish bulk load jobs.
Oracle Exchange	Catalog Author	Catalog Authoring - View Catalog Resources	User can view catalog resources.
Oracle Exchange	Catalog Author	Catalog Authoring - View Item	User can view items.
Oracle Exchange	Catalog Author	Catalog Authoring - View Pricing	User can view pricing.
Oracle Exchange	Catalog Author	Get Password Assistance	User can get password assistance.
Oracle Exchange	Catalog Author	Register	User can register and check the status of the registration.
Oracle Exchange	Catalog Author	View About Page	User can view the About page.
Oracle Exchange	Catalog Author	View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Catalog Author	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Catalog Author	View Home Page	User can view the Home page.
Oracle Exchange	Catalog Author	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Catalog Author	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Catalog Author	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Catalog Author	View Selling	User can view selling welcome page.
Oracle Exchange	Catalog Author	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Catalog Author	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Catalog Author	View/Update Trading Partner Keywords	User can view and update trading partner keywords.
Oracle Exchange	Catalog Author	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Company Administrator	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Company Administrator	Access Trading Partner Directory	User can access the Trading Partner Directory.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	Add Invitees to Open Negotiations	Users can add invitees to any in-progress negotiation created by their company.
Oracle Exchange	Company Administrator	Administer for Affiliate Companies	User can perform administrative tasks (in the Admin tab) for affiliate companies.
Oracle Exchange	Company Administrator	Administer Registration	"User can approve registration of other users in the company and of affiliate companies, assign job functions to the users, delegate job functions to the affiliate companies, and customize job functions."
Oracle Exchange	Company Administrator	Award Negotiations	User can make an award decision for any negotiation created by their company.
Oracle Exchange	Company Administrator	Bulk Load Users and Companies	User can access the bulk loading functionality to create or update users and affiliate companies.
Oracle Exchange	Company Administrator	Cancel Event	Users can cancel any negotiation event created by their company.
Oracle Exchange	Company Administrator	Cancel Negotiations	Users can cancel any negotiation created by their company.
Oracle Exchange	Company Administrator	Change Negotiations' Close Date	Users can change the close date of any negotiation created by their company.
Oracle Exchange	Company Administrator	Create Price Element Types	Users can create price element types for the entire company.
Oracle Exchange	Company Administrator	Define Custom Purchase Order Templates	User can define custom purchase order templates for the user's company and affiliate companies.
Oracle Exchange	Company Administrator	Disqualify Responses	Users can disqualify responses submitted to any negotiation created by their company.
Oracle Exchange	Company Administrator	Edit Business Regions	User can create and edit Business Regions for the company.
Oracle Exchange	Company Administrator	Get Password Assistance	User can get password assistance.

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	Manage Attribute Lists	Users can manage attribute lists for the entire company.
Oracle Exchange	Company Administrator	Manage Bidders Lists	"Users can manage both public and private invitation lists. If not authorized with this function, they can create and manage only their own private invitation lists."
Oracle Exchange	Company Administrator	Manage Draft Negotiations	"User can edit, delete, and publish draft negotiations."
Oracle Exchange	Company Administrator	Manage Negotiation Templates	"Users can manage both public and private negotiation templates. If not authorized with this function, users can create and manage only their own private templates."
Oracle Exchange	Company Administrator	Manage Price Element Lists	Users can manage price element lists for the entire company.
Oracle Exchange	Company Administrator	Register	User can register and check the status of the registration.
Oracle Exchange	Company Administrator	Unlock Draft Negotiations	User can unlock draft negotiations.
Oracle Exchange	Company Administrator	Unlock Sealed Negotiations	Users can unlock any sealed negotiation created by their company.
Oracle Exchange	Company Administrator	Unseal Sealed Negotiations	Users can unseal any sealed negotiation created by their company.
Oracle Exchange	Company Administrator	View About Page	User can view the About page.
Oracle Exchange	Company Administrator	View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	View Billing Tab	User can view the Billing Tab.
Oracle Exchange	Company Administrator	View Buying	User can view buying welcome page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Company Administrator	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	View Company Administration Guide	User can view Company Administration Guide
Oracle Exchange	Company Administrator	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Company Administrator	View Events	Users can view details of any event created by their company.
Oracle Exchange	Company Administrator	View Home Page	User can view the Home page.
Oracle Exchange	Company Administrator	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Company Administrator	View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Company Administrator	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Company Administrator	View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Company Administrator	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Company Administrator	View Other Company Negotiations	User can view details of negotiations created by other companies.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Exchange	Company Administrator	View Price List	User can view the pricing for services.
Oracle Exchange	Company Administrator	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	View Registered Companies	User can view profile information for registered affiliate companies.
Oracle Exchange	Company Administrator	View Registered Users	User can view profile information for registered users in own company and in affiliate companies.
Oracle Exchange	Company Administrator	View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Company Administrator	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	View Selling	User can view selling welcome page.
Oracle Exchange	Company Administrator	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Company Administrator	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	View/Update Approval Controls	User can view and update Order Approval Controls for the user's own company.
Oracle Exchange	Company Administrator	View/Update Company Address Book	User can view and update the user's own company Address Book.
Oracle Exchange	Company Administrator	View/Update Company Profile	User can view and update the user's own company profile.
Oracle Exchange	Company Administrator	View/Update Data Mapping	User can view and update Data Mapping settings for the user's own company.
Oracle Exchange	Company Administrator	View/Update Exchange Rates	User can view and update the currency conversion rates for the user's own company.
Oracle Exchange	Company Administrator	View/Update Payment Method	User can view and update payment method information for the user's company.
Oracle Exchange	Company Administrator	View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Company Administrator	View/Update Selling Preferences	User can view and update Selling Preferences for the user's own company.
Oracle Exchange	Company Administrator	View/Update Trading Partner Keywords	User can view and update trading partner keywords.
Oracle Exchange	Company Administrator	View/Update Transaction Delivery	User can view and update Transaction Delivery settings for the user's own company.
Oracle Exchange	Company Administrator	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Purchasing Manager	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Purchasing Manager	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Purchasing Manager	Control Pricing Approval	User can set up pricing approval rules for pricing changes submitted by suppliers.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Purchasing Manager	Export Supplier Catalogs	User can export supplier catalogs.
Oracle Exchange	Purchasing Manager	Get Password Assistance	User can get password assistance.
Oracle Exchange	Purchasing Manager	Manage Punchout Access	User can control which supplier punchouts are visible.
Oracle Exchange	Purchasing Manager	Register	User can register and check the status of the registration.
Oracle Exchange	Purchasing Manager	Review and Approve Price Changes	User can approve or reject pricing changes submitted by suppliers.
Oracle Exchange	Purchasing Manager	View About Page	User can view the About page.
Oracle Exchange	Purchasing Manager	View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View Billing Tab	User can view the Billing Tab.
Oracle Exchange	Purchasing Manager	View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Purchasing Manager	View Buying	User can view buying welcome page.
Oracle Exchange	Purchasing Manager	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Purchasing Manager	View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Purchasing Manager	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Purchasing Manager	View Home Page	User can view the Home page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Purchasing Manager	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Purchasing Manager	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Purchasing Manager	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View Supplier Price Lists	"User can View the details of any price lists created for the user's company, including searching and reviewing individual price lines."
Oracle Exchange	Purchasing Manager	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	View/Update Personal Information	User can view and update own personal information.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Purchasing Manager	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Seller	Accept or Reject Order Cancellation or Change Requests	User can accept or reject the order cancellation or change requests.
Oracle Exchange	Seller	Access Threaded Discussions	User can access threaded discussions.
Oracle Exchange	Seller	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Seller	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Seller	Acknowledge Orders	User can acknowledge orders placed with the user's company.
Oracle Exchange	Seller	Cancel or Request Order Cancellation	User can cancel or request for order cancellation.
Oracle Exchange	Seller	Change Order	User can change order.
Oracle Exchange	Seller	Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Exchange	Seller	Create Seller's Negotiation	"Users can create seller's negotiations and publish them to buyers. They can create private templates, invitation lists and also copy, unlock, unseal, cancel and award the negotiations they have created."
Oracle Exchange	Seller	Get Password Assistance	User can get password assistance.
Oracle Exchange	Seller	Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Exchange	Seller	Register	User can register and check the status of the registration.
Oracle Exchange	Seller	Respond to Buyer's Negotiation	"As a seller, a user can respond to any buyer's negotiation."
Oracle Exchange	Seller	View About Page	User can view the About page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Seller	View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Seller	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Seller	View Events	Users can view details of any event created by their company.
Oracle Exchange	Seller	View Home Page	User can view the Home page.
Oracle Exchange	Seller	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	View My Charges	User can view the charges for the user's own activity.
Oracle Exchange	Seller	View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Seller	View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Seller	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Seller	View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Seller	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Seller	View Orders - Supplier	User can view the history of orders placed with the user's company.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Seller	View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Seller	View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Exchange	Seller	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Seller	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Seller	View Selling	User can view selling welcome page.
Oracle Exchange	Seller	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Seller	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Seller	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Seller	View/Update User Address Book	User can view and update their User Address Book.
Oracle Sourcing	Sourcing Buyer	Access Threaded Discussions	User can access threaded discussions.
Oracle Sourcing	Sourcing Buyer	Access To Do List	User can access personalized To Do List.
Oracle Sourcing	Sourcing Buyer	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Sourcing	Sourcing Buyer	Create Buyer's Negotiation	"Users can create buyer's negotiations, private templates and invitation lists. They can also copy, unlock, unseal, cancel and award the negotiations they have created."
Oracle Sourcing	Sourcing Buyer	Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Sourcing	Sourcing Buyer	Get Password Assistance	User can get password assistance.
Oracle Sourcing	Sourcing Buyer	Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Sourcing	Sourcing Buyer	Register	User can register and check the status of the registration.
Oracle Sourcing	Sourcing Buyer	View About Page	User can view the About page.
Oracle Sourcing	Sourcing Buyer	View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Sourcing	Sourcing Buyer	View Buying	User can view buying welcome page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Buyer	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Sourcing	Sourcing Buyer	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Sourcing	Sourcing Buyer	View Events	Users can view details of any event created by their company.
Oracle Sourcing	Sourcing Buyer	View Home Page	User can view the Home page.
Oracle Sourcing	Sourcing Buyer	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Buyer	View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Sourcing	Sourcing Buyer	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Sourcing	Sourcing Buyer	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Sourcing	Sourcing Buyer	View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Sourcing	Sourcing Buyer	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Buyer	View/Update Personal Information	User can view and update own personal information.
Oracle Sourcing	Sourcing Buyer	View/Update User Address Book	User can view and update their User Address Book.
Oracle Sourcing	Sourcing Buying Company Admin	Access To Do List	User can access personalized To Do List.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Buying Company Admin	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Sourcing	Sourcing Buying Company Admin	Add Invitees to Open Negotiations	Users can add invitees to any in-progress negotiation created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	Administer for Affiliate Companies	User can perform administrative tasks (in the Admin tab) for affiliate companies.
Oracle Sourcing	Sourcing Buying Company Admin	Administer Registration	"User can approve registration of other users in the company and of affiliate companies, assign job functions to the users, delegate job functions to the affiliate companies, and customize job functions."
Oracle Sourcing	Sourcing Buying Company Admin	Award Negotiations	User can make an award decision for any negotiation created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	Bulk Load Users and Companies	User can access the bulk loading functionality to create or update users and affiliate companies.
Oracle Sourcing	Sourcing Buying Company Admin	Cancel Event	Users can cancel any negotiation event created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	Cancel Negotiations	Users can cancel any negotiation created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	Change Negotiations' Close Date	Users can change the close date of any negotiation created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	Create Price Element Types	Users can create price element types for the entire company.
Oracle Sourcing	Sourcing Buying Company Admin	Disqualify Responses	Users can disqualify responses submitted to any negotiation created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	Edit Business Regions	User can create and edit Business Regions for the company.
Oracle Sourcing	Sourcing Buying Company Admin	Get Password Assistance	User can get password assistance.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Buying Company Admin	Manage Attribute Lists	Users can manage attribute lists for the entire company.
Oracle Sourcing	Sourcing Buying Company Admin	Manage Bidders Lists	"Users can manage both public and private invitation lists. If not authorized with this function, they can create and manage only their own private invitation lists."
Oracle Sourcing	Sourcing Buying Company Admin	Manage Draft Negotiations	"User can edit, delete, and publish draft negotiations."
Oracle Sourcing	Sourcing Buying Company Admin	Manage Negotiation Templates	"Users can manage both public and private negotiation templates. If not authorized with this function, users can create and manage only their own private templates."
Oracle Sourcing	Sourcing Buying Company Admin	Manage Price Element Lists	Users can manage price element lists for the entire company.
Oracle Sourcing	Sourcing Buying Company Admin	Register	User can register and check the status of the registration.
Oracle Sourcing	Sourcing Buying Company Admin	Unlock Draft Negotiations	User can unlock draft negotiations.
Oracle Sourcing	Sourcing Buying Company Admin	Unlock Sealed Negotiations	Users can unlock any sealed negotiation created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	Unseal Sealed Negotiations	Users can unseal any sealed negotiation created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	View About Page	User can view the About page.
Oracle Sourcing	Sourcing Buying Company Admin	View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Buying Company Admin	View Buying	User can view buying welcome page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Buying Company Admin	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Sourcing	Sourcing Buying Company Admin	View Company Administration Guide	User can view Company Administration Guide
Oracle Sourcing	Sourcing Buying Company Admin	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Sourcing	Sourcing Buying Company Admin	View Events	Users can view details of any event created by their company.
Oracle Sourcing	Sourcing Buying Company Admin	View Home Page	User can view the Home page.
Oracle Sourcing	Sourcing Buying Company Admin	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Buying Company Admin	View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Sourcing	Sourcing Buying Company Admin	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Sourcing	Sourcing Buying Company Admin	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Sourcing	Sourcing Buying Company Admin	View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Sourcing	Sourcing Buying Company Admin	View Registered Companies	User can view profile information for registered affiliate companies.
Oracle Sourcing	Sourcing Buying Company Admin	View Registered Users	User can view profile information for registered users in own company and in affiliate companies.

