Oracle® Sourcing

Implementation and Administration Guide

Release 11*i*

Part No. A97394-06

July 2005

ORACLE®

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

Part No. A97394-06

Copyright © 2002, 2005, Oracle. All rights reserved.

Primary Author: Richard Sears

Contents

3   Maintaining and Administering Oracle Sourcing

A   Implementing E-Business Suite for Oracle Sourcing

B   Oracle Sourcing Responsibilities and Functions

C   Oracle Sourcing Notifications

Index

Send Us Your Comments

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

Part No. A97394-06

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

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

If you find any errors or have any other suggestions for improvement, please indicate the title and part number of the documentation and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: appsdoc_us@oracle.com
- FAX: 650-506-7200 Attn: Oracle Procurement Documentation Manager
- Postal service:
  Oracle Procurement Documentation Manager
  Oracle Corporation
  500 Oracle Parkway
  Redwood Shores, CA 94065
  USA

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

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

Preface

Intended Audience

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

See Related Documents on page x for more Oracle Applications product information.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

Documentation Accessibility

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

Accessibility of Code Examples in Documentation

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

Accessibility of Links to External Web Sites in Documentation

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

Structure

1 **Overview**

2 **Implementing Oracle Sourcing**

3 **Maintaining and Administering Oracle Sourcing**

A Implementing E-Business Suite for Oracle Sourcing

B Oracle Sourcing Responsibilities and Functions

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

C Oracle Sourcing Notifications

Related Documents

Oracle Applications System Administrator's Guide

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

Oracle General Ledger User Guide

This guide explains how to plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. It also describes how to define journal entry sources and categories so you can create journal entries for your general ledger.

Oracle Applications Flexfields Guide

This guide provides planning, setup and reference information for the Oracle Sourcing implementation team members creating value sets for use by abstracts and forms. .

Using Oracle HRMS - The Fundamentals

This guide explains how to set up organizations and site locations.

Oracle Inventory User's Guide

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

Managing Your Workforce Using Oracle HRMS

This guide explains how to enter employees and track employee data.

Oracle Purchasing User's Guide

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

Oracle Payables User Guide

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

Oracle Workflow Guide

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

1

Overview

This chapter covers the following topics:

- About Oracle Sourcing

About Oracle Sourcing

Because strategic sourcing is traditionally time-consuming and complex, many organizations are not able to source all of their spending for maximum savings. Oracle Sourcing increases the sourcing bandwidth of procurement professionals so they can exploit many more savings opportunities and capture more value from each. Online collaboration and negotiation makes it easy for participants from multiple organizations to exchange information, conduct bid and auction processes, and create and implement agreements. Professional buyers, business experts, and suppliers exchange information online for a more agile and accurate sourcing process. The application also dramatically reduces sourcing cycle time and creates a complete audit trail of supplier commitments. With Oracle Sourcing, your organization can find and exploit saving opportunities that were previously untouched.

With Oracle Sourcing you can:

- Source more of your spend.

- Source for lowest total cost.

- Create immediate and long-term savings.

Source More of Your Spend

Manage more sourcing events in less time and bring them to conclusion faster so you can find and exploit additional savings opportunities.

Exploit More Sourcing Opportunities

The time required to prepare bidding packages, issue them, and process responses has traditionally limited how much sourcing each professional could manage; leaving savings on the table. Oracle Sourcing lends structure to the entire sourcing process, greatly reducing the time and effort required to source each demand. Procurement professionals can use templates to quickly create sourcing events such as RFIs, RFQs, RFPs and reverse auctions. Sourcing events may also be created by directly consolidating demand from Oracle Purchasing. Buyers can even use one-click renegotiation to instantly clone expiring agreements into new sourcing events. Oracle Sourcing slashes the manual effort required to execute each sourcing event. So procurement professionals can do more of what they do best – save money.

Slash Time with Online Negotiations

With Oracle Sourcing, events are prepared more quickly, concluded sooner, and agreements can be implemented as soon as they are signed. Because it structures requirements-gathering, sourcing events take less time to prepare. Oracle Sourcing consolidates requirements, amendments, and responses in one central location, so suppliers can bid more quickly. Online tools alert buyers to events that need additional supplier actions. Online competition saves time by motivating suppliers to improve terms without time consuming back and forth negotiation. Agreements negotiated in Oracle Sourcing can also be immediately implemented in Oracle Purchasing. So you not only source more, you realize the resulting savings sooner.

Make Faster Award Decisions with Online Bid Comparison and Award Rules

Manually compiling and comparing bids causes slow and inaccurate award decisions. Oracle Sourcing gathers bids in a consistent and structured format and provides online analysis for fast, accurate awards. Side-by-side and graphical comparisons show at a glance which suppliers provide the best overall value. If your organization has developed spreadsheet models for unique categories, Sourcing also exports pricing and scoring data for offline analysis. Flexible award methods let you cherry-pick suppliers, bid lots and lines for the best pricing; or let Oracle Sourcing arrive at the best possible award based on the predefined scoring criteria. Configurable award rules build in compliance with policies such as minority business preference or multi-sourcing of mission-critical items. The award summary gives sourcing team members a complete view of the award recommendation, while award approvals ensure policy and regulatory compliance.

Source for Lowest Total Cost

Oracle Sourcing helps you make more best-value award decisions based on total cost, not just unit price.

Improve Sourcing Results with Cross-Functional Collaboration

Sourcing excellence requires combining the specialized skills of procurement professionals and subject matter experts. But time and distance constraints often make it difficult for all participants to work together. Oracle Sourcing's online collaboration makes it easy for technical, business, and commercial terms experts to lend their expertise to the sourcing process. This ensures both better sourcing processes and broader buy-in to award decisions. Engaging the right suppliers is equally important to strategic sourcing. Oracle Sourcing lets procurement professionals browse the wealth of supplier information that exists within the company and easily invite new suppliers to ensure highly competitive bids.

Leverage Best Practices with Sourcing Knowledge Capture

The knowledge and best-practices that saved money in one sourcing event are often lost when that event ends or an employee departs. Oracle Sourcing allows sourcing professionals to capture best-practice category knowledge for reuse. All of the successful elements from past events can be captured into category-specific templates for RFQs, RFIs and online auctions. Reusable invitation lists bring in the best suppliers. Reusable pricing elements align buying with supplier cost structures for the lowest total cost. Reusable negotiation styles capture knowledge of which event type and bidding rules will yield the best value. With Oracle Sourcing, your best sourcing knowledge is continually leveraged over time and across the enterprise.

Increase Savings with Lowest Total Cost Analysis and Complete Bid Package Evaluation

Sourcing professionals know that the lowest price does not always yield the lowest total cost. Oracle Sourcing enables lowest total cost analysis by identifying cost drivers and hidden costs that drive up total cost. Multi-attribute weighted scoring and pricing, including price breaks and price elements, enable procurement professionals to strategically define items and services and effectively negotiate with suppliers. Sourcing also provides configurable scoring criteria to analyze bid supplier strengths and weakness that affect downstream costs. Bids can be scored on any combination of price and buyer-defined criteria such as delivery dates, quality, vendor reliability and financial stability.

Create Immediate and Long-Term Savings

Oracle Sourcing creates immediate savings with rapid deployment and ROI, and with consistent execution through the Oracle Advanced Procurement Suite.

Start Saving Immediately with Rapid Deployment

Purchasing professionals know that even small percentage savings add up to a massive contribution to the bottom line. So every day that sourcing professionals aren't 100% productive costs your business money. Oracle Sourcing can have a dramatic impact on your sourcing organization in weeks, not months. The application can be run on-site or hosted, and works both independently and as part of the Oracle Advanced Procurement Suite. So you can apply Oracle Sourcing to current and upcoming sourcing opportunities and start saving right away, while ensuring that your solution can grow as needed.

Achieve Rapid ROI through Open Competition

Improving sourcing can save event. Organizations using Oracle even incumbent suppliers to risk by providing clearer requirements Reduced risk allows suppliers already have open today.

Realize Long Term Savings with Consistent Execution and Compliance

Even the best purchasing agreements are worth little unless they are consistently enforced. Oracle Sourcing provides even more savings to your organization when used within the Oracle Advanced Procurement suite by ensuring consistent execution from requisition to payment. Oracle Procurement Contracts drives compliance with built-in tracking of contract deliverables. Oracle Purchasing seamlessly executes agreements negotiated in Oracle Sourcing. Employee self-service requisitions placed in Oracle iProcurement automatically default to preferred suppliers at Sourcing-negotiated prices. Oracle Daily Business Intelligence monitors contract utilization and compliance and lays the ground work for finding new opportunities. The Oracle Advanced Procurement suite leverages the value of Oracle Sourcing by implementing and enforcing purchasing agreements enterprise-wide.

Unified Sourcing Platform

Oracle Sourcing is tightly integrated with the procurement modules of the E-Business Suite. Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more - all from applications that are built on a unified information architecture. This information architecture provides a single definition of customers, suppliers, employees, and products - all aspects of the business. Whether one module or the entire suite is

implemented. Oracle E-Business Suite enables procurement professionals to share unified information across the enterprise and smarter decisions with better information.

Oracle Sourcing Business Flows

There are three typical business flows that utilize Oracle Sourcing.

- Sourcing buyers can use the Demand Workbench feature of Oracle Purchasing to select approved requisition lines and aggregate demand into a draft auction or a Sourcing RFQ. Buyers can use the Demand Workbench without leaving Oracle Sourcing. The backing requisition line information is retained throughout the life cycle of the sourcing document.

Creating New Documents Using Demand Workbench
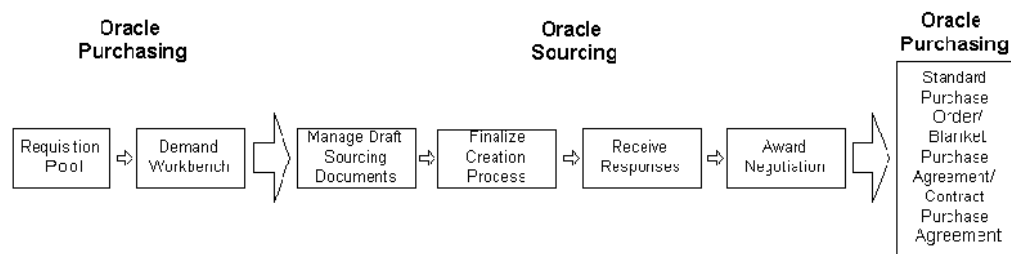
- Oracle Purchasing buyers can select a blanket purchase agreement (BPA) and use it as the basis of a new auction or Sourcing RFQ. The details of the BPA (including header, attachments, price breaks) are copied to the draft negotiation, and the sourcing lines refer to the originating BPA lines.

Creating New Documents from Existing Blanket Purchase Agreements
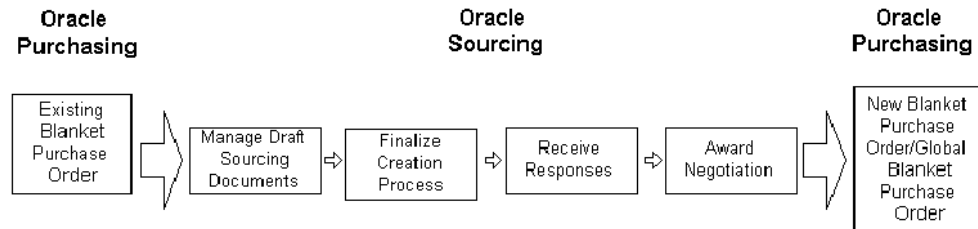
- Oracle Sourcing buyers can define sourcing documents directly in Oracle Sourcing. Inventory items can be selected and goods and services can be entered directly. A large number of items can be quickly entered by using the spreadsheet upload feature.

Creating Documents Directly in Oracle Sourcing

**Oracle
Sourcing**

**Oracle
Purchasing**

```
┌──────────┐    ┌──────────┐    ┌──────────┐     ┌──────────────┐
│  Create  │    │ Receive  │    │  Award   │     │  Standard    │
│ Sourcing │ ⇒  │Responses │ ⇒  │Negotiation│ ⇒  │  Purchase    │
│ Document │    │          │    │          │     │   Order/      │
└──────────┘    └──────────┘    └──────────┘     │  Blanket     │
                                                  │  Purchase    │
                                                  │  Agreement/  │
                                                  │  Contract    │
                                                  │  Purchase    │
                                                  │  Agreement   │
                                                  └──────────────┘
```
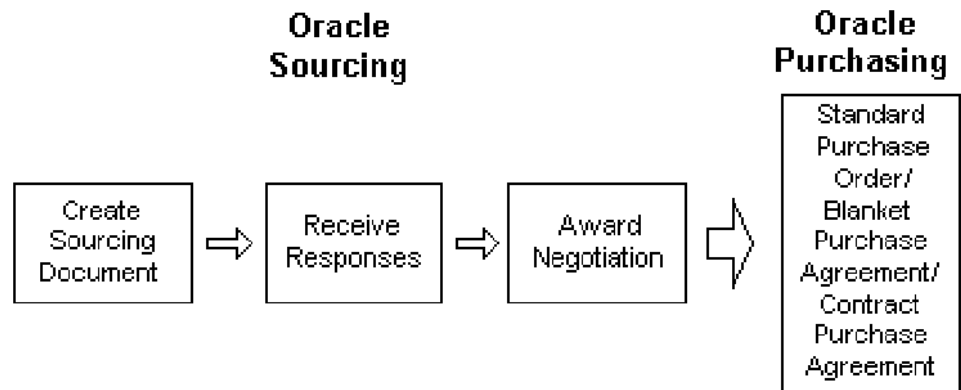
Buyers have visibility to information throughout the complete procurement
process. Oracle Purchasing users can view the awards that initiated the standard
purchase order or blanket purchase agreement. Likewise, requisitioners in Oracle
iProcurement can view the negotiation in which their requisitions are being
negotiated. Suppliers accessing Oracle iSupplier Portal can drill down from a purchase
order to the backing sourcing document and quotation in Oracle Sourcing.

