PeopleSoft®

# PeopleSoft Strategic Sourcing 8.8 PeopleBook

**December 2003**

## Open Source Disclosure

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# About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

**Note.** PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

## PeopleSoft Application Prerequisites

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

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

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

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

## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

# Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

## Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

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

### See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

## Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

### Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

### Telephone

Contact CPI at 800 888 3559.

### Email

Send email to CPI at psoftpress@cc.larwood.com.

### See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

## Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

| Typographical Convention or Visual Cue | Description |
|---|---|
| **Bold** | Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call. |
| *Italics* | Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.<br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W. |
| `Monospace font` | Indicates a PeopleCode program or other code example. |
| " " (quotation marks) | Indicate chapter titles in cross-references and words that are used differently from their intended meanings. |

| Typographical Convention or Visual Cue | Description |
|---|---|
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( \| ). |
| [ ] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables. |
| (ISO) | Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.<br><br>The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:<br><br>(GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive. |
| Cross-references | PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation. |

# Visual Cues

PeopleBooks contain the following visual cues.

## Notes

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

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**Note.** Example of a note.

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

**Important!** Example of an important note.

### Warnings

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

***Warning!*** Example of a warning.

## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

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

## Common Elements in These PeopleBooks

| | |
|---|---|
| **As of Date** | The last date for which a report or process includes data. |
| **Business Unit** | An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization. |
| **Description** | Enter up to 30 characters of text. |
| **Effective Date** | The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row. |
| **Once, Always,** and **Don’t Run** | Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don’t Run.<br>Select Always to run the request every time the batch process runs.<br>Select Don’t Run to ignore the request when the batch process runs. |
| **Report Manager** | Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list). |

| | |
|---|---|
| **Process Monitor** | Click to access the Process List page, where you can view the status of submitted process requests. |
| **Run** | Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. |
| **Request ID** | An ID that represents a set of selection criteria for a report or process. |
| **User ID** | An ID that represents the person who generates a transaction. |
| **SetID** | An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group. |
| **Short Description** | Enter up to 15 characters of text. |

## See Also

*Using PeopleSoft Applications*

*PeopleSoft Process Scheduler*

# Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.
- Pages with deferred processing.
- PeopleSoft standard field definitions.
- PeopleSoft Strategic Sourcing standard terms.

**Note.** This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

## PeopleSoft Application Fundamentals

The *PeopleSoft Strategic Sourcing PeopleBook* provides you with implementation and processing information for your PeopleSoft Strategic Sourcing system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

### See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*

## Pages With Deferred Processing

Several pages in PeopleSoft Strategic Sourcing operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value you enter before the system updates the page overrides the default.

Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page. For example, on the Line Bid Response page, the extended price and currency conversion do not display until you click the Recalculate button or otherwise refresh the page.

### See Also

*PeopleTools 8.44 PeopleBook: PeopleSoft Application Designer*

# Common Elements Used in This PeopleBook

**Bid**
A submission of an offer on an event.

**Bid Factor**
An element of an event, that may or may not be cost-related, which factors into the award of an event. Bid factors can be assigned weightings and used to determine the best bid.

Examples of bid factors include Price, Product Warranties, Service Level Agreements, and Defect Ratings.

**Bidder**
Anyone registered to place a bid on an event. The term *bidder* applies whether it is a sell event or a buy event.

**Business Unit**
An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

**Buy Event**
In a buy event, the event creator wants to buy goods or services. In addition to price, the creator may specify other bid factors and assign weightings, which factors into the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified End Date at which time the bids are evaluated and the event is awarded. In PeopleSoft Strategic Sourcing, there are three types of buy events:

*Auction*: Also known as a Reverse Auction. All bids are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid.

*RFx*: Also known as a Request for Quote. Each bidder submits one bid by the specified End Date, at which time the bids are evaluated and the event is awarded. Bidders never see others' bids but the event creator can see all bids throughout the event.

*Sealed RFx*: Similar to a RFx event, yet also restricts the event creator from viewing the bids until after the event has ended.

**Competitive Bid**
An event in which bidders can view each others' scores and bid as often as they want to submit the winning score.

**End Date**
The date and time the event closes − meaning that bids are no longer accepted.

**Event Creator**
The originator of the event.

**Extension Period**
The length of time an auction event is extended. Events can be extended if a bidder posts a bid at the last minute. Extensions are used to keep bidding fair by allowing bidders time to respond to the last minute bid.

**Factor Type**
The type of information being requested on the bid factor, such as monetary, numeric, date, text, yes/no, list, or separator.

**Preview Date**
The time available before an event's Start Date. During Preview, bidders may view the event, and may enter bid data into the system but not post it. Having a Preview Time for an event is optional.

**Public Event**
An event on which any person or organization may bid.

**Reserve Price**
The monetary amount that the event creator is willing to accept. When the event reaches Award status, the system warns the event creator if the highest scoring bid does not meet the reserve price. The user can still choose to award the event.

For a Sell event, the reserve price is the minimum acceptable; for a Buy event, it is the maximum acceptable.

**RFx**
A request for information or request for quote event in which each bidder bids once; bidders cannot see each others' bids and scores.

**Sell Event**
Most familiarly known as an *auction*. In a sell event, the event creator offers a good or service for sale. In addition to price, the creator may specify other bid factors which helps determine the award decision. Bidders must submit their bids, including responses to the bid factors, by a specified End Date at which time the bids are evaluated and the winners are declared. In PeopleSoft Strategic Sourcing, there are two types of sell events:

*Auction*: All bids and scores are visible to all bidders. Bidders can enter multiple bids, to beat the current highest-scoring bid.

*RFx*: Each bidder submits one bid by the specified End Date, at which time the event creators evaluates bids and awards the event. Bidders never see others' bids but the event creator can see all bids throughout the event.

**SetID**
An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your organization's structure and processing options.

**Start Date**
The date and time at which the event becomes open for bidding.

**User ID**
The system identifier for the individual who generates a transaction.

**Weighting**
Both bid factors and line items are weighted to reflect their level of importance. Weighting is used to analyze and score bids.

CHAPTER 1

# Getting Started with PeopleSoft Strategic Sourcing

This chapter provides an overview of PeopleSoft Strategic Sourcing and discusses the product's:

- Business processes.
- Roles.
- Integrations.
- Implementation.

## Understanding Strategic Sourcing

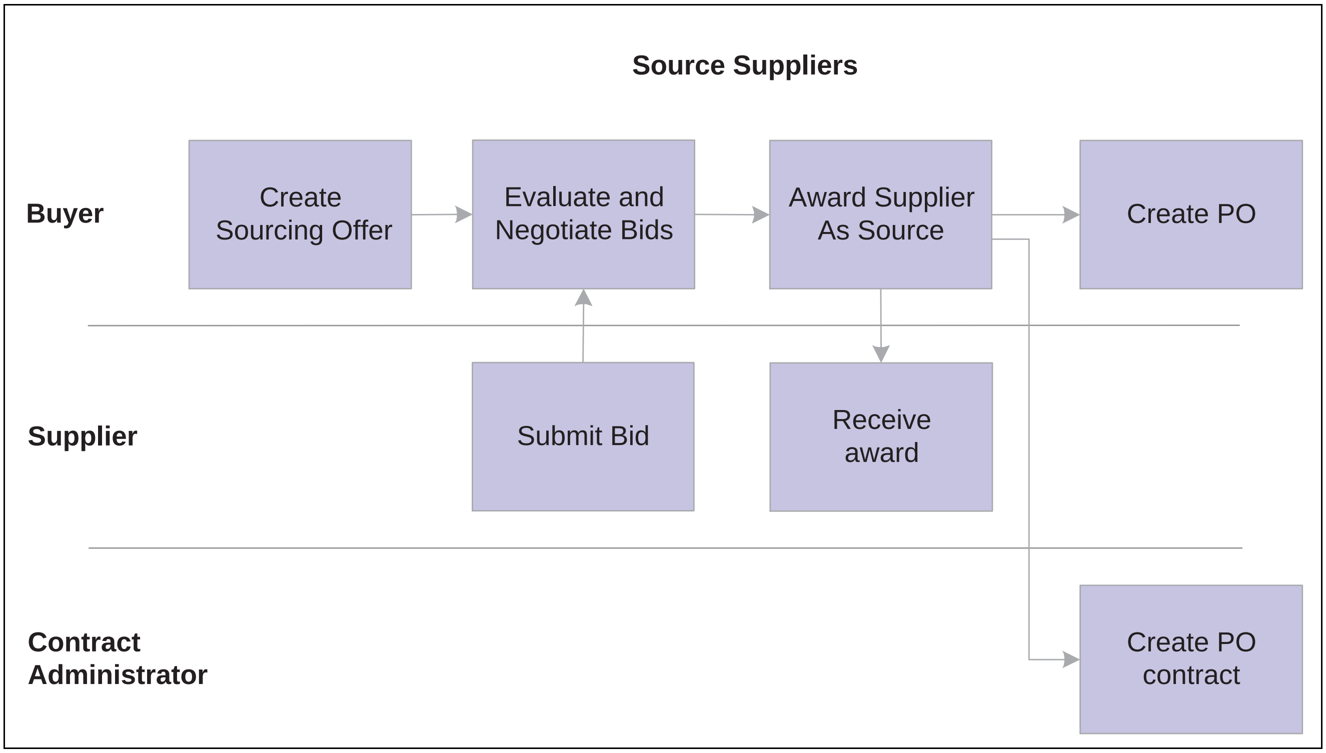
PeopleSoft Strategic Sourcing facilitates collaboration between buyers and suppliers of goods and services. Through PeopleSoft Strategic Sourcing events, you increase investment recovery through the sale of depreciated assets, and reduce costs by accepting competitive bidding for goods and services.

With this application, you can:

- Establish bid factors on which to score events.
- Create events and invite bidders to participate in them.
- Collaborate on events and event analysis with others in the enterprise.
- Enable new bidders to register to bid.
- Enable bidders to enter their bids online.
- Negotiate bids by creating multiple rounds and versions.
- Score bids and award the events.
- Use workflow processes to enable approvals and notifications throughout the event lifecycle.

## PeopleSoft Strategic Sourcing Business Processes

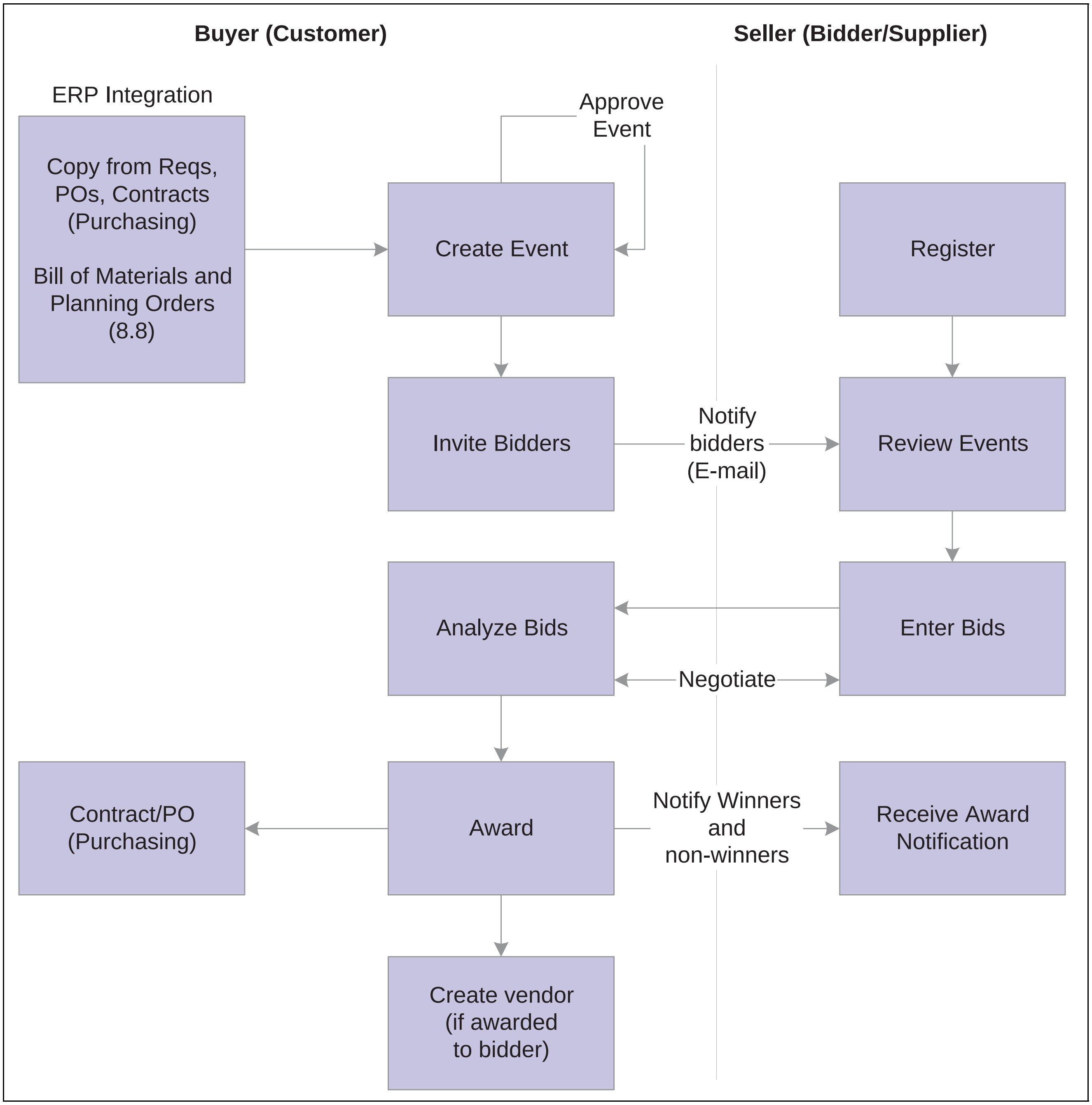
PeopleSoft Strategic Sourcing buy events are part of the Source to Settle business process.




Source Suppliers high level business process

## Buy Events

The following high level process is used for PeopleSoft Strategic Sourcing buy events:




Buy Event process flow

1. The buyer creates an event, and optionally copies from an existing event, an event template, requisitions, purchase orders, contracts, Manufacturing bills of material (BOMs), Engineering BOMs, or planned orders.

   The buyer includes bid factors, and invites bidders.

2. Optionally, the buyer invites collaborators to give input to the event, reviews the input, and posts the event based on the input.

3. Bidders register, review the event, and submit their bids.

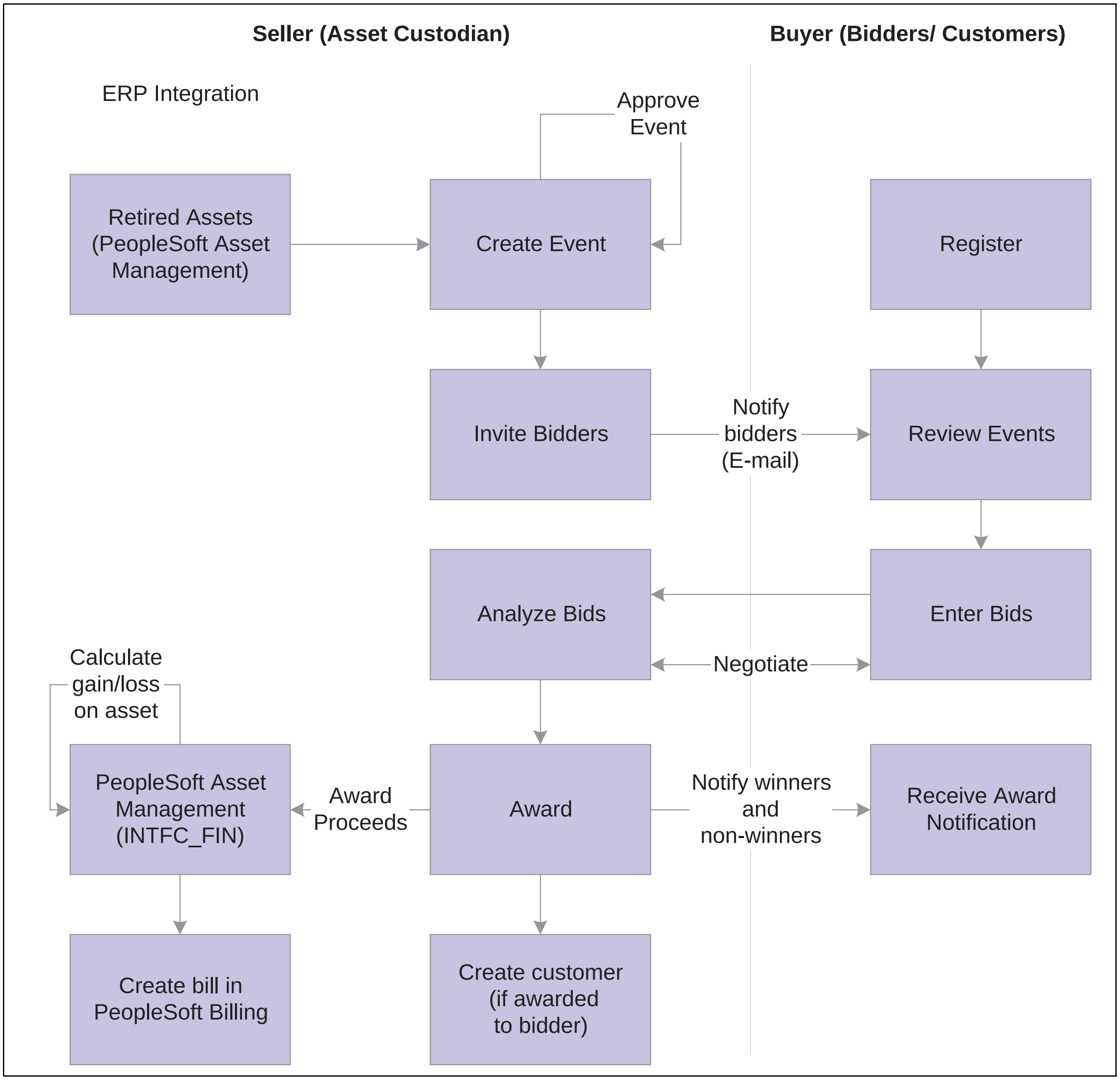
**Note.** Suppliers that exist as vendor users and have been granted the appropriate roles and permissions to bid do not need to register.

4. The buyer evaluates the bids based on the bid factors, and can create another round of the event to solicit more bids.
5. Optionally, the buyer invites collaborators to give input on the bids and bidders.
6. The buyer awards the winning bid, and the system notifies the winners and non-winners.
7. The buyer either creates a PO or a PO contract to order the goods or services from the awarded bidder.

   If the bidder isn't previously a vendor, the system creates a record for the bidder in the vendor table.

### Sell Events

The following process is used for PeopleSoft Strategic Sourcing sell events:




Sell Event process flow

1. The seller creates an event by selecting depreciated assets. The seller optionally includes bid factors, and invites bidders or customers.
2. Optionally, the seller invites collaborators to give input to the event, reviews the input, and posts the event based on the input.
3. Bidders register, review the event, and submit their bids.

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**Note.** Customers that exist as customer users and have been granted the appropriate roles and permissions to bid do not need to register.

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4. The seller evaluates the bids based on the bid factors, and can create another round of the event to solicit more bids.

5. Optionally, the seller invites collaborators to give input on the bids and bidders.
6. The seller awards the winning bid.
7. The system notifies PeopleSoft Asset Management of the sale, and PeopleSoft Asset Management notifies PeopleSoft Billing to bill the customer.

**Note.** If you create a sell event with an item added by description, thus without selecting an asset, there is no link to PeopleSoft Asset Management. Therefore, no transaction occurs when the event is awarded and the only way to bill the awarded bidder is by manually creating a bill in PeopleSoft Billing.

### Event Types

Use the following event type for the following situations:

| Situation | Recommended Event Format/Type |
|---|---|
| Information gathering for a future RFP. | RFI |
| Selling depreciated assets. You award the event to the highest bidder. | Sell/Auction price-only event. You select the Price Only check box on the Header Details page to create a price only sell event. |
| A reverse auction where price is the only consideration. You award the event to the lowest bidder. | Buy/Auction price only event. You select the Price Only check box on the Header Details page to create a price only buy event. |
| A complex purchase with many bid factors, such as a large procurement for a government agency. Bidders don't actively bid against one another, but instead submit their best overall bid. | Buy/RFx event. Optionally, you can create multiple rounds to negotiate further with selected bidders. |

### See Also

Chapter 7, "Creating Events," Entering Header Details, page 64

## PeopleSoft Strategic Sourcing Roles

This section discusses roles in PeopleSoft Strategic Sourcing, and each role's business functions.

### Roles

We deliver PeopleSoft Strategic Sourcing with the following internal default roles:

- Event Administrator
- Event Approver
- Event Buyer/Seller
- Event Collaborator

The following external default roles are delivered with PeopleSoft Strategic Sourcing:

- Event Bidder: businesses or individuals with whom the enterprise has not previously done business.
- Event Customer: businesses or individuals with whom an enterprise has sold to before.
- Event Vendor: businesses from which an enterprise has purchased before.
- Guest

## Event Administrators

Event Administrators perform the following tasks:

1. Set up the Strategic Sourcing business unit.
2. Set up bidder registration.
3. Set up bidder self-categorization trees.
4. Set up the file attachment server.
5. Set up discussion forums.
6. Set up chats using the MultiChannel Framework.
7. Reviews and approves bidder registration requests if registration approvals are turned on.

## Event Approvers

Event Approvers perform the following tasks:

1. Receive workflow notification of a pending event.
2. Approve or disapprove the event.

## Event Buyer/Seller

Event buyers and sellers perform the following tasks:

1. Create bid factors.
2. Create events and invite bidders.
3. Invite collaborators (optional).
4. Monitor their event. If necessary, pause the event or create another round or version.
5. Invite collaborators for event analysis.
6. Analyze the event.
7. Award a bidder.

## Event Collaborators

Event collaborators perform the following tasks:

1. Receive invitations to collaborate on event creation.
2. Check out events from the Manage Events Workbench and enter input on bid factors.
3. Receive an invitation to collaborate on event analysis.
4. Enter input on bids and bidders.

### Event Bidders

Bidders perform the following tasks:

1. Receive invitations to bid, or express interest in bidding.
2. Register to bid on events.
3. Submit bids.
4. View their rankings and scores during the event, if the event creator displays that information to bidders.
5. If invited, bidders can submit bids for multiround events.

### Event Customer

Event Customers carry out the following tasks:

1. Receive invitations to bid, or express interest in bidding.
2. Submit bids.
3. View their rankings and scores during the event, if the event creator displays that information to bidders.
4. If invited, bidders can submit bids for multiround events.

### Event Vendor

Event Vendors carry out the following tasks:

1. Receive invitations to bid, or express interest in bidding.
2. Submit bids.
3. View their rankings and scores during the event, if the event creator displays that information to bidders.
4. If invited, bidders can submit bids for multiround events.

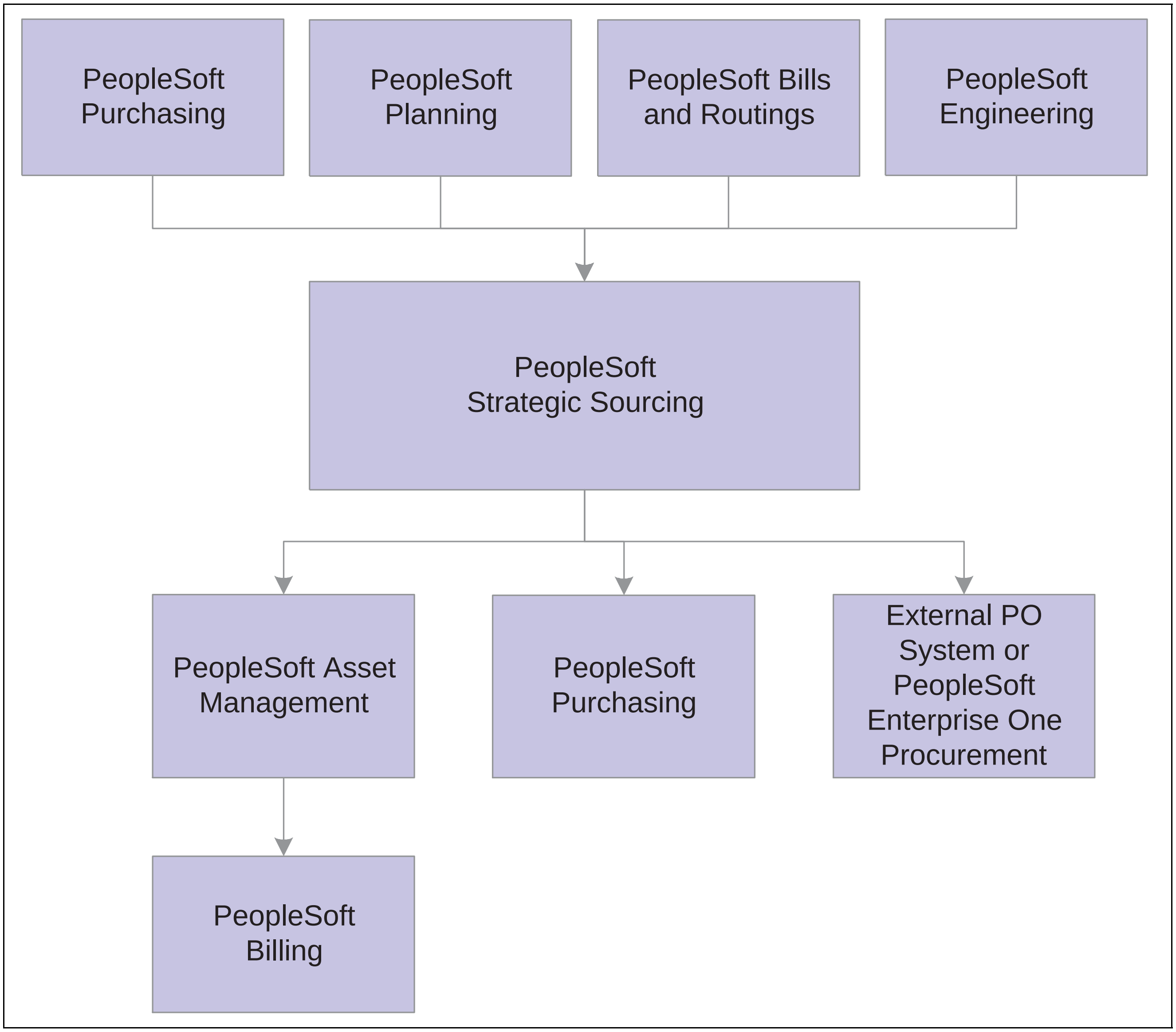
### Event Guest

Guest bidders carry out the following tasks:

1. View public events that are available for bidding.
2. Elect to register in order to bid on public events.

## PeopleSoft Strategic Sourcing Integrations

PeopleSoft Strategic Sourcing integrates with the following PeopleSoft applications:




PeopleSoft Strategic Sourcing Integrations

## PeopleSoft Manufacturing and PeopleSoft Engineering

PeopleSoft Strategic Sourcing can base buy and sell events on items from PeopleSoft Engineering bills of material (BOM) and PeopleSoft Manufacturing BOMs.