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Buying Company Admin	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Buying Company Admin	View/Update Company Address Book	User can view and update the user's own company Address Book.
Oracle Sourcing	Sourcing Buying Company Admin	View/Update Company Profile	User can view and update the user's own company profile.
Oracle Sourcing	Sourcing Buying Company Admin	View/Update Data Mapping	User can view and update Data Mapping settings for the user's own company.
Oracle Sourcing	Sourcing Buying Company Admin	View/Update Exchange Rates	User can view and update the currency conversion rates for the user's own company.
Oracle Sourcing	Sourcing Buying Company Admin	View/Update Personal Information	User can view and update own personal information.
Oracle Sourcing	Sourcing Buying Company Admin	View/Update Transaction Delivery	User can view and update Transaction Delivery settings for the user's own company.
Oracle Sourcing	Sourcing Buying Company Admin	View/Update User Address Book	User can view and update their User Address Book.
Oracle Sourcing	Sourcing Seller	Access Threaded Discussions	User can access threaded discussions.
Oracle Sourcing	Sourcing Seller	Access To Do List	User can access personalized To Do List.
Oracle Sourcing	Sourcing Seller	Get Password Assistance	User can get password assistance.
Oracle Sourcing	Sourcing Seller	Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Sourcing	Sourcing Seller	Register	User can register and check the status of the registration.
Oracle Sourcing	Sourcing Seller	Respond to Buyer's Negotiation	"As a seller, a user can respond to any buyer's negotiation."
Oracle Sourcing	Sourcing Seller	View About Page	User can view the About page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Seller	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Sourcing	Sourcing Seller	View Home Page	User can view the Home page.
Oracle Sourcing	Sourcing Seller	View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Sourcing	Sourcing Seller	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Sourcing	Sourcing Seller	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Sourcing	Sourcing Seller	View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Sourcing	Sourcing Seller	View Selling	User can view selling welcome page.
Oracle Sourcing	Sourcing Seller	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Sourcing	Sourcing Seller	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Seller	View/Update Personal Information	User can view and update own personal information.
Oracle Sourcing	Sourcing Seller	View/Update User Address Book	User can view and update their User Address Book.
Oracle Sourcing	Sourcing Selling Company Admin	Access To Do List	User can access personalized To Do List.
Oracle Sourcing	Sourcing Selling Company Admin	Administer Registration	"User can approve registration of other users in the company and of affiliate companies, assign job functions to the users, delegate job functions to the affiliate companies, and customize job functions."