2

Implementing Oracle Sourcing

This chapter covers the following topics:

- Introduction
- Overview of Oracle Sourcing Implementation
- Prerequisites
- Oracle Sourcing Implementation Steps
- Step 1: Set the Enterprise Name (Required)
- Step 2: Define System Profile Options (Required)
- Step 3: Assign Sourcing Responsibilities (Required)
- Step 4: Define Buyer Security (Optional)
- Step 5: Set Up Attribute Groups (Optional)
- Step 6: Set Up Negotiations Configuration (Optional)
- Step 7: Register Suppliers and Supplier Users (Required)
- Step 8: Define Negotiation Terms and Conditions (Optional)
- Step 9: Define Reusable Attribute Lists (Optional)
- Step 10: Define Price Factors and Price Factor Lists (Optional)
- Step 11: Define Reusable Invitation Lists (Optional)
- Step 12: Define Negotiations Templates (Optional)
- Step 13: Create Abstracts and Forms (Optional)
- Step 14: Set Up Document Print Layouts (Optional)
- Step 15: Enable Sourcing Optimization (Optional)
- Step 16: Enable Oracle Procurement Contracts (Optional)
- Step 17: Enable Oracle Services Procurement (Optional)
- Step 18: Set Up Inbox for Notifications (Optional)
- Step 19: Set Up Enhanced Supplier Search Feature (Optional)
- Step 20: Set Up Workflow Options (Optional)
- Step 21: Set Up Supplier Site Feature (Optional)
- Step 22: Customize Content (Optional)

- Step 23: Set Up Demand Workbench (Optional)

Introduction

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

Implementing Other E-Business Suite Applications

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

The Prerequisite step listed in the table below requires you to check the information in Appendix A, "Implementing E-Business Suite for Oracle Sourcing.", page A-1 If you have not implemented the required portions of the Oracle E-business Suite, use the information in this appendix, along with the indicated product documentation, to perform the required implementation steps.

Additionally, there are some Oracle Purchasing steps that are not required by Oracle Sourcing but can be used to support multi-national negotiations, reflect your company's business structure, standardize your business practices, or support optional features of Oracle Sourcing. See Optional E-Business Suite Implementation Steps in Appendix A, "Implementing E-Business Suite for Oracle Sourcing.", page A-1 for information on these steps.

Overview of Oracle Sourcing Implementation

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

The remainder of this chapter provides an expanded discussion of each implementation step. If the step is performed using the Administration functions within Oracle Sourcing, detailed information on navigation paths and page- level information is given in this chapter.

If the step is performed outside of Oracle Sourcing, references to appropriate documentation are given as well as any Oracle Sourcing specific instructions on performing that step.

Since Oracle Sourcing is one of E-Business suite applications, suppliers and supplier users must register with the system. Once they receive their system-generated signons and passwords, they can access and participate in negotiations. Oracle Sourcing provides features to allow suppliers and supplier users to easily register with the system.

Sourcing Implementation Steps

Step Number	Step Name	Required?	Information Source
Prerequisite	Review Information in Appendix A	Yes	Appendix A, Implementing E-Business Suite for Oracle Sourcing
1	Set Enterprise Name.	Yes	Instructions in this chapter.
2	Define System Profile Options	Yes	*Oracle Applications System Administration Guide* using the information in this chapter.
3	Assign Sourcing Buyer Responsibilities	Yes	*Oracle Applications System Administration Guide* using information in this chapter
4	Define Buyer Security	No	*Multiple Organizations in Oracle Applications* and *Oracle Purchasing User's Guide*
5	Set Up Attribute Groups	No	*Oracle Applications Developer's Guide* using information in this chapter.
6	Set Up Negotiations Configuration	No	Instructions in this chapter.
7	Register Suppliers and Supplier Users	Yes	Oracle Applications iSupplier Portal online help
8	Define Negotiation Terms and Conditions	No	Instructions in this chapter.
9	Define Reusable Attribute Lists	No	Instructions in this chapter.
10	Define Price Factors and Price Factor Lists	No	Instructions in this chapter.
11	Define Reusable Invitation Lists	No	Instructions in this chapter.
12	Define Negotiation Templates	No	Instructions in this chapter.

Step Number	Step Name	Required?	Information Source
13	Create Abstracts and Forms	No	Instructions in this chapter. *Oracle Applications System Administration Guide* using information in this chapter for creating value sets and values.
14	Set Up Document Print Layouts	No	*Oracle XML Publisher User's Guide* for instructions on creating templates. *Oracle Purchasing User's Guide* for instructions on assigning templates to documents.
15	Enable Sourcing Optimization	No	*Oracle Applications System Administration Guide* using instructions in this chapter.
16	Enable Oracle Procurement Contracts	No	*Oracle Applications System Administration Guide* for information on setting profile options and security. *Oracle Purchasing User's Guide* for information on setting document types.
17	Enable Oracle Services Procurement	No	*Oracle Applications System Administrator's Guide* using information in this chapter.
18	Set Up Inbox for Notifications	No	Information in this chapter
19	Set Up Enhanced Supplier Search Feature	No	*Oracle iSupplier Portal* documentation
20	Set Up Workflow Options	No	*Oracle Applications System Administration Guide* using information in this chapter.
21	Set Up Supplier Site Feature	Yes	*Oracle Purchasing User's Guide* using information in this chapter.

Step Number	Step Name	Required?	Information Source
22	Customize Content	Optional	Instructions in this chapter.
23	Set Up Demand Workbench	No	*Oracle Applications System Administrator's Guide* and *Configuring, Reporting, and System Administration in Oracle HRMS* using information in this chapter.

Prerequisites

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

Oracle Sourcing Implementation Steps

Implementing Oracle Sourcing includes performing tasks in both Oracle Sourcing as well as other applications. Implementation tasks performed in other applications typically use an administrative or super user type of responsibility within that application. The particular step details in this chapter will indicate which responsibility is needed to perform the task within that application.

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

Using the Administration Tab Functions

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

Negotiations Administration

Negotiation Tools

Reusable Attribute Lists
Price Factors
Reusable Price Factor Lists
Reusable Invitation Lists
Abstract and Forms
Manage Value Sets
Manage Values
Cancel / Delete Negotiation

Negotiation Setup

Setup Negotiation Terms and Conditions
Negotiations Configuration

You use the links available from this page to set up and maintain your Oracle Sourcing system.

Step 1: Set the Enterprise Name (Required)

You can specify the Enterprise name that is used in notification e-mails that are sent from Oracle Sourcing. To specify this name, run the following script

$APPL_TOP/pos/11.5.0/patch/115/sql/POSENTUP.sql

This script prompts for an enterprise name and updates the relevant tables with this information. If you do not run this script, any notifications sent to supplier users will have "Default enterprise name" as the company name in the subject and body of these notifications.

Step 2: Define System Profile Options (Required)

Profile options are one way to control system processing. They can control resource usage as well as enable or disable certain application features. The following system profile options relate to Oracle Sourcing. Other profile options are involved with enabling integrations between Oracle Sourcing and other applications such as Oracle Procurement Contracts and Oracle Services Procurement.

- Setting the option **PO: Allow Autocreation of Oracle Sourcing Documents** to Yes enables buyers to use AutoCreate to generate draft auctions and Sourcing RFQs that can then be completed and awarded in Oracle Sourcing.

- Setting the option **PO: Display the Autocreated Document** to Yes allows Sourcing to launch automatically from Oracle Purchasing once your buyers have finished AutoCreating the draft sourcing document. Buyers must also have a responsibility that contains the Edit Draft Negotiation function.

- The Award Approval feature allows buyer to go through an approval process before creating a Purchase Order. Before using this functionality, you need to implement Oracle Approvals Management following instructions in the *Oracle Approvals Management Implementation Guide*. Afterwards, set **PON: Enable Sourcing Award Approval** to Yes.

- The system can search recent supplier transactions. Buyers can use this transaction history to research a supplier's performance, for example, when identifying suppliers to invite to a particular negotiation. Set the **PON: Supplier Transaction History Time Period** to a number to indicate the number of prior days the system should search for supplier transaction details.

- **PON:External Application Framework Agent** specifies a URL (typically outside your firewall) will be used for the links in notifications sent to suppliers. If this value is not specified, the system will use the applications frame work agent value assigned to the Sourcing Default Responsibility (See below).

- Setting the **Sourcing Default Responsibility for External User** profile option specifies the applications framework agent that will be used if the **PON: External Applications Framework Agent** profile option is not set (See above). .

- In addition to the reports available from Oracle Sourcing, if you have Oracle Daily Business Intelligence implemented, you can set **POA: DBI Implementation** to Yes to access additional reports from Oracle DBI.

- The **POS: External URL** profile option sets the URL included in notifications sent from the system.

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

Step 3: Assign Sourcing Responsibilities (Required)

During this step, you assign your users the responsibilities they need to perform their jobs. As you assign a user a responsibility, make sure that each buyer's HR profile contains a first name, last name, and e-mail address.

See *Managing Your Workforce Using Oracle HRMS* for instructions on setting up personnel entries in Oracle HRMS.

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

The Sourcing Super User, Sourcing Buyer, and Sourcing Supplier responsibilities come predefined with most of the necessary job functions. However, you can create customized responsibilities using the job functions available. For a complete list of the job functions defined, see Appendix B, "Oracle Sourcing Responsibilities and Functions.", page B-1 The information in that appendix will help you decide whether to create a customized responsibility, and if so, which job functions to assign to the new responsibility. See *Oracle Applications System Administration Guide* for instructions on defining a new responsibility.

Controlling Publishing, Unlocking/Unsealing, and Awarding Negotiations

The following job functions (among others) come predefined to the Sourcing Super User and the Sourcing Buyer responsibilities. But since they deal with publishing negotiations, unlocking/unsealing negotiations, and awarding business; for security reasons, you may wish to create a customized responsibility that does not include them. Note that you should always create a new customized responsibility and not change a seeded responsibility.

Seeded Sourcing Job Functions

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

The following job functions are assigned to the Sourcing Super User but not to the Sourcing Buyer. You will need to explicitly grant them to buyers

Other Negotiations Job Functions

Function	Description	Seeded in Super User	Seeded in Buyer
Award Others' Negotiations	Users can make award decisions for negotiations created by other users	Yes	No
Manage Draft Sourcing Documents	Users can edit, delete, and publish any draft negotiations.	Yes	No

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

Granting Collaboration Team Management Capabilities

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

Collaboration Team Management Job Function

Function	Description	Seeded in Super User	Seeded in Buyer
Manage Collaboration Team	Users can manage the collaboration team for negotiations that they can access.	Yes	No

For details on Sourcing responsibilities, see Appendix B, "Oracle Sourcing Responsibilities and Functions.", page B-1

- Grant your buyers the Sourcing Buyer responsibility.

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

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

Step 4: Define Buyer Security (Optional)

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

- Public: All system users can access the document.

- Private: The document owner, collaboration team members, and the subsequent approver(s) can access the document.

- Hierarchy: The document owner, collaboration team members, and subsequent approver(s), and any other individuals in the security hierarchy can access the document. This security hierarchy is shared with Oracle Purchasing.

With Private and Hierarchy security, buyers will grant explicit access for each sourcing document by assigning people to the collaboration team. Additionally, any employee can be limited to view-only access and/or assigned as a document approver.

To set up buyer security:

- Run the Replicate Seed Data concurrent program for each operating unit in your enterprise. (Run this program in Single Organization mode if you have not set up multiple operating units). Please see the *Oracle Applications System Administration Guide* manual for instructions on how to run concurrent programs.

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

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

  2. Navigate to the Document Types form. Setup>Purchasing>Document Types

  3. Perform a Query by Example using%Sourcing% as the search criteria.

  4. Select the new security level (Public, Private, or Hierarchy) from the Security Level drop down menu.

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

Step 5: Set Up Attribute Groups (Optional)

Attribute groups are used for grouping attributes together to provide a more logical structure to negotiations using many attributes. When buyers add an attribute to negotiations they are creating, they can assign the attribute to a group. Sourcing is delivered with an attribute group called General. This attribute group will be automatically applied by default to any header or line attributes.

You can add other group values that can be used by buyers in place of "General." **To add additional group values:**

1. Log into Oracle Applications with a user that has access to the Application Developer responsibility.

2. Navigate to the Application Object Library Lookups form: (Application > Lookups > Application Object Library)

3. Query for PON%GROUPS. This will return two lookups:

Type	Meaning
PON_HEADER_ATTRIBUTE_GROUPS	Sourcing Header Attribute Groups
PON_LINE_ATTRIBUTES_GROUPS	Sourcing Line Attribute Groups

   The first entry lists the group values available for header attribute groups. The second entry lists the group values available for line attributes. To add header groups, click the first entry. To add line attribute groups click the second entry.

4. On the Application Object Library Lookups form, add the additional group values. When you have finished adding your group values, save your work and exit Oracle Applications.

   See *Oracle Applications Developer's Guide* for instructions on adding lookup values.

5. The middle-tier server must be bounced to reflect the new lookup values.

6. If you do not want General to be the default attribute group value, you can identify a different default. See instructions in the following step, Set Up Negotiations Configuration, on how to identify the default attribute group. .

Step 6: Set Up Negotiations Configuration (Optional)

You use the **Negotiations Configuration** page to set and maintain many aspects of your Oracle Sourcing system. This includes:

- Selecting the default ranking display.

- Identifying allowable price factor types.

- Allowing award approval to be required.

- Defining header scoring defaults.

- Defining default header and line attribute groups.

- Defining the default UOM for amount-based line types.

- Listing URLs for supplier discovery.

- Specifying the supplier online window value.

Using the Negotiations Configuration page:

All of the following tasks are performed from the **Negotiations Configuration** page.

To access the **Negotiations Configuration** page:

1. On the **Negotiations Home** page, click the Administration tab.

2. On the Administration tab, click " Negotiations Configuration."

3. After you have finished performing any of the following tasks, click OK to save your updates.

Setting the default ranking display:

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

To choose a ranking indicator:

1. In the Rank Indicator section of the **Negotiations Configuration** page, select a default rank indicator. This indicator is used to identify the method for displaying the rank of responses on a negotiation.

Rank Indicator

Select the default rank indicator which is displayed to negotiation creators and respondents throughout checkbox if you want the negotiation creators to be able to override this indicator when creating a negot

- ○ Win/Lose: Word Win or Lose is displayed.
- ⊙ 1,2,3...: Rank order is displayed.
- ○ No indicator displayed: No indicator displayed
- ☑ Allow negotiation creators to override indicator

Should Rank be Visible in Blind Auctions/RFQs?