## PeopleSoft Supply Planning

PeopleSoft Strategic Sourcing can base buy and sell events on items from PeopleSoft Supply Planning planned orders.

## PeopleSoft Purchasing

PeopleSoft Strategic Sourcing can base buy events on items from PeopleSoft Purchasing requisitions, purchase orders, and contracts. For awarded buy events, PeopleSoft Strategic Sourcing creates contracts or purchase orders directly in PeopleSoft Purchasing.

### PeopleSoft Asset Management

PeopleSoft Asset Management provides assets for sell events.

For analyzed and awarded sell events, PeopleSoft Strategic Sourcing passes awards to PeopleSoft Asset Management to record the proceeds from the sale of the asset. PeopleSoft Asset Management then integrates with PeopleSoft Billing to bill the customer for the sale.

### PeopleSoft Enterprise One

You can use PeopleSoft Strategic Sourcing to create and manage sourcing events, and to integrate the awards into PeopleSoft Enterprise One Procurement.

When awarding a buy event to an external purchasing system, the system creates an outbound PO message at the time of the award. No sourcing information is passed into PeopleSoft Enterprise Purchasing. An inbound message from PeopleSoft Enterprise One provides PeopleSoft Strategic Sourcing with the PO ID number from the external system for tracking purposes.

### See Also

Chapter 7, “Creating Events,” Copying Events and Creating Templates, page 72

Chapter 13, “Analyzing Bids and Awarding Events,” Posting the Award, page 169

## Implementing PeopleSoft Strategic Sourcing

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

### See Also

*PeopleSoft Setup Manager for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*

# CHAPTER 2

# Setting Up Business Units in PeopleSoft Strategic Sourcing

This chapter provides an overview of business units in PeopleSoft Strategic Sourcing and discusses how to define business units.

## Understanding Business Units in PeopleSoft Strategic Sourcing

A business unit is an operational subset of an organization. It tracks and maintains its own set of events and their respective awards.

When you create business units for events, you can set the defaults for event dates and times.

If you are using PeopleSoft Purchasing, sync the SetIDs between the business units of both applications to ensure that purchase orders and contracts are correctly created when you award events. Specifically, the same SetID should be used for the following record group IDs:

- FS_38 (vendors).
- FS_26 (locations).
- DS_02 (freight and shipping codes).
- FS_18 (items).
- PO_04 (ship to addresses).
- FS_18 (item categories).

You map the PeopleSoft Purchasing business unit to the Strategic Sourcing business unit on the Purchasing business unit setup page. This enables you to associate multiple Purchasing business units to the same Strategic Sourcing business unit, which facilitates consolidating requisitions across multiple Purchasing business units.

See *PeopleSoft Purchasing 8.8 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options".

This section discusses event dates.

### Event Dates

The formal dates within each event consist of the calendar date and the time of day, for example, 02/14/2001 9:49AM PST.

There are four dates for each event:

- Create: The date when you create the event, before it goes through the internal approval process and is made available for bidding.
- Preview: The date that you can make available to potential bidders, allowing them to review the event as well as enter and save their bids, which they can post as soon as the event starts.

  You can only preview auction and RFx events, not RFI events.
- Start: The date when bidders can begin to post bids for the event.
- End: The date when the bidding closes.

  This time can be extended; if a last-minute bid is entered, you can extend the end date to give earlier bidders the opportunity to counterbid.

# Defining Business Units

This section discusses how to:

- Define a business unit.
- Set event dates.

### See Also

Chapter 7, “Creating Events,” page 53

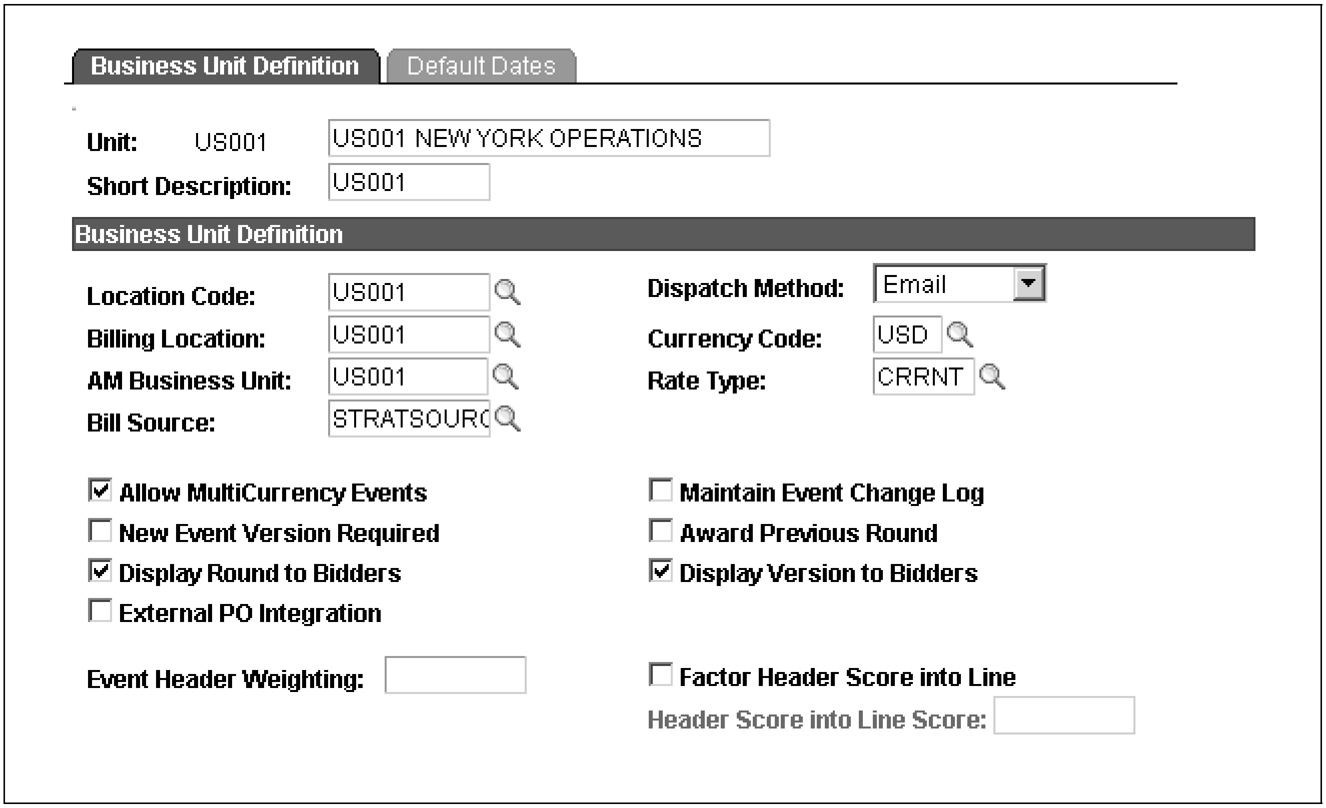
## Pages Used to Define a Business Unit

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Business Unit Definition | BUS_UNIT_TBL_A1 | Set Up Financials/Supply Chain, Business United Related, Sourcing, Business Unit Definition | Define the parameters of the business unit.<br>Either click the Add button after adding a new value, or select a business unit by number from list of existing values. |
| Default Dates | A1_DEFLT_DATE | Select the Default Dates tab on the Business Unit Definition page. | Set the dates and times for previewing, starting, and ending an event. |

## Defining a Business Unit

To set up sourcing business units, use the Maintain Business Units component.

Access the Business Unit Definition page.




Business Unit Definition page

Enter the values for the fields; these are the default values for events that are created for this business unit. You can change any of these defaults on a per-event basis, when you create events.

**Location Code** Enter default geographic locations for events within this business unit.

**Billing Location** Enter mailing addresses for billings that are to be used for this business unit. This is only applicable to sell events.

**AM Unit** (asset management unit) Enter the Asset Management Business Unit that is to be used for sell events within this business unit. Selected assets are based on the asset management business unit that is associated with the event business unit.

**Dispatch Method** Enter the default means by which bidders are notified: *Email, Print,* or *Fax.*

**Currency Code** Enter the default currency that is to be used for events that are within this business unit.

**Rate Type** Enter the default rate type that is to be used for events that are within this business unit.

**Bill Source** Enter the external and online systems from which PeopleSoft Billing receives bills. When you integrate to PeopleSoft Asset Management and sell an asset by using PeopleSoft Strategic Sourcing sell event, the Strategic Sourcing system sends the asset sale information to PeopleSoft Asset Management. PeopleSoft Asset Management then sends that information to PeopleSoft Billing to create the bill. The PeopleSoft Billing system uses the bill source to identify that the bill originated from PeopleSoft Strategic Sourcing. The system only displays this field if you have PeopleSoft Asset Management installed.

**Allow Multicurrency Events** Select to allow events to be created in currencies other than the default.

**Maintain Event Change Log** Select to indicate that you want to track the event change dates, times, and the user making changes to a sourcing event.

**New Event Version Required** Select to indicate that a new event version must be created when an event is changed.

**Award Previous Round** Select to indicate whether a previous event round can be awarded. If not selected, you can only award bids from the current round.

**Display Round to Bidders** Select that the system displays the round and version number to bidders.

**Display Version to Bidders** Select to indicate whether the event version should be displayed to the bidders. If selected, the Display Round to Bidders check box is also selected.

**External PO Integration** Select to enable awarded events to be published to external purchasing systems. The system automatically publishes the purchase order when you click the Post Award button on the Award Details page. With this selected, you can’t award buy events to PeopleSoft Purchasing.

**Factor Header Score into Line** Select to indicate that you want the system to factor the header score into the line score.

**Header Score into Line Score** Enter a default weighting for how the header score is factored into an individual line score. This option is only available if you select the Factor Header Score Into Line check box.

**Event Header Weighting** Enter a default weighting for how the system weights the header score in relation to the total score.

For example, say that you set the default event header weighting to 20 percent, and then create an event with three lines. Line 1 is weighted 50 percent, line 2 is weighted 20 percent, and line 3 is weighted 10 percent. The total weighting of the lines is 80 percent plus the defaulted weighting of the header (20 percent), totalling 100 percent.


Click the Create BU button after you enter all the field information to save the data and create the business unit.

If the business unit is unique, a new row is inserted into the SetID table.

## Setting Event Dates

Access the Default Dates page to set and maintain defaults for the preview, start, and end dates of all events that are related to this specific business unit.

These defaults can be adjusted on a per-event basis when you create individual events, at which time you can also provide for automatic extension of the event.

Enter the values of event dates and times that you need to set:

**Increment** Enter the unit of time in days, hours or minutes that you want to use to calculate the period.

**Start Time** Enter when bidders can post their bids on the items offered. The start date of the event is relative to the create date; that is, *X* days, hours, or minutes after the create date.

**Preview Time** Enter the time when prospective bidders can review the items that are offered and enter their responses to bid factors (but not post the bid). The time for preview is relative to the start time, that is, *X* days, hours, or minutes before the start time. This is optional.

**End Time** Enter the time when bidders can no longer bid; the event closes pending award. The end of the event is relative to the start time, that is, *X* days, hours, or minutes after the start time.

CHAPTER 3

# Preparing to Implement PeopleSoft Strategic Sourcing

This chapter provides an overview of PeopleSoft Strategic Sourcing implementation and discusses how to:

- Set up instant messaging by using Multi-Channel Framework.
- Set up bidder categorization trees.
- Set up the registration homepage.
- Set up discussion forums.
- Set up file attachment servers.
- Set up the uniform resource locator (URL) location for notifications.
- Prepare terms and conditions.
- Set up reason codes.
- Set up user preferences.
- Create standard comments.

## Understanding PeopleSoft Strategic Sourcing Implementation

This section discusses:

- Bidder categorization.
- Standard comments.
- Terms and conditions.
- Discussion forums.
- Implementation order.

### Bidder Categorization

You can set up bidder categorization trees, which bidders can use to register for interest in selected categories. You can use predefined trees or manually add nodes. You can select the number of node levels to display to the bidders; for example, you can display only the top three node levels of a four-node tree to the bidders.

Registered bidders can select bidding categories when they register to personalize the events in which they want to participate. Bidders can also maintain their lists of categories after they register and after becoming a vendor or customer. Event creators can use these categories to target event invitations to the group of bidders that is most interested in those events.

## Standard Comments

You can create various comments that you use regularly in various types of events. By creating standard comments, you do not have to rewrite them for each event or remember which comments need to go with which type of event.

You attach comments to events when you create the event.

You can display the comments on the event to the bidder or, if they are comments for internal use, you can hide them from bidders.

You can include comments on the award. If you are awarding to a purchase order or contract, the comments on the event also appear on the awarded purchase order or contract.

## Terms and Conditions

Terms and Conditions are the legal parameters that you establish to govern bidding on events. The Terms and Conditions document is displayed to users when they register to bid; they must accept the terms and conditions to complete their registration.

The document is also available for registered bidders to review at any time.

## Discussion Forums

Bidders can use discussion forums to communicate with the event creator. PeopleSoft Strategic Sourcing provides an event-specific forum for bidders to ask questions regarding the event and have them answered by the buyer. The forum administrator can delete messages from the forum, and delete entire forums as well.

## Implementation Order

Implement PeopleSoft Strategic Sourcing in the following order:

1. Strategic Sourcing Installation Options, including the Multichannel Framework for chat.
2. Autonumbering.
3. Bidder categorization trees.
4. Bidder registration defaults.
5. Discussion forums.
6. File attachment server.
7. URL location for notifications.
8. Bidder terms and conditions.
9. Sourcing reason codes.
10. User preferences.

11. Standard comments.

## Setting Up Instant Messaging Using MultiChannel Framework

The PeopleTools MultiChannel Framework is used to enable instant messaging among bidders and event creators. Bidders can initiate chats with an event owner, which enabling bidders to receive immediate responses on questions or clarifications for a selected event.

To set up the MultiChannel Framework:

1. Create and configure clusters.
2. Configure REN servers.
3. Configure MCF queues.
4. Access the Installation Options - Strategic Sourcing page.

   Set up MultiChannel Framework defaults.
5. Maintain MCF agents (optional).

See *PeopleTools 8.44 PeopleBook: PeopleSoft MultiChannel Framework*

---

**Note.** To maintain a chat log for events, select PeopleTools, MCF, Universal Queue, Configuration, Cluster Tuning. Change the Key log_chat_ses value to *Yes* to turn on the log. You must reboot the application server for the system to start maintaining a chat log.

---

### See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Setting Installation Options for PeopleSoft Applications,” Defining PeopleSoft Strategic Sourcing Installation Options

## Setting Up Bidder Categorization Trees

This section discusses how to set up bidder categorization trees

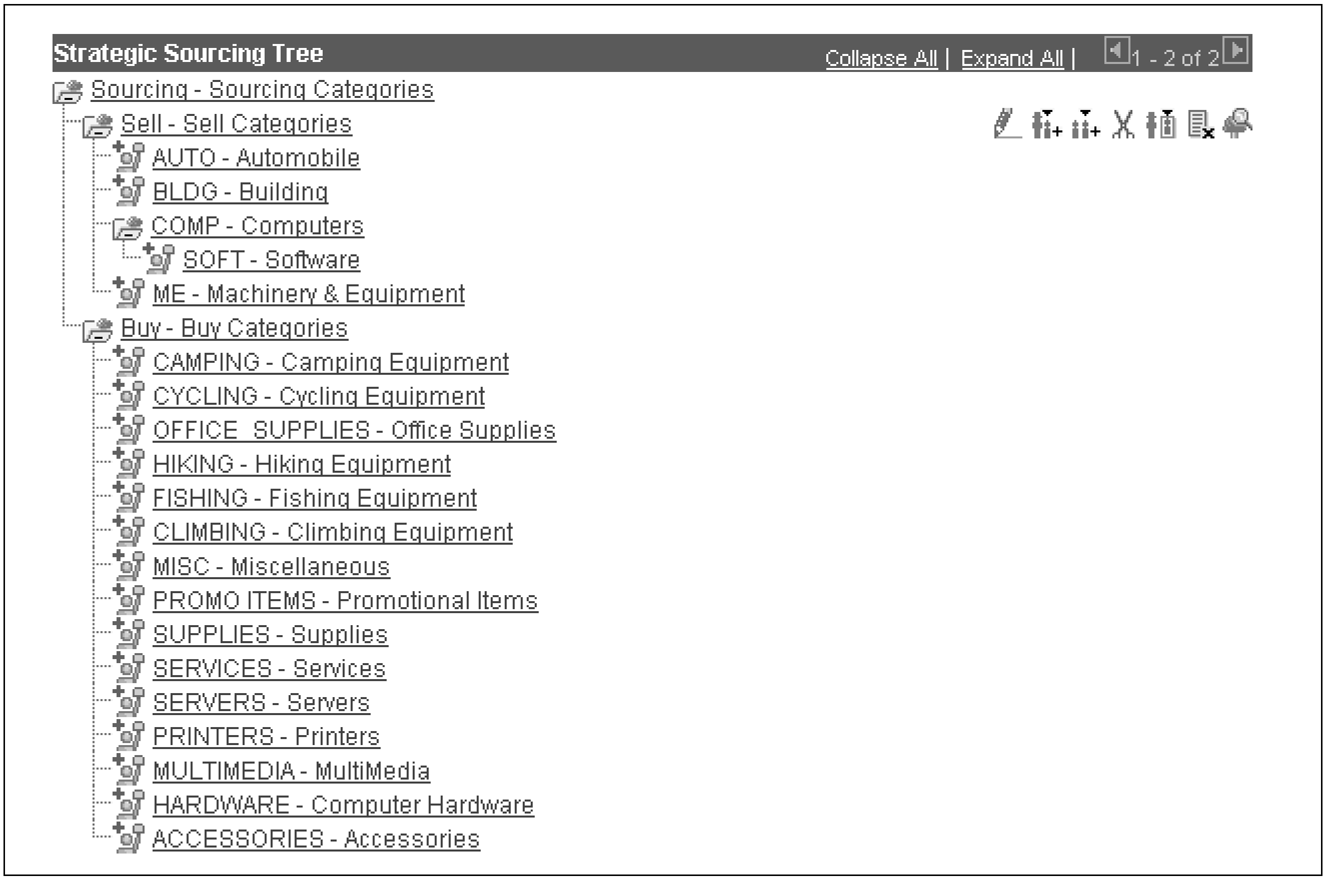
## Pages used to Set Up Bidder Categorization Trees

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Maintain Categorization Tree | AUC_CAT_CREATE_HP | Set Up Financials/Supply Chain, Product Related, Sourcing, Create SelfCategorization Tree | Create new and view existing self-categorization trees. |
| Self Categorization Tree | AUC_SLF_CAT_CREATE | Set Up Financials/Supply Chain, Product Related, Sourcing, Create SelfCategorization Tree. Click Edit to view an existing tree or create a new one. | Create and modify categorization trees that can be associated to bidders. |

## Setting Up Bidder Categorization Trees

To set up bidder categorization trees, use the Maintain Categorization Trees component.

Access the Maintain Categorization Trees page.




Maintain Categorization Tree page

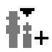
**Sourcing, Sell, Buy** Click to create a tree for sourcing, sell, or buy events.

---

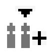
**Note.** Sell categories appear as purchase categories to bidders. Buy categories appear as sell categories to bidders.

---

Click to edit the selected tree node. The system displays the group box. Select a category and click the Submit button to add it to the tree.



Click to add a child branch to the node.



Click to add a sibling branch to the node.

Click to cut the selected child.

Click to paste a child.

Click to remove a child.

Click to add an existing PeopleSoft tree as a node to the self-categorization tree. If you have an existing item or asset category tree, it saves time to copy it into the buy or sell node.

# Setting Up the Registration Homepage

This section discusses how to set up bidder registration.

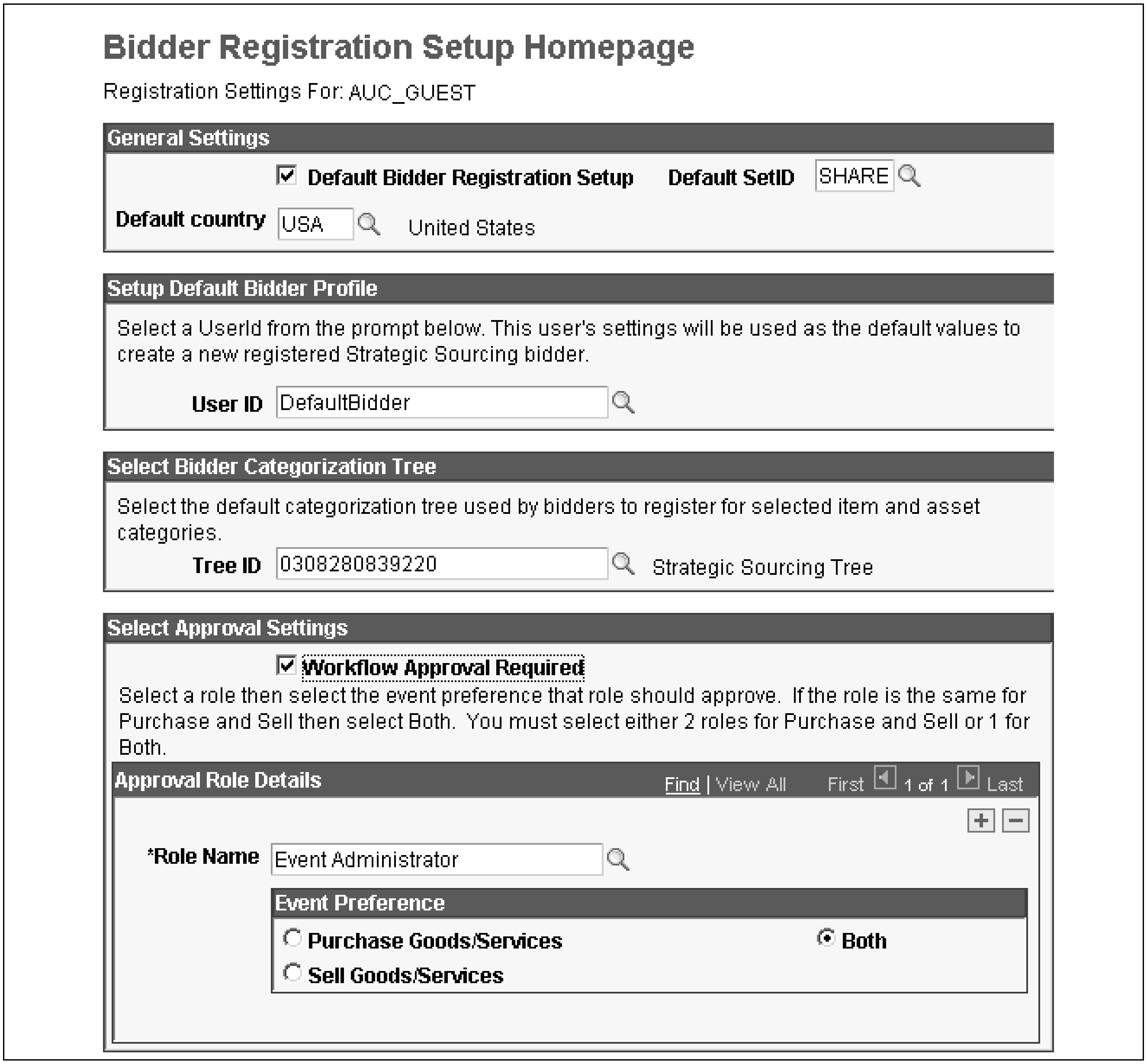
## Pages Used to Set Up the Registration Homepage

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Bidder Registration Setup Homepage | AUC_BID_REG_SETUP | Set Up Financials/Supply Chain, Product Related, Sourcing, Bidder Registration Setup | Identify the information that bidders must enter as part of registration and indicate whether approvals are required |
| Bid Factor Question | AUC_RG_BF_CMMT_SEC | Click the Bid Factor Question button on the Bidder Registration Setup Homepage. | Define profile questions for business or individuals to answer as part of the registration process. |

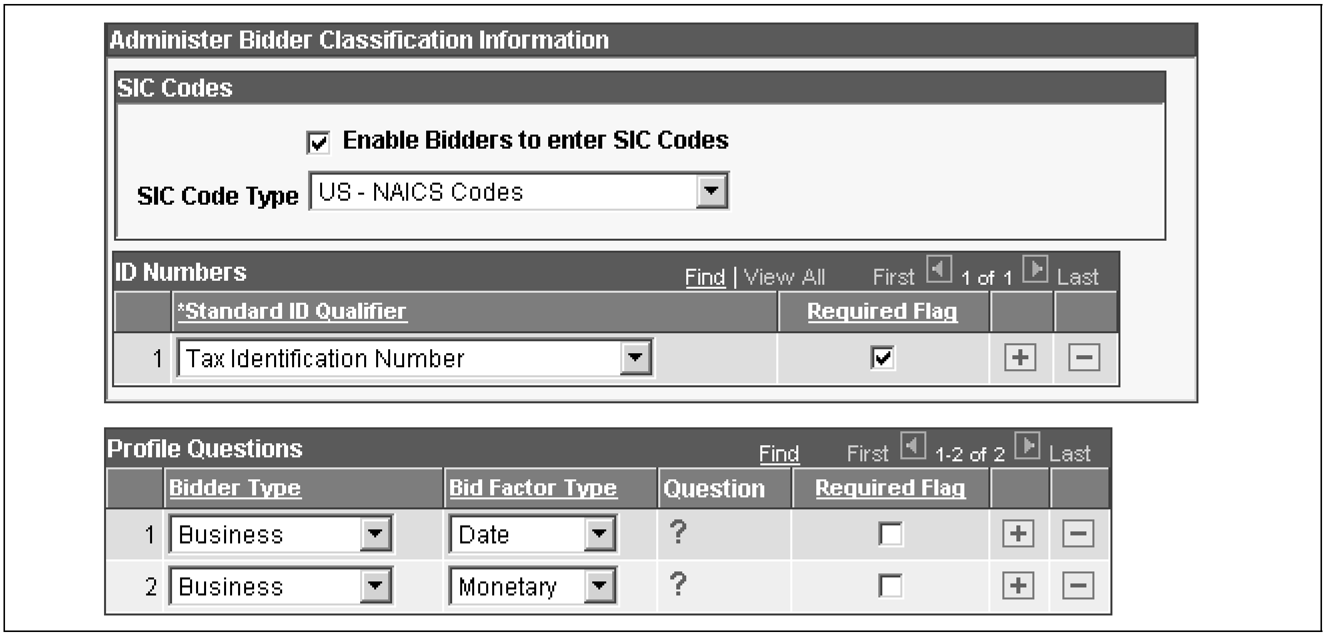
## Set Up Bidder Registration

To set up bidder registration, use the Bidder Registration Setup component.

Access the Bidder Registration Setup Homepage.




Bidder Registration Setup Homepage (page 1 of 2)




Bidder Registration Setup Homepage (page 2 of 2)

**Default Bidder Registration Setup** — Click to make the values that you enter a default guest user for the selected SetID.

**User ID** — Select to apply roles that are assigned to a default bidder to this bidder. This default bidder user ID is set up by using the User Profile - Roles page.