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Selling Company Admin	Bulk Load Users and Companies	User can access the bulk loading functionality to create or update users and affiliate companies.
Oracle Sourcing	Sourcing Selling Company Admin	Edit Business Regions	User can create and edit Business Regions for the company.
Oracle Sourcing	Sourcing Selling Company Admin	Get Password Assistance	User can get password assistance.
Oracle Sourcing	Sourcing Selling Company Admin	Register	User can register and check the status of the registration.
Oracle Sourcing	Sourcing Selling Company Admin	View About Page	User can view the About page.
Oracle Sourcing	Sourcing Selling Company Admin	View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Selling Company Admin	View Company Administration Guide	User can view Company Administration Guide
Oracle Sourcing	Sourcing Selling Company Admin	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Sourcing	Sourcing Selling Company Admin	View Home Page	User can view the Home page.
Oracle Sourcing	Sourcing Selling Company Admin	View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Sourcing	Sourcing Selling Company Admin	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Sourcing	Sourcing Selling Company Admin	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Sourcing	Sourcing Selling Company Admin	View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Sourcing	Sourcing Selling Company Admin	View Registered Users	User can view profile information for registered users in own company and in affiliate companies.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Sourcing	Sourcing Selling Company Admin	View Selling	User can view selling welcome page.
Oracle Sourcing	Sourcing Selling Company Admin	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Sourcing	Sourcing Selling Company Admin	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Sourcing	Sourcing Selling Company Admin	View/Update Company Address Book	User can view and update the user's own company Address Book.
Oracle Sourcing	Sourcing Selling Company Admin	View/Update Company Profile	User can view and update the user's own company profile.
Oracle Sourcing	Sourcing Selling Company Admin	View/Update Personal Information	User can view and update own personal information.
Oracle Sourcing	Sourcing Selling Company Admin	View/Update Selling Preferences	User can view and update Selling Preferences for the user's own company.
Oracle Sourcing	Sourcing Selling Company Admin	View/Update Trading Partner Keywords	User can view and update trading partner keywords.
Oracle Sourcing	Sourcing Selling Company Admin	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Third Party Catalog Author	Access To Do List	User can access personalized To Do List.
Oracle Exchange	Third Party Catalog Author	Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Add and Update Item Online	User can add and update items online.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Add and Update Pricing Online	User can add and update pricing online.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Bulk Load Catalog	User can bulk load catalog data.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Configure Item Availability	User can configure item availability.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Control Buyer Catalog Exports	User can control buyer catalog exports.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Control Catalog Load	User can control catalog load.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Delete Item Online	User can delete items online.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Delete Pricing Online	User can delete pricing online.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Export My Catalog	User can export my catalog.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Image Load	User can load image.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Manage Third Party Authoring	User can manage third party authoring.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Perform Third Party Authoring	User can perform third party authoring.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - Review and Publish Bulk Load Jobs	User can review and publish bulk load jobs.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - View Catalog Resources	User can view catalog resources.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - View Item	User can view items.
Oracle Exchange	Third Party Catalog Author	Catalog Authoring - View Pricing	User can view pricing.
Oracle Exchange	Third Party Catalog Author	Get Password Assistance	User can get password assistance.
Oracle Exchange	Third Party Catalog Author	Register	User can register and check the status of the registration.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Third Party Catalog Author	View About Page	User can view the About page.
Oracle Exchange	Third Party Catalog Author	View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Third Party Catalog Author	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Third Party Catalog Author	View Home Page	User can view the Home page.
Oracle Exchange	Third Party Catalog Author	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Third Party Catalog Author	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Third Party Catalog Author	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Third Party Catalog Author	View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Third Party Catalog Author	View Selling	User can view selling welcome page.
Oracle Exchange	Third Party Catalog Author	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Third Party Catalog Author	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Third Party Catalog Author	View/Update Trading Partner Keywords	User can view and update trading partner keywords.
Oracle Exchange	Third Party Catalog Author	View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Transaction Manager	Receive XML Failure Messages	Receive e-mail and notification messages in the event of a failure of an XML message.
Oracle Exchange	Transaction Manager	Receive XML Success Messages	Receive e-mail and notification messages in the event of a success of an XML message.
Oracle Exchange	Transaction Manager	Test Inbound Transactions	User can test the inbound transaction of XML documents.
Oracle Exchange	Unknown User	Get Password Assistance	User can get password assistance.
Oracle Exchange	Unknown User	Register	User can register and check the status of the registration.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Unknown User	View About Page	User can view the About page.
Oracle Exchange	Unknown User	View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Unknown User	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	View Home Page	User can view the Home page.
Oracle Exchange	Unknown User	View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Unknown User	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Unknown User	View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Unknown User	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Extensible Attribute Administrator	Create or Edit extensible attributes	Create or Edit extensible attributes
Oracle Product Development Exchange	Extensible Attribute Administrator	View or Edit extensible attributes	View or Edit extensible attributes
Oracle Product Development Exchange	Product Development Administrator	Access To Do List	User can access personalized To Do List.
Oracle Product Development Exchange	Product Development Administrator	Bulk Load Catalog Structure	User can bulk load catalog structure
Oracle Product Development Exchange	Product Development Administrator	Bulk Load Items	User can bulk load items
Oracle Product Development Exchange	Product Development Administrator	Change Administration	Change Administration
Oracle Product Development Exchange	Product Development Administrator	Change Creation	User can create a change
Oracle Product Development Exchange	Product Development Administrator	Change Management	User can manage a change
Oracle Product Development Exchange	Product Development Administrator	Create or Edit extensible attributes	Create or Edit extensible attributes
Oracle Product Development Exchange	Product Development Administrator	Document Creation	User can create a document
Oracle Product Development Exchange	Product Development Administrator	Document Management	User can manage a document

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development Administrator	Engineering Intelligence	Engineering Intelligence
Oracle Product Development Exchange	Product Development Administrator	Get Password Assistance	User can get password assistance.
Oracle Product Development Exchange	Product Development Administrator	Group Creation	User can create a group
Oracle Product Development Exchange	Product Development Administrator	Issue Creation	User can create an issue
Oracle Product Development Exchange	Product Development Administrator	Issue Management	User can manage an issue
Oracle Product Development Exchange	Product Development Administrator	Item Base Attributes Management	User can create and manage item base attributes
Oracle Product Development Exchange	Product Development Administrator	Item Category Management	User can create and manage catalog category
Oracle Product Development Exchange	Product Development Administrator	Item Creation	User can create an item
Oracle Product Development Exchange	Product Development Administrator	Item Management	User can manage an item
Oracle Product Development Exchange	Product Development Administrator	Log On	User can access the Log On page.
Oracle Product Development Exchange	Product Development Administrator	Manage Group	Manage Group
Oracle Product Development Exchange	Product Development Administrator	Product Planning	User can plan a product

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development Administrator	Program Management	User can manage a program
Oracle Product Development Exchange	Product Development Administrator	Project Creation	User can create a project.
Oracle Product Development Exchange	Product Development Administrator	Project Management	User can manage projects.
Oracle Product Development Exchange	Product Development Administrator	Register	User can register and check the status of the registration.
Oracle Product Development Exchange	Product Development Administrator	Role Creation	User can create a role
Oracle Product Development Exchange	Product Development Administrator	Role Management	User can manage a role
Oracle Product Development Exchange	Product Development Administrator	View About Page	User can view the About page.
Oracle Product Development Exchange	Product Development Administrator	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development Administrator	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Product Development Exchange	Product Development Administrator	View Home Page	User can view the Home page.
Oracle Product Development Exchange	Product Development Administrator	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Product Development Exchange	Product Development Administrator	View or Edit extensible attributes	View or Edit extensible attributes

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development Administrator	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development Administrator	View Role Description	User can view Role Description
Oracle Product Development Exchange	Product Development Administrator	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development Administrator	View Welcome Tab	User can view Welcome Tab
Oracle Product Development Exchange	Product Development Administrator	View/Update Personal Information	User can view and update own personal information.
Oracle Product Development Exchange	Product Development Administrator	View/Update User Address Book	User can view and update their User Address Book.
Oracle Product Development Exchange	Product Development User	Access To Do List	User can access personalized To Do List.
Oracle Product Development Exchange	Product Development User	Change Creation	User can create a change
Oracle Product Development Exchange	Product Development User	Change Management	User can manage a change
Oracle Product Development Exchange	Product Development User	Document Creation	User can create a document
Oracle Product Development Exchange	Product Development User	Document Management	User can manage a document
Oracle Product Development Exchange	Product Development User	Engineering Intelligence	Engineering Intelligence

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development User	Get Password Assistance	User can get password assistance.
Oracle Product Development Exchange	Product Development User	Group Creation	User can create a group
Oracle Product Development Exchange	Product Development User	Issue Creation	User can create an issue
Oracle Product Development Exchange	Product Development User	Issue Management	User can manage an issue
Oracle Product Development Exchange	Product Development User	Item Creation	User can create an item
Oracle Product Development Exchange	Product Development User	Item Management	User can manage an item
Oracle Product Development Exchange	Product Development User	Log On	User can access the Log On page.
Oracle Product Development Exchange	Product Development User	Manage Group	Manage Group
Oracle Product Development Exchange	Product Development User	Product Planning	User can plan a product
Oracle Product Development Exchange	Product Development User	Program Management	User can manage a program
Oracle Product Development Exchange	Product Development User	Project Creation	User can create a project.
Oracle Product Development Exchange	Product Development User	Project Management	User can manage projects.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development User	Register	User can register and check the status of the registration.
Oracle Product Development Exchange	Product Development User	View About Page	User can view the About page.
Oracle Product Development Exchange	Product Development User	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development User	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Product Development Exchange	Product Development User	View Home Page	User can view the Home page.
Oracle Product Development Exchange	Product Development User	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Product Development Exchange	Product Development User	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development User	View Role Description	User can view Role Description
Oracle Product Development Exchange	Product Development User	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development User	View Welcome Tab	User can view Welcome Tab
Oracle Product Development Exchange	Product Development User	View/Update Personal Information	User can view and update own personal information.
Oracle Product Development Exchange	Product Development User	View/Update User Address Book	User can view and update their User Address Book.

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Project Accounting	Project Super User	Access To Do List	User can access personalized To Do List.
Oracle Project Accounting	Project Super User	Change Creation	User can create a change
Oracle Project Accounting	Project Super User	Change Management	User can manage a change
Oracle Project Accounting	Project Super User	Document Creation	User can create a document
Oracle Project Accounting	Project Super User	Document Management	User can manage a document
Oracle Project Accounting	Project Super User	Group Creation	User can create a group
Oracle Project Accounting	Project Super User	Issue Creation	User can create an issue
Oracle Project Accounting	Project Super User	Issue Management	User can manage an issue
Oracle Project Accounting	Project Super User	Item Management	User can manage an item
Oracle Project Accounting	Project Super User	Manage Group	Manage Group
Oracle Project Accounting	Project Super User	Project Creation	User can create a project.
Oracle Project Accounting	Project Super User	Project Management	User can manage projects.
Oracle Project Accounting	Project Super User	Role Creation	User can create a role
Oracle Project Accounting	Project Super User	Role Management	User can manage a role
Oracle Project Accounting	Project Super User	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Project Accounting	Project Super User	View Home Page	User can view the Home page.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Project Accounting	Project Super User	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Project Accounting	Project Super User	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project Super User	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project Super User	View/Update Personal Information	User can view and update own personal information.
Oracle Project Accounting	Project Super User	View/Update User Address Book	User can view and update their User Address Book.
Oracle Project Accounting	Project User	Access To Do List	User can access personalized To Do List.
Oracle Project Accounting	Project User	Change Creation	User can create a change
Oracle Project Accounting	Project User	Change Management	User can manage a change
Oracle Project Accounting	Project User	Document Creation	User can create a document
Oracle Project Accounting	Project User	Document Management	User can manage a document
Oracle Project Accounting	Project User	Group Creation	User can create a group
Oracle Project Accounting	Project User	Issue Creation	User can create an issue
Oracle Project Accounting	Project User	Issue Management	User can manage an issue
Oracle Project Accounting	Project User	Item Management	User can manage an item
Oracle Project Accounting	Project User	Manage Group	Manage Group

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Project Accounting	Project User	Project Creation	User can create a project.
Oracle Project Accounting	Project User	Project Management	User can manage projects.
Oracle Project Accounting	Project User	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Project Accounting	Project User	View Home Page	User can view the Home page.
Oracle Project Accounting	Project User	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Project Accounting	Project User	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project User	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project User	View/Update Personal Information	User can view and update own personal information.
Oracle Project Accounting	Project User	View/Update User Address Book	User can view and update their User Address Book.
Oracle Supply Chain Exchange	Supply Chain Administrator	Access To Do List	User can access personalized To Do List.
Oracle Supply Chain Exchange	Supply Chain Administrator	Base User	Base user that can view supply chain exchange menu
Oracle Supply Chain Exchange	Supply Chain Administrator	Order Pegging	User can view order pegging
Oracle Supply Chain Exchange	Supply Chain Administrator	Order Tracking	User can track the Orders
Oracle Supply Chain Exchange	Supply Chain Administrator	Production Sequencing	User can view Production Sequences and Supply Chain Bills.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Analysis	User can analyze Supply Chain performance.