☑ TIP Changes to the rank visibility setup affect all your existing and future blind auctions/RFQs.
- ⊙ Yes, Rank is visible to respondents.
- ○ No, Rank is not visible to respondents.

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

3. If you wish the suppliers in blind auctions/RFQs to see the response rankings, select the appropriate radio button.

Identifying allowable price factor types:

Price factors are additional cost factors that should be included when calculating total cost for a line. There are two types of price factors.

- Supplier price factors identify additional costs (beyond just price) that the buyer must pay a supplier to acquire an item or service. For example, a software purchase might include the additional cost of training. Buyers define supplier price factors and suppliers respond with the amount they will charge.

- Buyer price factors reflect additional costs involved when dealing with a particular supplier. This cost could be incurred due to geographical location, supplier performance history, or other reasons. Buyers define buyer price factors and specify the amount for each. Suppliers do not respond to buyer price factors.

You can restrict the type of price factors buyers can apply to their negotiations.

To specify the allowable types of price factors:

1. Select the appropriate value from the Price Factors menu, and click OK.

Price Factors

Price Factors | Supplier ▼ |

☑ Allow negotiation creator to override price factors

2. Additionally, you can choose to allow the buyer to override these defaults.

Allowing award approval to be required:

You can choose to have award decisions approved before a purchase order can be generated. A buyer's approval hierarchy is defined in Oracle Human Resources (see instructions on Buyer Security in a previous step for information on approval hierarchies). Note this section only appears if you set the system profile option **PON: Enable Sourcing Award Approval** to Yes (see the previous step, Defining System Profile Options for instructions on this system profile option).

1. On the **Negotiations Configuration** page, select the appropriate radio button to indicate whether award approval is required.

Should Award Approval be Required for Auctions/RFQs?

◉ Yes, award approval is required before the negotiation is completed.

○ No, award approval is not required before the negotiation is completed.

☑ Allow negotiation creators to override indicator

2. Optionally, you can allow the buyer to override this setting by clicking "Allow negotiation creators to override indicator."

Defining header scoring defaults:

You can define defaults for header attribute scores. You can choose to allow buyers to weight scores when evaluating supplier responses, and you can define a default maximum score value (this can be overridden by the buyer when the negotiation is defined). You can also choose whether to display the scoring criteria to suppliers.

To define maximum header score defaults:

1. On the **Negotiations Configuration** page, select the appropriate check boxes and enter appropriate values.

Header Scoring Defaults

☑ Enable Weights

☐ Display scoring criteria to Suppliers

∗ Default Maximum Score | 10 |

Defining the default header and line attribute groups:

Attributes defined to a negotiation header, line or attribute list must be assigned to an attribute group. Attribute groups allow control over how attributes are displayed since you can specify the sequence of the attributes within the group. When attributes are initially created, they are assigned to a default group. You can specify the default group that is assigned to both header and line attributes.

1. On the **Negotiations Configuration** page, select a group from the list of predefined groups. You can specify a default for both header and line attributes.

    See instructions in a previous step for instructions on defining additional attribute group values.

    Attribute Groups

    Specify the default Attribute Groups. Contact your System Administrator if you need to add groups.

    Header Default Group [General ▼]

    Line Default Group [General ▼]

Defining the default UOM for amount-based line types:

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

To define a default unit of measurement:

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

    Unit of Measure for Amount Based Line Items

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

    * Unit of Measure [Each ▼]

Listing URLs for supplier discovery:

You can define a list of URLs that carry information about suppliers' external web sites. Buyers can use these links to access and browse the supplier web sites from the **Add Supplier** page during negotiation creation. Buyers can use the information from the supplier web site to decide whether to invite a supplier to the negotiation they are creating.

1. Scroll to the Supplier Discovery section of the **Negotiations Configuration** page. Enter the Provider Name (this is the name used within the system. It does not have to be the supplier's official name) and the URL to the provider's site. To allow your buyers to view and use the link, click Enabled. You can control access to different sites by selecting and deselecting the Enabled flag.

Supplier Discovery

Define the access to your external sources of supplier information.

Provider Name	URL	Enabled
D&B Information	http://www.dnb.com/us/	☑
Thomas Register	http://www.thomasregister.com/	☑
		☑
		☑
		☑

(Add Another Row)

2. When you are finished identifying sites, click OK.

Specifying the supplier online window value:

The Live Console feature allows buyers to monitor negotiations in real time. In addition to other information, this allows buyers to see which suppliers are actively participating in the negotiation. The system indicates which suppliers are considered to be currently "online" by tracking the time elapsed since that supplier's last action. You can specify the maximum amount of time that has elapsed since the supplier's last action before a supplier is considered to be no longer online.

To set the Supplier Online Window Value::

1. On the **Negotiations Configuration** page, scroll to the Supplier Online Window section. Enter a number for the Supplier Online Window value. This is the number of minutes that can elapse since a supplier's last action before that supplier is considered to be no longer active.

2. Click OK.

Step 7: Register Suppliers and Supplier Users (Required)

Supplier companies must be registered with the system to access Oracle Sourcing and participate in negotiations.

Once suppliers are registered, they can create profiles that supply detailed information on the products and services they provide. Buyers can search this supplier information to more efficiently target suppliers for negotiations they are creating. The system also tracks purchasing information on suppliers which can be used to generate many different reports for performance analysis.

The contacts at your supplier companies must also be registered with the system and assigned the Sourcing Supplier responsibility before they can participate in any Oracle Sourcing negotiations. See the *Internet Supplier Portal Implementation Guide* for instructions on registering suppliers and supplier users.

Step 8: Define Negotiation Terms and Conditions (Optional)

Negotiation terms and conditions are presented to supplier users before they respond to a negotiation for the first time. Supplier users must accept the terms and conditions before they can submit a response. Users are not required to accept terms and conditions when placing a subsequent response in the same negotiation.

To define negotiation terms and conditions:

1. On the **Negotiations Home** page, click the Administration tab.

2. Click "Set Up Negotiation Terms and Conditions."

3. Use the **Setup Negotiation Terms and Conditions** page to define the terms and conditions that you want to display on negotiations. If multiple languages are installed, select a Language and translate the terms and conditions for each language if your suppliers speak other languages.

4. When you have finished entering your negotiation terms and conditions, click Apply.

Step 9: Define Reusable Attribute Lists (Optional)

Attributes identify additional details that a supplier should provide (beyond just response price) when responding to a negotiation. Attributes can apply at both the negotiation header and/or line level.

Header attributes identify negotiation level characteristics that are not associated with a particular negotiation line. These can include company characteristics, for example, years in business, or company certifications.

Line attributes are characteristics that apply to lines in a negotiation. For example, if a negotiation includes a line for vehicles, there might also be a line attribute called *mileage*. This attribute might have a target value that specifies that responses to this line must have fewer that 12,000 miles on the odometer.

If your buyers repeatedly include the same attributes on negotiations, you can create attribute lists that contain the attribute definitions. Buyers can then simply apply the attribute list to a negotiation instead of having to repeatedly define the attributes. Attribute lists can streamline negotiation creation and standardize your sourcing procedures. Note that buyers can create their own attribute lists.

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

To create or edit a new header attribute list:

1. On the **Negotiations Home Home** page, click the Administration tab.

2. On the **Administration** page, click "Reusable Attribute Lists."

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

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

Enter your attribute information in the appropriate fields. Required fields are marked with an asterisk (*):

- *Attribute: Enter a name for your attribute (for example, Years in Business, or Authorized Certification).

- Group: Assign the attribute to one of the predefined groups. Groups can be used for sorting attributes. You can create additional groups for attribute grouping. See the previous section, Set Up Attribute Groups (Optional), for instructions on creating additional groups.

- Attribute Type: If you want all suppliers to enter a value for this attribute when responding, select Required. If you don't want to require suppliers to enter a value for this attribute when responding, select Optional. If you want this attribute to be displayed to the supplier without allowing any response, select Display Only. Select Internal if this attribute should not be displayed to suppliers, but viewed only by other sourcing personnel (for example, the buyer making the award decision).

- Value Type: Select the type of value that suppliers should enter for this attribute when responding. They may enter *text* (letters, words, digits, and so on), *number* (digits with decimals allowed), *date* the format you or the supplier select as your date preference), or *URL* (Web site addresses that begin with a valid URL protocol for example, http://, https://, and ftp://. Values with a URL type display as links; for example a Web site address entered as a *Text* type will display simply as text). The value type you select also governs the value you can enter in the Target Value field.

- Target Value: If desired, set the optimum value for the attribute in the Target Value field (for example: "10+ years in business").

- Display Target: If you want suppliers to see the target value, select this checkbox. If you wish to hide the target value from suppliers, leave the checkbox unselected.

- Maximum Score:

  Score values for header attributes are entered by the buyer when evaluating the responses. You can enter a value to specify the maximum score a buyer can enter for this attribute. (You can also define a default maximum score using the **Negotiations Configuration** page. See the previous step, Set Up Negotiations Configuration (Optional), for instructions.)

  To remove an attribute from the list, click the Delete icon.

5. When you have finished defining attributes to your list, click Apply.

   Continue adding any additional attributes to your list.

   Attributes appear within the list in the order you defined them. If you wish to change the order, click Sequence. On the **Create Header Attribute List: Sequence Attributes** page, enter numeric values to reflect the order in which you wish the attributes to appear. Attributes with lower numbers appear before attributes with higher number. When you have finished sequencing attributes, click Apply.

To create line attribute lists:

1. On the **Negotiations Home** page, click the Administration tab.

2. On the **Administration** page, click "Reusable Attribute Lists."

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

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

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).

- Group: Assign the attribute to one of the predefined groups. Groups can be used for sorting attributes.

- Attribute Type: If you want all suppliers to enter a value for this attribute when responding, select Required. If you don't want to require suppliers to enter a value for this attribute when responding, select Optional. If you want this attribute to be displayed to the supplier without allowing any response, select Display Only. Select Internal if this attribute should not be displayed to suppliers, but viewed only by other sourcing personnel (for example, the buyer making the award decision).

- Value Type: Select the type of value that suppliers should enter for this attribute when responding. They may enter *text* (letters, words, digits, and so on), *number* (digits with decimals allowed), *date* (the format you or the supplier select as your date preference, or *URL* (Web site addresses that begin with a valid URL protocol for example, http://, https://, and ftp://. Values with a URL type display as links; for example a Web site address entered as a *Text* type will display simply as text). The value type you select also governs the value you can enter in the Target Value field.

- Target Value: If desired, set the optimum value for the attribute in the Target Value field (for example: "Fewer than twelve thousand miles per vehicle"; "Fewer than eight defects per million parts manufactured"; and so on).

- Display Target: If you want suppliers to see the target value, select this checkbox. If you wish to hide the target value from suppliers, leave the checkbox unchecked .

5. Click the Score icon.

6. Suppliers can enter responses to line attributes (suppliers must enter responses if the attribute has an Attribute Type value of Required). Scoring the attribute allows you to define which values you will accept for the attribute and indicate the relative desirability of each response. Scores are also used by the system to determine the best response in Multi-Attribute Scoring negotiations.

    On the **Enter Scoring Criteria** page, you must specify the values you will accept for this attribute and assign a score to each value.

    For text attributes, you specify a list of acceptable values.

Edit Line Attribute List: Update Score

(Apply)

Enter Scoring Criteria

Enter acceptable response values and scores (0 to 100) for the attributes below

| | | | | Attribute **color** | | Display Value **No** |
| | | | | Target Value **red** | | Value Type **Text** |

Response Value		Score	Delete
red		100	🗑
			🗑
			🗑
			🗑
			🗑

(Add 5 Rows)

(Apply)

For number and date attributes, you specify a numeric or date range (to define a single number or date, set the From and To values to the same number or date. Click the pop-up calendar icon to select a date value.

Note that URL attribute types can not be scored in this manner.

Edit Line Attribute List: Update Score

(Apply)

Enter Scoring Criteria

Enter acceptable response values and scores (0 to 100) for the attributes below

| | | Attribute **Mileage** | | Display Value **No** |
| | | Target Value | | Value Type **Number** |

Response Value From	Response Value To	Score	Delete
			🗑
			🗑
			🗑
			🗑
			🗑

(Add 5 Rows)

(Apply)

Once you have identified all the allowable values for this attribute, you must define a score for each value (or range of values). Specify a number that represents the desirability of that value - the higher the number, the more desirable that response.

If you need to add and score more than five values, click Add Five Rows to display five more entry rows.

7. After you have identified and scored your values, click Apply. You return to the **Create Line Attribute List** page.

8. Add and score any remaining attributes for this list.

9. When you are finished defining attributes to this list, click Apply.

10. Note that you can optionally sequence the display order of your line attributes. Use the instructions above to specify the sequence of attributes.

Step 10: Define Price Factors and Price Factor Lists (Optional)

Price factors allow you to identify and negotiate on additional costs related to a line. You can use price factors to obtain a more realistic idea of the total cost of an item or service by factoring in any additional costs beyond just price. Such costs could include additional costs such as consulting or training, or internal costs such as switching costs.

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

To define a price factor:

1. On the **Negotiations Home** page, click the Administration tab.

2. Click "Price Factors."

3. On the **Price Factors** page, select the language for this price factor, and click Create.

4. On the **Create Price Factor** page, enter the following information:

- A unique code (the same code is shared between different language versions of the same price factor).

- The name of the new price factor.

- A short text description for the price factor.

- A pricing basis value to determine how this price factor is calculated. You can define: a fixed amount for the line, a fixed amount for each unit of the line, or a percentage amount of the line cost.

- The status for this price factor. Active price elements are immediately available for use. Inactive price elements cannot be used.

5. Once you have entered your information, click Apply. The information you entered is validated. If your code is not unique, you are prompted to enter a different one.

To create an existing price factor in a different language:

1. On the **Negotiations Home** page, click the Administration tab.

2. Click "Price Factors."

3. Select a language for this price element.

4. Click the edit icon for the price factor for which you are creating the new language version.

5. On the **Edit Price Factor** page, enter the new information.

6. Click Apply

To define a price factor list:

1. On the **Negotiations Home** page, click the Administration tab.

2. Click "Reusable Price Factor Lists."

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

4. On the **Create Price Factor List** page, enter the following information:

    •   Name of the new list

    •   A short text description of the new list

    •   The status of the new list. Active lists can be used immediately. Inactive lists cannot be used

5. From the Price Factor drop down list, select a price factor for this list and click Add to List. Repeat as necessary to add any remaining price factors to the list.