**Tree ID** — Assign a default bidder categorization tree to bidders when they register.

See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up Bidder Categorization Trees, page 19.

**Workflow Approval Required** — Indicate whether bidder registrations must be approved before bidders can use PeopleSoft Strategic Sourcing

**Role Name** — Assign the user role that is responsible for approving all bidder registration requests if workflow is required.

**Event Preferences** — Select the type of event to set up workflow approval for each role. Values are *Both, Purchase Good/Services, Sell Good/Services.*

**SIC Codes** (standard industry code codes) — Indicate whether bidders can enter standard industry codes that are related to their businesses. If selected, you can indicate the type of standard industry codes that bidders may select from.

**Standard ID Qualifier** — Select which ID numbers must be provided by the bidders during registration. Options include *Comp Tax Reg Number - Brazil, Company Identification Number, Company Number - Australia, DUNS Number, Dun & Bradstreet Number, Fiscal ID - Company - Italy, Fiscal ID - Indiv - Italy, Fiscal ID Number - Spain, Ind Tax Reg Number - Brazil, Municipal Reg Number - Brazil, NIC Number - France, SIREN Number - France, SIRET Number - France, State Reg Number - Brazil, Tax Identification Number.*

**Required Flag** Select to make each standard ID qualifier required for bidder registration.

**Profile Questions** Enter to obtain customer-identified information from the bidders. For example, you may want to know how many years the bidder has been in business. You create a profile code of YEARSBUS, make it a numeric type, and click the Bid Factor Question button to ask the question: How many years have you been in business? If you select the required check box, the bidder must answer to successfully register.

**Bidder Type** Indicate whether the profile question is for bidders registering as a business, an individual, or both.

**Profile Factor Type** Select standard bid factor types for profile codes: *Date, List, Monetary, Numeric, Text, Yes/No, Separator.*

**Required Flag** Select to make each profile factor required for bidder registration.

### See Also

*PeopleTools 8.44 PeopleBook: Security Administration*

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook,* "Defining User Preferences," Creating Strategic Sourcing User Preferences

# Setting Up Discussion Forums

This section discusses setting up discussion forums.

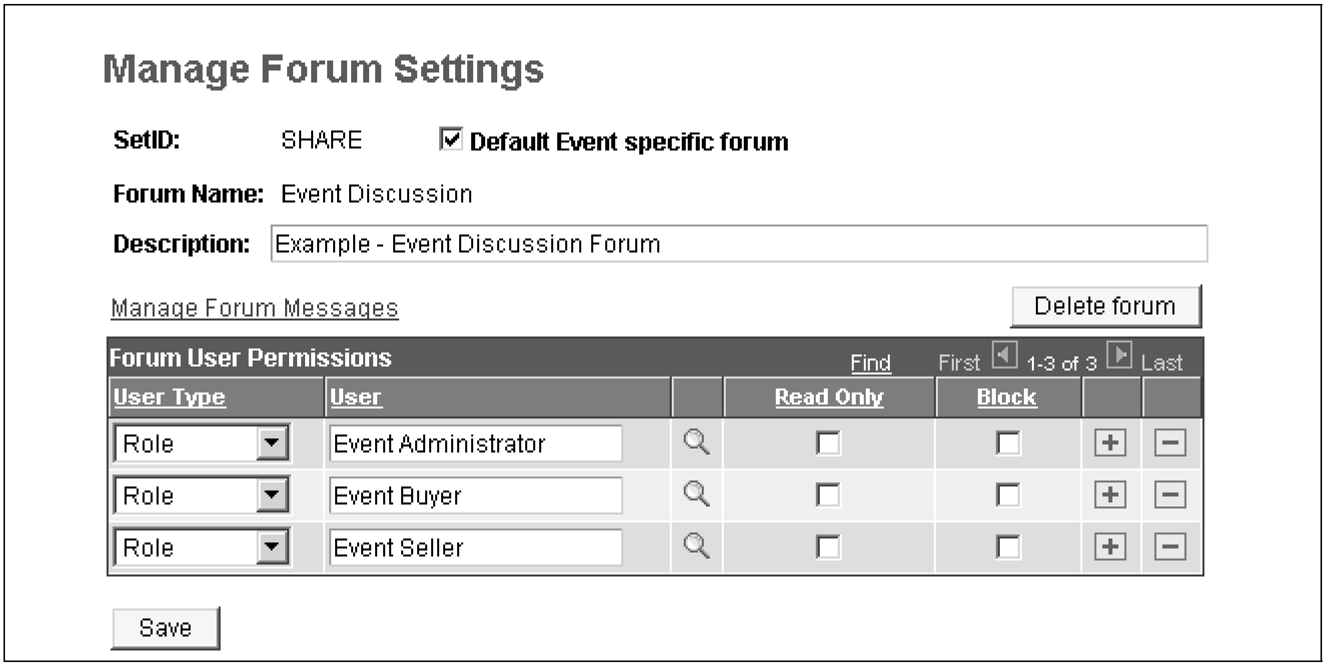
## Pages Used to Set Up Discussion Forums

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Manage Forum Settings | AUC_FORUM_MGR | Set Up Financials/Supply Chain, Product Related, Sourcing, Forum Administration | Use to create and manage discussion forums. You also can set up forum user permissions. |
| Manage Forum Messages | AUC_MESSAGE_MGR | Click the Manage Forum Messages link on the Manage Forum Settings page. | View and delete message threads. |
| Forum User Lookup | AUC_FORUM_LOOKUP | Click the Load Binds button for a user type on the Manage Forum Settings page. | Search for forum users. |

## Setting Up Discussion Forums

To set up discussion forums, use the Forum Administration component.

Access the Manage Forum Settings page.




Manage Forum Settings page

To create permissions for a discussion forum user:

1. Click Event Specific Forum to designate this forum as related to a specific event rather than a general forum.
2. You can optionally set this as the forum for which all event discussion threads are maintained by selecting the Default Event specific forum check box.
3. Enter a User Type of *Bidder, Customer, Role, User,* or *Vendor.*

   If you want to assign permission for a group of users by role, select *Role.*
4. Click Read Only to assign read permission to a user or role but not the ability to create messages.
5. Click Block to prevent the user type from accessing the discussion forum.

# Setting Up File Attachment Servers

In this section, we discuss how to set up servers to store event PDFs and XML.

## Page used to Set Up File Attachment Servers

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Maintain File Att Servers | PV_ATT_SRV_ADMIN | Set Up Financials/Supply Chain, Utilities, Administer File Attachments, Administer Attachment Servers | Used to set up the FTP server location for PDF and XML file attachments which are included with notifications. |

### Setting up File Attachment Servers

Access the Maintain File Att Servers page.

1. Click the Add FTP Server button.
2. Enter the Login Name, Password, FTP Server Name, and Pathname for the attachments.

#### See Also

*PeopleSoft eProcurement 8.8 PeopleBook*, "Using PeopleSoft eProcurement Administration," Setting Up Attachments for Transactions

## Setting the URL Location for Notifications

This section lists the page used to set up the URLs which appear on sourcing email notifications.

### Page Used to Set Up URL Locations

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| URL Maintenance | URL_TABLE | PeopleTools, Utilities, Administration, URLs | Enter the URL, pertinent description, and comments. |

### Setting Up URLs

Access the URL Maintenance page.

You must set up the following URLs:

- AUC_TEMP
- EMP_SERVLET
- SUP_SERVLET

## Preparing Terms and Conditions

To set up terms and conditions, use the Terms and Conditions Setup component.

This section discusses how to create terms and conditions.

## Pages Used to Prepare Terms and Conditions

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Define Terms and Condition | AUC_TERMS_PG | Set Up Financials/Supply Chain, Product Related, Sourcing, Define Terms and Conditions | Create legal terms for bidder agreement. |
| Terms and Conditions | AUC_VIEW_TERMS | Event Responses, View Terms and Conditions | Display terms and conditions for review. |

## Creating Terms and Conditions

Access the Define Terms and Conditions page.

**Sections** Create several sections within a Terms and Conditions document. An unlimited amount of text can go into each section.

**Message Text** Enter the text of the terms and conditions.

# Setting Up Reason Codes

In this section, we discuss how to set up reason codes.

## Page Used to Set Up Reason Codes

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Reason Codes | REASON_CD | Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes | Define reason codes, which provide explanations for occurrences such as returned stock and changes to order headers, lines, or schedules. |

## Using Reason Codes

Access the Reason Code page.

You can set up reason types and codes within PeopleSoft Strategic Sourcing. Reason types correspond to actions, codes are the reasons given for the action.

PeopleSoft delivers the following reason types and codes in PeopleSoft Strategic Sourcing, but you can add more to meet your business requirements:

- Bid Rejection
- Bidder Registration Denial
- Decline Event Invitation
- Disallow Bid
- Pause Event

- Resume Event

# Setting Up User Preferences

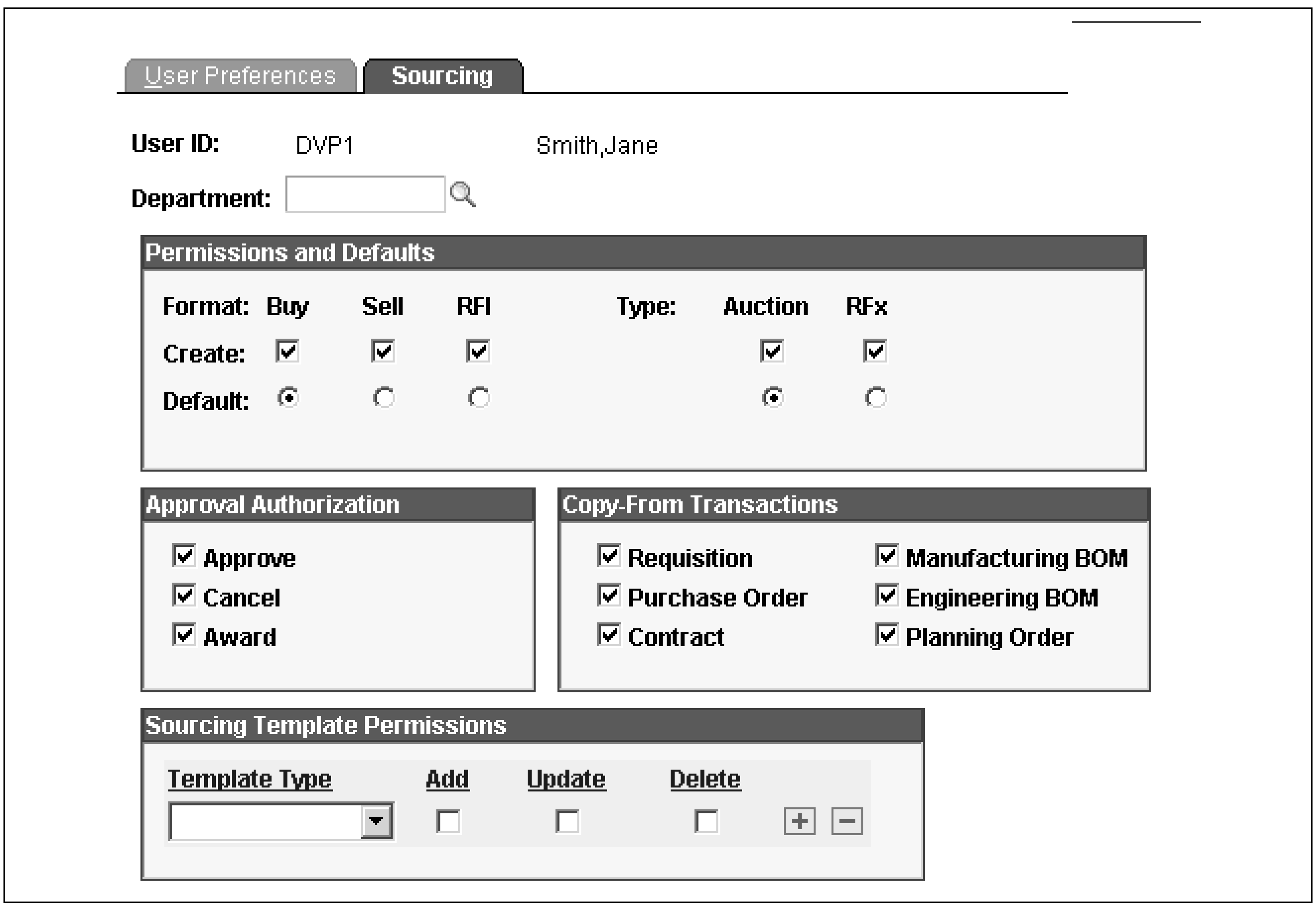
This section discusses how to create PeopleSoft Strategic Sourcing user preferences.

## Page Used to Set Up User Preferences

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| User Preferences - Sourcing | OPR_DEF_TBL_SS | Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences. Click the Strategic Sourcing link on the User Preferences page. | Capture PeopleSoft Strategic Sourcing specific user preferences and defaults. |

## Creating PeopleSoft Strategic Sourcing User Preferences

Access the Strategic Sourcing User Preferences page.




User Preferences - Sourcing page

Use this page to set up permissions and defaults for the selected user, including whether or not they can create buy, sell, or RFI events, approval authorizations, copy from transactions, and sourcing template permissions.

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**Note.** To award to purchase orders or contracts, users must have access on the Procurement User Preferences page to create contracts, purchase orders, and enter and approve vendors.

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See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Defining User Preferences,” Defining Procurement User Preferences.

### See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Defining User Preferences,” Creating Strategic Sourcing User Preferences

# Creating Standard Comments

To set up standard comments, use the Standard Comments component. To set up standard comment types, use the Standard Comments Types component.

This section discusses how to create standard comments.

### See Also

Chapter 7, “Creating Events,” page 53

*PeopleSoft Purchasing 8.8 PeopleBook*, “Defining PeopleSoft Purchasing Business Units and Processing Options,” Defining Standard Comments

## Pages Used to Create Standard Comments

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Standard Comments | AUC_STD_COMMENTS | Sourcing, Create Events, Standard Comments | Boilerplate comments that you use regularly for many events. |
| Standard Comment Type | AUC_STD_COMM_TYPE | Sourcing, Create Events, Standard Comment Type | Identify categories of comments, such as comments specific to sale events, for ease in identifying which comments to attach to which events. |

CHAPTER 4

# Using Workflow in PeopleSoft Strategic Sourcing

This chapter provides an overview of workflow and discusses how to:

- Set workflow rules.
- Assign workflow rules to PeopleSoft Strategic Sourcing business units.
- Run system processes.

## Understanding Workflow

The PeopleSoft Strategic Sourcing workflow features enable you to create and maintain workflow rules for the posting of events. PeopleSoft delivers Strategic Sourcing with a few example approvals, and the ability to add multiple approval processes so that you can approve posting in a variety of ways.

For each business unit, specify rules for approving events before posting. Configure these rules differently for each business unit. For example, you can have one business unit that requires approvals to go through workflow to verify approval limits and another business unit that does not have this requirement.

Depending on how you configure business units, amount approvals might need to be met before the system changes the status of an event from pending post approval to posted.

The difference between requiring and not requiring approval through workflow depends on what happens when the transaction is initially approved:

- When workflow approval is required, the first approval status is pending post approval, indicating that the transaction is approved pending successful matriculation through the workflow channels.

  However, if the criterion in workflow rules is not met, the status is posted.
- When workflow approval is not required, the first approval status is posted, and the transaction can continue.
- If workflow approval is required, but is set as a scheduled process, the status of the event is temporarily set to pending scheduled review.

  After the approval process runs, the status becomes either pending post approval or posted, depending on whether or not the criteria are met.

### See Also

*PeopleTools 8.44 PeopleBook: Workflow Technology*

## Roles and Users in PeopleSoft Strategic Sourcing

When you build a workflow rule, specify who performs each activity. Identify the users according to the roles that they play in your organization and in the workflow. The process of creating an event, for example, might involve the role of a buyer, a purchasing analyst, and a manager.

When the system routes a work item to the next activity in a business process, it forwards the item to the users who fill the role that is assigned to that activity.

Define users' roles when you give them their user IDs. In some cases, you might define multiple users who fill the role. In most cases, the system runs a query to find out who the appropriate users are for a given work item.

# Setting Workflow Rules

This section discusses how to:

1. Define rules.
2. Set roles for rules.
3. Specify criteria for the steps in rules.
4. Specify the values for step criteria.

## Pages Used to Set Workflow Rules

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Workflow Rule | AUC_WF_RULE | Set Up Financials/Supply Chain, Product Related, Sourcing, Define Approval Rules | Create and maintain a workflow rule. |
| Workflow Rule Step | AUC_WF_RULE_STEP | Click the Go To Steps for This Rule link on the Workflow Rule page | Create and maintain the steps within a workflow rule definition. |
| Workflow Step Criteria | AUC_WF_STEP_CRTA | Click the Go To Criteria for this Step link on the Workflow Rule Step page | Create and maintain multiple criteria for a workflow step. |
| Workflow Criteria Value | AUC_WF_CRTA_VALUE | Click the Go To Values for this Step link on the Workflow Step Criteria page | Create and maintain the ranges of values for the criteria in a workflow step. |

## Defining Rules

To set up workflow rules, use the Workflow - Rule Setup component.

Access the Workflow Rule page.

**Enable Escalation for Rule** Select to move the transaction up the approval chain if it is not processed within a specified time period. This prevents a transaction from getting stalled in the workflow process if an approver fails to take action. The default is *No*. (Optional)

**Number of Days** and **Number of Hours**
Enter the time period that a transaction can remain at one workflow step before it escalates. These two fields are combined to determine the total time, in days and hours, that an approver has to take some action. If Escalate is set to *Yes*, you must have either the number of days or the number of hours, or both, entered. (Optional)

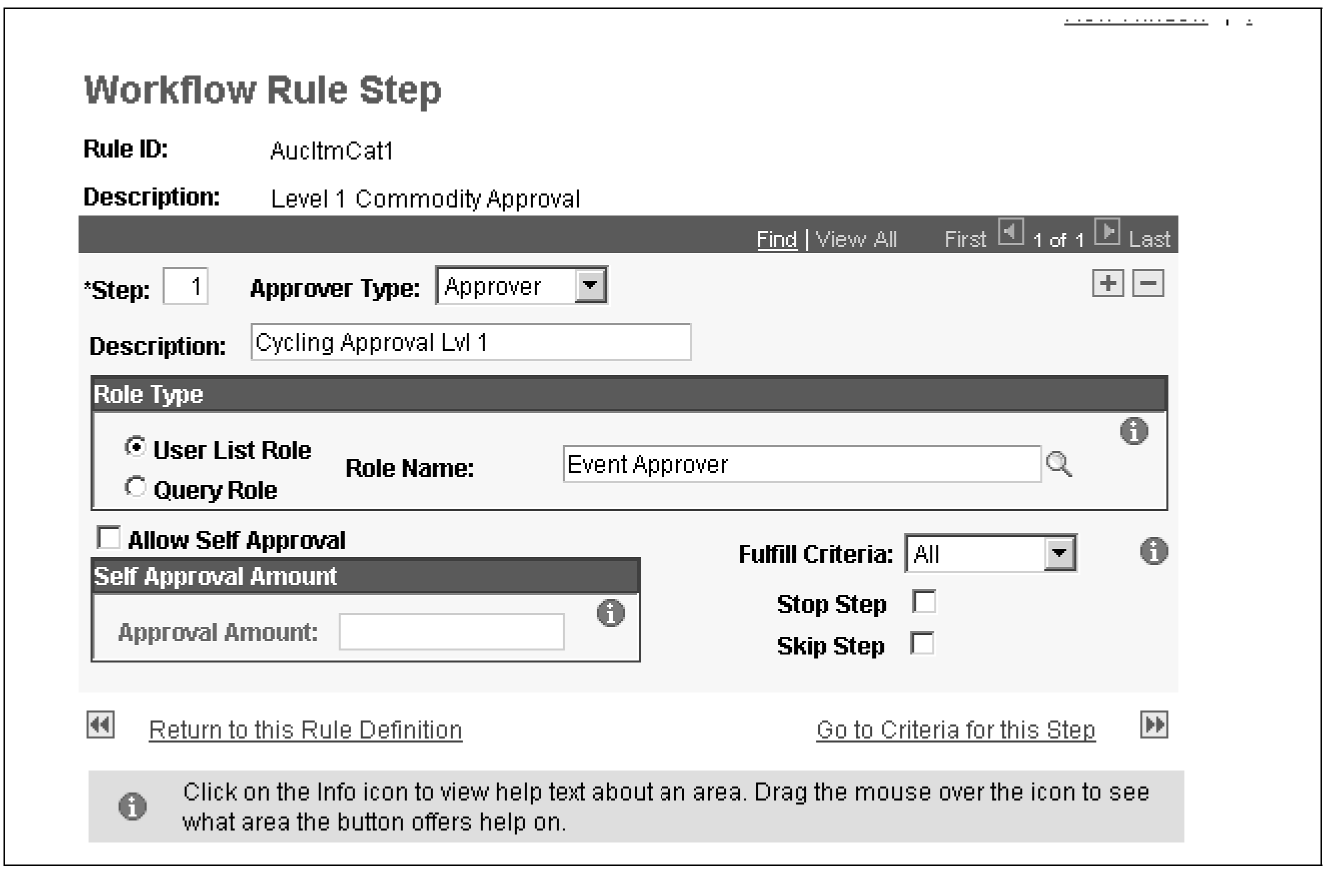
**Email User**
Sends email to the delinquent approver regarding the overdue event approval. If Route to Next Step is not selected, the email reminds the approver to take action. If Route to Next Step is selected, the email informs the reviewer that he has been skipped and can no longer take action.

**Email Supervisor**
Send email to the delinquent approver's supervisor, advising him of the escalation.

**Route to Next Step**
Select to skip the delinquent approver and route the approval to the next approver in the rule or rule chain.

## Setting Roles for Rules

Access the Workflow Rule Step page.




Workflow Rule Step page

**Step**
Provide the number of this step within the sequence of steps.

**User List Role** Enable routing of workflow based on a static user list role. The default is *Y.*

**Role Name** Enable routing of workflow to all users filling the specified role. The default value is *Supervisor.* If the User List Role option is selected, Role Name is a required field.

**Query Role** Enable routing of workflow based on a dynamic query that is executed at runtime.

**Query Role Name** Specify the query role that is used to route the transactions based on a Structured Query Language object that is executed during the Approval Workflow process (AUC_WF_MAIN).

Query Role Name must follow the standard:

SSWF_xxxx, where.

SSWF stands for Strategic Sourcing Workflow.

xxxx describes the type of query (for example, ROLE_SUPERVISOR_BY_OPRID).

If the Query Role option is selected, the Query Role Name is required.

PeopleSoft delivers Strategic Sourcing with two samples queries; you can create others.

**Fulfill Criteria** Enter the criteria that must be met before the workflow routing is executed. Values are:

*All:* All criteria that you define on the Workflow Step Criteria page must be met before the transaction is routed to the role.

*Any:* Only one of the criteria must be met before the transaction is routed to the role. This is the default setting.

**Skip Step** Select to allows workflow to skip the step if the event matches the step's criteria. It is only skipped if it is followed by another step; that is, lower-level approval is skipped when a higher-level approval is required. (Optional)

## Specifying Criteria for Steps in Rules

Access the Workflow Step Criteria page.

Enter the required values, including:

**Value Type** Indicates how the field values, specified on the Workflow Criteria Value page, are used to trigger the step. Values are:

*All Values:* No values are defined; the step is triggered if the event exceeds the value that is specified in the amount field. This is the default.

*Static:* A range of specific values that are defined on the Workflow Criteria Value page.

When the event matches one of these values, the step is triggered.

| | |
|---|---|
| **Record** | Enter the record name to be used when comparing the event to the step criteria values. This record must be keyed on BUSINESS_UNIT and AUC_ID. |
| **Approval Field** | Enter the field within the specified record that is to be used when comparing the event to the step criteria values. |
| **Amount Record** | Enter the amount that is required on the event in order to trigger the step. This record must be keyed on BUSINESS_UNIT and AUC_ID. (Optional) |
| **Amount Field** | Enter the field within the amount record to be used when comparing the event to the minimum amount that is required to trigger the step. (Optional) |
| **Amount** | Enter the minimum amount that is required on the event in order to trigger the step.<br>The system identifies all lines in the event that meet the criteria that is defined in the Amount Record and Amount Field. The amounts on these lines are totaled based on the Amount Record and Amount Field that is specified above. If the event total is higher than this minimum amount, the criteria is met. |
| **Currency Code** | Enter the currency type for the amount entered. If the value in this field differs from the currency identified by the currency record and currency field, the transaction's total amount is converted to the currency that is identified in this field. |

### Specifying Values for Step Criteria

Access the Workflow Criteria Value page.

| | |
|---|---|
| **From Value** and **To Value** | Enter the values that are the range of values for the specific criteria. |

## Assigning Workflow Rules to PeopleSoft Strategic Sourcing Business Units

This section discusses how to assign workflow rules to business units.

### Pages Used to Assign Workflow Rules to PeopleSoft Strategic Sourcing Business Units

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Workflow Rule Assignment | AUC_WF_BU_ASSIGN | Set Up Financials/Supply Chain, Product Related, Sourcing, Assign Business Unit Approval | Assign created rules to business units. |

### Assigning Workflow Rules to Business Units

To assign workflow rules to business units, use the Workflow - Bus Unit Assignment component.

Access the Workflow Rule Assignment page.

**Workflow Approval Process** Select to toggle workflow approval on and off for the business unit. (Optional)

**Schedule Approval Process** If this option is not selected (*No* is the default setting), the event approval workflow begins when the event creator clicks Post to submit the event. No process or manual intervention is required. (Optional).

When this option is selected, an administrator must schedule workflow approval as a process using PeopleSoft Process Scheduler. In this case, one of the following must be enabled:

- The Run Initialize Workflow Process page must be set to run on a regular basis using PeopleSoft Process Scheduler.
- Users must have security privileges to initialize workflow from the Event Workbench page using the Submit button.

**Rule Sequence** Enter the order in which the rules are executed. If zero is used, then the rule runs independently of any other rules. If one or greater is used then the rules become sequenced.

For example, rules at sequence two are not routed until sequence number one rules are complete.

You can set multiple rules at the same sequence number.

# Running System Processes

This section discusses the system processes you can run:

- Escalate workflow.
- Schedule approval process.
- Update event status.

## Pages Used to Run System Processes

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Approval Workflow Escalation | AUC_RUN_ESCALATE | Sourcing, Sourcing Administration, Approval Workflow Escalation | Run a process to find all delinquent approvals and take the appropriate action as defined in Define Approval Rules. |
| Schedule Approval Workflow | AUC_RUN_SCHED_APPR | Sourcing, Sourcing Administration, Schedule Approval Workflow | Setup Strategic Sourcing approval to run as a scheduled process. |
| Update Event Status | AUC_RUNAEAUCSTATCK | Sourcing, Sourcing Administration, Update Event Status | Run Strategic Sourcing status updates for events pending award. The process checks to see if any events have ended and updates the event status from Posted to Pending Award. |

# CHAPTER 5

# Creating and Using Bid Factors

This chapter provides an overview of bid factors and discusses how to:

- Create bid factors
- Create bid factor groups

## Understanding Bid Factors

The PeopleSoft Strategic Sourcing bid factor function enables you evaluate events based on price, warranties offered, lead time, and product quality. Bid factors are questions bidders must answer about their products, services, or company.