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Bill Import	User can import Supply Chain Bills into Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Collaboration Management	User can manage collaboration activities.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Export	User can export data from the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Import	User can import data into the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain User Preferences	User can manage user preferences.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Workbench	User can view the Supply Chain Workbench. This includes the Bucketed Views as well as the Vertical listing views.
Oracle Supply Chain Exchange	Supply Chain Administrator	View Exceptions	User can view Exceptions
Oracle Supply Chain Exchange	Supply Chain Administrator	View Plans	User can view plan information.
Oracle Supply Chain Exchange	Supply Chain Planner	Access To Do List	User can access personalized To Do List.
Oracle Supply Chain Exchange	Supply Chain Planner	Add/Delete Alternate Item Identifier	Add/Delete Alternate Item Identifier
Oracle Supply Chain Exchange	Supply Chain Planner	Base User	Base user that can view supply chain exchange menu
Oracle Supply Chain Exchange	Supply Chain Planner	Discover Item	Discover Item
Oracle Supply Chain Exchange	Supply Chain Planner	Item Management	User can manage an item
Oracle Supply Chain Exchange	Supply Chain Planner	Order Pegging	User can view order pegging

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Supply Chain Exchange	Supply Chain Planner	Order Tracking	User can track the Orders
Oracle Supply Chain Exchange	Supply Chain Planner	Production Sequencing	User can view Production Sequences and Supply Chain Bills.
Oracle Supply Chain Exchange	Supply Chain Planner	Remove Item Identifier	User can remove the association between item numbers to identify the same item
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Analysis	User can analyze Supply Chain performance.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Bill Import	User can import Supply Chain Bills into Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Export	User can export data from the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Import	User can import data into the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain User Preferences	User can manage user preferences.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Workbench	User can view the Supply Chain Workbench. This includes the Bucketed Views as well as the Vertical listing views.
Oracle Supply Chain Exchange	Supply Chain Planner	Update Supply/Demand	
Oracle Supply Chain Exchange	Supply Chain Planner	View Alternate Item Identifiers List	View Alternate Item Identifiers List
Oracle Supply Chain Exchange	Supply Chain Planner	View Basic Item information	View Basic Item information
Oracle Supply Chain Exchange	Supply Chain Planner	View Exceptions	User can view Exceptions
Oracle Supply Chain Exchange	Supply Chain Planner	View Item People List	View Item People List

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Supply Chain Exchange	Supply Chain Planner	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Supply Chain Exchange	Supply Chain Planner	View Plans	User can view plan information.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Base User	Base user that can view supply chain exchange menu
Oracle Supply Chain Exchange	Supply Chain Reviewer	Production Sequencing	User can view Production Sequences and Supply Chain Bills.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Review Supply /Demand	
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Analysis	User can analyze Supply Chain performance.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Export	User can export data from the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain User Preferences	User can manage user preferences.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Workbench	User can view the Supply Chain Workbench. This includes the Bucketed Views as well as the Vertical listing views.
Oracle Supply Chain Exchange	Supply Chain Reviewer	View Exceptions	User can view Exceptions
Oracle Transportation	Oracle Transportation Manager	Administer Document Setup	User can set up and maintain document setup
Oracle Transportation	Oracle Transportation Manager	Administer Lane Responsibilities	User can set up and maintain lane restriction rules
Oracle Transportation	Oracle Transportation Manager	Administer Notification Routing Setup	User can set up and maintain rules relating to the routing of notifications
Oracle Transportation	Oracle Transportation Manager	Bulk Loads	"User can do bulk Load (lanes, schedules, price lists, zones, regions) and see the status of the same"

Table D-11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Transportation	Oracle Transportation Manager	Catalog Pricing Estimates	User can do pricing estimate on the selected service lanes
Oracle Transportation	Oracle Transportation Manager	Catalog Search Engine	"User can search for Lanes to Edit, if necessary"
Oracle Transportation	Oracle Transportation Manager	Create or Edit Lane	User can Define or Edit Lanes
Oracle Transportation	Oracle Transportation Manager	Create or Edit Load Zone	User can Maintain Zones
Oracle Transportation	Oracle Transportation Manager	Create or Edit Price Lists	User can Maintain Price Lists
Oracle Transportation	Oracle Transportation Manager	Create or Edit Region	User can Define or Edit Regions
Oracle Transportation	Oracle Transportation Manager	Create or Edit Schedule	User can Define or Edit Schedules
Oracle Transportation	Oracle Transportation Manager	Define or Edit Shipments	"User can create new shipments and modify the existing shipments created, tendered, and pending. User can view Shipment history and details"
Oracle Transportation	Oracle Transportation Manager	Download Shipments	User can download the shipment
Oracle Transportation	Oracle Transportation Manager	Download Templates	User can Download Templates/DTDs
Oracle Transportation	Oracle Transportation Manager	Maintain Shipments Pickup Requests by Shipper	User (Shipper) can do maintain Shipment Pickup Requests.
Oracle Transportation	Oracle Transportation Manager	Maintain SPR by Transportation Provider	User (Transportation Provider) can do maintain Shipment Pickup Requests.
Oracle Transportation	Oracle Transportation Manager	Negotiation	"User can define negotiation (RFQ, Auction)"
Oracle Transportation	Oracle Transportation Manager	Setup for Shipment Pickup Request Workflow - Carrier	Setup Parameters for Shipment Pickup Request Workflow - Carrier

Table D–11 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Transportation	Oracle Transportation Manager	Setup for Shipment Pickup Request Workflow - Shipper	Setup Parameters for Shipment Pickup Request Workflow - Shipper
Oracle Transportation	Oracle Transportation Manager	Transportation Welcome Page	User can review Transportation functionality on welcome page
Oracle Transportation	Oracle Transportation Manager	Upload Shipments	User can upload the shipments
Oracle Transportation	Oracle Transportation Manager	View and Generate Documents	User can view and generate documents
Oracle Transportation	Oracle Transportation Manager	View Orders	"User can view orders ,order details and it's history."

Registration

This appendix provides information on the following topics:

- [Independent Entity, Affiliate, and User Registration](#) on page E-2
- [Registration and Administration Hierarchy](#) on page E-3
- [Registration and Approval Process](#) on page E-4
- [Self-Service vs. Bulk Load Registration](#) on page E-9

Independent Entity, Affiliate, and User Registration

When people register on the system, they can register as an *independent entity*, *affiliate* (in the Exchange only), or *user* of an already-registered company. The System Operator must approve all independent entities. The System Operator can also approve affiliates and users, but this is normally the responsibility of the parent company with whom the affiliate or user is registering. (If the System Operator tries to approve an affiliate or user online, the system will give a warning message that this company or user is pending approval by the parent company.)

Independent Entity (Company Registration)

If registered as an independent entity, a company will not be associated as an affiliate (subsidiary, division, or branch) of any other company. Other companies, such as the registered company's subsidiaries, divisions, or branches, can register as affiliates (with the registered independent entity's approval). The System Operator approves an independent entity's registration and assigns job functions to the company.

Once registered as an independent entity, the Company Administrator will be responsible for administering the company's account and users. If the Company Administrator approves an affiliate company account, the Company Administrator will have access to perform administrative tasks for the affiliate company.

Affiliate (Company Registration)

A company can choose to register as an affiliate (subsidiary, division, or branch) of a registered parent company. The parent company must approve the affiliation and assign job functions to the affiliate company.

As an affiliate, the company allows the parent company's Company Administrator access to perform administrative tasks for the affiliate company's account at any time. The affiliate Company Administrator will also be able to administer its own company's account and users.

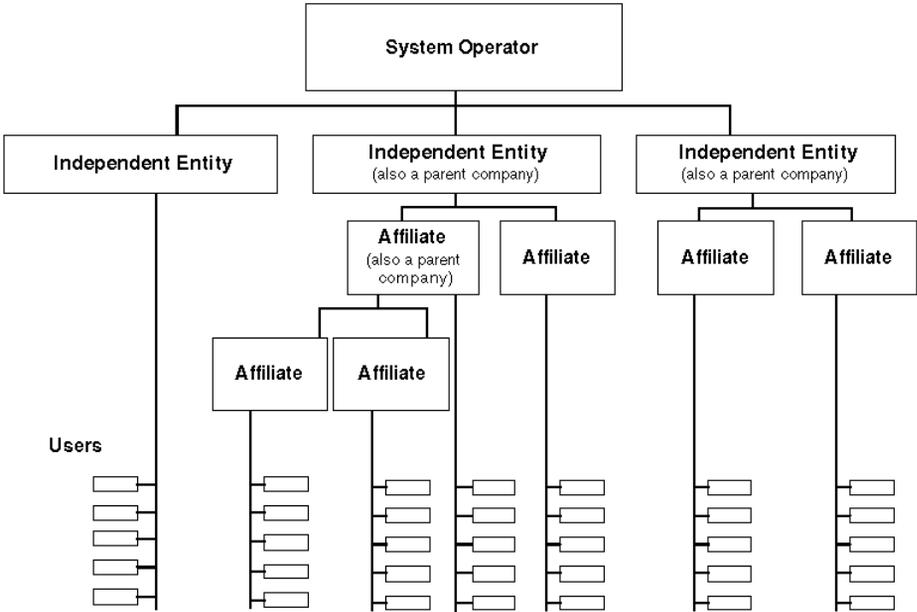
In addition, other companies can register as affiliates of an affiliate company. If this is the case, then the affiliate company will act as both an affiliate (of the parent company) and a parent company (to the company or companies that register as affiliates). The affiliate will allow the parent company's Company Administrator access to perform administrative tasks for its company, and the affiliate will have access to perform administrative tasks for its affiliate company's account.