6. When you are finished adding price elements, click Apply.

Step 11: Define Reusable Invitation Lists (Optional)

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

To create a new invitation list:

1. On the **Negotiations Home** page, click the Administration tab.

2. Click "Reusable Invitation Lists."

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

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

Click Add Suppliers.

5. Search for and select suppliers to add to your invitation list. Note that you can use the advanced Supplier Search features to build lists of suppliers based on the commodities or items they provide.

Create Office Suppliers: Add Suppliers

See the Oracle Sourcing online help for instructions on using the search fields.

6. When the **Search Suppliers** page displays the search results, select the supplier(s) you want to add to the list and click Add to Invitation List.

Create Office Suppliers: Add Suppliers

7. Click Apply to return to the **Create Invitation List** page.

8. You return to the **Create Invitation List** page. For each supplier, ensure there is a value for Supplier Contact. If you wish to send a notification to an additional supplier contact and you know the contact's e-mail address, you can enter that in the Additional Contact Email field. This is especially useful if the supplier has set up a broadcast e-mail.

Create Invitation List

Use the instructions in the previous two steps to continue adding suppliers. When you have finished adding suppliers, click Apply.

Step 12: Define Negotiations Templates (Optional)

If many of your negotiations use many of the same criteria (bid/quote controls, item attribute lists, invitation lists, etc.), you can create templates for each negotiation type (auction, RFQ, RFI).

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

1. Under the Templates section on the **Negotiations Home** page, click the link for the negotiation type for which you want to define a template.

2. On the **Manage Templates** page, click the button to create a new template.

3. On the Create Template: Header page, select an Access value of Public to allow the template to be used by your Sourcing buyers. Select Private to designate the template for your use only.

4. Complete the remaining creation pages as you would if creating a negotiation. Note that since you are creating a template, not all fields are available to define. For example, you can define line attributes and price factors, but you can not define actual negotiation lines.

Step 13: Create Abstracts and Forms (Optional)

Organizations need to publish data concerning their negotiations to:

• Advertise the purchase to increase competition.

• Comply with rules and regulations regarding proper competition.

To accomplish these goals, Oracle Sourcing provides the capability for a buying organization to create abstracts and forms.

Abstracts

An abstract is a summary or synopsis of a negotiation. It usually contains information such as the goods or services being purchased, whom to contact for more information, and the open and close date. An abstract can even contain a PDF version of the negotiation for the supplier to download. abstracts are presented to suppliers on the buying organization's external website. Suppliers can view the details about negotiations and determine if they are interested in participating without having to log in to the sourcing application.

Forms

A form captures information from the buyer in a similar fashion as an abstract but rather than publishing data to the buying organization's website, this information is captured in an XML file that can be transferred to a third party system. The forms that are created with Oracle Sourcing typically are modeled after the third party systems so that the data collected matches their requirements. The buyer can then generate the appropriately formatted XML file and send it for publishing on the third party system.

Creating Abstracts and Forms

Abstracts and forms are composed of fields and sections. These are the building blocks that are used to create a form or abstract. When creating a form or abstract, first create these building blocks in the application. You can then use these building blocks to construct your form or abstract.

General Steps to Using the Abstract Feature:

1. (Super User) Create any new fields or sections (building blocks) desired on the Abstract.

2. (Super User) Modify and activate the existing Abstract definition.

3. (Super User) Set up and customize external website.

4. (Buyer) Add Abstract to negotiation and complete required information.

5. (Buyer) Publish the Abstract for a specific negotiation to an external website.

General Steps to Using the Forms Feature:

1. (Super User) Create fields and sections.

2. (Super User) Create a new form or modify an existing form.

3. (Super User) Add any new fields or sections on the form.

4. (Super User) Activate the form.

5. (Super User) Map to third-party XSD/DTD file

6. (Buyer) Complete the form and generate XML.

7. (Super User) Update form as requirements change

Using Abstracts and Forms:

Oracle Sourcing is seeded with a draft abstract and two forms.

You may, however, decide that you want to capture different information than what the abstract or the forms are seeded with. To capture new information, you can create new sections and/or fields and use them in your abstract and forms definition.

Creating New Sections/Fields

1. From the **Negotiations Home** page, click the Administration tab.

2. On the **Administration** page, click "Abstract and Forms."

3. The **Abstract and Forms** page displays the abstract and the forms that exist in the system (initially you should see only one abstract and two forms that are seeded with the application).

4. On the **Abstract and Forms** page, click Manage Sections and Fields.

5. On the **Manage Sections and Fields** page, click Create Section to define a new section, or click Create Field to define a new field.

   Use the instructions in the sections below to create new fields and sections.

To update an existing section or field, enter all or the initial part of the section/field name or code and click Go. When the search results display, click the Update icon for the section/field you wish to update. Use the following instructions to add either a new field or a new section.

Creating New Fields

1. On the **Create Field** page, enter values for the following fields:

- Code. This is a required, user-defined value that uniquely identifies the field. The Field code and only be up to 30 characters and can only have alphanumeric characters (Underscores are allowed within the code). If this field will be used on a form, to facilitate easy mapping, this value should match the code from the XSD/DTD to which you will be mapping.

- Name. This is a required field, user-defined value that will be associated with the field. This value will appear next to the entry field/poplist/List of Values on the form that will be presented to the buyer. Enter a value that is meaningful to the buyer.

- Description. This is an optional field that is presented to the buyer as a tip if data is entered. You can use this to enter any additional information that you feel the buyer needs to have to correctly complete this field.

- Value Type. This specifies the type of data value the buyer can enter in the field. Possible data types are: text, number, date, date/time, and amount.

- List of Values. To limit the field's data input to only a predefined set of values, click the flashlight and select the Value Set. The flashlight will query all value sets that are defined for Oracle Sourcing. To create a new value set, click on the Manage Value Sets button at the top of the page. You can also create a value set on the Administration page (see the section below for instructions on creating value sets). The following types of value sets are supported:

  - Table

- Independent

- Translatable independent

- Status. When you initially enter the page, the values in this poplist will be Draft (selected), and Active. Only active fields can be added to a section or form. While the field is draft status, you can edit the Code Name and other properties of the field. You can also delete the field. Once you change the status to Active, you can no longer modify the Code of the Value Type. Also, you can no longer delete the field. You will only be allowed to make the field inactive.

2. Once you have finished defining your new field, click Apply

Creating New Sections

1. On the **Create Section** page, enter values for the following fields:

- Code. A required, user-defined value that uniquely identifies the section. The section code can only be up to 20 characters and can only have alphanumeric characters (Underscores are allowed within the code). If this section will be used on a form, for ease of mapping, this value should match the code from the XSD/DTD to which you will be mapping.

- Version. This is a display only field that is updated when a new version of the section is created.

- Name. A required, user-defined value that will be associated with the section. This value appears above the section when the form is presented to the buyer. Enter a value that is meaningful to the buyer.

- Description. A required field used to describe the section. It is not displayed to the buyer.

- Section Contains repeating Data. Identifies this section as a repeating section. Repeating sections are displayed to the buyer as a table. If the section contains repeating data, no system fields can be defined to it.

- Text Tip. This text is presented to the buyer as a tip below the section header. Use this to give specific instructions to the buyer for this section.

- Status. When you initially enter the page, the values in this poplist are Draft (selected), and Active. Only active sections can be added to an abstract, section, or form. While the section is in draft status, you can edit Code, Name, and other properties of the section. You can also delete the section. Once you change the status to active, you can no longer modify Code or make the section repeating. Also, you can no longer delete the section. You can only make the section inactive.

Once you have activated a section, you can create a revision or make a copy of the section (you can also make a copy of the section while it is in draft status). Revisions are used to make changes to an existing section. If you find there are changes that have been made to the form that you must send to the third party system, you can use revisions to make the changes to the sections. Once you click the Create Revision button, a draft section is created with the version number incremented by one. You may then edit and activate this draft section. You will need to replace the existing section on the form with the new revision to expose it to the buyer.

Copies are similar to revisions, but they do not increment the version number and are considered new sections. You can copy an existing section by clicking the Copy Section button. This will create a draft section for you to edit. You will be required to change Section Code and Name and click Apply for the copy to be saved.

- Sections and Fields. When you click Add Another Row in the Sections and Fields table, you must click the flashlight or type in the name of the section or field that you want to add. Only active sections and fields can be added to the section. Notice that you can sequence the section and field within the section to ensure the appropriate ordering. You can also specify if a field is required. You may delete sections and fields from the section until you make the section active. If the section is either active or inactive, you can not remove fields and sections. You will have to create a new revision to the section and then you can remove the fields and sections. Sections are required to have at least one field.

2. To add a field to the section, click Add Another Row.

3. Click the flashlight icon.

4. Search for and select the field or section you wish to add (you can add a section within a section). After you have added the field or section, specify whether it requires a response from the supplier.

5. Once you have added all the fields and/or sections to the section, click Apply.

Updating Existing Fields or Sections

1. On the **Manage Sections and Fields** page, enter all or the initial part of the field name or code and click Go.

2. When the search results display, click the Update icon for the field you wish to update.

3. Update the values for the field or section and click Apply.

Modify the Existing Abstract Definition

Different organizations have different requirements for data they need to display to suppliers to advertise negotiations. Oracle Sourcing allows you to customize the data that will be displayed to suppliers. The Abstract consists of a main external page that lists all published abstracts and a details page to display detailed information about a single negotiation.

You can modify the seeded Abstract definition by using

1. From the **Negotiations Home** page, click the Administration tab.

2. On the **Administration** page, click "Abstracts and Forms."

3. The **Edit Abstract** page displays the current definition for the abstract.

The Abstract definition uses the fields and sections defined using the instructions discussed in the previous sections. If you need to create or modify fields or sections, click "Manage Sections and Fields."

The Edit Abstract page displays information about the Abstract definition and allows you to modify some values.

- Status. When you initially enter the page, the values in this poplist will be Draft (selected) and Active. If the Abstract is in draft or inactive status, nothing will appear on the external webpage. Once you have updated the Abstract definition, change the status to active and click Apply. The Abstract is then available on the external page.

- Name. Displays the name of the field or section.

- Version. The version of the section (not applicable for fields).

- Sequence. This indicates the order in which the fields and sections appear. This value can be modified.

- Display on Main Page. If you check this box, this field is displayed on the main page of the Abstract. Otherwise, the field appears on the detail page when you drill down from the main page. Sections can not be displayed on the main page.

- Required. Checking this box requires that buyers enter information for the field. This checkbox is not applicable for system fields since their information is supplied internally by the system.

- Type. This indicates whether the entry is a field or section

- Source. This indicates whether the values for the field are supplied by the user of the system.

- Active. If you check this box, the field is included in the Abstract definition.

- View. Clicking this icon allows you to see the details of the field definition.

- Delete. Click this icon to remove the field or section from the Abstract definition. The definition must be inactivated for this icon to be available.

Adding a New Field to the Abstract

1. Click Add Another Row

2. Click the flashlight icon to access the Search and Select window.

3. Search for the field you wish to add. You can search by:

   - Field Name

   - Code

   - Type (field or section)

   - Description

   - Source

4. Select the field or section you wish to add and specify whether to display the field on the main abstract page. Fields not displayed on the main page are displayed on the detail drill down page.

5. Once you have completed your modifications to the abstract, change the status to active and click Apply.

Customizing the External Abstract Page

Sourcing is delivered with a draft Abstract that includes a number of system fields. You should review the other system fields available and modify the Abstract definition to include all of the fields that you need. After you modify the Abstract definition, you must then activate the Abstract for it to be used as part of a negotiation.

Setting the External Page URL

Suppliers can view the details for all negotiations with published abstracts attached by navigating to the external abstract page. The URL to access the external abstract page is determined by the following profile option:

POS: External URL (display name - internal name: **POS_EXTERNAL_URL**)

This profile option should be set as part of iSupplier Portal setup and has the following format:

http or https://<external web server machine> <port>

For example: http://external.oracle.com:1033

An actual URL to access the abstract page set above would be:

http://external.oracle.com:1033/OA_HTML/OA.jsp?OAFunc=PON_ABSTRACT_ PAGE

This external page will be available to suppliers without logging into the system. You may reference this URL from other websites to allow your abstracts to be visible to potential suppliers.

Changing User Preference Values at Login

By default, the user preferences (for example, language settings, date format, etc.) for the abstract external page are derived from the settings for "GUEST" user. However, the external page can accept the following parameters:

- PON_LANGUAGE_CODE
   The display language for the page can be changed by passing this parameter value

- PON_ORGANIZATION_ID
   The particular organization for which negotiations

should be displayed. Otherwise, by default, negotiations from all organizations across the buyer company are displayed.

- PON_NEGOTIATION_STATUS
Negotiations in a particular status can be displayed. Values are: ALL_STATUS, PREVIEW, ACTIVE, AUCTION_CLOSED, AWARDED, and CANCELED.

Since each of these parameters has a default, none is required.

For example, the following Abstract URL displays all active negotiations for organization 123 in English:

http://external.oracle.com:10333/OA_HTML/OA.jsp?OAFunc=PON_ABSTRACT_ PAGE&PON_LANGUAGE_CODE=EN&PON_ORGANIZATION_ID=123&PON_ NEGOTIATION_STATUS=ACTIVE

See the *Oracle Applications System Administrator - Configuration* manual for information on setting up the GUEST user.

Customizing Your Web Page

You can customize your external web page in two ways

- Adding a branding .gif image to the top of the page.

- Adding custom HTML regions on the left, right, or bottom of the page.

These customizations are applied to both the Main External webpage, which lists all of the negotiations, as well as the Abstract Detail page, which displays the details for each Abstract.

Gif File Size

According to Oracle standards, advertising .gif files for Oracle HTML applications should be one of the following sizes:

- 460 x 60

- 230 x 60

- 230 x 30

Loading Your Customizations

Loading these files is similar to adding custom HTML regions on the buyer and supplier homepages. To load these filed:

- Create your .gif files. Name them

  - pon_SourcingExternal_Adv.gif (the branding .gif that appears at the top of the page)

  - pon_SourcingExternal_left.htm (the HTML region on the left side of the page)

  - pon_SourcingExternal_right.htm (the HTML region on the right side of the page)

  - pon_SourcingExternal_bottom.htm (the HTML region at the bottom of the page)

- Copy the .gif files and the relevant .htm files to the following directory

$<template-path>/pon/custom/marketing/SRC_EXTERNAL/<language-directory/

where <template-path> is a system property that is specified in the iAS properties file. For example, a path might look like

/OA_HTML/pon/custom/marketing/SRC_EXTERNAL/US

Note: If a particular file is not found in the specified directory, the corresponding region is not displayed.