You set weightings for each bid factor, letting the bidder know how much value you give to that portion of his bid. Price is by default the first bid factor of any buy or sell event. It is required for auction events, and you set a weighting for it. In some events, price might be the most important consideration, so you give it a 70 percent weighting. Or the color of the product might be so significant that you give it a 50 percent weighting.

If the event is an auction, bid factors of type text cannot be weighted. This is because there is no method to weigh answers that are given in text (for example, answers to a bid factor that asks, "In what city is the headquarters located?"). PeopleSoft Strategic Sourcing automatically assigns this a weight of zero, enabling you to collect this useful information without affecting bid scoring. If the event is an RFx or RFI event, you can manually score text responses during bid analysis.

You can also create bid factors that you answer, but do not display to the bidders. These bid factors can be for subjective responses such as current business relationship or interview results.

You, the creator, can see the scores and can even edit the weighting percentages of the bid factors to consider what-if scenarios for RFx and RFI events.

You can also create bid factor groups which contain multiple bid factors. When you add a bid factor group to an event, the system automatically assigns the bid factors that are assigned to that group to the event.

This section discuss:

- Header bid factors vs. line bid factors.
- Scoring vs. weighting.
- Line weighting vs. bid factor weighting.
- Default rule assignment.
- Ad hoc bid factors.

- Required or mandatory response designation.
- Price components.
- Bid factor groups.
- Automatic bid factor population with queries.

## Header Bid Factors vs. Line Bid Factors

Header bid factors relate to the overall event, whereas line bid factors relate only to the specific line.

Header bid factors cover the entire event. For example:

- Is this a minority- or woman-owned business?
- In what state is the corporate headquarters located?
- Is the company ISO certified?

Because for any bid factor, you can change such variables as the range for best and worst responses, for ideal response and for weighting, it is possible to use the same bid factor for the event and for one or more line items. This ensures accurate weighting and responses.

- For a sale of sporting goods, color might be an important factor.

  You can set different ranges or weightings for color on the line item for tents, backpacks, and hiking boots.
- You can set ideals and weightings that, for the line item, differ from the same bid factor set in the header.

  For example, suppose that on the header you set a delivery bid factor, with an ideal delivery time of four weeks. You can set, on a line item, a delivery bid factor with an ideal delivery time of six weeks.

## Scoring vs. Weighting

Here are three factors to consider when looking at scoring vs. weighting:

- The score depends on how close the answer to the bid factor comes to the ideal answer.
- The weighting is based on how important the bid factor is to the overall event.
- The final score is the average of the score and the weighting.

The header and line bid factors are scored separately; each bidder gets two scores. The following table outlines how scores and weighting are used by the system:

| Bid Factor | Ideal Answer | Bidder's Response and Score | Weighting and Score |
|---|---|---|---|
| Header: Is the headquarters located in North America? | Yes | Yes = 100 percent | 70 percent = 70<br>(70 percent of the score of 100) |

| Bid Factor | Ideal Answer | Bidder's Response and Score | Weighting and Score |
|---|---|---|---|
| Header: Is the company ISO 9000 certified? | Yes | No = 0 percent | 30 percent = 0<br>(30 percent of the score of 0) |
| Combined header scores. | | 50<br>(100+0 / 2)<br>50 is the header score if no weightings are set. | 70<br>(100 percent * 70 percent + (30 percent * 0 percent)<br>70 is the header score if these weightings are set. |
| Line: How many pages-per-minute can be processed? | 20 | 10 = 50 percent | 30 percent = 15<br>(30 percent of 50) |
| Line: "How many years does the warranty cover?" | 10 | 8 = 80 percent | 70 percent = 56<br>(70 percent of 80) |
| Combined line scores. | | 65<br>(50+80/2)<br>65 is the line score if no weightings are set. | 71<br>((50 percent * 30 percent) + (80 percent * 70 percent)).<br>71 is the line score if these weightings are set. |

## Line Weighting vs. Bid Factor Weighting

You can set two types of weighting on a line item:

- The bid factor weighting, meaning how important the bid factor is to an overall event. Set bid factor weightings if you want to factor the weightings into the bid scoring.
- The line item weighting, meaning how important that specific item or service is to the overall event. If you do not set specific line weightings, the lines are weighted equally.

For example, in an event to purchase central processing units (CPUs), monitors and keyboards, the CPUs might be more important to you than the keyboards. You weight the line item for the CPUs at 50 percent, the monitors at 30 percent and the keyboards at 20 percent.

The table below uses this example. The bidder scores high on bid factors for the line items that have a low line weight. After line weighting is calculated, his per-line scores decrease:

| Example Score with Bid Factor Weightings Calculated | Line Weight | Final Score for each Line Item |
|---|---|---|
| CPU = score of 80 | 50 percent | 40<br>(80*50 percent) |
| Monitor = score of 90 | 30 percent | 27<br>(90 * 30 percent) |
| Keyboards = score of 100 | 20 percent | 20<br>(100 * 20 percent) |
| | | 87<br>(Total combined line score) |

## Default Rule Assignment

You have the option to create default rules for bid factors and bid factor groups. Default rules can be for header or line bid factors. For example, if you have a line bid factor group default rule called Apparel, and you assign an Item ID of 10006 to this rule, the bid factor group Apparel always appears by default on any event line containing the item 10006.

You can default bid factors and bid factor groups based on item categories, item IDs, start price, extended price, and event quantities. Bid factors and groups can be associated to business units or departments to provide additional filtering options.

## Ad Hoc Bid Factors

The bid factors that you create on the Bid Factors page are available to use in any of the events.

You can also create ad hoc bid factors, specific to an event, when you create the event. An ad hoc bid factor is valid only for the event in which you create it and is not available for any other events.

### See Also

Chapter 7, “Creating Events,” Specifying Bid Factors for the Event, page 68

## Required or Mandatory Response Designation

You can designate that a response is required for a bid factor. If required, the bidder must enter a response for the specified bid factor before successfully posting a bid.

You can also designate a mandatory response for a bid factor. The bidder’s response must match the specified best response for the bid to be considered for award.

### Price Components

You can break out the price bid factors into related and measurable components, such as material, labor, shipping, and so forth. This enables you to gain a better understanding of what comprises the quoted bid price as well as negotiate on specific price components, thereby increasing your overall negotiation power.

### Bid Factor Groups

You can assign multiple bid factors to a bid factor group. The total of the assigned bid factor weightings must equal the weighting of the bid factor group. The system provides the bid factor group weightings first over individual bid factor weightings when providing defaults.

You can select a bid factor group during event creation and all associated bid factors are added to the event. You can also assign bid factor groups to business units and departments.

### Automatic Bid Factor Population with Queries

You can associate a bid factor to a specified PeopleSoft query, which automatically populates bid factor responses based on the query results. When a bidder selects to bid on an event, the query that is associated with the bid factor is executed and the resulting values are populated in the respective bid factor response fields.

For example, you could have a header bid factor asking whether the bidder is a minority vendor. This information is collected when the bidder registers and is on the vendor record. You can build a query by using the vendor and bidder records, and as part of the bidder event response, the system runs the query and automatically populates the response with the minority vendor information.

You can also extract external supplier information, such as supplier performance, to weight and factor in during bid analysis. You can map a supplier performance bid factor to the Supply Chain Warehouse database or to a Dun and Bradstreet database.

#### See Also

*PeopleTools 8.44 PeopleBook: PeopleSoft Query*

## Creating Bid Factors

This section discusses how to:

- Specify bid factor attributes.
- Use price components.
- Assign defaults and rules.
- Assigning responses based on queries.

#### See Also

Chapter 7, “Creating Events,” Specifying Bid Factors for the Event, page 68

Chapter 7, “Creating Events,” page 53

## Pages Used to Create Bid Factors

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Bid Factor | BID_FACTOR_PNL | Sourcing, Create Events, Bid Factor Setup | Specify the attributes of the bid factor. |
| Assign Business Units and Departments to Bid Factor | BID_FCTR_BUDEPT | Click the Assign Business Units and Departments link on the Factors page. | Assigns bid factors to business units or departments to facilitate searching. |
| Assign Defaulting Rules to Bid Factor | BID_FACTOR_LINE | Click the Assign Additional Defaults and Rules link from the Bid Factors page. | Assign an item category to the bid factor. |
| Assign Response Query to Bid Factor | BID_FCTR_QRY | Click the Assign Response Query link on the Bid Factors page. | Associates queries to bid factors, which automatically populate bid factor responses based on the query results. |

## Specifying Bid Factor Attributes

To set up Bid Factors, use the Bid Factor Setup component.

Access the Bid Factor Setup page.

The bid factors that you create on the Bid Factor Setup page become available to be used in any of the events.

You can also create ad hoc bid factors, specific to an event, when you create the event. An ad hoc bid factor is valid only for the event in which you create it and is never available for any other events.

**Price Bid Factor**

Indicates that this bid factor is used as the line bid price factor on events. Only one bid factor per SetID can be a price bid factor. Selection enables you to enter price components. This check box becomes available only for bid factor types of *Monetary.*

**Note.** You must have a price bid factor for auction events.

**Bid Factor Type**

Determines what fields appear on the page.

Values are:

*Date:* A range of calendar dates.

*List:* A list of attributes, such as color or size. For list bid factors, you can designate whether multiple selections are allowed. For example, you can have a list bid factor asking what colors are available for an item, with list items of black, red, blue, yellow, and white. Bidders select one or more of the available list items. If you do not allow multiple selections for a list bid factor, the bidder can only select one list item.

*Monetary:* A range of costs that are related to the bid factor.

*Numeric:* A range of figures, such as length of service contract.

*Separator:* A heading bid factor that is not weighted and does not require a response from bidders.

*Text:* A question requiring a text answer. In auction events, this type of bid factor is automatically weighted zero.

*Yes* and *No:* A text question requiring a yes or no answer.

**Question** Unlimited length field in which you can ask the bidder a question.

**Display Bid Factor** Click to display bid factor to bidders. If not selected, the event creator or any collaborators add their input to bid factors that are hidden to bidders.

**Bid Required** Click to indicate that a response is required for this bid factor.

**Mandatory Response** Click to indicate that a bidder must respond with the best or ideal response in order for the bid to be considered. If the bidder doesn't provide the mandatory response for one or more bid factors, the bid is disqualified and unavailable for award.

## Using Price Components

Access the Bid Factor Setup page using the price bid factor.

**Price Bid Factor** Indicates that this bid factor is used as the line bid price factor on events. Only one bid factor per SetID may have this indicator set to *yes.* When selected, enables entering price components.

**Component** Enter a price component such as material, labor, tax or profit. Only enter price components if you want bidders to specify the components for their bids. You can assign an unlimited number of components to the price.

**UOM** (unit of measure) Enter a UOM for each price component. This is optional.

**Weighting** Assign the weighting for this component. This can be used during analysis to determine the importance of each component on bids.

## Assigning Defaults and Rules

Access the Assign Defaulting Rules to Bid Factor page.

You can assign default bid factors based on item categories, item IDs, line quantity, line start price, line extended price, or any combination of defaults. The system provides bid factor as a default when an event line meets any of the criteria that you set here.

You can assign default bid factors to the event header or to the applicable line.

You can set unique weightings at the rule level that differ from the weightings that you set at the overall bid factor level. These weightings override the weighting that you enter at the overall bid factor level.

### Example

Consider a bid factor for warranty. At the header level, you set a best to worst range of two to five years. You then create two separate rules and assign the bid factor to two categories:

- Hardware category, for which you set a best to worst range of two to six years.
- Equipment category, for which you set a range of five to ten years.

After bid factors are assigned to categories, you create an event with an item from the hardware category:

- All bid factors that are associated with the hardware category automatically populate into the event.

  You can delete any that are not relevant to the new event, or add more that are.
- These bid factors display the ranges that are related to that category; for this example, the range is two to six years for the warranty bid factor.

### Assigning Responses Based on Queries

Access the Assign Response Query to Bid Factor page.

After creating a query by using PeopleSoft query and associating it to a bid factor, you can test the query to assure that it executes properly within the bid response application.

The Bidder SetID, Bidder ID, Bidder Type, and Bidder Loc are used as query bind variables. The system uses the Infobox field to display test query help and query results.

**Test** Click to test the query against the query bind variables.

## Creating Bid Factor Groups

This section discusses how to use bid factor groups.

### Pages Used to Create Bid Factor Groups

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Bid Factor Group | BID_FACTOR_GRP | Sourcing, Create Events, Bid Factor Group Setup | Assigns multiple bid factors to a group. |
| Search Bid Factors Groups | BID_FCTR_GRP_SRCH | Click the Select Bid Factor Group link on the Bid Factor Group page. | Search for bid factor groups by group code, business unit, or department. |
| Assign Business Units and Departments to Group | BID_FCTR_GRP_BU | Click the Assign Business Units and Departments link on the Bid Factor Group page. | Assigns bid factor groups to business units or departments to facilitate searching. |
| Assign Defaults and Rules to Group | BID_FCTR_GRP_RULE | Click the Assign Additional Defaults and Rules link on the Bid Factor Group page. | Creates default rules for bid factor groups. |

### Using Bid Factor Groups

To set up bid factor groups, use the Bid Factor Group Setup component.

Access the Bid Factor Group page.

| | |
|---|---|
| **Weighting** | Enter a default weighting for the group or for the bid factors that are associated with the group. The total of the bid factor weightings that are associated with the group must equal the weighting of the bid factor group. The system then calculates the total of the bid factors |

You can add rows to include multiple bid factor codes for the bid factor group. If you select a bid factor group during event creation, all associated bid factors are added to the event.

The system looks to bid factor groups before individual bid factors when applying defaults. For example, if you have a bid factor group of COMPUTERS which includes two bid factors: manufacturer, which is weighted 10 percent, and warranty, which is weighted 30 percent. The COMPUTERS bid factor group is assigned to item AP-001, which has a category of HARDWARE. You also have WARRANTY created as a bid factor, assigned to the HARDWARE category, and weighted 20 percent. If you add item AP-001, the system provide WARRANTY as a default based on the group rule, and therefore provides it a weighting of 30 percent, which overrides the individual bid factor rule that had the weighting of 20 percent.

**CHAPTER 6**

# Preparing Notification to Bidders

This provides an overview of notification and discusses how to alter email templates.

## Understanding Notification

PeopleSoft Strategic Sourcing provides the means to notify bidders of:

- Registration requests and approvals.
- Event invitations and event interest notifications.
- Bid responses and statuses.

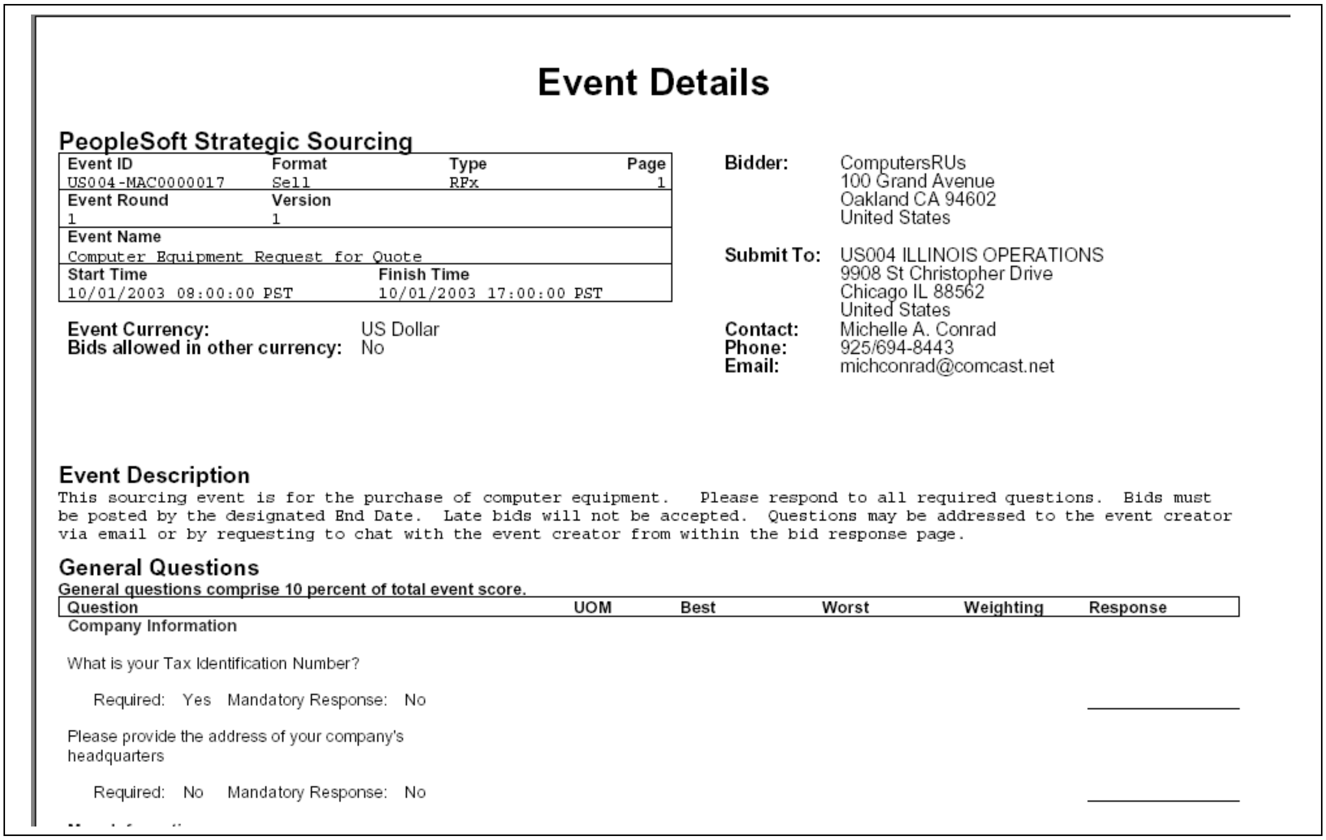
PeopleSoft Strategic Sourcing also provides the means to notify internal users of:

- Registration and event approval requests.
- Collaboration requests and statuses.
- Event statuses, such as when an event is ready for analysis and award.

### Email Notifications

The first email notice that is sent to bidders is either a registration confirmation email containing an assigned password or notification that the registration is routed for approval. Subsequent emails are automatically generated to advise bidders and internal users of the progress of the event.

PeopleSoft Strategic Sourcing delivers several standard email notices, which you can alter as needed. Some specific email notifications include links to a website or a PDF file attachment that provides further information.



# Event Details

**PeopleSoft Strategic Sourcing**

| Event ID | Format | Type | Page |
| --- | --- | --- | --- |
| US004-MAC0000017 | Sell | RFx | 1 |
| **Event Round** | **Version** | | |
| 1 | 1 | | |
| **Event Name** | | | |
| Computer Equipment Request for Quote | | | |
| **Start Time** | **Finish Time** | | |
| 10/01/2003 08:00:00 PST | 10/01/2003 17:00:00 PST | | |

**Event Currency:** US Dollar
**Bids allowed in other currency:** No

**Bidder:** ComputersRUs
100 Grand Avenue
Oakland CA 94602
United States

**Submit To:** US004 ILLINOIS OPERATIONS
9908 St Christopher Drive
Chicago IL 88562
United States

**Contact:** Michelle A. Conrad
**Phone:** 925/694-8443
**Email:** michconrad@comcast.net

**Event Description**

This sourcing event is for the purchase of computer equipment. Please respond to all required questions. Bids must be posted by the designated End Date. Late bids will not be accepted. Questions may be addressed to the event creator via email or by requesting to chat with the event creator from within the bid response page.

**General Questions**

General questions comprise 10 percent of total event score.

| Question | UOM | Best | Worst | Weighting | Response |
| --- | --- | --- | --- | --- | --- |
| Company Information | | | | | |
| What is your Tax Identification Number? | | | | | |
| Required: Yes Mandatory Response: No | | | | | ________ |
| Please provide the address of your company's headquarters | | | | | |
| Required: No Mandatory Response: No | | | | | ________ |

Example of a notification PDF file.

# Altering Email Templates

This section discusses how to alter email templates.

## Bidder Registration Notifications

PeopleSoft Strategic Sourcing includes the following notifications regarding bidder registration.

| | |
| --- | --- |
| **Registration Confirmation** | Notifies a bidder when they are successfully registered. Includes the assigned password. |
| **Sourcing Approval** | Notifies the registration approver that a bidder registration is submitted for review. |
| **Sourcing Approved** | Notifies the bidder that the registration request is approved. |
| **Sourcing Denied** | Notifies the bidder that the registration request is denied. |

## Event Creation and Status Notifications

PeopleSoft Strategic Sourcing includes the following event notifications.

| | |
| --- | --- |
| **Collaboration Notice** | Notifies collaborators that they are invited to collaborate on an event. |

| | |
|---|---|
| **Collaborator Removal** | Notifies a collaborator that his participation in the collaboration is no longer required |
| **Collaboration Completion** | Notifies the event creator that the collaboration ended either because the collaboration due date passed or all invited collaborators provided the necessary input. |
| **Event Approval Next** | Notifies an event approver that an event requires his approval. |
| **MCF Agent Creation** (MultiChannel Framework agent creation) | Notifies the event creator that he is created as a MultiChannel Framework agent, which enables internal users to chat real-time with bidders using the MultiChannel Framework. |
| **Event Invitation** | Notifies invited bidders that they are invited to participate in a sourcing event. |
| **Event Interest** | Notifies uninvited bidders that a public event is posted in which they may be interested based on their self-categorization preferences. |
| **Event Edited** | Notifies bidders that a previously posted event is edited. |
| **RFI Invitation** (request for information invitation) | Notifies bidders that they are invited to a request for information (RFI) event. |
| **RFI Event Edited** | Notifies bidders that a posted RFI event is edited. |
| **Event Lot Update** | Notifies bidders that associated event lot dates are updated. |
| **Pause Notification** | Notifies invited bidders that an auction event is paused. |
| **Resume Notification** | Notifies invited bidders that a paused auction event is resumed. |
| **Event Cancelation** | Notifies invited bidders that a posted event is canceled. |

## Bid Response and Status Notifications

PeopleSoft Strategic Sourcing includes the following event notifications.

| | |
|---|---|
| **Bid Notification** | Notifies a bidder that he successfully posted a bid. |
| **Outbid Notice** | Notifies a bidder that he is outbid on one or more sourcing event lines. |
| **Event Extension** | Notifies invited bidders that the event end date is been extended. |
| **Bid Cancelation** | Confirms to a bidder that he canceled his bid. |
| **Withdrawal Notification** | Confirms to a bidder that he is withdrawn from one or more event lines on a countered offer. |
| **Bid Disallow** | Notifies a bidder that his bid is disallowed and therefore is canceled. |
| **Bid Rejection** | Notifies a bidder that his bid is no longer being considered for award. |

## Analysis and Award Notifications

PeopleSoft Strategic Sourcing includes the following event notifications.

| | |
|---|---|
| **Event Analysis Export** | Sends an XML version for the bid analysis to selected users. |

**Non-Winning Bidder** Notifies nonawarded bidders that they are not selected for award.

**Winning Bidder** Notifies awarded bidders that they are selected for award.

### See Also

Chapter 4, “Using Workflow in PeopleSoft Strategic Sourcing,” page 31

## Pages Used to Alter Email Templates

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Generic Template Definition | WL_TEMPLATE_GEN | PeopleTools, Workflow, Notifications, Generic Templates | Edit the text of bidder notification boilerplate email templates. You can also modify the HTML that is associated with each template. |
| Define Template | WL_TEMPLATE | PeopleTools, Workflow, Notifications, Notification Templates | Edit the text of all boilerplate email templates except for bidder registration notifications. You can also modify the HTML that is associated with each template. |

CHAPTER 7

# Creating Events

This chapter provides an overview of PeopleSoft Strategic Sourcing events and discusses how to:

- Create an event.
- Create event lines.
- Copy events and create templates.
- Create a request for information (RFI) event.
- Invite bidders.
- Set asset status.

## Understanding PeopleSoft Strategic Sourcing Events

This section lists a prerequisite and discusses:

- Event creation.
- RFIs.
- Event statuses.
- Multiversion and multiround events.
- Event modification.
- Optional quantities.
- Bidder downloads.
- Price breaks.

### Prerequisites

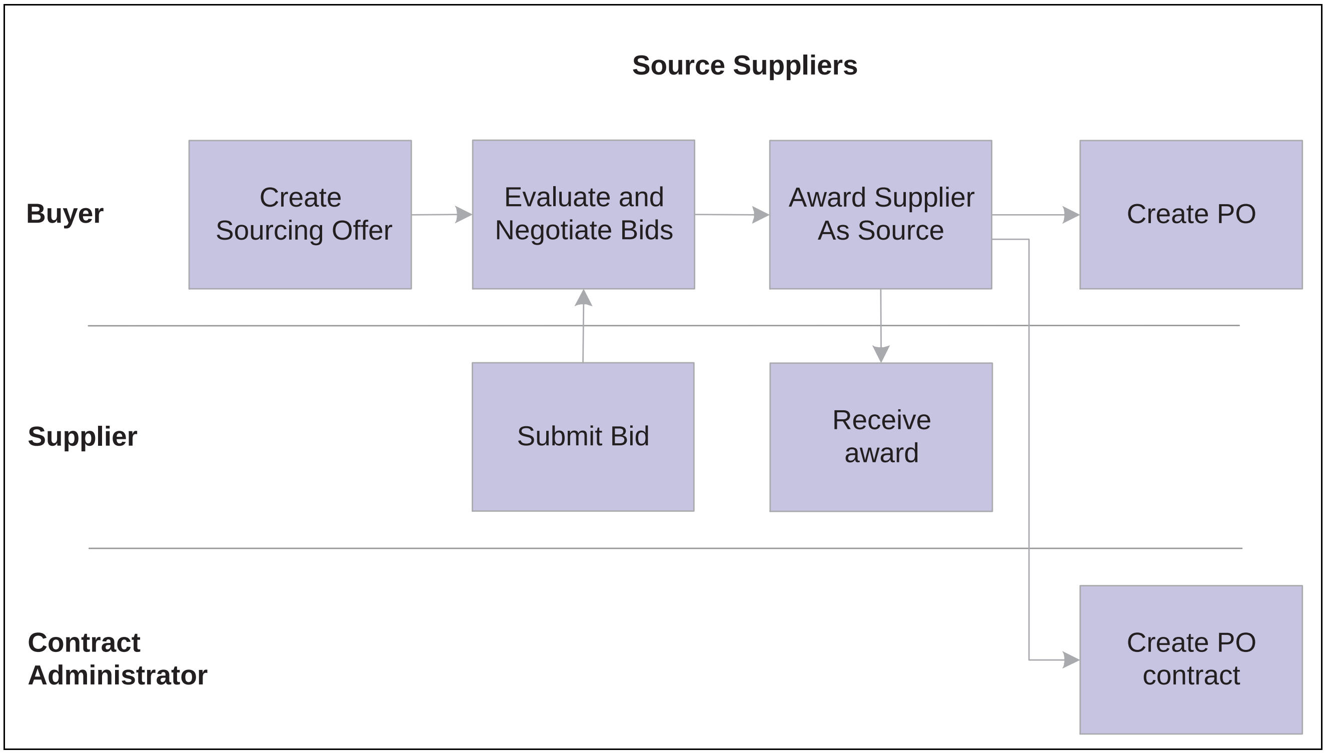
Before you create an event, you must set up user preferences so that you can create buy, sell, or RFI events.