User Registration

Users can register under a company after the company is registered (as either an independent entity or affiliate). The Company Administrator of the company approves the users and assigns them job functions that will allow them to perform transactions on the system.

Registration and Administration Hierarchy

Affiliate companies can have other affiliate companies registered under them, and those affiliates in turn can have more affiliates registered under them. There is no limit to the number of layers of affiliates.



Users can view and navigate a graphical representation of a company’s relationship with its affiliates when registering or administering affiliates.

Any company (an independent entity or affiliate) with affiliates registered under it is called a parent company. A parent company may choose to do all administrative tasks for an affiliate company, or may give the affiliate full or partial administrative tasks for the affiliate’s company. (The affiliate Company Administrator can never be

assigned more administrative tasks than the parent Company Administrator has been assigned—only the same tasks, or a subset of those tasks.)

Regardless of whether an affiliate has full or partial administrative rights for its company, the parent Company Administrator can still administer for it. The parent Company Administrator can also administer for its affiliates' affiliates. This means the parent company can click the Change Company button in the Company Administration application, select one of its affiliate companies, and perform any of the administrative tasks in the Company Administration application for that company. However, all notifications to approve users and affiliates that register under an affiliate company are sent only to that affiliate company—but both the affiliate and the affiliate's parent company can approve the affiliate's or user's registration.

Nothing that a parent company does for its own company automatically applies to its affiliates. There is no automatic "inheritance" of a parent company's setup or options to its affiliates, other than that an affiliate can never perform more tasks than its parent company has been assigned. For example, the exchange rates that a Company Administrator of a parent company uploads will be valid only for the parent company. The exchange rates will not be available to any of that parent company's affiliates. (The Company Administrator can upload exchange rates for each affiliate separately when administering for affiliates.) In another example, affiliates also do not "inherit" the buyer prices of their parent company. Prices created specifically for a buyer are visible only to that buying company's users, not its affiliates. A seller would have to create price lists for each company, including each affiliate, and not just for the affiliates' parent company.

Note: If the System Operator deactivates a company, then its users, its affiliates, and its affiliates' users cannot log in.

Registration and Approval Process

The following sections describe the company and user registration process.

Independent Entity Registration

If registering as an independent entity:

1. Begin registration.

The company begins registering as an independent entity by accepting the role of Company Administrator for the company and entering company and (for the Exchange) payment information.

2. Read the legal agreement.

If the registrant has the authority to accept the legal agreement and complete the registration submission:

- Wait for approval. The System Operator reviews the registration request for authenticity, accuracy, and completeness. The registrant may be contacted by the System Operator if questions arise about the registration.

If the registrant submits the legal agreement for review by a legal representative in the company:

- Wait for legal review. The legal representative receives an automated e-mail of the agreement for review and (from the e-mail) submits a response to the agreement directly to the system. The e-mail includes contact information for the System Operator in case the legal representative has questions. If the legal representative does not respond in seven days, the registration request automatically expires (the registrant will be notified by e-mail) and the registrant will need to register again. The System Operator is not informed of the registration request until the legal representative accepts the agreement. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. The status will let the registrant know whether legal review is pending, has been approved, or has been rejected.
- Receive notification of legal representative's response. The registrant will receive an automated e-mail notification as soon as the legal representative approves or rejects the agreement. If the legal representative rejects the agreement by responding to the e-mail with Reject, the registration is automatically rejected by the system. The System Operator never received the registration request. The legal representative can discuss the agreement with the Operator offline, and once an agreement is reached, the registrant can register again. If the legal representative accepts the agreement within seven days, the next step is to await approval from the System Operator.

3. Receive notification of approval or rejection.

When the System Operator approves or rejects a registration request, the system sends an automated e-mail notifying the registrant of the decision. How long it takes to receive a response depends on the System Operator. Registrants can check their registration status by clicking the "Check my registration status" link

on the **Home** page. If a request is rejected, the System Operator will provide a reason.

4. Begin business on the system.

If a registration is approved, the registrant can begin business on the system. As part of the approval process, the System Operator chooses which job functions are assigned to the registrant. Job functions control who has access to certain tabs, pages, and links in the system. To check assigned job functions, the registrant can click the My Profile icon in the top right of any page on the system, click "Edit Personal Information," and scroll to the Job Function section of the **Edit Personal Information** page.

Affiliate Registration

If registering as an affiliate of a parent company:

1. Begin registration.

The company begins registering as an affiliate of a parent company by accepting the role of Company Administrator for the company and entering company and payment information.

Note: The registration request will be submitted to the Company Administrator of the parent company. If the parent Company Administrator approves the registration, the parent Company Administrator may choose to do all administrative tasks for the affiliate company, or may give the affiliate full or partial administrative tasks for its company. Regardless of whether the affiliate has full or partial administrative rights for the company, the parent company's Company Administrator can still administer for the affiliate.

2. Read the legal agreement.

If the registrant has the authority to accept the legal agreement and complete the registration submission:

- Wait for approval. The Company Administrator of the parent company reviews the registration request for authenticity, accuracy, and completeness. The affiliate may be contacted by the parent Company Administrator if questions arise about the registration.

If the registrant submits the legal agreement for review by a legal representative in your company:

- Wait for legal review. The legal representative receives an automated e-mail of the agreement for review and (from the e-mail) submits a response to the agreement directly to the system. The e-mail includes contact information for the Company Administrator of the parent company in case the legal representative has questions. If the legal representative does not respond in seven days, the registration request automatically expires (the registrant will be notified by e-mail) and the registrant will need to register again. The Company Administrator of the parent company is not informed of the registration request until the legal representative accepts the agreement. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. The status will let the registrant know whether legal review is pending, has been approved, or has been rejected.
- Receive notification of legal representative's response. The registrant will receive an automated e-mail notification as soon as the legal representative approves or rejects the agreement. If the legal representative rejects the agreement by responding to the e-mail with Reject, the registration is automatically rejected by the system. The Company Administrator of the parent company never received the registration request. The legal representative can discuss the agreement with the parent Company Administrator offline, and once an agreement is reached, the registrant can register again. If the legal representative accepts the agreement within seven days, the next step is to await approval from the parent Company Administrator.

3. Receive notification of approval or rejection.

When the Company Administrator of the parent company approves or rejects the registration request, the system sends an automated e-mail notifying the registrant of the decision. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. If the request is rejected, the Company Administrator will provide a reason.

4. Begin business on the system.

If the registration is approved, the registrant can begin business on the system. As part of the approval process, the Company Administrator of the parent company chooses which job functions are assigned to the affiliate, including whether the registrant has full or partial administrative privileges over its company (see the Note above). Job functions control who has access to certain

tabs, pages, and links in the system. To check assigned job functions, the registrant can click the My Profile icon in the top right of any page on the system, click "Edit Personal Information," and scroll to the Job Function section of the **Edit Personal Information** page.

As an emergency or backup measure, the System Operator can approve a company's affiliates or users.

User Registration

If registering as a user of a company:

When someone registers as a user of a company, the legal agreement has already been reviewed and accepted by the user's company, so the registration approval process is as follows:

1. Begin registration.

The person begins registering as a user of a company by selecting the company to register with and entering user information.

2. Read the legal agreement.

The registrant reads the approved legal agreement and submits the registration.

3. Wait for approval.

The Company Administrator reviews the registration request for authenticity, accuracy, and completeness. The registrant may be contacted by the Company Administrator if questions arise about the registration.

4. Receive notification of approval or rejection.

When the Company Administrator approves or rejects the registration request, the system sends the registrant an automated e-mail notifying the registrant of the decision. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. If the request is rejected, the Company Administrator will provide a reason.

5. Begin business on the system.

As part of the approval process, the Company Administrator chooses which job functions are assigned to the registrant. Job functions control who has access to certain tabs, pages, and links in the system. To check assigned job functions, the registrant can click the My Profile icon in the top right of any page on the

system, click "Edit Personal Information," and scroll to the Job Function section of the **Edit Personal Information** page.

As an emergency or backup measure, the System Operator can approve a user's registration.

Self-Service vs. Bulk Load Registration

The System Operator decides whether to let companies register themselves online through the system's self-service registration, to turn this feature off and bulk register the companies (using the "Bulk Registration Management" link in the Configuration tab), or to allow both registration methods. (To disable self-service registration, the System Operator would remove this task from the Unknown User job function.)

The Company Administrator of each registered company on the system can also bulk-register users using the "Bulk Registration Management" link in the Company Administration application of the system, or approve individual users' registration requests online.

Online registration requires online review and approval. With bulk load registration, the parties are considered automatically approved once they are uploaded. (However, just as with self-service registration, the "approval" is already given by the System Operator or Company Administrator bulk loading the registrants.) The System Operator or Company Administrator specifies user names and passwords in the bulk load file. When the bulk load completes, the Operator or Administrator must let the registrants know that they can log on. (If desired, users can then change their passwords by clicking the "Edit Personal Information" link in My Profile.)