Linking the Abstract Page to Your Main Web Page:

After you have created your Abstract page, you need to link it to your company's main web pate. The link text on your main web page will usually say something link "Current Solicitations," "Solicitation Details," or "Current Negotiations."

Creating and Using Forms:

Oracle Sourcing is seeded with two forms. You can modify and use these forms, or create new forms.

Planing the form
1. Determine the desired output.

   To understand the structure of the output, you should obtain a form that displays the fields (including required fields) and sections. This helps you to determine the fields, sections and their relations to each other. If a form is not available, you should construct the form in some fashion to identify the overall structure of the form. Otherwise it is difficult to model the form in Oracle Sourcing.

2. Create a plan of the form.

   Develop a plan for how you will model the form in Oracle Sourcing. When developing your plan, determine:

   - Which, if any, fields are required.

   - Whether there are any repeating sections.

   - Do certain fields only allow predefined values.

   - Can certain fields obtain their values from the system.

3. Model the form in Oracle Sourcing.

   Once you have planned your form, model the design in Oracle Sourcing. This includes determining the order in which you will define data elements as well as any naming conventions.

   The building blocks of your form are fields and sections. Fields are single data elements on a form such as phone number or commodity code.. Sections are collections of fields and/or other sections.

   Since you build your form by combining fields and sections, you should define the form in Oracle Sourcing starting at the lowest level and working up.

   The codes you use should match the codes that are used in your third party system. This makes mapping your form fields easier.

Creating the form definition
1. On the **Abstract and Forms** page, click Create Form.

2. On the **Create Form** page, enter the required information:

- Code. A required, user-defined value that uniquely identifies the form. Code can only be up to 20 characters and can only have alphanumeric data (underscores are allowed within the value). For ease of mapping, the value should match the code from the XSD/DTD to which you will map.

- Name. Required, user-defined value associated with the form. Enter a value that is meaningful to the buyer.

- Version. This is a display-only field showing the version of this definition. It is updated when a new version is created.

- Description. A required field that you can use to describe the form. It is not displayed to the buyer.

- XML Publisher Template. Once you have mapped the form to the third party system, you will select the XML publisher template file here. Information on mapping the form and creating the template is discussed below.

- XML Publisher Data Source. This is the file name of the data source (XSD file) that is created for you automatically when you change the status of a form to Active. The format of the name given to that file is "PON#" + the form name + # + version number. For example, for a form named FORM_TEST, the XML Publisher Data Source will be named PON#TEST_FORM#1. This file is used for mapping to the third party system and can be downloaded from XML Publisher. Information on mapping the form is discussed below.

- Status. Values are either Active or Draft.

- Form Type. Specify the scope of the form to indicate whether the information obtained from this form applies to a single negotiation or a Sourcing event (a group of negotiations).

3. Click Add Another Row to add a section or field to this form.

4. On the **Create Form** page, click the flashlight icon.

5. Search for and select the field or section you wish to add to the form.

6. If you added a field, specify whether a response from the supplier is required.

7. Once you have completed your form definition, click Apply.

Activating the form

1. From the **Negotiation Home** page, click the Administration tab.

2. On the **Administration** page, click "Abstract and Forms."

3. Locate the Abstract definition and click the update icon.

4. On the **Edit Abstract** page, select Active from the Status drop down menu, and click Apply.

Mapping a form to a third party XSD/DTD file

When you activate your form, Oracle Sourcing automatically creates an XSD file for you that will be used as the XML Publisher Data Source file. You will use this file to map to the third party XSD/DTD file so that the XML output generated from your form is acceptable to the third party system.

Oracle Sourcing leverages another Oracle product, Oracle XML Publisher, to create the Data Source XSD file and to load your mapping file. To download the Data Source XSD file created for you and to upload your mapping file, you must have the XML Publisher Administrator responsibility.

Download the XSD data source file

1. Log in to Oracle Applications and select theXML Publisher responsibility.

2. Select Data Definitions.

3. Enter "Sourcing" into the Application search criteria and press Go.

   The search results display all the data source files related to Oracle Sourcing. Your form data source will appear as "Data Source for Sourcing form *xxx*,

   where *xxx* matches the name of the data source file created by the system when you activated the form. (See the information on the XML Publisher Data Source form field above for details on how this name is created. Note that the name on the **Data Definitions** page omits the PON prefix.).

4. Click the name link for your form's data source file.

5. On the **View Data Definition** page, click the link for the XML Schema. This downloads the XSD file. Save this file locally.

Create XSL file to map to the third party XSD/DTD

Next you need to obtain the XSD or DTD from the third party system that you are mapping to. This will usually be available from their website or from a technical communication.

6. Once you have both the XSD file for your form and the XSD or DTD file from your third party system, you need to map them to create an XSL file. XSL is a language for defining XML style sheets. Similar to a CSS style sheet that defines how an HTML file is displayed, an XSL style sheet is a file that describes how to display an XML document of a given type.

   Oracle recommends you use a software package such as Stylus Studio to perform this mapping. Stylus Studio allows you to drag and drop from one XSD to another to map the elements in the two XSD files to each other. XML mapping can be complex depending on the complexity of the form. You may consider having an experienced XML developer prepare this mapping for you.

7. Save your mapping file.

Load the XSL file

Once the XSL file containing the mapping has been created, you must upload it into XML Publisher.

8. Log into Oracle Applications and select the XML Publisher responsibility.

9. Access the **Templates** page.

10. Click Create Template and enter the following information

    - Name. Enter any name to identify the template. This name appears on the **Form** page within Oracle Sourcing. This field is required.

    - Code. Provide a unique code for the template. This field is required.

    - Application. Enter "Sourcing."

    - Data Definition. Search the List of Values for the application "Sourcing" and select the data definition file that was created by the system when you activated your form.

    - Type. Select XSL-XML.

    - Start Date. The date on which you want to activate the template. You should use the default date.

    - End Date. The date on which you want to inactivate the template. You can leave this blank.

    - Description. Enter text to describe this template.

    - File. select the XSL file you have created from your mapping tool.

    - Language. Your default language.

    - Territory. Your default territory.

11. Click Apply.

12. Log out of the XML Publisher responsibility and into Oracle Sourcing Super User responsibility.

13. Access your form definition. If it is active, deactivate it.

14. Enter the name of your template on the **Create Form** page to attach this template to your form. This allows the system to generate the XML file for you that matches the format needed by the third party system.

15. Click Apply.

Create value sets for abstracts and forms

When creating Abstracts or Forms, you can choose to allow buyers to enter field values, or you can require buyers to select a value from a predefined list. To define a list of values for a field, you must first create a Value Set. Once you have created the Value Set, you can define the values that it contains. Value sets and their values are defined using the System Administration functions of Oracle Applications. You must have the System Administration responsibility to create Values Sets and Values.

1. From the **Negotiations Home** page, click the Administration tab,

2. On the **Administration** page, click "Manage Value Sets." This places you on the Values Set form in the System Administration application.

See *Oracle Applications System Administrator Guide* for instructions on defining Value Sets.

Create values for abstracts and forms and abstracts

Once you have created the Value Set for your Abstract or Form field, you can define its allowable values.

1. From the **Negotiations Home** page, click the Administration tab.

2. On the **Administration** page, click "Manage Values." This takes you to the Find Value Set form.

3. On the Find values Set form, enter the name of the value set you created in the previous step, and click Find.

4. On the Segment Values form, enter the allowable values for your field. See *Oracle Applications System Administration Guide* for instructions on defining values for value sets.

Step 14: Set Up Document Print Layouts (Optional)

You can assign a separate layout to use when printing different sourcing document types. See the *XML Publisher User's Guide* for instructions on creating layout templates

To Assign Layout Templates:

1. Log into Oracle Purchasing as a Purchasing Super User.

2. Navigate to the Document Types form. Set Up > Purchasing > Find Document Types.

3. Select a Sourcing document type (Auction, Sourcing RFI, Sourcing RFQ).

4. For each document type, select a layout. (If you have Oracle Procurement Contracts licensed and installed, also select a layout for contract terms.)

Step 15: Enable Sourcing Optimization (Optional)

If you have the Oracle Sourcing Optimization feature licensed, setting the **PON: Enable Award Optimization** system profile option to Yes allows buyers to user the Award Optimization feature to specify multiple award criteria and have the system compute the award that best fits the award conditions defined by the buyer.

Step 16: Enable Oracle Procurement Contracts (Optional)

If you have Oracle Procurement Contracts licensed and implemented:

1. Enable Oracle Procurement Contracts functionality by setting the site-level profile option **PO: Contracts Enabled** to Yes.

2. Implement security on Oracle Procurement Contracts by ensuring that the Manage Contract Terms job function does not appear in any responsibilities that should not be able to author or view contract terms on a negotiation.

3. Set the templates for Oracle Sourcing document. See the Oracle Procurement Contracts online help for instructions on creating documents.

   • Set up contract templates in the Contract Terms Library. Set up particular templates to be applicable for a particular organization, or set up global template(s) which are available to negotiations from any organization.

   • Associate the contract templates with sourcing document types.

   • Select a contract template to be the default for each sourcing document type.

4. Set contract terms layout for sourcing documents. In the Document Types window in Oracle Purchasing, associate a contract terms layout template to each sourcing document type.

   See the Oracle Purchasing online help for instructions on using the Document Types window.

Step 17: Enable Oracle Services Procurement (Optional)

If you have Oracle Services Procurement licensed, turn on the profile option **PO: Enable Services Procurement** to Yes to enable the Services line types in Oracle Sourcing. When the profile option is enabled, buyers can create negotiation lines with the following additional line types:

• Fixed Price Services

• Fixed Price Temp Labor

• Rate Based Temp Labor

If you have Oracle Payables installed, you need to have Oracle Financials F (Oracle Payables Family Pack M) to have temporary labor line types available in Oracle Sourcing.

Step 18: Set Up Inbox for Notifications (Optional)

If you plan to receive notifications in your e-mail inbox outside of Oracle Worklist, your e-mail inbox editor should be HTML-based, not text based (text-based is supported, but notifications are handled better with an HTML-based editor).

Step 19: Set Up Enhanced Supplier Search Feature (Optional)

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

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

Step 20: Set Up Workflow Options (Optional)

Once buyers have completed awarding business in a negotiation, they can choose to automatically generate the required purchase documents. Once the purchase document

information has been generated, a Workflow process, the Workflow Background Process, must be run with an item type of Sourcing Complete Auction to create the purchase documents. If you wish to automatically generate purchasing documents, you should schedule this process to run frequently.

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

Step 21: Set Up Supplier Site Feature (Optional)

The Supplier Site feature allows buyers to send information to particular supplier sites. To enable this feature, each supplier site must be identified within the system. For each site, ensure that the Purchasing and/or RFQ Only flag for that site is checked in Oracle Purchasing.

Step 22: Customize Content (Optional)

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

The following screen shot shows the supplier's **Negotiations Home** page. The container on the right hand side of the page that is labeled "Information" is the location where your customized content will appear.

To customize the text on the home page:

1. If the Information box is not displayed, enable it using Oracle Application Framework personalization. Set the Render property to true.

2. To modify the text displayed to buyers, edit the content of the pon_SourcingBuying. htm file. The location of this file depends on your webserver configuration. The location is specified in the TemplatePath property of the ssp_init.txt file. Modify the file and same the new version to the same directory.

3. To modify the text displayed to suppliers, edit the content of the pon_SourcingSelling.htm file. The file location depends on your webserver configuration. It is specified in the TemplatePath property of the ssp_init.text file. Save the new version of the file to the same directory.

Step 23: Set Up Demand Workbench (Optional)

Oracle Sourcing buyers can use the Demand Workbench feature of Oracle Purchasing to access and import requisition information from Oracle Purchasing to create a new negotiation without leaving Oracle Sourcing. To set up the Demand Workbench for use by Oracle Sourcing buyers:

1. Set up the AutoCreate feature as normal in Oracle Purchasing.

2. Set the **PO: Default Requisition Grouping** system profile option (values: Requisition or Default)

   This specifies the default grouping method used when aggregating demand to create a new sourcing document. **Default** will combine lines from multiple requisitions to create a single negotiation line if possible. **Requisition** will create a separate line for each Requisition line.

3. Set the **PO: Document Builder Default Document Type** system profile option. (values: Blanket Auction, Blanket RFQ, Standard Auction, Standard RFQ).

   This specifies the default target document type when creating a new negotiation (this can be changed when the negotiation is initially created in Demand Workbench by selecting one of the other three values from a drop down menu).

4. Set up Multi-Organization Access Control. You use Multi-Organization Access Control to define which operating units a user can access. This allows buyers to access requisitions from multiple operating units and combine them into a single sourcing document. To set up Multi-Organization Access Control:

   • Define a security profile

     1. Define a security profile to control access to records at the responsibility level. This security profile should specify the operating units you wish the user of a particular responsibility to be able to access.

        See "Chapter 3: Security" in *Configuring, Reporting, and System Administration in Oracle HRMS* for more information.

     2. Run the Security List Maintenance program as a single request to populate the hierarchy with the most up-to-date information in your system Use the Human Resources responsibility to run this program. Ensure that the request completes successfully before proceeding. *See Oracle Applications System Administrator's Guide* for information on running requests.

   • Assign the security profile to a responsibility

     1. Using the System Administrator responsibility, navigate to Profile > System.

     2. On the **Find System Profile Values** form, click in the Responsibility field and search for the responsibility to which you want to assign the security profile.

     3. Once you return to the **Find System Profile Values** form, enter MO:% in the Profile field and click Find.

     4. On the **System Profile Values** form, click in the Responsibility column for the **MO: Security Profile** row.

     5. Search for the security profile you defined previously and wish to assign to this responsibility.

     6. Once you have identified the security profile, save your work.

3

Maintaining and Administering Oracle Sourcing

This chapter covers the following topics:

- Introduction
- Registration
- Merging Suppliers
- Deactivating a Supplier Site
- Suppliers on Purchase Order Hold Status
- Canceling or Deleting a Negotiation
- Using Sourcing Events
- Unlocking Draft Negotiations
- Applications Setup

Introduction

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

Registration

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

See the Internet Supplier Portal online help for instructions on registering and approving supplier users.