### Event Creation Process

Three types of events exist in PeopleSoft Strategic Sourcing:

- A *sell* event: the sale of goods that you own (equivalent to a forward auction).
- A *buy* event: the purchase of goods or services (equivalent to a request for purchase/quote or a reverse auction).
- An *RFI* event: a request for information.

The event creator must have the appropriate role or roles to create events. PeopleSoft Strategic Sourcing comes with two user roles: the Event Buyer role and the Event Seller role. The Event Buyer role can create buy events; the Event Seller role can create sell events. However, when you create events, the allowable event formats and types are based on User Preference settings – not roles.




Sourcing Offer process

To create a sourcing offer, you:

1. Plan and create a buy or sell event.
2. Define bid factors, item or service specifications, and due dates.
3. Optionally invite collaborators to provide event input
4. Invite bidders to bid on the event, and post the event for bidding.

When you create an event, you provide bidders an overall description of the event at the header level with item-specific details at the line level. You can copy a previous event, purchase order, requisition, contract, PeopleSoft Engineering bill of material (BOM), PeopleSoft Manufacturing BOM, PeopleSoft Supply Planning planned order, or RFI to create a new event, and save events to use as templates in the future. You can also attach documents and image files to the event, to provide bidders with precise information about what you are buying or selling.

Specify at the header level any bid factors that pertain to the entire event. Then, at the line level, specify bid factors that apply to specific items. For each bid factor, set a weighting, letting the bidder know how much value you give to that portion of the bid. Price is, by default, the first bid factor of any event, and you also set a weighting for it. You can enter bid factors that you answer without displaying them to the bidders. These bid factors can be for subjective responses such as *Current Business Relationship* or *Interview Results.*

You can specify a list of bidders to invite to the event. You can modify this list by inviting some of them to bid only on specified line items of the event. You can also specify an event as public to enable any organization or individual to register and place a bid.

When you create an event, the system generates a PDF file describing the event. In addition, you can have an XML file created containing the details of the event, which can be used by bidders to enter their bid and upload their responses using Excel 2002. This PDF file, and optionally the XML file, is attached to the email that notifies bidders of the event. If you modify the event, you can regenerate the PDF and XML files and dispatch it to bidders.

You can set numerous options when creating an event. For example, you might prefer that events for specific business units accept bids in multiple currencies. Or, you might set extensions to the end time of some events but not others.

## RFIs

You can quickly create an RFI before you issue a request for proposal (RFP) or request for quote (RFQ). RFIs are used to gather information before issuing an RFP or RFQ event. The RFI includes header bid factors and no line items. There are no preview dates for RFI events. Bidders can respond to the RFI, and the RFI creator can review the RFI responses. RFIs aren't awarded, but instead are marked as *Reviewed.* You can, however, score a RFI. You can copy an RFI into a future RFP or RFQ, and the related RFI responses are accessible from the Analyze Bids component for bidders who respond to both the RFI and RFP or RFQ.

RFI functionality enables event creators and bidders to:

- Copy from existing RFIs and RFI templates.
- Select options for the RFI such as whether bidders can edit posted responses, whether responses are required for all bid factors, and whether bid factor weightings should be displayed to bidders.
- Create a PDF of the RFI, which you send as an email. to the invited bidders.
- Enable bidders to view and respond to RFIs.
- Create a PDF version of the posted RFI response and send an email with the PDF to the bidder.
- Analyze RFI responses, optionally assign scores manually to text-based responses, and perform what-if analysis.
- Enable creation of buy events by copying an RFI, and maintain a reference of the RFI on the related buy event.
- View the related RFI bidder response when analyzing buy events.

## Event Statuses

When you create an event, its status is *Open.* Once you post the event for internal approval, its status becomes *Pending Post Approval.* Other valid event statuses are:

- *Collaborating Event:* Event has been routed for internal collaboration
- *Posted:* Approved event, bidding is ongoing.
- *Event Completed:* Event has ended but the update event status process has not been run
- *Pending Award:* Completed event, not yet awarded.
- *Collaborating Bid Analysis:* Event has been routed for bid analysis collaboration

- *Awarded:* Event award has been approved; the event itself is complete.
- *Not Awarded:* The event ended without the event being awarded.
- *Canceled:* The event creator canceled the event.

For RFI events, the following event statuses include:

- *Open:* Event is newly created, not yet approved.
- *Collaborating Event:* Event has been routed for internal collaboration
- *Pending Post Approval:* Event is posted for internal approval.
- *Posted:* Approved event, bidding is ongoing.
- *Posted/Event Ended:* Approved event, event has ended but is not yet reviewed.
- *Pending RFI Review:* Status once event has ended and is awaiting review.
- *Collaborating Bid Analysis:* Event has been routed for bid analysis collaboration
- *RFI Reviewed:* Status once RFI responses have been reviewed.
- *Canceled:* The event creator canceled the event.

## Event Modification

After you post an event, you can make only the following modifications:

- Add comments and attachments, including regenerating the PDF file that describes the event.
- Revise the event extension parameters.
- Extend the end date.
- Invite new bidders.
- Change the reserve price.

When you make these modifications, you have the option of generating email notifications to bidders.

## Bid Factor Grouping and Defaults

You can create bid factor groups which contain multiple bid factors. When using a bid factor group with an event, the system automatically adds all associated bid factors to the event. You can use bid factors as defaults at either the header or line level based on item categories, Item ID, item quantities, and item prices. Bid factors and groups can be associated to business units or departments to provide additional filtering options. You can designate that a response is either mandatory or optional for a selected bid factor, and indicate that a bidder must provide a specific response for their bid to be accepted.

### See Also

Chapter 5, "Creating and Using Bid Factors," page 39

## Event Templates

You can save events as templates to reuse in future events, and associate an event template to business units, departments, or a specified user, based on the user's security. You can also create templates using the Sourcing, Create Events, Maintain Event Templates menu. In addition, users with the appropriate security can modify templates after they are created. Strategic Sourcing users can then copy from the templates they have access in order to expedite the event creation process.

You can save a template as a Business Unit, Department, or Personal template. If a template is marked as a Business Unit template, it is available to all users who have access to that business unit. If a template is marked as a Department template, you can associate one or more departments to the template. Only users assigned to the associated departments have the ability to copy from department templates. If a template is marked as a Personal template, only the user who created the template has access to it.

### See Also

Chapter 7, "Creating Events," Saving an Event as a Template, page 77

## Event Lotting

You can create multiple auction events and link them together as lots within an overall auction process. Each lot is treated as a unique event, but is tied to other events. As the bidding on one event lot ends, the bidding on another event lot immediately begins. This continues until all of the linked event lots have completed. You link auction events to other events from the Create Event pages by selecting a preceding event to link to the current event. The start date/time of one event lot is dependent on the end date/time of the previous lot, therefore any change to the end date/time of one event lot can cause a change to the end date/time of any subsequent event lots. The system recreates the PDF and XML documents for each impacted event to ensure that the documents reflect the most current preview, start, and end date/times.

Bidders can easily navigate between event lots in order to view and enter bids. During analysis, you can easily navigate between event lots to analyze all linked events.

### See Also

Chapter 12, "Placing and Managing Bids," Bidding on Linked Events, page 148

## VAT Calculation

In PeopleSoft Strategic Sourcing, you can track whether an event line is for a good or a service for the purposes of calculating value added tax (VAT). VAT is calculated differently depending on whether the sale is for a good or a service and, if it is a service, where the service occurs. The system provides these values as defaults based on the item or item category. VAT information is only required on buy events.

VAT is calculated for a purchase when the purchase order is created.

## Optional Quantities

Quantities are optional on events. Bidders can enter a flat amount for the services without providing a bid quantity.

For example, if you create an event for consulting services, you might prefer bidders to quote a flat amount for the entire implementation rather than an hourly rate for consultants. You can enter a starting bid amount, which is the maximum amount you are willing to pay for the implementation, and the bidders can enter bids based on the suggested start price.

You can indicate that specific line items on events don't require quantities. Then the line quantity is *N/A* (not available), and the amount equals the extended price. In all other cases the quantity and amount appear normally.

You can then enter the start price. The extended price equals to the start price because the system calculates the extended price by multiplying the quantity times the start price. Bidders only need to enter a bid price; the quantity is not available for input. The total bid amount for the line is the same as the bid price for the line because the quantity is automatically set to *1.* At award time, the purchase order or contract reflects that it is an amount-only transaction. Price tiers are not allowed for quantity-optional line items.

If you do not require a quantity on a line item, then:

- Line items can be amount-only.
- Line quantities and units of measure are not necessary for amount-only line items.
- Bidders' responses do not need to include a bid quantity.
- Awards can be amount-only.

## Price Adjustments

You can specify whether price adjustments for higher volumes are allowed on an event. The event creator defines the price tiers or allows the bidders to provide their own price tiers. If you specify the price tiers, you can create as many tiers as you need.

For example, a bidder can specify that for a quantity between 1 and 100, the price is 5 USD per unit, and between 101 and 500, the price would be 4 USD per unit.

Price adjustments are for buy events only.

## Quick Auctions

You can create a "quick auction," or price-only auction event by selecting the price-only event check box on the Header Details page. These are the requirements for quick auctions:

- Bidders must bid on the full requested quantity.
- Bidders must bid on all lines.
- Price is the only bid factor associated with the line items.
- There are no header bid factors for these events.

For price-only events, the system compares the total bid price to determine whether the bid beats the last bid or current winning bid.

## Requisition Consolidations

You can consolidate requisitions across multiple PO Business Units for the same item. All schedule and distribution information is maintained for the requisitions. The selected requisitions are prevented from being sourced to a PO while the event is taking place. If an event is canceled, the requisitions would be available for sourcing.

## Discussion Forums

You can use discussion forums to communicate with buyers or sellers. PeopleSoft Strategic Sourcing includes two delivered forums:

- An event specific forum would allow suppliers to ask questions regarding the event and have them answered by the buyer.
- A general question forum for inquiries regarding the application’s operation and the bidding process.

System administrators can also create new forums. A replier can mark their reply public or private. If private is selected, only the replier and the author of the post being replied to can view the message. If the message is marked public, all users can view the message. Forums can also be marked read only so that some users can view the messages, but not post replies or post new messages. All delivered and newly created forums reside in the Forums component.

At the time an event or RFI is created, you can start a high level message thread for that particular event. Upon posting that event, the system includes a text message about the discussion forums in the notification email sent to invited bidders. For each event that has a message thread, the system provides a link to the message thread on the Search Events and Event Workbench pages. Security for the forum is role based, and enforced at the Event ID level. in addition, the event creator can exclude named users from seeing a particular forum. A bidder can either see all of the public discussion surrounding an event or nothing.

Bidders can ask questions to event creators regarding use of the application and the bidding process using the general question forum. This forum is not tied to any specific event, and can be accessed from the general forum on the supplier facing Search Events page, the Event Workbench, Analyze Events, Bid Response, and Home Page pagelet. Security for the forum is role based in addition to the named supplier exclusion feature.

The Forum Administration component enables the event creator to manage the forums, including deleting messages, creating new custom forums, modifying existing forums and setting security for all the forums.

### See Also

Chapter 10, “Managing Events,” Using Discussion Forums, page 118

## Bidder Downloads

You can designate that bidders can download events, manage them in a spreadsheet format, and then upload their bids.

When an event is posted, the system creates an XML bid package with event information that can be stored as a header attachment. The XML file is also included in the event invitation email that is sent to the invited bidders. Bidders can download event details into Excel 2002 spreadsheet format enabling the bidder to review event details and enter responses. This eliminates bidder concerns that the buyers are reviewing bids to gain negotiation strategies before final submission. This approach makes it easier to gather input from other third parties who do not have primary responsibilities for completing a bid but whose input is necessary to establish a response.

Bidders can then convert the spreadsheet to XML, then upload responses into PeopleSoft Strategic Sourcing.

**Note.** Bidders must use Excel 2002 to save their spreadsheet responses as an XML file and upload them into PeopleSoft Strategic Sourcing.

## Disallow Bidders

In cases where a bidder is not adhering to the rules of the event, the event creator can remove the bidder from the event. In this case, the system automatically cancels any bids entered by the bidder and all other bids are rescored to exclude the canceled bids.

# Creating an Event

This section discusses how to:

- Describe the event at the header level.
- Enter additional header information.
- Specify bid factors for the event.
- Specify bid factors at the line level.
- Specify line details.
- Invite bidders.

## Pages Used to Create an Event

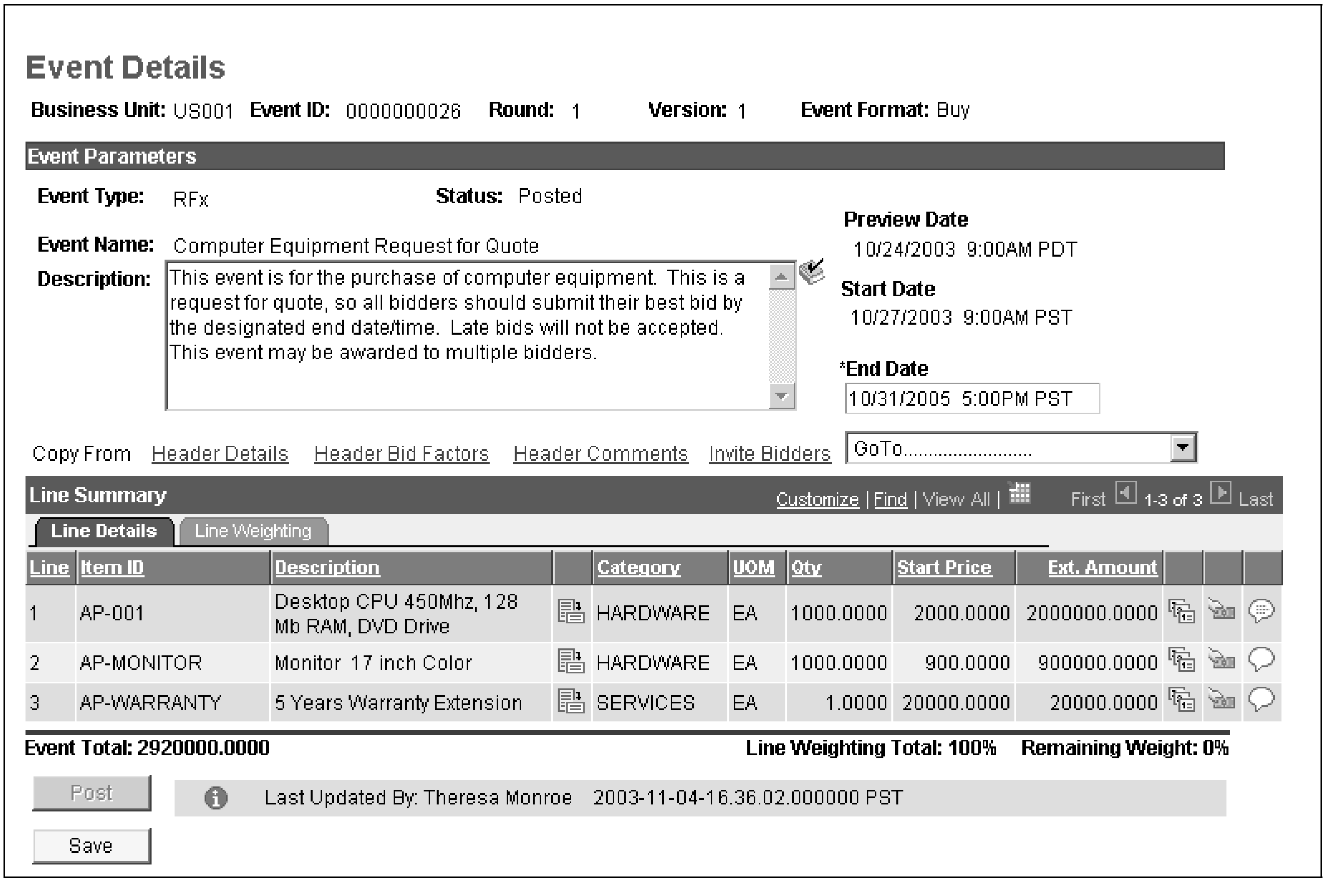
| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Event Details | AUC_CREATE_PNL | Sourcing, Create Events, Event Details | Enter header information. |
| Enter Copy Criteria | AUC_COPY_SEC | Click the Copy From link on the Event Details page. | Use a previous event, requisition, purchase order, contract, PeopleSoft Engineering BOM, PeopleSoft Manufacturing BOM, PeopleSoft Supply Planning planned order, or RFI as the template for a new event. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Header Details | AUC_DETAILS_PNL | Click the Header Details link on the Event Details page. | Specify currency and payment details, set extensions to event time, and permit multiple bids. Require bids on all lines, prohibit creator from seeing bids before end of event, and permit bids in multiple currencies. |
| Sourcing Exchange Rate Inquiry | EXCHANGE_RT_DTL_INQ | Click the Exchange Rate link on the Header Details page. | View the rate of exchange against the event's currency. |
| Event Bid Factors | AUC_BID_FAC_PNL | Click the Header Bid Factors link on the Event Details page. | Specify header level bid factors that relate to the entire event. |
| Bid Factor List Items | AUC_HDR_BF_LST_SEC | Click the Bid Factor List Items link on the Event Bid Factors page. | View and enter the list items associated with the bid factor. This page only appears if you select a list bid factor. |
| Header Comments and Attachments | AUC_COMM_SEC | Click the Header Comments link on the Event Details page. | Enter comments or attachments that you want to appear at the header level. Select to display the attachments and comments to the bidders. |
| Standard Comments | AUC_STD_COMM_SEC | Click the Standard Comments link on the Header Comments page. | Create a standard comment to use on the Header Comments and Attachments page. |
| Line Details | AUC_LN_DTLS_SEC | Click the Line Details button on the Event Details page. | Enter shipping information, bid parameters, item specifications, and line images. |
| Line Bid Factors | AUC_LN_BF_SEC | Click the Line Bid Factors button for the specified line on the Event Details page. | Specify bid factors that relate to the line item. |
| Search Bid Factor Groups | BID_FCTR_GRP_SRCH | Click the Add Bid Factors by Group link on the Line Bid Factors page. | Search for bid factor groups. |
| Search Bid Factors | BID_FCTR_SRCH | Click the Select Bid Factorslink on the Line Bid Factors page. | Search for bid factors. |
| Price Components | AUC_LN_BF_PRC_SEC | Click the Price Components link on the Line Bid Factors page. | View, add or modify price components associated with a price bid factor. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Bid Factor List Items | AUC_LN_BF_LIST_SEC | Click the Bid Factor List Items link on the Line Bid Factors page. | View and enter the list items associated with the line bid factor. This page only appears if you select a list bid factor. |
| Line Comments and Attachments | AUC_COMM_LN_SEC | Click the Line Comments and Attachments button on the Event Details page. | Insert comments or attach files pertinent to the line item. Display the attachments and comments to the bidders. |
| Item Specifications | AUC_ITEM_SPEX | Click the Fetch Item Specs link on the Line Comments and Attachments page. | Use to include item specifications on the event. |
| Sourcing Document Status Inquiry | AUC_DOC_STATUS | Sourcing, Maintain Events, Event Document Status<br>Click the Document Status Inquiry link from the Go To options on the pages in the Create Events and Analyze Events components. | Inquiry into the status of documents associated with sourcing events. |
| Event Lots | AUC_EVENT_LOT_SEC | Select the Event Lots link from the Event Details page. | Use to link an event with a preceding event. This page is only available for auction events. |
| Invite Collaborators | AUC_EVENT_COLLAB | Click the Invite Collaborators link on the Event Details page. | Invite collaborators to participate in creating the event.<br>See Chapter 8, “Using Event Collaboration,” page 87. |
| Template Info (template information) | AUC_TMPLTE_SEC | Click the Template Info link on the Event Details page. | Save the event as a template for future use. |

## Describing the Event at the Header Level

Access the Event Details page.




Event Details page

| | |
|---|---|
| **Round** | For multiround events, displays the round number for the selected event. |
| **Version** | For multiversion events, displays the version number for the selected event. |
| **Event Type** | Displays the type of event. Values are *Auction* or *RFx* for RFIs. This value appears by default from the Strategic Sourcing User Preferences page. |
| **Time Zone** | Enter the time zone in which you hold the event. The database server's time zone appears by default, but you can override it with a different time zone. |
| **Start Date** and **End Date** | Enter beginning and ending dates. Initially, the fields display the Business Unit default dates, which you can change. |
| **Preview Date** | (Optional) Enter a preview period. If you do not want a preview period, set the preview date to match the start date. |
| **Preceding Lot** | Click to access the immediately preceding lot for events linked in a lot. |
| **Next Lot** | Click to access the immediately subsequent lot for events lined in a lot. |

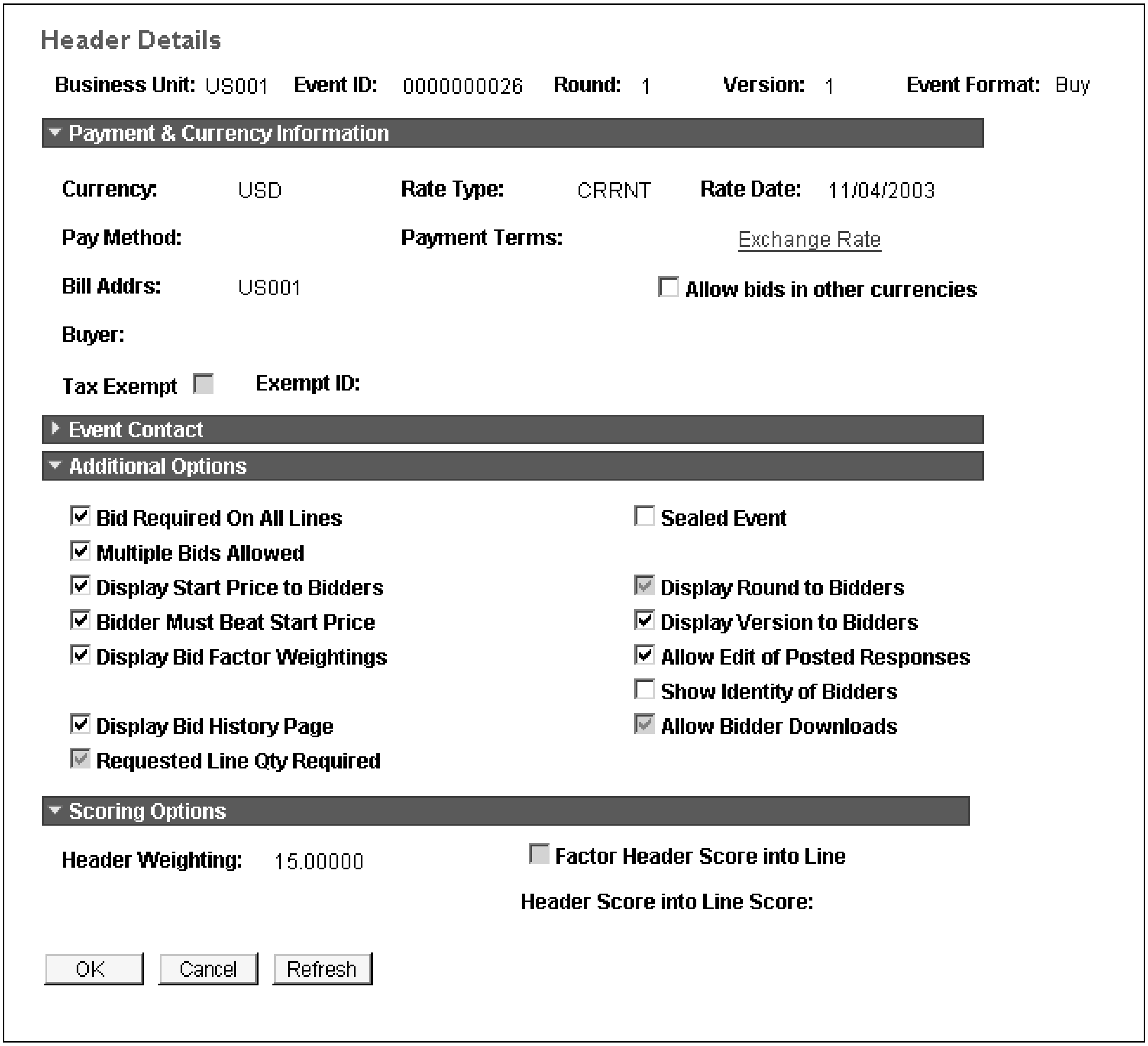
### See Also

Chapter 9, "Negotiating Events Using Multiple Rounds and Versions," page 97

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Defining User Preferences," Creating Strategic Sourcing User Preferences

## Entering Header Details

Access the Header Details page.




Header Details page

## Payment and Currency Options

**Allow Bids in Other Currencies**

Select to permit bidders to enter bids in currencies other than the event currency.

## Event Extension

The fields in this section are populated with either the business unit defaults or, if you use a template, the template information (which overrides default data).

**Allow Extension**

Select to activate the extension function for the event that you are creating.

**Last Bid Received** and **Type**

Enter a time period, relative to the end time of the event, during which bidding is extended for the event.

For example, if the Last Bid Received field has the value *1*,and the type is *Hours*, then the event is extended when a bid is received within 1 hour before the scheduled end time.

---

**Note.** The extension begins at the scheduled end time, not at the time of the last bid.

---

**Number of Extensions**

Enter the number of times the event can be extended. An extension occurs if the Last Bid Received and Type field criteria are met for as many extensions as you allow.

The event ends either when no bid is received before the Last Bid Received time expires or the number of extensions is reached (regardless of when the last bid is entered).

**Length of Extension** and **Type**

Enter the amount of time to enable bidding to continue after each extension starts.

For example, if the length of extension is *4* and the type is *Hours*, then the event extended 4 hours after the scheduled end time.

---

**Note.** The extension begins at the scheduled end time, not at the time of the last bid.

---

## Additional Options - Bidder Display Options

**Display Start Price to Bidders**

Select to indicate that the start price should be displayed to bidders. If selected, the Worst price for the price bid factor is displayed to the bidders. If cleared, the start price is not displayed to the bidders and therefore bidders may enter any price for the line item. For auction events, the combination of the start price flag and bid scoring options determine what price each bidder may bid.

If Must Beat Best Bid is selected and Display Start Price is not selected, the initial bid on the event sets the start price. So the event creator could have set the Start Price to $2,000 but elected to not use the Start Price. The first bidder could post a bid of $2,400; therefore that first bid score is 100 percent. Any subsequent bids should be for less than $2,400 for a buy event.

If Must Beat Own Bid is selected and Display Start Price is not selected, then each bidder sets their own start price. So if the event creator set the Start Price to $2,000 and elected to not use the Start Price, Bidder A could enter an initial bid of $2,400, Bidder B could enter an initial bid of $2,600 and Bidder C could enter an initial bid of $2,800. Each bidder then has to bid lower than their initial bid on their subsequent bids.