Some bulk load scenarios include the following:

- The System Operator can bulk load a company and its users.
- The System Operator can bulk load one representative from each company, and the Company Administrator can use online or bulk load registration to register others in the company.

The System Operator or Company Administrator provides the same information through bulk load registrations as through online registrations. For example, one must designate a default Company Administrator in the bulk load registration file, just as online registration requires. In online registration, the approver assigns job functions while approving the registrant. In bulk loading, one can do the same by specifying job functions for each user in the bulk load file.

For instructions on bulk registering companies, see the Readme file that appears in the Zip download when you click Download Now on the **Bulk Registration** page. See also [To bulk load companies or users:](#) on page 4-11.

Workflows

Some of the processes that occur on the system are controlled by Oracle Workflow technology. These workflow-governed processes are listed and described below, in the following sections:

- [Registration](#) on page F-1
- [Catalog](#) on page F-2
- [Purchasing](#) on page F-3
- [Negotiations](#) on page F-7
- [Oracle Supply Chain Exchange](#) on page F-9
- [Oracle Transportation](#) on page F-10
- [Oracle Product Development Exchange](#) on page F-11

The workflow notifications described in the following sections are sent via e-mail and via the "View All Open Notifications" link after people in registered companies log on to the system.

Caution: Any customizations you make to the workflows are not supported by Oracle. See the *Oracle Workflow Guide* for more information.

Registration

There is one registration workflow that controls the automated registration process. Once someone registers online, the registration workflow routes the request to a third-party legal approver that the registrant specifies, if any. After legal approval, if any, the workflow routes the registration request to the appropriate approver. The

workflow times out the registration request if the legal approver does not respond. The workflow sends notifications to the approvers about new registration requests. The workflow sends notifications to the registrant after each step.

See [Registration and Approval Process](#) in [Appendix E](#) for a complete description of the registration flow.

Catalog

The following workflows control catalog authoring processes:

Bulk Loading and Publishing

When a catalog author reviews a bulk load job, a catalog workflow sends the following notifications:

- After the catalog author publishes the job, the system sends a notification to the catalog author that the publication process succeeded or failed. If a third-party catalog author published the job for the supplier, the supplier's catalog author also receives this notification. If the publication process failed, the system also sends a notification to the System Operator.
- If the catalog author discards a bulk load job, the system sends a notification that the discard process succeeded or failed. If the discard process failed, the system sends notifications to both the catalog author and the System Operator.

Buyer Pricing Approval

A buyer can choose to review and approve or reject buyer pricing changes before they are published to the system by setting up pricing approval rules (see the Catalog Authoring section of the online Help that companies see on the system). If a buyer sets up pricing approval rules, a catalog workflow sends the buyer and supplier notifications to update them on the status of the price changes.

Online Help: Help icon > Buying and Selling > Catalog Authoring > Approving Buyer Price Lists

The system sends the buyer one notification summarizing any or all of the following activity, if any of these activities occurred in the last 24 hours:

- The supplier has submitted updated buyer pricing that requires the buyer's approval.

- The supplier has deleted a buyer price. (The buyer is not notified when a supplier deletes an item altogether.)
- The buyer still has not approved a supplier's buyer pricing after five days.

The system sends the supplier one e-mail summarizing any or all of the following activity, if any of these activities occurred in the last 24 hours:

- The buyer rejects a supplier's buyer pricing.
- The buyer approves a supplier's buyer pricing.
- The buyer still has not approved a supplier's buyer pricing after five days.

When a buyer approves or rejects an entire price list (rather than just one or several price changes at a time) or approves changes that the supplier made to the price list header, the buyer price approval workflow sends the following notifications:

- A notification to the buyer that the approval or rejection of the price list was successful.
- A notification to both the buyer and System Operator if the approval or rejection failed for some reason.

Third-Party Authoring

If the System Operator or supplier uses a third party to add the supplier's items to the catalog, the third-party catalog authoring workflow sends the following notifications:

- A daily notification to the supplier about changes the third-party catalog author made to the supplier's catalog in the last 24 hours.
- A notification to the supplier when a third party's catalog bulk load job has completed and is ready for the supplier's review and publication. (The supplier can choose whether to review a third party's bulk loads of its catalog on the **Set Catalog Preferences** page.) The system sends the notification to the individual who is assigned the Catalog Authoring - Review and Publish Bulk Load Jobs system task.

Purchasing

When a buyer creates an order, workflows send notifications to the buyer, buyer's approvers, and supplier to update the parties on the status of the order.

Order Acknowledgment

The system sends the following notifications to buyers regarding acknowledgment of their orders or order changes:

- *Your [System Name] order [Number] has been Approved* notifies the buyer that the order has been approved by the final approver and sent to the supplier.
- *Your change to [System Name] order [Number] has been [Approved/Rejected]*. If a change to an order requires approval within the buyer's company, this notification informs the buyer whether the approvers approved the change. If approved, the system also already sent the change to the supplier.
- *Your [System Name] order [Number] has been placed* notifies the buyer that the order has been sent to the supplier (the order did not need to be approved within the company first).
- *Your [System Name] order [Number] has been [acknowledged/rejected]* notifies the buyer whether the supplier acknowledged or rejected the order.
- *[System Name] order [Number] has been canceled*. If a buyer cancels an order and the cancellation does not require supplier approval, the system updates the order status to Order Cancelled and sends this notification to the buyer and supplier confirming the cancellation.
- *Line cancellation for [System Name] order [Number]*. If a buyer cancels an order line and the cancellation does not require supplier approval, the system updates the line status to Cancelled and sends this notification to the buyer and supplier confirming the cancellation.
- *Line cancellation request for [System Name] order [Number] has been forwarded*. If a buyer's order line cancellation requires approval, the system informs the buyer that the cancellation request has been submitted to the supplier.
- *Cancellation request for [System Name] order [Number] has been submitted* notifies the buyer that the buyer's cancellation of the order was submitted to the supplier for approval.
- *Your Change to [System Name] order [Number] has been submitted to supplier*. This notification is sent when a buyer's change to an order does not require buyer approval (within the company), but is sent directly to the supplier for approval. (If the change requires buyer approval, the second notification above is sent.)
- *Your request to cancel [System Name] order [Number] has been [Accepted/Rejected] by [Supplier Name]* notifies the buyer whether the supplier approved or rejected the buyer's cancellation of the order.

- *Response to your Cancel Line(s) Request for [System Name] order [Number]* notifies the buyer whether the supplier approved or rejected a buyer's cancellation of an order line.
- *Change Request for [System Name] order [Number]* notifies the buyer that the supplier changed or cancelled an order. The buyer must approve or reject the change or cancellation.
- *Response to your Change Request for [System Name] order [Number]* notifies the buyer whether the supplier approved or rejected the buyer's change to the order.
- *Response Due, Change Request for [System Name] order [Number]*. If a buyer has not yet responded to a supplier's change or cancellation, the system sends this reminder to the buyer. The frequency of the reminders (such as every two days after the change) is set by the System Operator.
- *Future Change Flag has been changed for [System name] Order [Number]* notifies the buyer that the supplier has prevented or reallocated future changes to an order line.
- *Your manager has [approved/rejected] the change requests to order [Number] made by supplier* notifies the buyer. When a supplier changes an order and the buyer accepts the changes, the system reroutes the order through the hierarchy for approval if the order total still (or now) requires approval.
- *Your change to [System Name] order [Number] has been aborted* notifies the buyer that the buyer's changes (those changes that are still pending approval) are cancelled because the buyer has subsequently requested cancellation of the order or line.

The system sends the following notifications to suppliers regarding new or changed orders:

- *New order [Number] from [System Name] has been placed* informs the supplier that a buyer has placed a new order.
- *[System Name] order [Number] requires acknowledgment* notifies the supplier that the buyer has requested the supplier to acknowledge the order by a certain date.
- *Acknowledgment Due for [System Name] order [Number]*. If the buyer specifies an acknowledge-by date, and the supplier fails to acknowledge the order prior to this date, the system sends a warning to remind the supplier to acknowledge the order. The warning is sent on the acknowledge-by date. Subsequently, the warning is resent based on the System Operator reminder frequency.

- *[System Name] order [Number] has been cancelled.* If a buyer cancels an order and the cancellation does not require supplier approval, the system updates the order status to Order Cancelled and sends this notification to let the supplier know the buyer cancelled the order.
- *Line cancellation for [System Name] order [Number].* If a buyer cancels an order line and the cancellation does not require supplier approval, the system updates the line status to Cancelled and sends this notification to the supplier confirming the cancellation.
- *Cancellation request for [System Name] order [Number] requires your approval* notifies the supplier that the buyer's cancellation of an order requires the supplier's approval.
- *Line cancellation request for [System Name] order [Number]* notifies the supplier that the buyer's cancellation of an order line requires the supplier's approval.
- *Change Request for [System Name] order [Number]* notifies the supplier to approve or reject a change that a buyer has made to an order. (The change could include a line cancellation, if any. If the only change the buyer made was to cancel a line, then the system sends the line cancellation notification above.)
- *Response to your Change Request for [System Name] order [Number].* When a supplier changes or cancels an order, the buyer must approve or reject the change or cancellation. The system sends this notification to the supplier to convey the response.
- *Response Due, Change Request for [System Name] order [Number].* If a supplier has not yet responded to a buyer's change or cancellation, the system sends this reminder to the supplier. The frequency of the reminders (such as every two days after the change) is set by the System Operator.
- *Your change to [System Name] order [Number] has been aborted* notifies the supplier that the supplier's changes (those changes that are still pending approval) are cancelled because the buyer has subsequently requested cancellation of the order or line. (A supplier cannot cancel a line or order that is pending a response to changes.)