Merging Suppliers

There may be times when you or a Purchasing Manager need to deactivate a supplier contact. See the *Oracle Purchasing User's Guide* for instructions. Inactivating a supplier contact has the following impact:

- When buyers create sourcing documents, inactive supplier contacts are not displayed when searching for contacts to invite. Only active contacts are available for inviting.

- Inactive contacts can sign on to and navigate the system, but they receive an error message if they attempt to access Oracle Sourcing.

Deactivating a Supplier Site

There may be occasions when you need to deactivate one or more sites for a particular supplier. You can deactivate all sites for a supplier. If a supplier has no active sites, buyers can still invite contacts for this supplier, award business to the supplier, but cannot generate a purchase order for that supplier.

- If the supplier has multiple sites, any deactivated sites are not available from the Supplier Site drop down list when the buyer creates a purchase order. The buyer has to select another supplier site or reactivate this supplier site to create a purchase order for this site.

- If all sites are deactivated, the buyer cannot create a purchase order for this supplier. At least one of the supplier's sites must be reactivated before a purchase order can be created.

Suppliers on Purchase Order Hold Status

There may be occasions when a supplier is put on Purchase Order Hold. You can accomplish this by assigning the supplier a status of Purchase Order Hold. See the *Oracle Purchasing User's Guide* for instructions on performing this task.

- A buyer can invite a supplier with Purchase Order Hold status to participate in a negotiation.

- The supplier's contacts can log on, and the buyer can award the supplier business, but the buyer will receive a warning message.

- A purchase order will be created but cannot be approved, if approval is needed.

Canceling or Deleting a Negotiation

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

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

To cancel a negotiation in progress:

1. From the **Negotiations Home** Page, click the Administration tab.

2. On the **Administration** page, click "Cancel / Delete Negotiation."

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

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

5. Click Done.

To delete a negotiation:

1. From the **Negotiations Home** page, click the Administration tab.

2. On the Administration page, click "Cancel / Delete Negotiation."

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

4. Click Delete Negotiation.

5. Click Done.

Using Sourcing Events

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

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

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

Sourcing events can be in one of three statuses:

*   Active - an event is active as soon as it is created

*   Completed - an event is completed once its associated negotiations have been completed

*   Canceled - an event can be canceled by the Sourcing Super User or a Sourcing Buyer with a responsibility containing the Cancel Events function

To create a sourcing event:

1. Click "Event" under the Create column of the Quick Links section of the **Negotiations Home** page

2. On the **Create Event** page, enter a title, description, and an inactive date/time. No negotiations can be associated with this sourcing event after its inactive date and time has passed.

3. Click Apply.

To cancel a sourcing event:

1. Click "Events" under the Manage column of the Quick Links section of the Buyer **Home** page.

2. On the **Manage Events** page, search for and select the event you wish to cancel.

3. Click Cancel.

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

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

6. Click Apply.

Unlocking Draft Negotiations

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

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

To unlock a draft:

1. From the **Negotiations Home** page, Click "Drafts" under the Manage column of the Quick Links section.

2. On the **Manage Draft Negotiations** page, search for locked draft.

3. Select the locked draft, and click Unlock to release the draft.

Applications Setup

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

- Update any exchange rates you might have set

- Review your negotiation invitation lists to reflect the changes in your business

- Check or update your negotiation attributes lists, price factors, and price factor lists to streamline the negotiation creation process

- Update your negotiation abstract document and/or create any new forms.

- Update your list of supplier discovery URLs as needed.

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

A

Implementing E-Business Suite for Oracle Sourcing

This appendix covers the following topics:

- Introduction

Introduction

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

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

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

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

The second table identifies additional optional steps you may wish to perform. If you choose to implement any of the optional steps, see the information following the table for any Oracle Sourcing-related information needed to perform the step.

E-Business Suite Implementation Steps Required by Oracle Sourcing

Step Number	Step Name	Information Source
1	Set up System Administrator	*Oracle Applications System Administration Guide*
2	Set up Accounting Key Flexfield	*Oracle Applications Flexfields Guide*

Step Number	Step Name	Information Source
3	Set Up Calendars, Currencies, and Set of Books	*Oracle General Ledger User's Guide*
4	Define Human Resources Key Flexfield	*Oracle Applications Flexfields Guide*
5	Define Locations	*Using Oracle HRMS*
6	Define Organizations and Organization Relationships	*Using Oracle HRMS*
7	Define Inventory Key Flexfield	*Oracle Applications Flexfields Guide*
8	Define Units of Measure	*Oracle Inventory User's Guide*
9	Define Categories	*Oracle Inventory User's Guide*
10	Set Up Personnel	*Managing Your Workforce Using Oracle HRMS*
10	Set Up Oracle Workflow	*Oracle Workflow Guide*
11	Decide how to use the Account Generator	*Oracle Purchasing User's Guide*
12	Open Inventory and Purchasing Accounting Periods	*Oracle Purchasing User's Guide*
13	Set up Approval Information	*Oracle Purchasing User's Guide*
14	Define Purchasing Options	*Oracle Purchasing User's Guide*
15	Define Buyers	*Oracle Purchasing User's Guide*
16	Start the Purchasing Database Administrator	*Oracle Purchasing User's Guide*
17	Define Financial Options	*Oracle Payables User's Guide*
18	Define Receiving Options	*Oracle Purchasing User's Guide*
19	Set Up Transaction Managers and Resubmission Levels	*Oracle Applications System Administration Guide*
20	Define Suppliers	*Oracle Payables User's Guide*
121	Submit Workflow-Related Processes	*Oracle Payables User's Guide*
22	Perform Additional System Administration Setup	*Oracle Applications System Administration Guide*
23	Define Manufacturing System and User Profile Options	*Oracle Purchasing User's Guide*

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

Oracle Sourcing-related Details for Optional Steps

Consider the following Oracle-related details, if you choose to implement the following steps,

Step 24: Convert to Multi-Org

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

Step 25: Define Freight Carriers

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

Step 26: Define Payment Terms

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

Step 27: Define Approval Information

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

Step 28: Define Lookup Codes

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

B

Oracle Sourcing Responsibilities and Functions

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

This appendix covers the following topics:

- Oracle Sourcing Responsibilities
- Responsibility/Function Cross-Reference

Oracle Sourcing Responsibilities

The following responsibilities come installed with Oracle Sourcing:.

Responsibilities Installed With Oracle Sourcing

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

Responsibility/Function Cross-Reference

The following tables show which job functions are initially defined to the Oracle Sourcing Super User/Buyer responsibilities and which are defined to the Oracle Sourcing Supplier. Note, however, that since users with the System Administration responsibility can customize a responsibility, the exact responsibility definitions you see may be

different. Use these tables when planning any customized responsibilities you wish
to define.

Oracle Sourcing Super User/Buyer Job Functions

User Function Name	Description
Abstract and Forms OA Page	Users can access abstract and forms.
Accept Terms & Conditions OA Page	Users can accept terms and conditions.
Acknowledge Amendments OA Page	Users can acknowledge amendments.
Acknowledge Participation	Users can acknowledge negotiation participation.
Add Additional Currencies Page	Users can add additional currencies during negotiation creation.
Add Invitees to In-Progress Negotiations	Users can add additional invitees to any in-progress negotiations.
Additional Supplier Control Access	Users can control additional invitees' access to different negotiation lines.
Advanced Workflow Worklist	Users can access advanced worklist to view notifications.
All Events Page	Users can view all events.
Allocation Summary	Users can view the Allocation Summary page.
Amendment History Buyer OA Page	Users can view the buyer amendment history..
Analyze Price Breaks Page	Users can view the Analyze Price Breaks page.
Apply Invitation Lists Page in Create Flow	Users can apply invitiation lists during negotiation creation.
Apply Price Factor Lists Page	Users can apply price factor lists.
Approval History for Negotiations	Users can view negotiation approval history.
Approve or Reject Negotiation	Users can approve or reject negotiation.
Approve/Reject Award page	Users can approve or reject award.
AutoAward Optimization Page	Users can access award optimization.
Autocreate Document Builder Page	Users can access Demand Workbench.
Autocreate Requisition Search Page	Users can use advanced search in Demand Workbench.
Autocreate Return Requisition Page	Users can return requisitions in Demand Workbench.
Award Approval - Reject Responses page	Users can enter approval notes during award approval.
Award Approval History page	Users can view the Award Approval History page.
Award By Line page in Award Flow	Users can view all lines to be analyzed/awarded.
Award By Quote page in Award Flow	Users can view all responses to be analyzed/awarded.
Award Line page in Award Flow	Users can analyze/award on the line level.
Award My Negotiations	Users can make award decisions for negotiations they created.

User Function Name	Description
Award Others' Negotiations	Users can make award decisions for negotiations created by other users.
Award Quote page in Award Flow	Users can analyze/award on the response level.
Award Scenario Results Page	Users can view award scenario results in award optimization.
Award Summary Page	Users can view the Award Summary page.
Bid Price Break Differentials Page	Users can respond to price break differentials.
Buyer Search	Users can perform advanced search on negotiations.
Cancel Event Page	Users can cancel events.
Cancel Negotiation Page	Users can cancel negotiations.
Cancel Outcome Page	Users can cancel the decision to create an outcome document.
Cancel Proxy Bidding Page	Users can cancel proxy bidding.
Category Savings Page	Users can view Savings by Category report.
Change First Award Approver page	Users can change first award approver.
Close Early Page	Users can close negotiations early.
Compare Header Level Attributes	Users can compare header level attributes.
Complete Award Page	Users can complete an award.
Complete RFI Page	Users can complete RFI.
Control Access to Negotiation Lines	Users can control suppliers' access to different negotiation lines during negotiation creation.
Controls Page in Create Flow	Users can define negotiation control information during negotiation creation.
Create Award Scenario Page	Users can create award scenarios in award optimization.
Create Fields OA Page	Users can create fields for abstract and forms.
Create Group Details Page	Users can enter line group details.
Create Inv List	Users can create invitation lists.
Create New Event Page	Users can create new events.
Create or Edit Price Element Type	Users can create or edit price factor types.
Create Outcome Page	Users can create purchase orders as outcome of negotiations.
Create Price Differentials	Users can create price differentials.
Create Response OA Page	Users can create responses.
Create Sections or Forms OA Page	Users can create sections or forms.
Create Surrogate Response: Search & Select Supplier page	Users can search and select suppliers to create surrogate responses.

User Function Name	Description
Creation Attribute Sequence Page	Users can define the sequence of attributes during negotiation creation.
Creation Item Summary Page	Users can define line information during negotiation creation.
Creation Score Page	Users can enter scores for line attributes during negotiation creation
Define Incumbent Suppliers Page	Users can define incumbent suppliers in award optimization.
Define Item Detail Page	Users can define line details during negotiation creation.
Define Suppliers Page in Create Flow	Users can define supplier information during negotiation creation.
Discussion Summary	Users can access online discussions.
Disqualify Response	Users can disqualify responses.
Download Negotiation Items to Spreadsheet	Users can download negotiation lines to spreadsheets.
Edit Additional Constraints Page	Users can edit additional constraints in award optimization.
Edit Draft Sourcing Documents	Users can directly edit the AutoCreated draft negotiations in Oracle Sourcing.
Edit Price Element List Page	Users can edit price factor lists.
Enter Allocations Page	Users can enter allocations.
Enter Response Item Details OA Page	Users can enter response line details.
Export Awards Page	Users can export awards to spreadsheets.
Forms JRAD Container OA Page	Users can access abstract and forms details.
Header Attribute Scoring Settings page	Users can select header attribute scoring settings.
Header Attribute Spreadsheet Page	Users can upload header attribute spreadsheets.
Header page in Create Flow	Users can define header information during negotiation creation.
Intelligence	Users can access Intelligence tab.
Invite Additional - Invitation List Search	Users can search invitation list when they invite additional suppliers.
Invite Additional - Supplier Search	Users can search suppliers when they invite additional suppliers.
Invite Additional - View Reusable Invitation List	Users can view reusable invitation lists when they invite additional suppliers.
Invite Additional Supplier	Users can invite additional suppliers.
iProcurement: Requisition Details	Users can view requisition level details.
iProcurement: Requisition Lifecycle Tracking	Users can view requisition line level details.
iProcurement: View Purchase Order Details	Users can view purchase orders from requisition details.
Item Details page for negotiation creation	Users can view line details during negotiation creation.
Item Savings Page	Users can view Savings by Items report.

User Function Name	Description
List Attribute Sequence Page	Users can define the sequence of attributes while defining an attribute list.
Live Console Page	Users can view live console.
Load Awards Page	Users can load awards from spreadsheets.
Manage Attribute List	Users can edit, delete, and publish attributes lists.
Manage Bidder List	Users can edit, delete, and publish invitation lists.
Manage Collaboration Team	Users can manage the collaboration team for negotiations that th can access.
Manage Contract Terms	Users can manage contract terms.
Manage Draft Negotiations Page	Users can access draft negotiations.
Manage Draft Responses OA Page	Users can edit, delete, and publish any draft responses.
Manage Draft Sourcing Documents	Users can edit, delete, and publish any draft negotiations.
Manage Draft Surrogate Responses	Users can edit, delete, and publish any draft surrogate responses
Manage Global Agreements	Users can create negotiations with global agreements outcome.
Manage Header Attributes	Users can manage header attributes.
Manage Negotiation Abstract and Forms	Users can manage abstract and forms in negotiation summary.
Manage Negotiation Employee Search	Users can manage negotiation employee search.
Manage Negotiation Team	Users can manage collaboration teams for negotiations they crea
Manage Price Element List Page	Users can edit, delete, and publish price factor lists.
Manage Price Element Types	Users can manage price factor types.
Manage Sections and Fields OA Page	Users can manage sections and fields for abstracts and forms.
Manage Sourcing Document Templates	Users can create, edit, and manage negotiation templates.
Manage Templates OA Page	Users can access templates.
Manual Extend	Users can manually extend negotiations.
Move Negotiation Lines	Users can move negotiation lines.
Negotiation Cancel / Delete	Users can cancel and delete negotiations.
Negotiation Contract Terms Page	Users can define contract terms during negotiation creation.
Negotiation Creation View Price Break Differentials Page	Users can view price break differentials during negotiation creat
Negotiation Cross Copy Page	Users can copy negotiations across different document types.
Negotiation Item Details Page	Users can view negotiation line details.
Negotiation Summary Page	Users can view the Negotiation Summary page.