**Bidder Must Beat Start Price**

Select to indicate that bidders must beat the displayed start price. If not selected and Display Start Price to Bidders is selected, bidders can see the start price but are not required to beat the start price. If Display Start Price to Bidders is not selected, then the Bidder Must Beat Start Price cannot be selected, since bidders must be able to see the start price in order to beat the start price.

**Display Round to Bidders**

The system provides this value as a default Strategic Sourcing Business Unit. It indicates whether the event round number should display on the bid response pages and event PDF/XML files.

**Display Version to Bidders**

The system provides this value as a default from the Strategic Sourcing Business Unit. It indicates whether the event version number should display on the bid response pages and event PDF/XML files. If selected, the system automatically selects the Display Round to Bidderscheck box also.

**Display Winning Bid to Bidders**

Select to indicate that the winning bid price/score should be displayed to bidders for an auction event.

This check box must be selected if Must Beat Best Bid is selected. If Must Beat Own Bid is selected, displaying the winning bid is optional.

If selected and Bid Required on All Lines is also selected, the system displays the total winning price/score for the overall event. If selected and Bid Required on All Lines is not selected, the system displays the winning price/score for each line item.

If this check box is not selected and Bid Required on All Lines is selected, the system does not display the total winning price/score for the overall event. If this check box is not selected and Bid Required on All Lines is not selected, the system won’t display the winning bid price/score for each line item.

**Display Bid History Page**

Select to display the Bid History page to bidders. The bidder is able to view all bids posted on the event by bidder name and rank, score or price. If not selected, only the bidder’s bids display on the Bid History page and the bidder won’t see bids entered by other bidders.

**Display Bid Factor Weightings**

Select to display to bidders the weightings associated with bid factors. This option only displays for RFx events.

**Display Bid Rank**

Select to display the bidder’s bid rank, based on each bidder’s best bid. This is only available for auction events, not RFx events. If selected, the system displays the rank instead of the bid status on the Create Bid Response and Bid Confirmation pages. For example, the system displays *4* instead of *Outbid*.

If this check box is selected, the system makes the Show Number of Bids check box available for input.

If both Display Bid Rank and Bid Required on All Lines are selected, the system ranks the bids based the on total price/score as well as the line price/score.

---

**Note.** If Bid Required on All Lines is selected, the bidder's objective is to have the overall rank be *1* regardless of what the line rankings are. For example, a bidder could have an overall ranking of *1*, but is ranked *1* for line 1, *2* for line 2 and *3* for line 3. This might happen if the bid price for line 1 is especially good and thus makes up for a less favorable bid on lines 2 and 3.

If bids are not required on all lines, then bidders are competing at the individual line level, and the system won't calculate an overall rank.

---

**Show Number of Bids**

Displays the total number of bids for the event to bidders. This is only available for auction events. If this option is selected, the bid rank is displayed based on the total number of bidders, such as *3* of *5*. Only the overall rank displays as 'x' of 'x'. The individual lines don't show the total number of bidders, since this is the same number as for the overall event.

If the Bid Required on All Linescheck box is not selected, then each line displays as 'x' of 'x', since it is possible to have a different number of bids for each line.

**Show Identity of Bidders**

Select to display actual bidder names to the bidders on the Bid History page. If the bidder is an individual rather than a company, the system displays the bidder name rather than the company name. If this option is not selected, the system shows the bidder name as Bidder Number 1 and so forth.

## Additional Options - Bid Requirements

**Bid Required on All Lines**

Select to require bidders to enter a bid for every line on the event. The bid would not be valid unless the bidder enters a bid on every line.

**Price Only**

Select to indicate the event is price-only. This option only displays for auction events. When selected, the system automatically selects the Bid Required On All Lines and Requested Line Quantity Required check boxes. The system removes all non-price bid factors from the event if previously entered and you can't add any additional bid factors. This also requires all event lines to be weighed equally and the line quantity requested is required. While bidding, bidders view a streamlined response page for price-only events.

**Requested Line Qty Required**

Select to indicate that the bidder must bid on the entire line quantity. When selected, the bid quantity is automatically set to the line quantity on the Bid Response page and can't be changed by the bidder. If not selected, the bidder can enter any line quantity within the specified minimum and maximum bid quantity amounts.

**Allow Edit of Posted Responses**

If selected, enables the bidder to edit their posted bid response while the event is still open for bidding. This is only applicable for RFx and RFI events.

**Allow Bidder Downloads**

Select to permit bidder downloads. If bidder downloads are allowed, when an event is posted, the system creates the event details PDF file and XML file as header attachments. If this option is cleared, then only the PDF file is created and attached to the event.

**Sealed Event**

Select to indicate the event is sealed, which means that the event originator cannot view either bids or bid history until the event has ended. This option is only available for RFx events.

### Scoring Options

**Factor Header Score into Line**

If selected, you can enter a default weighting for how the header score is factored into an individual line score. This is most commonly used when bid required on all lines is not selected.

**Header Score into Line Score**

Enter a weighting for how the system calculates the header score against the line score. You must select Factor Header Score into Line to make this field available for entry.

For example, if a line has three bid factors, such as price, warranty, and lead time that are weighted 50 percent, 25 percent, and 15 percent, respectively. The system calculates the header factor weighting as 10 percent and factors it into the total line score.

**Header Weighting**

You can enter a default weighting for how the header score is weighted in relation to the total score. For example, you could set the default weighting to 20 percent, and create an event with three lines. You weight Line 1 at 50 percent, line 2 to 20 percent and line 3 to 10 percent. Thus the total weighting of the lines is 80 percent plus the system uses 20 percent for the defaulted header, totalling 100 percent. This is most commonly used when bids are required on all lines.

### Bid Scoring Options

**Must Beat Own Bid**

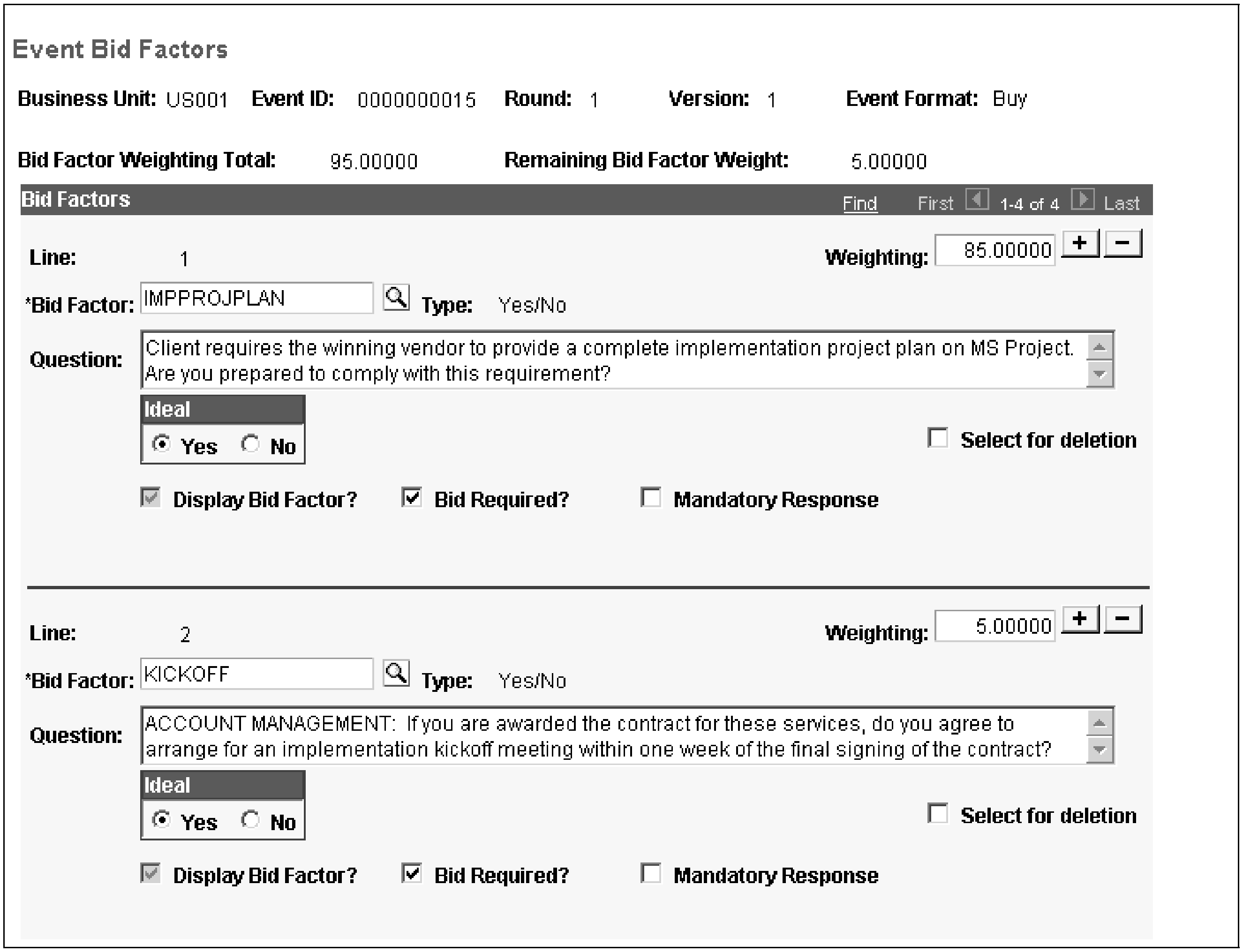
Select to indicate that the bidder must beat their current best posted bid for an auction event. The bidder is not required to have the winning bid in order to post the bid. This option is the system default. This option is not available for RFx events.

**Must Beat Best Bid**

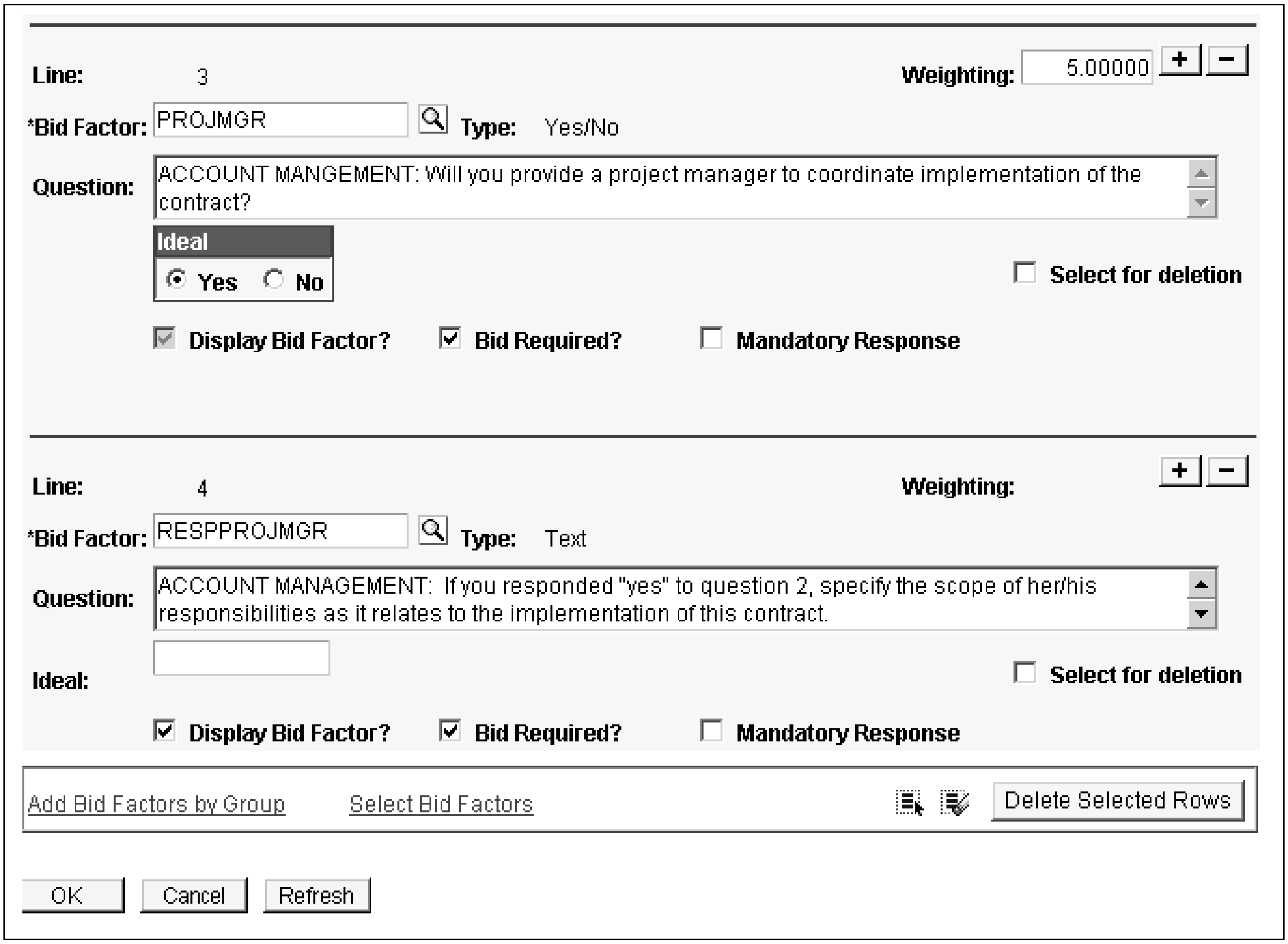
Select to indicate that the bidder must beat the overall best posted bid for an auction event. If bids are not required on all lines, then bidders must beat their previous bid or the best bid for each line item they are bidding on. If bids are required on all lines, then bidders must beat their total bid price or the total winning price. This option is not available for RFx events.

## Specifying Bid Factors for the Event

Access the Event Bid Factors page.




Event Bid Factors page (1 of 2)




Event Bid Factors page (2 of 2)

Specify bid factors that relate to the entire event.

**Best** and **Worst** — Displays the range of acceptable responses to the bid factor question for bid factor types of date, monetary, and numeric.

**Ideal** — Displays the preferred response to the bid factor question. This field appears for bid factor types where there is no best and worst values (yes/no, text, list)

**Increment** — If price is the only bid factor and the event is an auction, enter the increment (if a sell event) or decrement (if a buy event) by which each bid must increase or decrease. Each new bid (for the entire line quantity) must equal or beat the previous bid by the bid increment /decrement amount.

If, for example, the current bid on a sell event is $3,000 and the increment is $500, then the next bid must be at least $3,500.

When a new bid is posted, the system displays the amount of the new bid in the Worst field.

**Display Bid Factor?** — Select to display the bid factor to the bidder. If not selected, the bid factor is hidden from the bidder and a response can be entered on the bid analysis pages.

| | |
|---|---|
| **Bid Required?** | If required, the bidder must enter a response for the specified bid factor before successfully posting a bid. |
| **Mandatory Response** | If selected, the bidder's response must match the specified Best response for the bid to be posted. |
| **Select for Deletion** | Select to mark row for deletion. |
| **Delete Selected Rows** | Click to delete rows that have been marked to Select for Deletion. |

### Bid Factor Groups

Access the Line Bid Factors page.

To add bid factors by group:

1. Click the Add Bid Factors by Grouplink.
2. On the Search Bid Factor Groups page, select a Bid Factor Group Code. You can also select a Business Unit and Department. Click Search.
3. Click the Select check box for the desired bid factor groups, then click OK to add the bid factor group to the line bid factors.

### Ad Hoc Bid Factors

For any event, you can both edit existing bid factors and create new ones.

To create a new bid factor, enter the relevant data in the fields. The new bid factor applies only to the event for which you create it. It is not available for any other event.

To edit a bid factor, select an existing bid factor and then modify the field information. The changes that you make to the bid factor apply only to the event for which you edit it. The original bid factor remains available for all other events.

---

**Note.** You can use the same procedures to create ad hoc bid factors at the line level.

---

### See Also

Chapter 5, "Creating and Using Bid Factors," Scoring vs. Weighting, page 40

Chapter 5, "Creating and Using Bid Factors," Line Weighting vs. Bid Factor Weighting, page 41

Chapter 5, "Creating and Using Bid Factors," page 39

## Creating Lotting Events

Access the Event Lots page.

To create lotting events, select a Preceding Lot ID to associate this event with one scheduled to occur before it. The second event does not begin until the first event has ended.

When you change an event end date where there are subsequent event lots, the system does the following:

- Updates all subsequent event lots dates based on the original increments set for the Preview and End Dates.
- Regenerates the PDF and XML documents for all impacted events.

- Generates an email notification to the invited bidders notifying them of the changes in the event date/times.

### See Also

Chapter 7, "Creating Events," Event Lotting, page 57

# Copying Events and Creating Templates

This section discusses how to:

- Copy an event.
- Save an event as a template.
- Specify event details.

### See Also

Chapter 7, "Creating Events," Describing the Event at the Header Level, page 62

Chapter 5, "Creating and Using Bid Factors," page 39

## Pages Used to Copy Events and Create Templates

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Enter Copy Criteria | AUC_COPY_SEC | Click the Copy From link on the Event Details page. | Use a previous event, requisition, purchase order, contract, PeopleSoft Engineering BOM, PeopleSoft Manufacturing BOM, PeopleSoft Supply Planning planned order, template, or RFI as the template for a new event. |
| Contract Lines to Copy | AUC_COPY_CNTRCT | Click the Copy From link on the Event Details page. Select *Contract.* | Select contract lines to copy to an event. |
| Bill of Material Lines to Copy | AUC_BOM_SUMMARY2 | Click the Copy From link on the Event Details page. Select *Manufacturing* or *Engineering Bill of Material*. | Select PeopleSoft Manufacturing or PeopleSoft Engineering BOM components to copy to an event. |
| Event Lines to Copy | AUC_COPY_PLN | Click the Copy From link on the Event Details page. Select *Planning Order*. | Select planned order lines to copy to an event. |
| Purchase Order Lines to Copy | AUC_COPY_PO | Click the Copy From link on the Event Details page. Select *Purchase Order*. | Select purchase order lines to copy to an event. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| RFI Lines to Copy | AUC_COPY_RFI | Click the Copy From link on the Event Details page. Select *Request For Information*. | Select RFI lines to copy to an event. |
| Requisition Lines to Copy | AUC_COPY_REQ | Click the Copy From link on the Event Details page. Select *Requisition*. | Select Requisition lines to copy to an event. |
| Sourcing Event Lines to Copy | AUC_COPY_AUC | Click the Copy From link on the Event Details page. Select *Sourcing Event.* | Select event lines to copy to a new event. |
| Sourcing Template Lines to Copy | AUC_COPY_SEC | Click the Copy From link on the Event Details page. Select Sourcing Template. | Select sourcing template lines to copy to an event. |
| Search Templates | AUC_TMPLTE_SRCH |  Click the Search Templates button on the Sourcing Template Lines to Copy page. | Search for templates. |
| Template Info | AUC_TMPLTE_MAINT | Create Events, Maintain Event Templates<br>Select *Template Info* from the available options on the Event Details page. | Use to create and maintain event templates. |

## Copying an Event

Access the Enter Copy Criteria page.

To create an event based on a previous sale or purchase, you can copy the lines from another event or from a purchase order, purchase requisition, contract, PeopleSoft Manufacturing BOM, PeopleSoft Engineering BOM, or planned order. You use the Strategic Sourcing User Preferences page to specify the transactions from which users can copy.

You can use several documents to create one event. The system consolidates identical line items. For example, if you copy from three different requisitions that all contain an identical line item, that line item appears only once on the new event.

---

**Note.** If you selected External PO Integration on the Business Unit Definition page and thus are awarding events to an external purchasing system, you can only copy from sourcing events, sourcing templates, and RFIs.

---

See Chapter 2, “Setting Up Business Units in PeopleSoft Strategic Sourcing,” page 11.

### Copy Template

**Copy From** Select the source from which to copy. Values are:

*Contract:* You can copy contract line items onto buy events.

*Engineering BOM:* You can copy items from a PeopleSoft Engineering BOM onto any event by entering an item ID.

*Manufacturing BOM:* You can copy items from production and rework BOMs onto any event.

*Planning Order:* You can copy items from planned orders onto buy events by selecting a business unit and planner code.

*Purchase Order:* You can copy purchase order line items onto buy events.

*Purchase Requisition:* You can copy requisition line items onto buy events. If you copy a requisition into an event, the requisition is not available for sourcing until the event is awarded.

*Request for Information:* You can copy lines from an RFI onto any event.

*Sourcing Event:* You can copy line items from previous events onto any event.

*Sourcing Template:* You can use an event template to copy the entire event details onto any event.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Defining User Preferences," Creating Strategic Sourcing User Preferences.

### Select Criteria

**Copy Method** Select the way the system copies the information. Values are:

*Override:* The system replaces any existing information for the event with the data from the template.

*Append:* The system adds information to existing event information but does not write over any fields that contain data.

Other fields that appear in the Select Criteria group box depend on the selection in the Copy From field.

### Copy Criteria

Enter identifying information into any one field to search for the template that you want. Narrow the search response by entering criteria in more than one field.

## Entering Criteria

The select and copy criteria are different depending on the transaction from which you are copying.

### Contract

The system displays only contracts with a status of closed, or approved, or open. You can only copy contracts to Buy Events.

If you select SetID, the system makes the Item IDand Categoryfields available.

**Process Option** Select *General Contract*, *Prepaid Voucher*, *Prepaid Voucher with Advance PO*, *Purchase Order*, *Recurring PO Voucher*, *Recurring Voucher*, or *Release to Single PO Only*.

**Include Cancelled Lines** Select to include canceled contract lines on the event.

### PeopleSoft Engineering and PeopleSoft Manufacturing BOM

You can copy from PeopleSoft Engineering and PeopleSoft Manufacturing BOMs only for buy events.

There are three possible reasons for using an PeopleSoft Engineering or PeopleSoft Manufacturing bill of material for a sourcing event.

- You are outsourcing all or part of the manufacturing of a subassembly or final end item and sharing the product structure with the potential suppliers of the subcontracted services. In this case, you require a detailed bid where the material cost of each component supplied by the subcontractor must be specified as well as the cost of the outside processing services.
- You are outsourcing an item’s repair. You are sharing product structures with bidding vendors to indicate what they may be repairing or replacing.
- You are requesting bids on the components that make up a subassembly or final end item.

**Item ID** Enter the item ID for the BOM to be copied.

**BOM Type** Enter *Manufacturing* or *Rework*.

**BOM Code** Specify the version of the BOM you want you copy.

**Depth** Specify the number of BOM levels you want to copy. For example, if the BOM includes two levels, level 1 includes components that make up the finished good, and level 2 includes components that make up the level 1 subassemblies.

### Planned Orders

You can copy from planned orders only for buy events.

You can convert a planned order into a strategic sourcing event prior to creating the actual purchase order. New planning orders are eligible for copying into Strategic Sourcing when they are designated as Strategic Sourcing Events and are approved. You designate this on the Business Unit Item - Planning page by clicking the Spot Buy check box.

See *PeopleSoft Managing Items 8.8 PeopleBook*, “Defining Items,” Specifying Planning Information for an Item.

**Planner Cd** (code) Specify the planner code associated with the order you wish to copy.

**From Due Date, End Due Date** Enter the due date range from which to choose planned orders.

**From Start Date, End Due Date** Enter the start date range from which to choose planned orders.

### Purchase Order

You can copy from a purchase order only for buy events.

### Request for Information

You can copy any RFI for the specified business unit for RFI, buy, and sell events.

**Event ID** Enter the event from which to copy. Only event IDs for RFI events are available.

**Round** If the event includes multiple rounds, enter the event round from which to copy.

**Version** If the event includes multiple versions, enter the version of the event from which to copy.

### Requisitions

You can copy from requisitions only for buy events. To copy from a requisition, it must have a line status of approved, is not on hold and has a valid budget status.

When you search for requisitions by criteria that are SetID-based (for example, contracts, vendor ID, item ID, or item category), you must enter a SetID. The system consolidates requisitions that have the same item ID into one event line, even if the requisitions have different purchase order business units.

---

**Note.** You must ensure that the TableSet controls are set up so that the SetIDs for contracts, items, vendors, and so forth are the same as the ones associated with the PeopleSoft Strategic Sourcing business unit and the related PeopleSoft Purchasing business units.

---

For example, suppose that two requisitions are associated with the PeopleSoft Purchasing business unit US001 and the item ID AP-001. Another requisition is associated with the PeopleSoft Purchasing business unit US002 and the item ID AP-001. All requisitions use the SetID *Share.* You can consolidate the requisitions into one event line while maintaining the unique PeopleSoft Purchasing business units.

If an event is created from a requisition, and the event is canceled, the system reverses the requisition’s source status so that the requisition lines are again available for sourcing.

**Select Lines** You can copy from *RFQ Not Required, RFQ Required,*or *Requisition Lines*.

### Sourcing Event

You can copy any existing auction for the specified business unit for RFI, buy, and sell events.

**Event Type** You can copy from auction or RFx events.

**Copy Header Bid Factors** Select to include header bid factors when copying from a sourcing event.

### Sourcing Template

You can copy any existing auction for the specified business unit for buy and sell events.

**Event Type** You can copy from auction or RFx events.

**Template/Event ID** Search for the template ID or event ID from which to copy.

 Click to search for templates using the Search Template page.

## Saving an Event as a Template

After creating an event, access the Template Info page.

Once you create a template from the Create Events page, you can only modify it from the Template Info page. You can still copy from the template on the Enter Copy Criteria pages.

The event template info page enables you to indicate the type of template to create (Business Unit, Department, Personal) based on the user preference settings. If Department is selected, you can select the departments that should be associated with the event. The system creates the template upon posting of the event.

# Creating Event Lines

This section discusses how to:

- Enter line level information.
- Attach comments and files.

## Pages Used to Create Event Lines

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Event Details | AUC_CREATE_PNL | Sourcing, Create Events, Event Details | Enter line information. |
| Line Details | AUC_LN_DTLS_SEC | Click the Line Details button on the Event Details page. | Enter shipping information, bid parameters, item specifications, and line images. |
| Line Bid Factors | AUC_LN_BF_SEC | Click the Line Bid Factors button on the Event Details page. | Enter bid factors related to the line. |
| Line Comments and Attachments | AUC_COMM_LN_SEC | Click the Line Comments and Attachments button on the Event Details page. | Insert comments or attach files pertinent to the line item. Display the attachments and comments to the bidders. |
| Line Defaults | AUC_CREATE_DFLTS | Click the Line Defaults link on the Event Details page. | Enter or edit default due date and shipping information. |

## Entering Line Level Information

Access the Event Details page.

**Item ID** Select from the item master (for buy events) or asset records (for sell events).

**Description** By default, displays the description of the item ID. If no item ID exists, enter a description in this field.

**Category** Displays the category by default from the specified item or asset. If adding an item by description, select a category. Any bid factors that you assign to the specified category are added to the line bid factors.

**Event Qty** (event quantity) Enter the number of units that you want to sell or buy.

**Start Price** Enter the amount at which the bidding must start if Must Beat Start Price is selected. If an item is selected, the system uses the item's standard unit price as a default.

**Item SetID** The system tracks this information for consolidating requisitions across PO Business Units.

**Physical Nature** Select to specify the type of item. Values are *Good* and*Service.* The system uses this information to calculate VAT in PeopleSoft Purchasing by differentiating goods from services. This field is only required for buy events. The value appears by default depending on the item or item category, but you can override it.