Order Approval

The system sends the following notifications to approvers, if the Company Administrator has enabled order approvals for orders created by buyers in the company:

- *[System Name] order [Number] requires your approval* notifies the approver that an order from a buyer in the company requires that approver's approval.
- *Your [System Name] order [Number] has been Rejected* notifies the buyer that the order has been rejected by an approver within the company. This notification is also sent when the final approver did not respond in two business days.
- *Your [System Name] order [Number] has been cancelled* notifies the buyer when the buyer's approver did not approve the order before the acknowledge-by date or earliest need-by date on the order. In this case, the order status becomes Rejected by Approver.
- *Change Request to [System Name] order [Number] requires your approval*. When an order changes, the system reroutes the order through the hierarchy for approval if the order total still (or now) requires approval.
- *CANCELED: [System Name] order [Number] requires your approval* notifies the approver that a previous notification has been canceled before the approver had a chance to respond for either of the following two reasons:
 - The approver did not respond by the order's acknowledge-by date or, if the buyer did not give an acknowledge-by date, by the earliest need-by date on the order.
 - The approver did not respond in time, and the order was therefore forwarded to the next, or the default, approver.

This notification is sent by e-mail. Online, the system removes the original notification from the approver's notifications list.

Note: If the buyer cancels an order while it is still in a Pending Approval status, the approval notification is simply removed from the approver's notifications list.

Negotiations

The following negotiations processes are controlled by workflows. At each step, the workflows send notifications to the negotiation owner or respondent about the activity.

The system sends the following notifications for auctions and RFQs (requests for quotations):

- A notification to the negotiation creator confirming that the auction or RFQ is open for preview.
- A notification to the negotiation creator confirming that the auction or RFQ is now open for bids or quotations.
- Notifications to registered and (if any) non-registered companies, inviting them to participate in the auction or RFQ: one notification is sent to registered invited companies, one to an additional company contact (if any) that the negotiation creator specified on the auction or RFQ, and one to non-registered companies that were invited (if any).
- A notification to invitees and respondents of an early close of the auction or RFQ.
- A notification to invitees and respondents of an extension or shortening of the auction or RFQ.
- A notification to invitees and respondents that the auction or RFQ has been cancelled.
- A notification to invitees and respondents that the auction or RFQ has been awarded.
- A notification to the respondent that the respondent's bid (on an auction) or quotation (for an RFQ) has been disqualified.
- A notification to all invitees and respondents that a bid or quotation has been disqualified.
- Notifications to invitees that the auction or RFQ has entered an additional round: one notification is sent to registered invited companies, one to the additional company contact (if any) that the negotiation creator specified on the auction or RFQ, one to non-registered companies that were invited (if any), and one to companies that were not invited but responded in the first round.
- Reminder notifications to invitees who have not yet acknowledged the auction or RFQ, to acknowledge the auction or RFQ: one notification is sent to registered invited companies, one to the additional company contact (if any) that the negotiation creator specified on the auction or RFQ, and one to non-registered companies that were invited (if any).

The system sends the following notifications for offers:

- A notification to the offer creator confirming the offer's creation.
- Notifications to registered companies and (if any) non-registered companies, inviting them to participate in the offer: one notification is sent to registered

invited companies, one to the additional company contact (if any) that the negotiation creator specified on the offer, and one to non-registered companies that were invited (if any).

- A notification to all invitees and respondents that the offer has been cancelled.
- A notification to the offer creator that there has been a counteroffer, requesting the offer creator to counter or commit.
- A notification to the respondent that the offer creator has made a counteroffer, to which the respondent can counter or commit.
- A notification to the offer creator to approve or reject a respondent's commitment. If the offer creator selected the option to make the commitment immediately binding, this notification confirms the respondent's commitment.
- A notification to the respondent that the offer creator has made a commitment to the respondent's counteroffer.
- A notification to the respondent that the offer creator has approved the respondent's commitment.
- A notification to the respondent that the offer creator has rejected the respondent's commitment.
- A notification to all invitees and respondents that the offer has been updated.
- Reminder notifications to invitees who have not yet acknowledged the offer, to acknowledge the offer: one notification is sent to registered invited companies, one to the additional company contact (if any) that the offer creator specified on the offer, and one to non-registered companies that were invited (if any).

Oracle Supply Chain Exchange

Supply Chain Exchange generates the following workflow notifications to sending and receiving companies for plan invitations:

- Plan invitation initiation
- Plan invitation acceptance
- Plan status change

Supply Chain Exchange generates the following workflow notifications when a company uploads supply or demand information:

- Notification to the publishing company whether the upload was successful or contained errors.

- Notification to the receiving company that the information has been uploaded.

Supply Chain Exchange generates workflow notifications for over 30 exceptions. Both the buyer and supplier receive the notifications—for example, when there is a material shortage or excess. To see a complete list and description of the exceptions, see the Supply Chain Exchange section of the online Help when you log on to the system as a user.

Oracle Transportation

The Oracle Transportation application contains the following workflows:

Shipment Pickup Request

The shipment pickup request workflow provides a channel between a shipper and a transportation provider whereby the shipper can request a shipment pickup and the carrier can respond online by accepting, rejecting, or partially accepting the pickup request.

The following shipment pickup request notifications are available to the shipper:

- *Shipment Pickup Request Accepted* notifies the shipper that the shipment pickup request has been accepted.
- *Shipment Pickup Request Rejected* notifies the shipper that the shipment pickup request has been rejected.
- *Shipment Pickup Request Partially Accepted* notifies the shipper that the shipment pickup request has been partially accepted.
- *No Response to Shipment Pickup Request* notifies the shipper that the transportation provider has not responded to the shipment pickup request.
- *Shipment Pickup Request Cancelled* notifies the shipper that the shipment pickup request has been cancelled.
- *Reminder to Split Shipment* reminds the shipper to split the shipment.
- *Confirmed Accepted Partial Shipment Pickup Request Processed* notifies the shipper that the split shipment pickup request has been accepted.
- *Confirmed Rejected Partial Shipment Pickup Request Processed* notifies the shipper that the partial shipment pickup request has been rejected.

The following shipment pickup request notifications are available to the carrier:

- *Request for Shipment Pickup* notifies the carrier that the shipper has submitted a shipment pickup request.
- *Confirmation - Shipment Pickup Request Accepted* notifies the carrier that the shipment pickup request has been accepted.
- *Confirmation - Shipment Pickup Request Rejected* notifies the carrier that the shipment pickup request has been rejected.
- *Confirmation - Shipment Pickup Request Canceled* notifies the carrier that the shipment pickup request has been cancelled.
- *Under Review - Partial Shipment Acceptance* notifies the carrier that the shipper is reviewing the carrier's request for partial acceptance.
- *Confirmation - Partial Shipment Pickup Request Accepted* notifies the carrier that the partial shipment pickup request has been accepted.
- *Partial Shipment Pickup Request Rejected* notifies the carrier that the partial shipment pickup request has been rejected.

Proof of Delivery

The proof of delivery workflow provides shipment delivery status to the shipper, carrier, and consignee. The shipper enters the shipment pickup date and time by the carrier. The carrier indicates the shipment delivery date and time. The consignee enters the date and time of shipment receipt. The proof of delivery workflow provides a mechanism to capture shipment delivery information.

The proof of delivery workflow generates the following notifications:

- *Proof of Delivery Notification*, sent from the carrier, notifies the shipper that the shipment has been delivered
- *Confirmation - Pickup Notification*, sent from the shipper, notifies the consignee that the shipment has been picked up by the carrier.
- *Proof of Receipt Notification*, sent from the consignee, notifies the shipper that the shipment has been received.

Oracle Product Development Exchange

Product Development Exchange comes with the following workflows:

- *A change management workflow* for automating the approval process of change requests, RFIs, and document review and approvals. Change orders and issues

do not have an approval process. Instead, they have a status reporting workflow that uses the AutoNag feature. (RFIs and document review and approvals also use the AutoNag feature.)

A workflow process is optional at the line and header level. Each object (Change Order, Change Request, Issue, and Line) has a default workflow process provided by the system. Updating the status of a change or issue is done by workflow. The statuses can be updated through the Action menu on the **Change Management** pages.

- A *project/task date change notification to dependents* workflow for notifying people who are depending on a task or project of date changes for that task or project.

The change management workflow issues the following notifications:

- **Informational Notification.** This notification is sent to all users with a View privilege on the change, issue, or line. The notification includes a URL for the work item's **Detail** page. The notification requires no response.
- **Approval Notification.** This notification is sent to all users with an Approve privilege on the change, issue, or line. The notification includes a URL for the work item's **Detail** page. The notification requires an Approve or Reject response. The change, issue, or line is rejected as soon as one person rejects it. For the change or issue to be approved, the notification requires a 100% Approve response.

For details on the Product Development Exchange workflow item types and processes, see the Product Development Exchange section of the online Help (the online Help that users see after they register on the system).