User Function Name	Description
Negotiation Summary View Price Break Differentials Page	Users can view price break differentials in negotiation summary.
Negotiations Configuration OA Page	Users can access the Negotiation Configuration page.
New Message	Users can send new messages.
New Round Summary OA Page	Users can view new round summary.
Pause Negotiations	Users can pause/resume negotiations.
Review Response Download Contracts	Users can download contracts response on review response page.
Preview Contract Terms	Users can generate PDF documents from structured terms.
Print Discussion	Users can print online discussions.
Publish Negotiation	Users can publish negotiations.
Purchase Order Summary	Users can view the Purchase Order Summary page.
Query Inv List	Users can query invitation lists.
Remove Approvers from Collaboration team	Users can remove approvers from collaboration teams.
Reply Message	Users can reply to messages.
Requisition Summary	Users can view requisition summary.
Review Awards Page	Users can review award results uploaded by spreadsheets.
Review Group Details	Users can review line group details.
Review page in Create Flow	Users can access review pages during negotiation creation.
Review Price Factor Values Page	Users can review price factor values.
Review Price Factor Values Page for Negotiation Creation	Users can review price factor values during negotiation creation.
Review Response OA Page	Users can review responses.
Review Uploaded Negotiation Items Page	Users can review uploaded negotiation lines.
Score Page for Header Attributes	Users can enter scores for header attributes.
Search Attribute List for Creation	Users can search attribute lists during negotiation creation.
Search Reusable Attribute List	Users can search reusable attribute lists.
Select and apply template	Users can select and apply negotiation templates.
Select Price Break Setting	Users can select price break settings.
Setup Terms and Conditions OA Page	Users can setup terms and conditions.
Show Ship To Page	Users can view ship to addresses for price breaks.
Sourcing	Text for the branding logo.
Sourcing Administration	Users can access Administration tab.

User Function Name	Description
Sourcing Buyer Home Page	Users can access buyer negotiations home page.
Sourcing Notification Link Redirect Page	Internal function to redirect users to target pages from links in notifications.
Submit Award for Approval page	Users can submit award for approval.
Submit Bid to Buyer's Negotiations	Users can submit responses to negotiations.
Submit Negotiation For Approval Page	Users can submit negotiation for approval.
Supplier Activity OA Page	Users can monitor supplier activitiies.
Supplier Details Page	Users can view supplier details.
Supplier Search Page	Users can search suppliers.
Supplier Search Page in Create Flow	Users can search suppliers during negotiation creation.
Template Item Page	Users can set defaults for lines in negotiation templates.
Text Score Page	Users can enter scores for line attributes during attribute list crea
Unlock Draft Sourcing Documents	Users can unlock any draft negotiations.
Unlock Draft Surrogate Response	Users can unlock any draft surrogate responses.
Unlock Sealed Negotiations	Users can unlock any sealed negotiations.
Unseal Sealed Negotiations	Users can unseal any sealed negotiations.
Update Price Factor Values Page	Users can update price factor values.
Update Response Deliverables	Users can update response deliverables during response creatior
Upload Negotiation Items from Spreadsheet	Users can upload negotiation lines from spreadsheets.
Value Analysis	Users can view savings generated by AutoAward.
View Acknowledge	Users can view acknowledgement of negotiation participation.
View All Requisitions	Users can view requisitions under their organizations.
View Bid	Users can view responses.
View Bid History	Users can view response history.
View Bid Price Break Differentials Page	Users can view price break differentials of responses.
View Bidders List Page	Users can view invitation lists.
View Contact Details	Users can view contact details.
View Group Details	Users can view line group details.
View Header Attribute List	Users can view header attribute lists.
View Invitation List Page in Create Flow	Users can view invitation lists during negotiation creation.
View Line Attribute List	Users can view line attribute lists.
View Message Details	Users can view message details.

User Function Name	Description
View My Group's Requisitions	Users can view requisitions created by employees in their organizations.
View My Requisitions	Users can view requisitions owned by them.
View Net Changes OA Page	Users can view net changes of amendments and multi-rounds.
View Price Element List Page	Users can view price factor lists.
View Purchase Order Internal	Users can view purchase order details.
View Submit Net Changes OA Page	Users can view net changes during amendments and multi-rounds creation.
View Supplier Access	Users can view supplier access.
View Surrogate Responses page	Users can view surrogate responses.

Oracle Sourcing Supplier Job Functions

User Function Name	Description
Accept Terms & Conditions OA Page	Users can accept terms and conditions.
Acknowledge Amendments OA Page	Users can acknowledge amendments.
Acknowledge Participation	Users can acknowledge negotiation participation.
Advanced Workflow Worklist	Users can access advanced worklist to view notifications.
Amendment History Seller OA Page	Users can view supplier amendment history.
Auction Monitor	Users can view auction monitor.
Award By Line page in Award Flow	Users can view all lines to be analyzed/awarded.
Award By Quote page in Award Flow	Users can view all responses to be analyzed/awarded.
Award Line page in Award Flow	Users can analyze/award on the line level.
Award Quote page in Award Flow	Users can analyze/award on the response level.
Bid By Spreadsheet OA Page	Users can submit responses by spreadsheets.
Bid Price Break Differentials Page	Users can respond to price break differentials.
Cancel Proxy Bidding Page	Users can cancel proxy bidding.
Compare Header Level Attributes	Users can compare header level attributes.
Create Response OA Page	Users can create responses.
Discussion Summary	Users can access online discussions.
Edit Personal Information	Users can edit personal information.
Enter Response Item Details OA Page	Users can enter response line details.

User Function Name	Description
Forms JRAD Container OA Page	Users can access abstract and forms details.
Manage Draft Bids or quotes	Users can access draft responses.
Manage Draft Responses OA Page	Users can edit, delete, and publish any draft responses.
Monitor Bid	Users can monitor their own responses with AutoRefresh setting.
Monitor Event	Users can monitor events.
My Disqualified Bids Page	Users can view their disqualified responses.
My Lost Bids Page	Users can view their lost responses.
My Won Bids Page	Users can view their won responses.
Negotiation Item Details Page	Users can view negotiation line details.
Negotiation Summary Page	Users can view the Negotiation Summary page.
Negotiation Summary View Price Break Differentials Page	Users can view price break differentials in negotiation summary.
New Message	Users can send new messages.
New Round Summary OA Page	Users can view new round summary.
Open Invitation Page	Users can view open invitations.
Review Response Download Contracts	Users can download contracts response on review response page.
Print Discussion	Users can print online discussions.
Reply Message	Users can reply to messages.
Respond To Auctions Page	Users can search negotiations to respond to.
Review Group Details	Users can review line group details.
Review Response OA Page	Users can review responses.
Show Ship To Page	Users can view ship to addresses for price breaks.
Sourcing	Text for the branding logo.
Sourcing Notification Link Redirect Page	Internal function to redirect users to target pages from links in notifications.
Sourcing Supplier Home Page	Users can access supplier negotiations home page.
Submit Bid to Buyer's Negotiations	Users can submit responses to negotiations.
Unlock Draft Response	Users can unlock any draft responses.
Update Response Deliverables	Users can update response deliverables during response creation.

User Function Name	Description
View Active Bids Page	Users can view active responses.
View Bid	Users can view responses.
View Bid History	Users can view response history.
View Bid Price Break Differentials Page	Users can view price break differentials of responses.
View Contact Details	Users can view contact details.
View Group Details	Users can view line group details.
View Message Details	Users can view message details.
View Net Changes OA Page	Users can view net changes of amendments and multi-rounds.

C

Oracle Sourcing Notifications

This appendix covers the following topics:

- Introduction
- Notifications Content
- RFx/Auction Requires Your Approval
- RFx/Auction Requires Your Approval - Reminder
- RFx/Auction Has Been Approved
- RFx/Auction Has Been Rejected
- RFx/Auction Creation Confirmation
- RFx/Auction Invitation - Supplier Contact
- RFx/Auction Invitation - Supplier Additional Contact
- RFx/Auction Acknowledgement Reminder - Participants
- RFx/Auction Extend
- RFx/Auction Bid/Quote Disqualification - All Invitees and Respondents
- RFx/Auction Bid/Quote Disqualification - Respondent with Bid/Quote Disqualified
- RFx/Auction Early Close
- RFx/Auction Additional Round Invitation - Uninvited Participants
- RFx/Auction Amendment Acknowledgement
- RFx/Auction Canceled
- RFQ/Auction Award Approval Required
- RFQ/Auction Award Approval Reminder
- RFQ/Auction Award Approval Approved
- RFQ/Auction Award Approval Rejected
- RFQ/Auction Award
- RFQ/Auction Allocation Failed
- RFQ/Auction Purchase Order Creation Notification
- Reminder Notifications
- Timing of Reminder Notifications

Introduction

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

For each notification, the following details are covered:

- The recipient

- The triggering event

- Appropriate action by the recipient

- Any subsequent action

- Sample text

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

Notifications Content

The notifications sent by Oracle Sourcing provide the recipient with high-level information about the negotiation as well as information related to the triggering event, including what action the recipient should take. Each notification contains the following regardless of the triggering event of the notification:

- Title: The title of the notification

- From: The person whose action initiated the notification.

- To: The person to whom the notification is sent.

- Sent: Date and time the notification was sent

- ID: System generated number for this notification

- Company: The buyer company conducting the negotiation

- Title: The title of the negotiation

- Number: The negotiation number

- Negotiation Preview: The date and time the negotiation opens for preview (if specified)

- Negotiation Open: The date and time the negotiation opens for responding

- Negotiation Close: The date and time the negotiation is to be closed as of the time the notification was generated (the negotiation may have been closed early or extended after the negotiation was sent).

Additionally, the notification will contain specific information related to the event that triggered the event. In some cases, the notification is for information only; in other cases, some type of action is required by the recipient. If action is required, the notification text will indicate what needs to be done.

Summary of Negotiation Notifications

Title	Event	Recipient	Action
RFx/Auction Requires Your Approval	Buyer submits the document for approval (document approval, not award approval)	All approvers on the collaboration team	Review the negotiation and either approve or reject
RFx/Auction Requires Your Approval - Reminder	Generated automatically halfway between the time the first notification was sent and either the preview date (if specified), the open date (if specified), or the close date (if the open date is immediate) (document approval, not award approval)	Any approver on the collaboration team who has not yet approved or rejected the sourcing document	View the negotiation and approve or reject
RFx/Auction Has Been Approved	Whenever the last negotiation approver on the collaboration team approves the negotiation	Negotiation creator	For information
RFx/Auction Has Been Rejected	Whenever an approver on the collaboration team rejects the negotiation	Negotiation creator	View rejection reason, modify the negotiation and resubmit for approval
RFx/Auction Creation Confirmation	When the negotiation is opened for preview or responding	Negotiation creator.	For information
RFx/Auction Invitation - Supplier Contact	When the negotiation is published	Potential suppliers	Acknowledge intent (online or via e-mail), and enter Oracle Sourcing to participate
RFx/Auction Invitation - Supplier Additional Contact	When the negotiation is published	Any additional supplier contacts	Register if necessary, acknowledge intent, and enter Oracle Sourcing to participate
RFx/Auction Acknowledgement Reminder - Participants	See section on Reminder Notifications for information	All supplier contacts who have not yet acknowledged	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
RFx/Auction Extend	When the negotiation is extended	All invitees and respondents	For information
RFx/Auction Bid/ Quote Disqualification - All Invitees and Respondents	When a bid/quote is disqualified	All invitees and respondents	For information

Title	Event	Recipient	Action
RFx/Auction Bid/ Quote Disqualification - Respondent with Bid/Quote Disqualified	When a bid/quote is disqualified	Respondent with disqualified bid/quote	View reason for disqualification and resubmit a new response
RFx/Auction Early Close	When a negotiation is closed early	All invitees and respondents	For information
RFx/Auction Additional Round Invitation - Uninvited Participants	When a negotiation is opened for an additional round of responding	Previous invitees and respondents who are not invited to the additional round	For information
RFx/Auction Amendment Acknowledgement	When an amendment is created	All invitees and respondents	View details of amendment, acknowledge amendment, and resubmit responses
RFx/Auction Canceled	When a negotiation is canceled	All invitees and respondents	For information
RFx/Auction Award Approval Required	When award decision is submitted for approval	All award approvers	View award decision and approve or reject
RFx/Auction Award Approval Required - Reminder	24 hours after the first approval notification is sent	All award approvers	View award decision and approve or reject
RFx/Auction Award Approved	Whenever the last award approver approves the award	Negotiation creator	Once all approvers have approved the award recommendation, continue award process
RFx/Auction Award Rejected	Whenever an approver rejects the award	Negotiation creator	View details of rejection, modify award recommendation as necessary, and resubmit for approval
RFx/Auction Award	When an award decision is shared with suppliers	All respondents	For information
RFQ/Auction Allocation Failed	If the requisition allocation fails	Buyer who submitted the purchase order creation process	Review the requisition allocation and resubmit the purchase order creation process
RFQ/Auction Purchase Order Creation Status	When the purchase order is/is not successfully created	Buyer who submitted the purchase order creation process	If any PO creation fails, the buyer can resubmit the purchase order creation process

RFx/Auction Requires Your Approval

Summary of e-mail notification

- Recipient: all approvers on the collaboration team

- When: buyer submits negotiation for approval

- Possible Action: review negotiation and either approve or reject

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **10-MAY-2005 10:15:30**	Number **192619**
ID **1043765**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**

Note to Approvers

To approve this document, press the Approve button on this page. To reject it, press the Reject button. You may enter a note to the buyer in the space below before approving or rejecting.