**Where Performed** Select to specify where a service is most often performed. This field becomes available when you select *Service*in the Physical Nature field. Values are *Buyer's, Ship From, Ship To,* and *Supplier's.* This field is only required for buy events. The value appears by default depending on the item or item category, but you can override it.

**Weighting** Enter a value to indicate the importance of the line item to the entire event. If you do not enter specific line weightings, each line item is weighted equally.

Click the Line Details button to access the Line Details page.

Click the Line Bid Factors button to access the Line Bid Factors page.

Click the Line Comments and Attachments button to access the Line Comments and Attachments page.

## Specifying Bid Factors at the Line Level

Access the Line Bid Factors page.

**Weighting** Enter a value to indicate the importance of the line item to the entire event. If you do not enter specific line weightings, each line item is weighted equally.

**Bid Factor Weighting** Enter a value to indicate the importance of the bid factor to the line item. The system then factors weightings into the score.

You must enter weightings for bid factors if you want the bid factor responses to be scored. You can leave the bid factor weighting set to 0 if you don't want it factored into the score.

### Price Components

Access the Price Components page.

You can add price components so that bidders can specify the areas that make up their total price, such as labor or material. You can also include a weighting for each component. Price components can only be added to the bid factor that is designated as the price bid factor.

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**Note.** Price components can only be added to the price bid factor.

---

### Ad Hoc Bid Factors

You can create ad hoc bid factors at the line level.

See Chapter 5, “Creating and Using Bid Factors,” Scoring vs. Weighting, page 40.

## Specifying Line Details

Access the Line Details page.

### Bid Parameters

**Reserve Price** Enter the price that bidding must reach before you award the event to any bidder. Awards can still be posted if the reserve price is not met, but the system issues a warning.

**Minimum Quantity** Enter the minimum units that a bidder must bid on.

**Maximum Quantity** Enter the maximum number of units that a bidder can bid on. Use this field if you plan to award the event to more than one bidder.

**Quantity Not Applicable** Select for non-item lines, such as extended warranties. Bidders must enter a bid price but not a bid quantity.

**User Defined Price Breaks** Select to indicate that price adjustments are required for the line item. Select to make the Minimum Quantityand Maximum Quantity fields available to enter price adjustments. You cannot select both User Defined Price Breaks and Bidder Defined Price Breaks.

**Bidder Defined Price Breaks** Select to indicate that bidders can define their own price tiers for the line item or group. You cannot select both User Defined Price Breaks and Bidder Defined Price Breaks.

**Price Break - Minimum Quantity** the minimum quantity allowed for the specified tier. The quantity must be lower than the maximum quantity entered for the tier, and it must also be greater than the maximum quantity for the previous tier. This field appears only if you have selected the User Defined Price Breaks check box.

**Price Break – Maximum Quantity** Enter the maximum quantity allowed for the specified tier. The quantity must be greater than the minimum quantity entered for this tier, and it must not exceed the maximum bid quantity. Also, the maximum quantity for the final price tier must not exceed the line maximum bid quantity. This field appears only if you have selected the User Defined Price Breaks check box.

---

**Note.** If you selected External PO Integration on the Business Unit Definition page and thus are awarding events to an external purchasing system, you can have only one schedule per line.

---

### Item Specifications

If you select an item or asset that contains physical attributes or images, the system populates the Item Specifications group box automatically. You can, however, enter new data or edit the defaults.

### Line Image

You can add multiple images for each line.

## Attaching Comments and Files

Access the Header Comments and Attachments page to attach comments and files at the header level.

Access the Line Comments and Attachments page to attach comments and files at the line level.

### Comments

| | |
|---|---|
| **Send to Bidder** | Select to enable the bidder to see the comment or attachment. |
| **Include on Award** | Select to enable the comments to appear on the contract and purchase order award. |
| **Standard Comments** | Click to access the Standard Comments page, where you can select or edit predefined comments. |
| **Fetch Item Specs** | Click to access the Item Specifications page where you can select to add pre-defined item specifications to the line item. If item specifications have been defined for an item and they are marked to Copy to Transactions, they automatically are added as line comments. |

---

**Note.** If you selected External PO Integration on the Business Unit Definition page and thus you are awarding events to an external purchasing system, you can't include comments or attachments on events.

---

### Files

When you post an event, the system generates a PDF file and optionally an XML file that describes the event. The PDF and XML files are attached to the email that notifies bidders of the event. You can see the PDF and XML files listed as attachments when you access the Header Comments and Attachments page. The PDF and XML files that the bidder receives are tailored to the bidder; for example, if you invite one bidder to all lines but invite another bidder to only one line, each bidder receives a PDF and XML file showing only the invited lines.

### See Also

Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Creating Standard Comments, page 29

## Reviewing Shipping Information

Access the Line Defaults page.

If you create an event and want specific shipping and delivery date information as defaults on the event lines, you can specify this information on this page. Select append if you want any new line items to contain the specified shipping information. Select override to change any existing line shipping information to the information specified on this page.

# Inviting Bidders

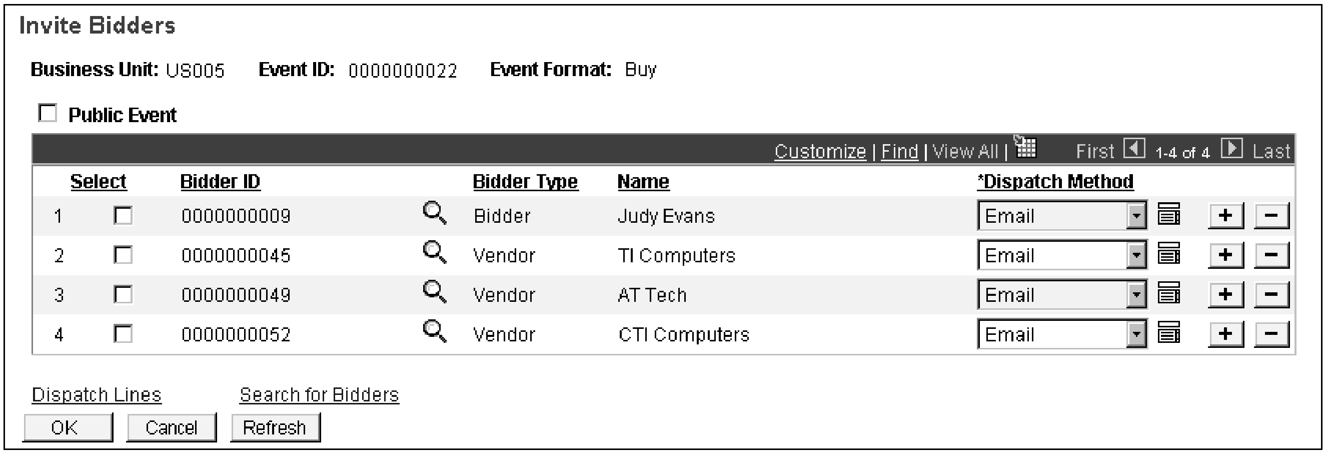
This section discusses how to invite bidders.

## Pages Used to Invite Bidders

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Invite Bidders | AUC_DISP_SEC | Click the Invite Bidders link on the Event Details page. | Announce an event. Solicit bids from registered bidders, vendors, or customers. Specify that bidders place bids on certain line items only. Invite bidders who are not currently vendors or customers. |
| Contact Bidders | AUC_DISP_ADDR_SEC | Click the Contact Details button on the Invite Bidders page. | View contact information about the bidder. |
| Public Event Contacts | AUC_DISP_CNTCT_SEC | Click the Contact Bidders button for a bidder ID. | View and enter contacts for a public event. |
| Dispatch Lines | AUC_DISP_LINE | Click the Dispatch Lines link on the Invite Bidders page. | Invite specified bidders to bid only on certain line items. If the event is a public event, the dispatch lines link is disabled as bidders are invited to all lines for public events. |
| Search for Bidders | AUC_BIDDER_SRCH_M | Click the Search for Bidders link on the Invite Bidders page. | Search for bidders based on various criteria, and select bidders to invite to an event. |

## Inviting Bidders

Access the Invite Bidders page.



Invite Bidders page

**Public Event** Select to make the event available to any interested party. For all events, bidders must be registered.

When you select Public Event, a bidder called PUBLIC_AUC appears on the bidder list. You can use the PUBLIC_AUC bidder to invite unregistered bidders. Click the Contact Details button and enter the names and the email addresses of the people that you want to invite.

**Dispatch Method** Select to determine the dispatch method for sending an invitation. Options are *Email*, *Fax*, and *Printed Document.* This method appears by default from the business unit setting.

**Dispatch Lines** By default, bidders are invited to bid on all line items. Click to specify that a bidder is invited to bid on certain line items only.

**Search for Bidders** Click to access a sortable list of bidders from which you can invite to the event.

**Invite Status** After an event is posted, the Invite Status displays to indicate whether an invited bidder has Accepted or Declined the event invitation.


Click the Contact Details button to view or update contact information about the invited bidders.

**Renotify** Select to resend event notices and updates to selected suppliers.

## Bids on Specific Line Items

In some cases, you need to invite a bidder to bid on specific lines but not on the entire event. For example, suppose that you create a buy event to purchase software and training. You would invite vendors who only handle training to bid on the training line item but not the software line item.

To invite a bidder to bid on specific line items:

1. Invite that bidder to the event.
2. In the Select column, select the check box next to the bidder's name.

   You can select multiple bidders, if you plan to invite them to bid on the same line items.
3. Click the Dispatch Lines link.

**Note.** For public events, bidders can't be invited to selected lines. Therefore, the Dispatch Lines link is disabled if the event is public.

4. In the Select column of the Assign Bidder to Lines page, select the check boxes next to the line items that you want the bidders to bid on.

   Clear the check boxes next to the line items that you do not want the bidders to bid on.
5. Click OK.

### Bidders Who Are Not Registered Bidders, Customers, or Vendors

You may need to invite people who are not on your bidder, customer or vendor list.

To send invitations to those individuals or organizations that may be interested in a specific public event:

1. Click the Contact Details button on the PUBLIC_AUC line.
2. On the Contact Details page, enter name and email address of the bidder to invite.
3. Click the Add (plus sign) button to create new lines on which to enter additional names and addresses.

**Note.** Invitation recipients are required to register before bidding on the event.

## Disallowing Bidders

Access the Invite Bidder page from the Event Details page.

To disallow a bidder:

1. Select Delete to remove the bidder from the event
2. If the bidder has already posted one or more bids on the event, the system alerts you that all posted bids are canceled for this bidder.
3. Confirm that you wish to remove the bidder from the invite list.
4. The bidder no longer is able to bid on the event.
5. Any of the bidder's posted bids are canceled or disallowed.

# Creating an RFI Event

This section discusses how to create RFIs.

## Pages Used to Create an RFI Event

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| RFI Details | AUC_CREATE_RFI | Sourcing, Create Events, Event Details | Enter RFI header information. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Enter Copy Criteria | AUC_COPY_SEC | Click the Copy From link on the RFI Details page. | Use a previous RFI or sourcing template as the basis for the new RFI event.<br><br>See Chapter 7, "Creating Events," Copying Events and Creating Templates, page 72. |
| RFI Details | AUC_RFI_DETAILS | Click the Event Details link on the RFI Details page. | Use the RFI details page to enter header information for the RFI event. |
| Event Comments | AUC_COMM_SEC | Click the Event Comments link on the RFI Details page. | Enter comments or attachments to appear at the header level. Display the attachments and comments to the bidders. |
| Standard Comments | AUC_STD_COMM_SEC | Click the Standard Comments link on the Header Comments and Attachments page. | Create a standard comment to use on the Header Comments and Attachments page. |
| Invite Bidders | AUC_DISP_SEC | Click the Invite Bidders link on the Event Details page. | Announce an event. Solicit bids from registered bidders, vendors, or customers. Specify that bidders place bids on certain line items only. Invite bidders who are not currently vendors or customers. |
| Search for Bidders | AUC_BIDDER_SRCH_M | Click the Search for Bidders link on the Invite Bidders page. | Search for bidders based on various criteria, and select bidders to invite to event. |
| Template Info (template information) | AUC_TMPLTE_SEC | Click the Template Info link on the RFI Details page. | Save the event as a template for future use. |
| Invite Collaborators | AUC_EVENT_COLLAB | Click the Invite Collaborators link on the RFI Details page. | Invite collaborators to participate in creating the event.<br><br>See Chapter 8, "Using Event Collaboration," page 87. |
| Find Collaborators | AUC_COLLAB_SRCH | Click the Find Collaborators link on the Invite Collaborators page. | Search for collaborators, and select collaborators an event. |
| Event Bid Factor Question | AUC_BF_CMMT_SEC |  Click the Bid Factor Question button on the RFI Details page. | View the text of the question associated with a bid factor. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Bid Factor List Item | AUC_HDR_BF_LST_SEC |  Click the Bid Factor List Items button on the RFI Details page. | View and enter the list items associated with the bid factor. This page only appears if you select a list bid factor. |
| RFI Bid Factor Comments and Attachments | AUC_COMM_BF_SEC | Click the Add Attachment button on the RFI Details page. | Add attachments to the RFI event. |

## Creating RFIs

You create RFIs similar to how you create auction events.

1. First, access the RFI Details page to enter header information. You can copy from an existing RFI, or sourcing template using the Enter Copy Criteria page.

   See Chapter 7, "Creating Events," Copying Events and Creating Templates, page 72.

2. Add RFI comments using the Header Comments and Attachment page.
3. Add RFI Details, such as whether you want the event scored, whether you display the round and version to bidders, and whether bidders must respond to all bid factors.
4. Invite bidders to participate in the event.

   See Chapter 7, "Creating Events," Inviting Bidders, page 81.

5. Save the event as a template if you want to copy from it later.

   See Chapter 7, "Creating Events," Copying Events and Creating Templates, page 72.

6. You can optionally invite internal collaborators to participate in the event creation.

   See Chapter 8, "Using Event Collaboration," page 87.

7. You can request bidder responses to event questions using the Bid Factor Question page. If the questions require a list, you can enter the items on the Bid Factor List Items page.
8. You can add bid factor comments and attachments to send to the bidder or include on the award.
9. You have the option to display the line bid factors to the bidders using the Displaycheck box.

## Creating RFI Details

Access the RFI Details page.

**Score RFI Event** Select to indicate that you want the system to calculate a score for RFI responses. whether If not selected, the system hides the Best, Worst, Ideal and Weighting fields on the Bid Response page.

### See Also

Chapter 7, "Creating Events," Entering Header Details, page 64

# Setting Asset Status

If you use PeopleSoft Asset Management, follow these guidelines:

- To enter an asset as a line item for sale in an event, the strategic sourcing status for the asset must be *Allowed to be Auctioned*.
- Once you post the event, the asset management status changes to *Sent to Auction.*
- The status remains *Sent to Auction* until the event is awarded or canceled.
- Once awarded, the PeopleSoft Asset Management status changes to *Sold in Auction*.

If the event is not approved or awarded, you must set the event status to *Canceled* to change the asset management status from *Sent to Auction* back to *Allowed to be Auctioned.*

## See Also

Chapter 13, "Analyzing Bids and Awarding Events," Posting the Award, page 168

CHAPTER 8

# Using Event Collaboration

This chapter provides an overview of event collaboration and discusses how to:

- Collaborate on event creation.
- Collaborate on event analysis.

## Understanding Collaboration

Often during a sourcing event, there are multiple stakeholders involved in the event. While the event creator is usually the buyer responsible for the event, the buyer may not have all of the information that is critical to the event. Therefore, it is critical for the event creator to distribute the event to the stakeholders for input prior to posting the event. This also enables the event creator to get everyone's input into the event and ensure that everyone agrees on the overall objectives of the procurement.

Collaboration also might be useful during the bid analysis of RFx and RFI events. One stakeholder may feel that price is more important than warranty, while another stakeholder may be responsible for the cost of replacing parts that are not under warranty and therefore may weight warranty more than price. By allowing the stakeholders to review the bids and provide input on bid factor weightings, hidden bid factors, and text based scoring, the buyer can be certain that the interests of all the collaborators have been factored in on the award decision. The system calculates an average score based on the input of all the collaborators.

Any users with a role of *Event Collaborator* can be invited to contribute to event creation or analysis. During event creation, collaborators check out the event and enter their input as to bid factor weightings and so forth. Once collaboration is complete, the event creator can review the input and decide which changes to accept. The system then updates the event based on the accepted changes

During bid analysis, collaborators can manually score text based bid factors, enter responses to hidden bid factors, and change bid factor weightings. The system calculates an average score across all collaborators.

## Collaborating on Event Creation

This section discusses event creation collaboration.

## Pages used to Collaborate on Event Creation

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Event Details | AUC_CREATE_PNL | Sourcing, Create Events, Event Details | Enter header information. |
| Event Collaboration Details | AUC_EVENT_COLLAB | Click the Invite Collaborators link on the Event Details page. | Invite internal users to collaborate on event creation. |
| Find Collaborators | AUC_COLLAB_SRCH | Click the Find Collaborators link on the Event Collaboration Details page. | Search for collaborators to invite to participate in the event. |
| Event Workbench | AUC_MANAGE_EVENTS | Sourcing, Maintain Events, Event Workbench | To collaborate on events, check them in and out. |
| Review Event Collaboration - Event Header | AUC_COLLAB_HDR | Select the View Collaboration link on the Event Details page. | Used by event creator to view collaborators' event input. |
| Description | AUC_COLLAB_HDR_SEC | Click the Description button on the Review Event Collaboration - Event Header page. | View or enter a description of an event. |
| Review Event Collaboration - Event Lines | AUC_COLLAB_LN | Click the Event Lines link on the Review Event Collaboration - Event Header page. | Click to review the event collaboration by line. |
| Review Event Collaboration - Bid Factors | AUC_COLLAB_FCTR | Click the Bid Factors link on the Review Event Collaboration - Event Header page. | Click to review the event collaboration by bid factor. |
| Review Event Collaboration - Comments and Attachments | AUC_COLLAB_ATTCH | Click the Comments and Attachments link on the Review Event Collaboration - Event Header page. | Click to review the event collaboration comments and attachments. |
| Full Comment Text | AUC_COLLAB_CMMTS1 | Click the Event Comments button on the Review Event Collaboration - Comments and Attachments page. | Enter comments on collaboration |
| Review Event Collaboration - Invited Bidders | AUC_COLLAB_DISP | Click the Invited Bidders link on the Review Event Collaboration - Event Header page. | Click to review the event collaboration by invited bidder. |

## Collaborating During Event Creation

To collaborate on an event:

1. Access the Invite Collaborators page and select users with the role of event collaborator to invite to the event.

   Click Route on the Event Details page to route the event to the first collaborator.

The event status then changes to Collaborating Event and the Collaboration Status is set to Available for Checkout.

---

**Note.** The event creator can create a new version of the event and invite collaborators to have a snapshot of the event before and after collaboration. This enables the event creator to compare the previous version to the current collaborated version.

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2. The system sends an email notification to all invited collaborators.

   The first collaborator receives a worklist entry immediately, the rest of the collaborators receive a worklist entry once the current collaborator completes their collaboration input.

3. The collaborators access the event through the Event Workbench.

   They check out the event, which changes the Collaboration Status to Checked Out, make any changes, then route it to the next collaborator, which changes the status to *Available for Checkout*.

   The event creator and event collaborators see the event as changed by the previous collaborator.

4. Once the collaboration is done, the system notifies the event creator by email and worklist entry.

5. The event creator can cancel the collaboration and remove collaborators from the event.

   If the collaboration is canceled, the event is available for posting.

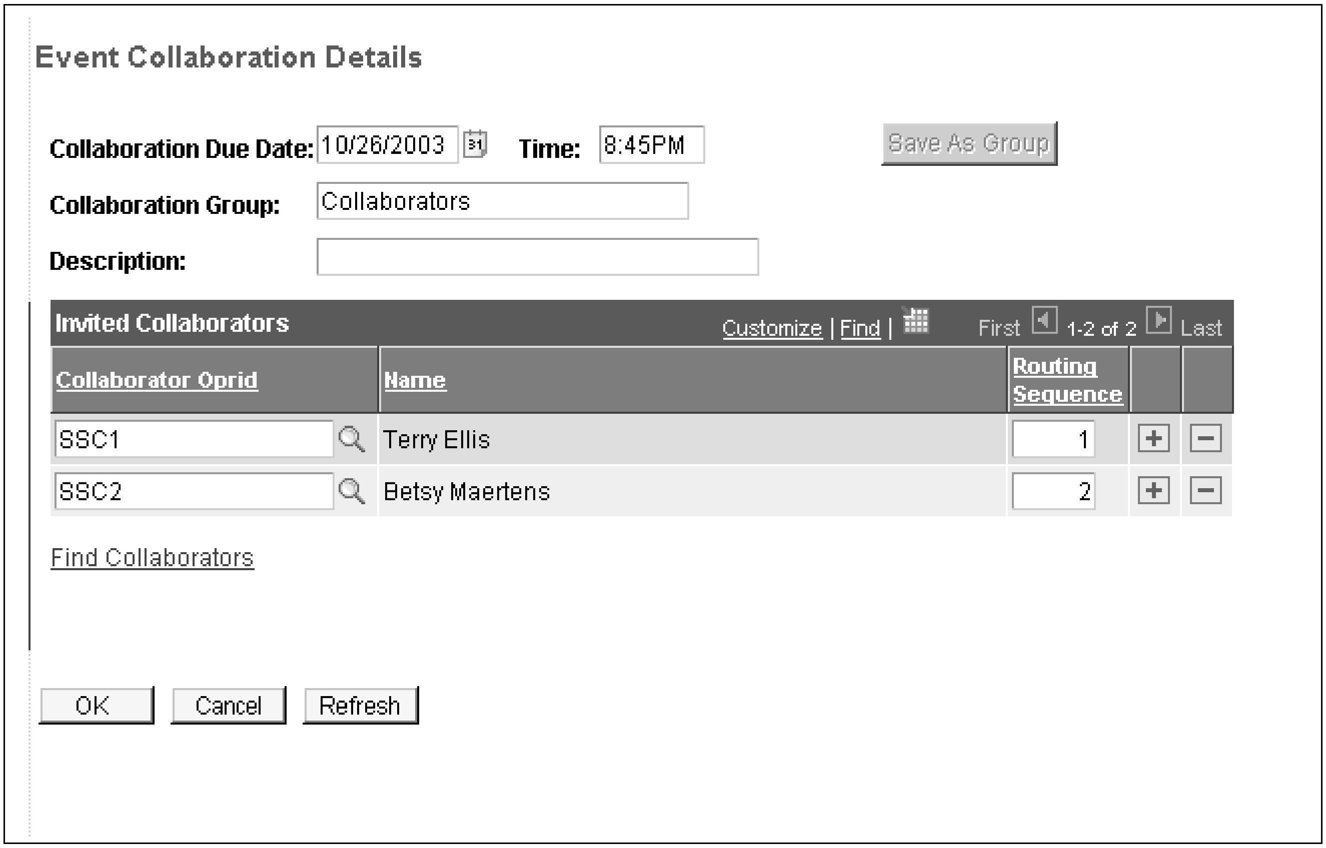
   If the event creator removes a collaborator from the collaborators list, the removed collaborator receive an email notification informing them that they have been removed.

### See Also

Chapter 7, “Creating Events,” page 53

## Inviting Collaborators

Access the Event Collaboration Details page.




Event Collaboration Details

**Collaboration Due Date** Enter the date that the collaboration is finished. This date must be before the preview date of the event.

**Save as Group** Click to save the selected list of collaborators as a group. The system makes the Collaboration Group and Description fields available for entry. For future collaborations, you can select the group instead of individual collaborators.

**Routing Sequence** Enter a routing number for each collaborator.

## Checking Events in and Out

Access the Event Workbench page.

Click to check out the event for collaboration.

Indicates that the event is checked out by a collaborator and isn't available.