Index

A

- administration
 - hierarchy of companies, E-3
 - Operator setup, 2-2
- affiliate, E-2
- approving companies, 4-9
- attribute lists for negotiations, 2-64
- attributes (catalog)
 - base, B-4
 - category, B-5
 - creating, 2-48
 - negotiations, B-5
 - pricing, B-4
 - properties, 2-47
- attributes, Manage Custom Attributes, 2-73

B

- base attributes
 - creating, 2-50
 - description, B-4
 - setup considerations, 2-47
- billable activity types
 - creating, 2-87
 - customizing, 2-85
 - descriptions, C-1
- billing, 4-14
 - activating, 2-88
 - billable activities, C-1
 - customer updates via export, 2-108
 - customer updates via Receivables, 2-99
 - default bill-to parties, 2-83, 2-85
 - default price list, 2-89

- effective dates, 2-89
- examples, C-6
- export options, 2-108
- exporting data, 2-108
- fee schedule examples, C-6
- minimum and maximum fees, 2-92
- Oracle Receivables integration, 2-93
- payment method types, 2-120
- pricing methods, C-6
- pricing types, C-7
- setup, 2-81
- Software Setup page, 2-98
- transaction delivery, 2-107
- billing activity inbound transaction, 2-82
- billing automatic payment types, 2-120
- Billing Exceptions page, 4-13
- Billing Parameters page
 - enable billing, 2-88
 - Receivables integration, 2-99
 - XML options, 2-107
- billing spreadsheet download type, 2-120
- billing XML transfer type, 2-120
- blocking countries (territories), 2-118
- branding, 2-17
- browsing categories, B-2
- bulk loading
 - catalog errors, B-6
 - catalog structure, 2-50
 - currency conversion rates, 1-18
 - regions, 2-38
 - users and companies, E-9
 - view status for catalogs, 2-50
- bulk-load registration, E-9
- business regions, 2-36

C

- CAD view types, 2-74
- cancelling negotiations, 4-15
- catalog news, 2-55
- catalog structure
 - bulk loading, 2-50
 - review, 2-51
- catalogs
 - bulk loader troubleshooting, B-6
 - categories, B-2
 - category hierarchy, overview, B-3
 - creating hierarchy, 2-48
 - data types, B-6
 - image controls, 2-53
 - options, 2-52
 - preparation, B-1
 - punchout, B-1
 - setup, 2-45
 - unified catalog, B-1
 - workflows, F-2
- categories, B-2
 - browsing, B-2
 - creating, 2-48
 - item, B-3
 - popular list, 2-61
- category attributes
 - creating, 2-49
 - description, B-5
- category hierarchy
 - creating, 2-48
 - overview, B-3
- change line types, 2-75
- change management setup, 2-74
- character set
 - Customize Content page, 2-35
 - Software Setup page, 2-5
 - style sheet upload, 2-23
- Charge Subscription Fees page, 4-14
- communication methods, A-1
- companies
 - Operator approval, 4-9
 - registration approval process, E-4
 - test company, 2-10
- contact title, 2-120

- counteroffer limit, 2-120
- country blocking, 2-118
- Create Document Category link, 2-76
- credit card types, 2-120
- currencies
 - default currency, 2-7
 - exchange rates, 4-13
 - overview, 1-7
 - setup, 1-17
- custom attributes (Product Development), 2-73
- customer spreadsheet download type, 2-120
- customer updates
 - billing exports, 2-108
 - Receivables integration, 2-99
- customer XML transfer type, 2-120
- customizations, 2-17
- Customize Content page, 2-32
- Customize Help Logo page, 2-135
- Customize Help page, 2-127
- Customize Images page, 2-24
- Customize Text page, 2-26
- Customize Unit of Measure link, 2-44
- Customize UOM Class link, 2-43
- Customize UOM Conversion link, 2-44

D

- data types, B-6
- database link with Receivables, 2-94
- deactivating a company or user, 4-13
- default billing price list, 2-89
- default company administrator, 4-9
- default job functions list, 2-127
- deleting negotiations, 4-15
- document
 - management, Product Development, 2-76
 - setup, Transportation, 2-69

E

- Edit List of Values link, 2-119
- exchange rates, 4-13
- exporting billing information, 2-108

F

fee schedules, 2-89
FOB terms, 2-121
fonts and colors, modifying, 2-19
freight carrier, 2-123
freight terms, 2-123

G

generic item category, 2-62
geographic regions, 2-36

H

Help files
 customizing, 2-127
 Help logo customization, 2-135
 Oracle Sourcing edits, 3-8
hierarchy of companies, E-3
hold, placing a company on, 4-12
home page customization, 2-31
HTTP communication method, A-2
HTTPS communication method, A-4
hub mode portal setup, 1-5

I

Identification page, 2-7
images
 catalog controls, 2-53
 customizing, 2-24
inbound transactions, 2-15
independent entity, D-6, E-2
Intelligence setup, 2-126
invoices
 exporting billing data, 2-108
 Oracle Receivables integration, 2-99
issue types, 2-74
item categories, B-3
item cross referencing, 4-8
iteration limit, 2-123

J

job functions

assigning to companies, 4-10
assigning to users, 4-10
default list, 2-127
setup, 2-114
Unknown User, 2-118

L

languages, 1-7
 bulk loading region translations, 2-40
 categories and attributes translations, 2-50
 default language, 2-7
 multiple languages setup, 1-17
 online regions translations, 2-42
launching the system, 4-2
list of values. See lookup types
login
 monitoring, 1-5
 System Operator, 2-2
logo customization, 2-34
lookup types
 Oracle Exchange, 2-119
 Oracle Product Development Exchange, 2-71
 Oracle Transportation, 2-67
 projects, 2-77

M

maintenance, 4-8
Manage Custom Attributes links, 2-73
Manage Job Functions page, 2-114
Manage Regions page, 2-36
Manage Reusable Attribute Lists link, 2-64
manual charges, 4-14
maximum billing fee, 2-92
menu lists configuration. See lookup types
minimum billing fee, 2-92
monitoring logins, 1-5
monitoring transactions, 2-14
months lookup type, 2-123

N

negotiations
 attribute lists, 2-64

- cancelling or deleting, 4-15
- catalog attributes, B-5
- configuration, 2-62
- customizing notifications and text, 2-30
- item category setup, 2-62
- setup, 2-62
- workflows, F-7

notifications

- customization, 2-26
- customizing for negotiations, 2-30
- workflows, F-1

O

- online Help customization, 2-127
- online Help edits, 3-8
- Operator account
 - editing, 2-3
 - setup, 2-2
 - viewing others, 2-4
- Operator setup steps, 1-9
- Oracle Portal
 - fields on Software Setup page, 2-5
 - overview, 1-5
- Oracle Sourcing, 3-8
 - compared to Oracle Exchange, 3-1
 - setup steps, 3-3
- Oracle Transport Agent
 - and webMethods, 2-12
 - HTTP communication method, A-2
 - HTTPS communication method, A-5
- orders configuration, 2-56

P

- page customizations, 2-31
- password policy setup, 2-9
- payment methods
 - between companies, 2-124
 - System Operator payment, 2-108
- payment terms, 2-124
- popular categories list, 2-61
- portal. See Oracle Portal
- prefix title, 2-120
- price breaks

- creating for billing, 2-92
- examples, C-6
- price lists
 - company-specific billing setup, 4-3
 - default billing, 2-89
- pricing attributes for items, B-4
- Pricing Exceptions
 - currency errors, 4-14
 - page, 4-13
- pricing methods for billing, C-6
- pricing types for billing, C-7
- project management lookup types, 2-77
- punchout catalog, B-1
- Purchasing configuration, 2-56

R

- Receivables integration
 - Billing Parameters page, 2-99
 - setup, 2-93
- regions setup, 2-36
- registration and administration hierarchy, E-3
- registration workflows, F-1
- requirement types, 2-74
- RFI types, 2-74

S

- schema. See catalog structure
- Search and Manage Document Category link, 2-76
- search configuration, 2-59
- security, job functions, 2-114
- shipping methods, 2-125
- shipping terms, 2-125
- slogan, 2-26
- SMTP (E-mail) communication method, A-7
- software setup, 2-4
- sourcing. See Oracle Sourcing
- spoke mode portal setup, 1-5
- spreadsheet
 - billing export, 2-111
 - download language, 2-3
- SQL queries, 1-6
- style sheet, 2-19
- Supply Chain Customizations link, 2-80

T

- territories blocking, 2-118
- test company, 2-10
- Test Inbound Transactions page, 2-12
- text, customizing, 2-26
- third-party catalog authoring, B-7
 - control review of, 2-54
 - setup, 4-3
- time zones, 1-7
- To Be Determined prices, B-4
- tracking page setup, 4-4
- trading partner types, 2-125
- transaction delivery
 - billing, 2-108
 - methods, A-1
 - testing, 2-12
- transaction monitor, 2-14
- transportation
 - document setup, 2-69
 - lookup types, 2-67
 - method, 2-125

U

- undo
 - customizations, 2-17
 - image customizations, 2-25
 - page customizations, 2-36
 - text customizations, 2-31
- unified catalog, B-1
- units of measure
 - classes, 2-43
 - conversions setup, 2-44
 - creating and editing, 2-44
 - customization overview, 2-43
- Unknown User job function, 2-118
- UOM. See units of measure
- user, E-3
- UTF-8
 - billing spreadsheets, 2-112
 - catalog structure download, 2-51
 - Customize Content page, 2-35
 - style sheet upload, 2-23

W

- webMethods
 - and Oracle Transport Agent, 2-12
 - HTTP communication method, A-3
 - HTTPS communication method, A-6
- Welcome page customization, 2-31
- workflows
 - catalogs, F-2
 - guidelines, F-1
 - negotiations, F-7
 - Oracle Product Development Exchange, F-11
 - Oracle Supply Chain Exchange, F-9
 - Oracle Transportation, F-10
 - registration, F-1
 - shopping and ordering, F-3
 - uploading for Product Development, 2-78

X

- XML
 - billing data export, 2-108
 - billing inbound transaction, 2-82
 - billing transaction delivery, 2-107
 - communication methods, A-1
 - documentation, 2-12
 - list of transactions, 2-15
 - testing transactions, 2-12