Click here if you want to view the document before approving or rejecting it. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFx/Auction Requires Your Approval - Reminder

Summary of e-mail notification

- Recipient: any approver on the collaboration team who has not either approved or rejected the negotiation

- When: notification is automatically triggered halfway between when the first approval notification was sent and either the preview date (if specified), open date (if specified), or close date (if negotiation is defined as open immediately)

- Possible Action: view negotiation and approve or reject

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **13-MAY-2005 10:15:30**	Number **192619**
ID **10473701**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**

Negotiation Close **May 31, 2005 03:18 pm Chicago**
Note to Approvers

To approve this document, press the Approve button on this page. To reject it, press the Reject button. You may enter a note to the buyer in the space below before approving or rejecting.

Click here if you want to view the document before approving or rejecting it. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFx/Auction Has Been Approved

Summary of e-mail notification

- Recipient: negotiation creator

- When: whenever the last approver on the collaboration team has approved the negotiation

- Possible Action: none (information only)

- Next Steps: none

Sample e-mail text

From **Black, Mr. Chris**	Company **Vision Enterprise**
To **Tanaka, Jane**	Title **Bridge Construction Project**
Sent **15-MAY-2005 15:20:30**	Number **192619**
ID **1074122**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Approval Date **May 15, 2005 3:20 pm Chicago**

Click here to view the document. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFx/Auction Has Been Rejected

Summary of e-mail notification

- Recipient: negotiation creator

- When: whenever one of the approvers of the collaboration team rejects the negotiation

- Possible Action: view rejection reason, modify the negotiation and resubmit for approval

- Next Steps: none

Sample e-mail text

From **Smith, Mr. John**	Company **Vision Enterprise**
To **Tanaks, Jane**	Title **Bridge Construction Project**
Sent **14-MAY-2005 08:16:30**	Number **192619**
ID **1063734**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Rejection Date **May 14, 2005 8:16 am Chicago**

Note to buyer **Please apply the standard header attribute list to this negotiation.**

Click here to view the document. If you are not already logged in, you will first be taken
to a page where you will need to enter your user name and password.

RFx/Auction Creation Confirmation

Summary of E-mail notification

- Recipient: negotiation creator

- When: the negotiation is opened for preview or open for responding (if no preview
  date is specified).

- Possible Action: none (information only)

- Next Steps: none (information only)

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **12-MAY-2005 13:20:59**	Number **192619**
ID **1073681**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:20 pm Chicago**
Negotiation Close **May 31, 2005 3:18 pm Chicago**

Click here to view the document. If you are not already logged in, you will first be taken
to a page where you will need to enter your user name and password.

RFx/Auction Invitation - Supplier Contact

Summary of e-mail notification

- Recipient: potential suppliers

- When: when the negotiation is published

- Possible Action: register if necessary, acknowledge intent, and enter Oracle Sourcing
  to participate

- Next steps: preview or submit responses within Oracle Sourcing for the specified
  negotiation if preview/open time is immediate or past. Otherwise, wait until the
  negotiation is open for preview/responding.

Sample e-mail text

From **Tanaka, Jane**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **12-May-2005 13:21:00**	Number **192619**
ID **1073683**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:20 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**

To acknowledge your intent to participate, press the Yes button on this page. To decline the invitation, press the No button. You may enter a note to the buyer in the space below before acknowledging or declining.

Click here if you want to view the document before acknowledging intent to participate and/or to enter a response. If you are not already logged in, you will first be taken to a page where you will need to enter your use name and password.

RFx/Auction Invitation - Supplier Additional Contact

Summary of e-mail notification

- Recipient: any additional supplier contacts

- When: When: when the negotiation is published

- Possible Action: Enter Oracle Sourcing to acknowledge intent and to participate

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **dan.winter@acme.com**	Title **Bridge Construction Project**
Sent **20-MAY-2005 10:45:30**	Number **192619**
ID **1074599**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**

Click here to acknowledge your intent to participate.

Click here if you want to view the document before acknowledging intent to participate and/or to enter a response. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFx/Auction Acknowledgement Reminder - Participants

Summary of e-mail notification

- Recipient: respondents who have not acknowledged intent to participate

- When: negotiation is in progress and the company has not acknowledged its intent to participate. This could be one hour, one day, or three days after the open/preview date/time.

- Possible Action: acknowledge online or reply to this notification to acknowledge intent to participate

- Next Steps: none

Sample e-mail text

From **Tanaka, Jane**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **13-MAY-2005 00:49:09**	Number **192619**
ID **1073428**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 13:21 pm Chicago**
Negotiation Close **May 31, 2005 03:19 pm Chicago**
Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**

To acknowledge your intent to participate, press the Yes button on this page. To decline the invitation, press the No button. You may enter a note to the buyer in the space below before acknowledging or declining.

Click here if you want to view the document before acknowledging your intent to participate and/or to enter a response. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

If you are using this system for the first time, click to submit a request to us to create a user for you.

RFx/Auction Extend

Summary of e-mail notification

- Recipient: all invitees and participants

- When: buyer has extended the negotiation

- Possible Action: none (information only)

- Next Steps: respondents may decide to resubmit responses

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **15-MAY-2005 12:20:59**	Number **192619**
ID **1073781**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**
Extended Close **July 31, 2005 03:18 pm Chicago**

Click here to view the document. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFx/Auction Bid/Quote Disqualification - All Invitees and Respondents

Summary of e-mail notification

- Recipient: all invitees and participants

- When: the buyer has disqualified a response

- Possible Actions: respondents may wish to resubmit new responses

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **18-MAY-2005 12:20:59**	Number **192619**
ID **1073781**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Date Disqualified: **May 21, 2005 05:28 pm Chicago**

This is to inform you that a bid in this negotiation has been disqualified.

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

Summary of e-mail notification

- Recipient: respondent whose response has been disqualified

- When: the respondent's response is disqualified

- Possible Action: respondent can view reason for disqualification and resubmit a new response

- Next Steps: none (information only)

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **ALAN BROWN**	Title **Bridge Construction Project**
Sent **18-MAY-2005 14:45:59**	Number **192619**
ID **1076783**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Date Disqualified **May 21, 2005 5:28 pm Chicago**

Supplier **Southside Equipment**
Supplier Site **HEADQUARTERS**

Reason for disqualification: **This bid does not conform to the terms and conditions for this auction.**

Click here to view the disqualified bid, from where you can optionally create a fresh bid. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFx/Auction Early Close

Summary of e-mail notification

- Recipient: all invitees and participants

- When: buyer closes the negotiation early

- Possible Action: none (information only)

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **20-MAY-2005 15:20:30**	Number **192619**
ID **1073799**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**
Early Close **May 20, 2005 03:20 pm Chicago**

Reason for closing early. **This auction is going into a new round.**

RFx/Auction Additional Round Invitation - Uninvited Participants

Summary of e-mail notification

- Recipient: all invitees and participants from previous round who have not been invited to the subsequent round

- When: buyer opens the negotiation for the subsequent round

- Possible Action: none (information only)

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **ALAN BLAIR**	Title **Bridge Construction Project**
Sent **25-MAY-2005 08:47:30**	Number **192619-2**
ID **1083499**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Supplier **Southside Equipment**
Supplier Site **HEADQUARTERS**

Thank you for participating in earlier rounds of this negotiation. You have not been invited to participate in an additional round of negotiating.

RFx/Auction Amendment Acknowledgement

Summary of e-mail notification

- Recipient: all invitees and participants

- When: buyer creates an amendment to the negotiation

- Possible Action: review the details of the amendment and acknowledge it

- Next Steps: resubmit bids

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **15-MAY-2005 14:23:30**	Number **192619,1**
ID **1073788**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close: **May 31, 2005 03:18 pm Chicago**
Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**

This auction has been amended. To be considered for award you must acknowledge each amendment and resubmit your response to ensure your response complies with the changes.

Click here to review the changes for this amendment. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFx/Auction Canceled

Summary of e-mail notification

- Recipient: all invitees and participants

- When: a buyer cancels a negotiation

- Possible Actions: none (information only)

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **15-MAY-2005 12:20:59**	Number **192619**
ID **1073781**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**

Cancel Date **May 28, 2005 10:25 am Chicago**
Cancellation Reason Insufficient number of responses

RFQ/Auction Award Approval Required

Summary of e-mail notification

- Recipient: all award approvers

- When: the buyer submits the award decisions for approval

- Possible Action: view award decisions and approve if appropriate

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **20-MAY-2005 14:00:33**	Number **192619**
ID **1083256**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Intended Award Date

Note to Approvers

Select from the buttons on this page to take appropriate action or click here to view the award recommendation, from where you can also either Approve or Reject. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFQ/Auction Award Approval Reminder

Summary of e-mail notification

- Recipient: all award approvers

- When: 24 hours after the initial approval notification is sent

- Possible Action: view award decisions and approve if appropriate

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **21-MAY-2005 14:00:33**	Number **192619**
ID **1083756**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Rejection Date **May 28, 2005 10:45 am Chicago**
Intended Award Date

Note to Approvers

Select from the buttons on this page to take appropriate action or click here to view the award recommendation, from where you can also either Approve or Reject. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFQ/Auction Award Approval Approved

Summary of e-mail notification

- Recipient: negotiation creator

- When: whenever the last approver approves the award recommendation

- Possible Action: once all approvers have approved the award recommendation, continue the award process

- Next Steps: none

Sample e-mail text

From **Black, Mr. Chris**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **23-MAY-2005 14:00:33**	Number **192619**
ID **1083678**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Approval Date J**une 5, 2005 11:08 Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Intended Award Date

Click here to view the approved award recommendation. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFQ/Auction Award Approval Rejected

Summary of e-mail notification

- Recipient: negotiation creator

- When: whenever an approver rejects the award recommendation

- Possible Action: view the rejection details and modify the award recommendation

- Next Steps: none

Sample e-mail text

From **Black, Mr. Chris** To **Jane Tanaka** Sent **22-MAY-2005 14:00:33** ID **108478**	Company **Vision Enterprise** Title **Bridge Construction Project** Number **192619**

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Intended Award Date

Note to Buyer

Click here to view the rejected award recommendation, from where you can modify the award. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

RFQ/Auction Award

Summary of e-mail notification

- Recipient: all respondents

- When: the buyer shares the award decision

- Possible Action: none (information only)

- Next Steps: none

Sample e-mail text

From **Jane Tanaka** To **SUE BROWN** Sent **25-MAY-2005 17:00:33** ID **1083481**	Company **Vision Enterprise** Title **Bridge Construction Project** Number **192619**

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**
Award Date **June 5, 2005 5:00 pm Chicago**
Your Bid Number **151168**

Number of line(s) awarded from your bid: **1**
Number of line(s) rejected from your bid: **0**

Note to Supplier:

Click <u>here</u> to view your bid. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

Important Note: This award decision may or may not result in the generation of a purchase order.

RFQ/Auction Allocation Failed

Summary of e-mail notification

- Recipient: buyer who submitted the purchase order creation request

- When: requisition allocation fails in Oracle Purchasing

- Possible Action: review allocations and correct

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2005 11:01:34**	Number **192619**
ID **1043855**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Organization **Vision Operations**
Line Number **Line information is not available at this point**
Item,Rev/Job
Line Description
Requisition Number(s)

Error: **Requisition split Error - Your encumbrance accounting transaction(s) completed with exception(s).**

Your allocations have been saved. If the process failed due to an error other than System Error, click <u>Allocation Summary page</u> to modify allocations and restart Standard Purchase Order creation. If you are not already logged in, you will first be taken to a page where you will need to enter your user name and password.

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

RFQ/Auction Purchase Order Creation Notification

Summary of e-mail notification

- Recipient: buyer who submitted the purchase order for creation

- When: purchase order is/is not created

- Possible Action: the buyer can resubmit the purchase order creation process if purchase order creation fails

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **20-MAY-2005 11:45:30**	Number **192619**
ID **1043852**	

Negotiation Preview **Not specified**
Negotiation Open **May 12, 2005 10:21 pm Chicago**
Negotiation Close **May 31, 2005 03:18 pm Chicago**
Organization **Vision Operations**
Number of Standard Purchase Order(s) created **1**
Number of Standard Purchase Order(s) not created **0**

Details of Standard Purchase Order(s) created
Bid Number **175172**

Supplier **Acme Widgets**
Supplier Site **HEADQUARTERS**
Standard Purchase Order Number **3495**
Buyer **Jane Tanaka**

Details of Standard Purchase Order(s) not created
Bid Number
Supplier
Supplier Site
Standard Purchase Order Number Not Created
Buyer
Error

For those lines where Standard Purchase Orders were not created, your
manual allocations have been saved. If the process failed due to an error
other than System Error, please go to Allocations Summary to
modify allocations and restart Standard Purchase Order creation.

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

Details of up to 10 created Standard Purchase Orders will be displayed.
To view the details of all created Standard Purchase Orders, please go to the Purchase
Order Summary

Reminder Notifications

Reminder notifications are sent to certain persons associated with a negotiation if they
have not responded to earlier notifications. For example, approvers on the collaboration
team receive a reminder if they have not approved a negotiation document after a certain
length of time. Invited suppliers are also prompted to acknowledge whether they intend
to participate in a negotiation.

Supplier Reminder Notifications

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

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

Timing of Reminder Notifications

Approval Reminders

Negotiation document approvers and award approvers receive a reminder notification 24 hours after the first approval notification is sent.

Supplier Reminders

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

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

- If additional suppliers are added before the original reminder time, these new invitees receive reminders at the original time. However, if they are added after the original reminder time, they do not receive reminders.

- If the buyer starts another round of negotiations before the reminder time, the reminder is not sent. The new round of negotiations is treated as a regular new negotiation and invited contacts in the new round should acknowledge their intent again.

- If the negotiation is closed, cancelled or deleted before the reminder time, invitees do not receive any notifications.

- Invitees do not receive notifications if someone at their company has submitted a response.

Index

R

registering supplier users, 2-14
registering suppliers, 2-14
responsibilities
    for Oracle Sourcing, B-1
reusable attribute lists
    definition of, 2-15
reusable invitation lists
    definition of, 2-21

S

security level, specifying, 2-9
sourcing events
    creating, 3-3
    definition of, 3-3
sourcing responsibilities, assigning, 2-7
supplier online value, defining, 2-14
supplier site feature, enabling, 2-38

supplier users, registering, 2-14
suppliers, registering, 2-14
system profile options, defining, 2-6

T

terms and conditions
    definition of, 2-15

V

value sets
    defining value to, 2-35
    how used with forms and the abstract, 2-35

W

Workflow Background Process, enabling, 2-37