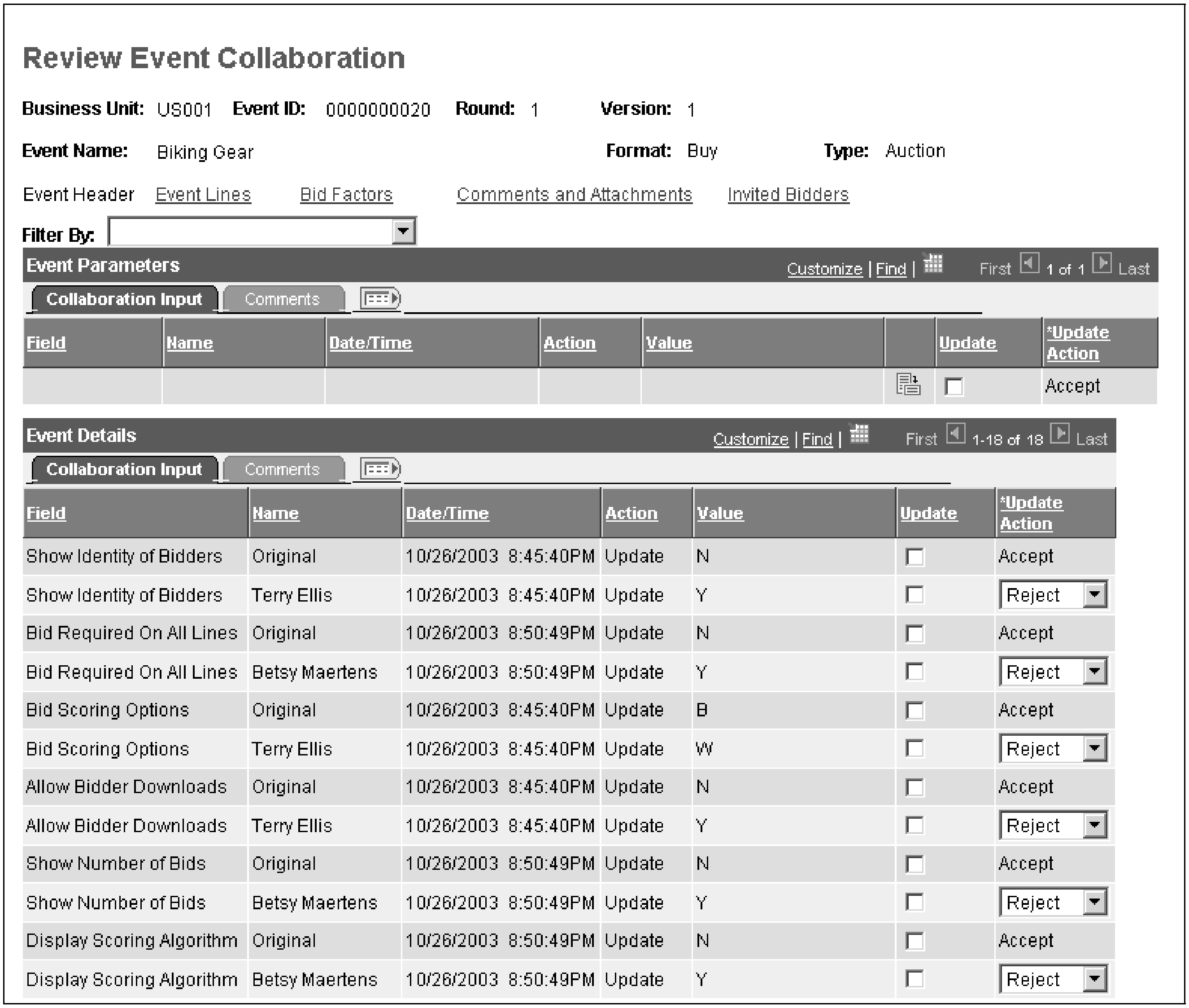
### See Also

Chapter 10, "Managing Events," Managing Events, page 105

# Reviewing Event Collaboration Input

Access the Event Workbench page.

| | |
|---|---|
|  | Click to move to Review Event Collaboration page to view collaboration on the selected event. |



## Review Event Collaboration

**Business Unit:** US001 **Event ID:** 0000000020 **Round:** 1 **Version:** 1

**Event Name:** Biking Gear **Format:** Buy **Type:** Auction

Event Header Event Lines Bid Factors Comments and Attachments Invited Bidders

**Filter By:**

**Event Parameters** Customize | Find | First 1 of 1 Last

Collaboration Input | Comments

| Field | Name | Date/Time | Action | Value | | Update | *Update Action |
|---|---|---|---|---|---|---|---|
| | | | | | | | Accept |

**Event Details** Customize | Find | First 1-18 of 18 Last

Collaboration Input | Comments

| Field | Name | Date/Time | Action | Value | Update | *Update Action |
|---|---|---|---|---|---|---|
| Show Identity of Bidders | Original | 10/26/2003 8:45:40PM | Update | N | | Accept |
| Show Identity of Bidders | Terry Ellis | 10/26/2003 8:45:40PM | Update | Y | | Reject |
| Bid Required On All Lines | Original | 10/26/2003 8:50:49PM | Update | N | | Accept |
| Bid Required On All Lines | Betsy Maertens | 10/26/2003 8:50:49PM | Update | Y | | Reject |
| Bid Scoring Options | Original | 10/26/2003 8:45:40PM | Update | B | | Accept |
| Bid Scoring Options | Terry Ellis | 10/26/2003 8:45:40PM | Update | W | | Reject |
| Allow Bidder Downloads | Original | 10/26/2003 8:45:40PM | Update | N | | Accept |
| Allow Bidder Downloads | Terry Ellis | 10/26/2003 8:45:40PM | Update | Y | | Reject |
| Show Number of Bids | Original | 10/26/2003 8:50:49PM | Update | N | | Accept |
| Show Number of Bids | Betsy Maertens | 10/26/2003 8:50:49PM | Update | Y | | Reject |
| Display Scoring Algorithm | Original | 10/26/2003 8:50:49PM | Update | N | | Accept |
| Display Scoring Algorithm | Betsy Maertens | 10/26/2003 8:50:49PM | Update | Y | | Reject |

Review Event Collaboration page (page 1 of 2)

| | | | | | | |
|---|---|---|---|---|---|---|
| Display Winning Bid to Bidders | Original | 10/26/2003 8:45:40PM | Update | N | | Accept |
| Display Winning Bid to Bidders | Terry Ellis | 10/26/2003 8:45:40PM | Update | Y | | Reject |
| Requested Line Qty Required | Original | 10/26/2003 8:50:49PM | Update | N | | Accept |
| Requested Line Qty Required | Betsy Maertens | 10/26/2003 8:50:49PM | Update | Y | | Reject |
| Display Bid Rank (4th) | Original | 10/26/2003 8:45:40PM | Update | N | | Accept |
| Display Bid Rank (4th) | Terry Ellis | 10/26/2003 8:45:40PM | Update | Y | | Reject |

Update Event

Review Event Collaboration page (page 2 of 2)

**Event Action**

Select *Accept* or *Reject* for each collaborator's change. If you don't select an action, the system uses the values entered by the last collaborator. Whichever value you accept rejects the other values for that field or change. Also, if you accept a previously entered value, it rejects the current value.

For example, the warranty bid factor has a best value of 5 years, and collaborator 1 changes it to 4, and collaborator 2 changes it to 3. If I accept 4, then 3 is rejected.

**Update**

Click to indicate which action you want the system to accept.

**Comments**

Enter a comment for why you are accepting or rejecting that input. The system records accept and reject actions in the Comments field also, so that you can view the collaboration history.

**Update Event**

After you have accepted or rejected all the input, click to update the event with the selected input. The changes are made to the event and you are transferred back to the Event Details page where you can review the updates.

**Note.** Occasionally, collaborators can make conflicting changes. For example, if the event creator accepts the change that the Bidder Must Beat the Start Price, and also accepts the change that the Start Price is not displayed, there is a conflict. These two changes conflict, since if the bidder must beat the start price, the start price must be displayed. In cases like this, the system informs the event creator when they click Update Event that a conflict exists and the change that caused the conflict is not made. All other updates are made to the event.

## See Also

Chapter 10, "Managing Events," Managing Events, page 105

# Collaborating on Event Analysis

This section discusses event analysis collaboration.

## Pages used to Collaborate on Event Analysis

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Analyze Total | AUC_AWARD_PG | Sourcing, Maintain Events, Analyze Event | Review each bidder's overall bid and score. |
| Score Text Bid Factors | AUC_AWARD_HTXT_SEC |  Click the Text Bid Factor Score button on the Analyze Total page. | Use to manually score text bid factor responses and incorporate this score into the total score. |
| Price Component Detail | AUC_AWD_CLB_PRCMPT | Click the Price Component Detail button on the Analyze Line page. | View price component detail entered by each collaborator. |
| Analyze Line | AUC_AWARD_LN_PG | Click the Analyze Line link on the Analyze Total page. | Review each bidder's bid for each line item in the event. |
| Event Collaboration Details | AUC_EVENT_COLLAB | Click the Invite Collaborators link on the Analyze Totals page. | Invite internal users to collaborate on event analysis. |

## Collaborating During Event Analysis

To collaborate during event analysis:

1. Access the Analyze Totals page.
2. Once bids have been received and the event is available for analysis, the event creator can distribute the event for bid analysis collaboration using the Invite Collaborators page.
3. While collaborators are analyzing the event, the system sets the event status to *Collaborating Bid Analysis*.

   The collaborators use the Analyze pages to indicate their weightings for each bid factor, enter responses to hidden bid factors, and manually score text-based responses.

   The system calculates the average weighting and score based on the collaborators input.
4. The event creator can't see the collaboration input until the collaboration due date and time has passed or the collaborators have finished entering their input, whichever occurs first.

   The Update Event Status process sends a worklist item and email notification to the event creator if the collaboration due date has passed before all the collaborators have provided their input.
5. The event creator can review the input including the bid factor weightings set by each collaborator and decide on which score to base the award decision.

### See Also

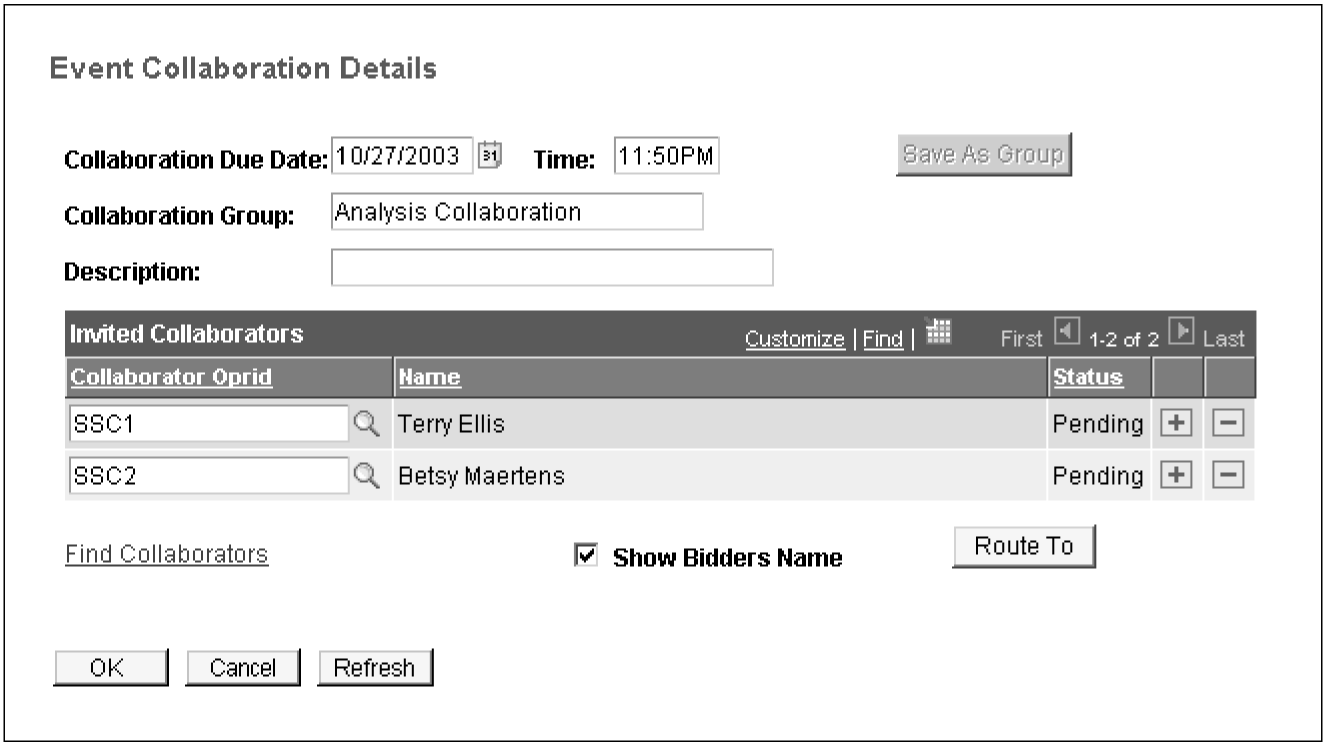
Chapter 4, “Using Workflow in PeopleSoft Strategic Sourcing,” Running System Processes, page 36

Chapter 5, “Creating and Using Bid Factors,” Creating Bid Factors, page 43

Chapter 13, “Analyzing Bids and Awarding Events,” page 155

## Inviting Collaborators

Access the Event Collaboration Details page.




Event Collaboration Details

**Collaboration Due Date** The date that the collaboration input is due.

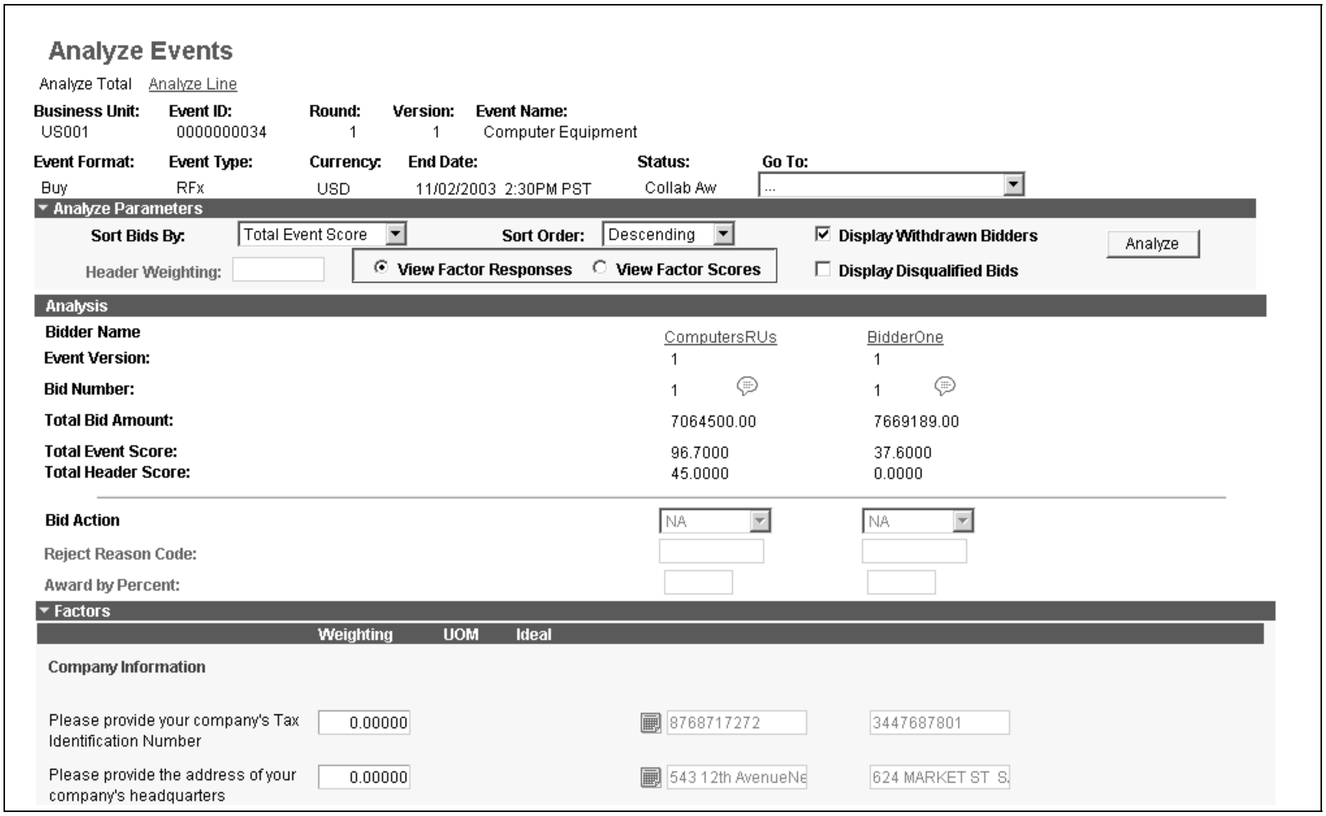
**Save as Group** Click to save the selected list of collaborators as a group. The system makes the Collaboration Group and Description fields available for entry. For future collaborations, you can select the group instead of individual collaborators.

**Show Bidder’s Name** Click to show the bidders to the collaborators. If you leave the check box unselected, the collaborators won’t see the bidders’ names, which might make the collaboration more impartial.

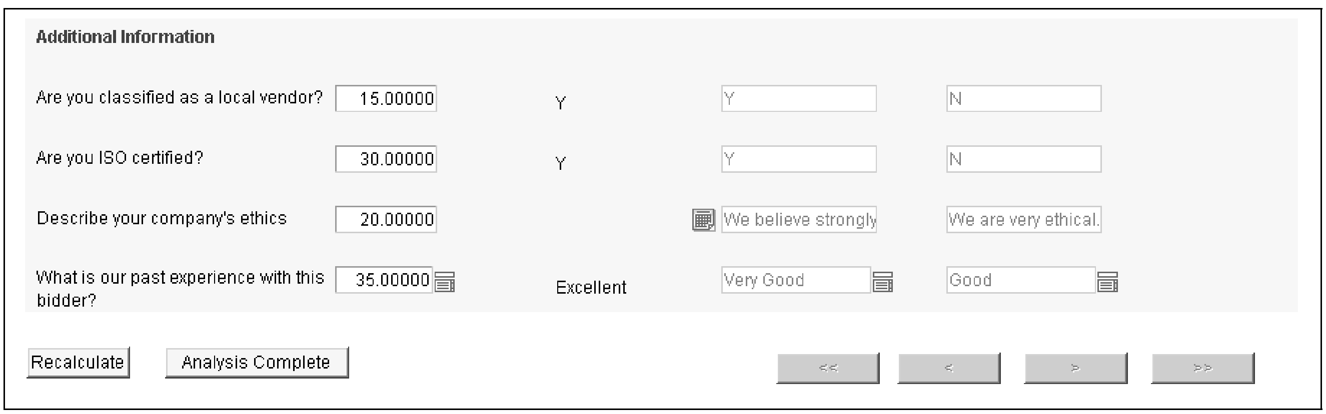
**Route To** Click to route the event to the first collaborator. This makes the event read only for non collaborators until the collaboration due date, and thus, it can’t be awarded.

## Entering Analysis Feedback

Access the Analyze Total page as a collaborator.

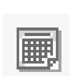



Example of event analysis input (page 1 of 2)




Example of event analysis input (page 2 of 2)

Collaborators can suggest changes to weightings, manually score text bid factors, and answer hidden bid factors.



Click to manually score text bid factor responses.

Click to choose list values as part of collaboration input.

CHAPTER 9

# Negotiating Events Using Multiple Rounds and Versions

This chapter provides and overview of multiversion and multiround events and discusses the event negotiation process.

## Multiversion and Multiround Events

You can create multiversion and multiround events to negotiate with bidders.

Bidders always bid on the most current posted event version and round. You have the option to hide the round or version number from bidders.

### Multiversion Events

Create multiversion events when changes are needed to a posted event. Once a new version is created, you can't delete lines or bid factors since bids to the previous version would include those lines and bid factors.

You can create and edit versions of multiversion events. When you are viewing a multiversion event in the Event Workbench component, the system displays the most recent posted version of the event. The new version of the event must be posted to be active for bidding.

You use the Edit Current Version button to make changes to the most current version of the event and access the Event Details pages in Update/Display mode. This button is only available for multiversion events, and isn't available if the New Event Version Required check box is selected on the Business Unit Definition page, or if the event status is *Awarded* or *Canceled.*

You use the Create New Version button to create a new version of an event and access the Events Details page in Add mode. When you click the Create New Version button:

- You create a new version of the event.
- The system increments the version number by one.
- The previous current version of the event becomes read-only upon posting the new version, and you cannot make further changes to that version.

**Note.** The previous posted version is available for bidding until a newly created version is posted, not created. So if bidders are bidding on version 1, that is the version on which they have access to bid until version 2 is posted.

- If a new round is created for the event, the system resets the version number to 1.

The version number is incremented by 1 for the specified round if you modify the event. For example, when you create a new event, it is round 1, version 1. If you change the event and create a new version, then the event is round 1, version 2. If you create a new round, the event is round 2, version 1. If you change the event at this point, the event is round 2, version 2.

- You cannot add or delete line items, change bid factors, or change the start price or line quantity for a new version.
- If any scoring-related changes are required, you must create a new round.

### Bidder Participation in Multiversion Events

If a new version is created for an event, the bidder's invitations statuses should be carried forward to the new version, meaning that if a bidder accepted on version 1, the system keeps their status as accepted for version 2. If an invited bidder declined on version 1 but wanted to be kept informed of event updates, the bidder should show declined for version 2 but still receive updates on version 2. If a public bidder who was not explicitly invited to version 1 accepts the event invitation, the bidder should be accepted for version 2.

## Multiround Events

Use multiround events for RFx events, to negotiate with bidders after initial bids are received. This is useful when either substantive changes are made to the event, requiring additional input from the bidders, or when bids are evaluated and narrowed to a select group for further negotiation.

You can select to counter one or more bidders from the Analyze Totals page, for the overall event or individual lines. The system creates the new round by copying the previous round/version. Countered bidders are the invited bidders for the new round. Only countered lines are included in the new round. Additional bidders can be added if necessary.

The system provides the best bid factor responses for the countered responses from the previous round as the new default worst values for the new round. For example, warranty is a bid factor with 1 as the worst and 5 as best. Bidder A bids 2 years and Bidder B bids 3 years for the warranty. Both bidders are countered. Round 2 now has warranty with a default worst response of 3 years and best response of 5 years.

If a line was partially awarded and also countered, only the remaining quantity (original line quantity minus the awarded quantity) displays on the new round. So if a line originally had a quantity of 100, and you awarded a quantity of 40 in round 1, round 2 has 60 as the line quantity.

The new round is posted out to the invited bidders. The bidders receive a new invitation along with a new counter PDF version of the event. When a bidder bids on the new round, the bidder can view their initial bid and the countered offer.

Bidders can either withdraw, accept, or counter the counter offer either at the event level or for each line. If they accept, the system automatically creates a new bid response with the best response for each bid factor. If they counter, the new bid response is copied from the best response, but the bidder can override the values. If a bidder withdrawals, they can't bid on any portion of the event from that point forward.

If Award to Previous Round is not selected on the Sourcing business unit page, the previous round/version is inactivated. The analyzer has the option to reject bids as part of a multiround process, either the entire bid or individual lines.

Once the bids are received on the counter, the analyzer can review the bids and choose to accept (award), reject, or counter. This process can continue indefinitely until the event is awarded or manually closed.

See Chapter 2, "Setting Up Business Units in PeopleSoft Strategic Sourcing," Defining Business Units, page 12.

### Price Components

When a new round is created, the best bids for each price component should become the new worst values for each price component. Meaning if the original start price for Materials was $60 and Bidder A bid $50 for materials, Bidder B bid $60, and Bidder C bid $55, when a new round is created, the new Start Price for Materials would be $50.

### Bidder Participation in Multiround Events

The Event Bid History shows the event participation by round and not by version. Therefore, if the following bid situation occurred:

- Bidder A accepted on version 1 and posted a bid on version 2
- Bidder B accepted on version 2 but never posted a bid
- Bidder C declined on version 3 for round 1
- Bidder D never responded to any of the event notifications

The system displays the following on the event participation page for round 1:

- Invited Bidders: 4
- Participating Bidders: 2
- Declined Bidders: 1
- No Response: 1

### See Also

Chapter 2, "Setting Up Business Units in PeopleSoft Strategic Sourcing," Defining Business Units, page 12

# Creating Multiversion Events

In this section, we discuss how to create multiversion events.

## Pages used to Create Multiversion Events

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Event Workbench | AUC_MANAGE_EVENTS | Sourcing, Maintain Events, Event Workbench | Review a list of all created events and event details. |

## Creating Multiversion Events

Access the Event Workbench page.

To create a multiversion event:

1. Click the Create New Version button. All the details from the previous round or version are copied into the new version.
2. The system does not display the Edit Version button if you have selected new version required on the Sourcing Business Unit page.
3. Once a new version is created and posted, the system inactivates the previous version and makes it read only. You can view the previous version on the Event Details page.

### See Also

Chapter 2, “Setting Up Business Units in PeopleSoft Strategic Sourcing,” Defining Business Units, page 12

# Creating Multiround Events

In this section, we discuss how to create multiround events.

## Pages Used to Create Multiround Events

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Analyze Totals | AUC_AWARD_PG | Sourcing, Maintain Events, Analyze Events. | Award the bid as a total event or a percentage of the event. |
| Multi-Round Bid Factor History | AUC_BFL_HIST_SEC | Click the View Bid History button on the Analyze Total page. This button only displays if the event includes multiple rounds. | Displays bid factor history for multiround events. |

## Creating Multiround Events

Access the Analyze Totals page.

To create a multiround event:

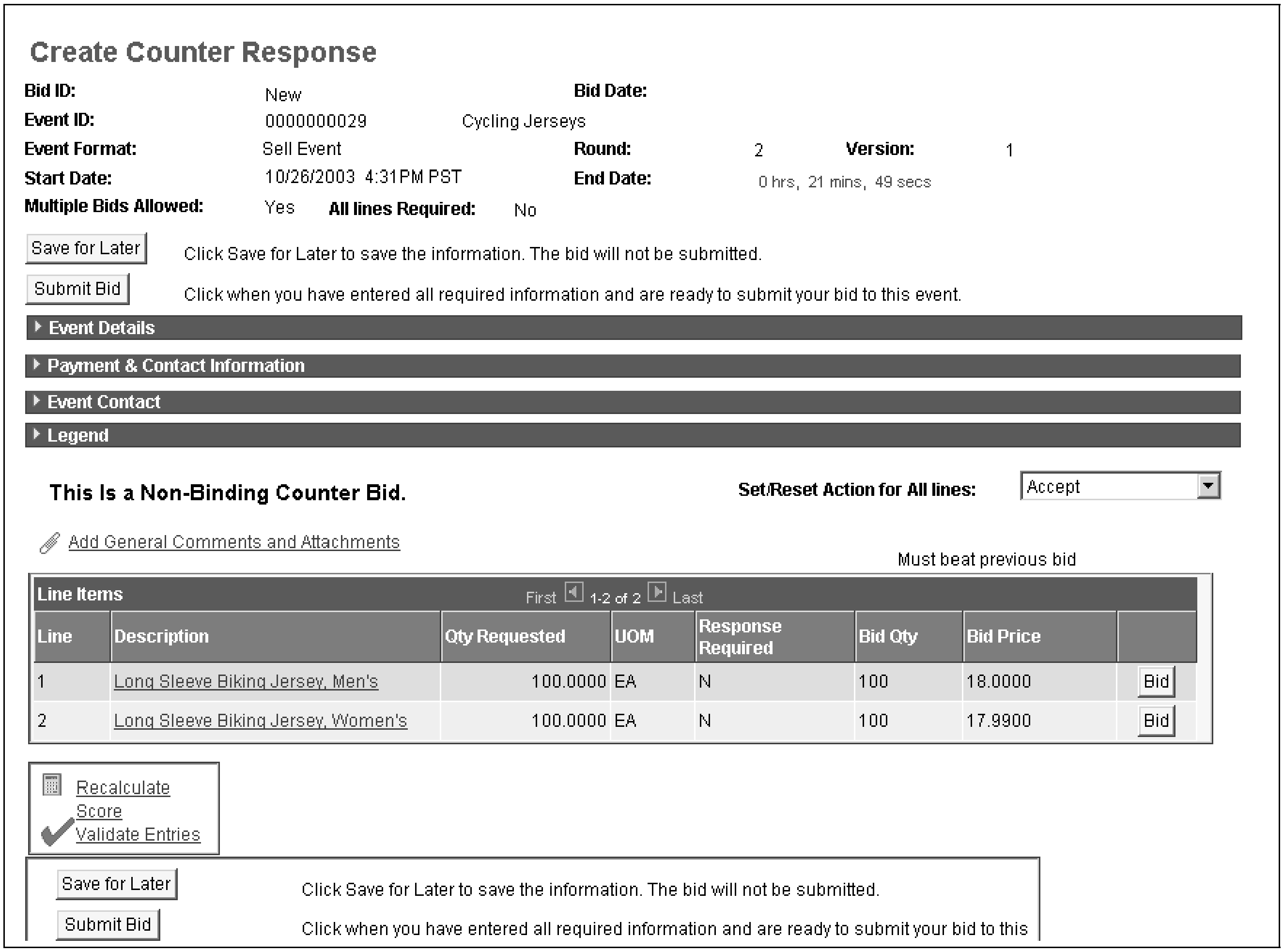
1. Select the Counter action from the Bid Action option for every bid or line that you want to include in the next round. All the details from the previous round are copied into the new round.
2. Select Create New Round on the Go To menu.
3. The system opens the Event Details page in a new window, provides the existing event ID including the event data, and increments the round number by 1. The bidders you countered are listed on the Invite Bidders page. The system also takes the best values of the bidders and that becomes the default worst values for the next round.

   You must post the new round for it to be available for bidding, just like a new event.
4. The bidder can select to accept, counter, or withdraw for each line or for the event in its entirety.
5. Click the View Bid History button on the Analyze Total page to view the bid history for multiple rounds using the Multi-Round Bid Factor History page. This button only displays if the event includes multiple rounds.

Click to access the Multi-Round Bid Factor History page.

### Viewing Counter Bids

Access the Create Bid Response page when countering a bid.




Create Counter Response page

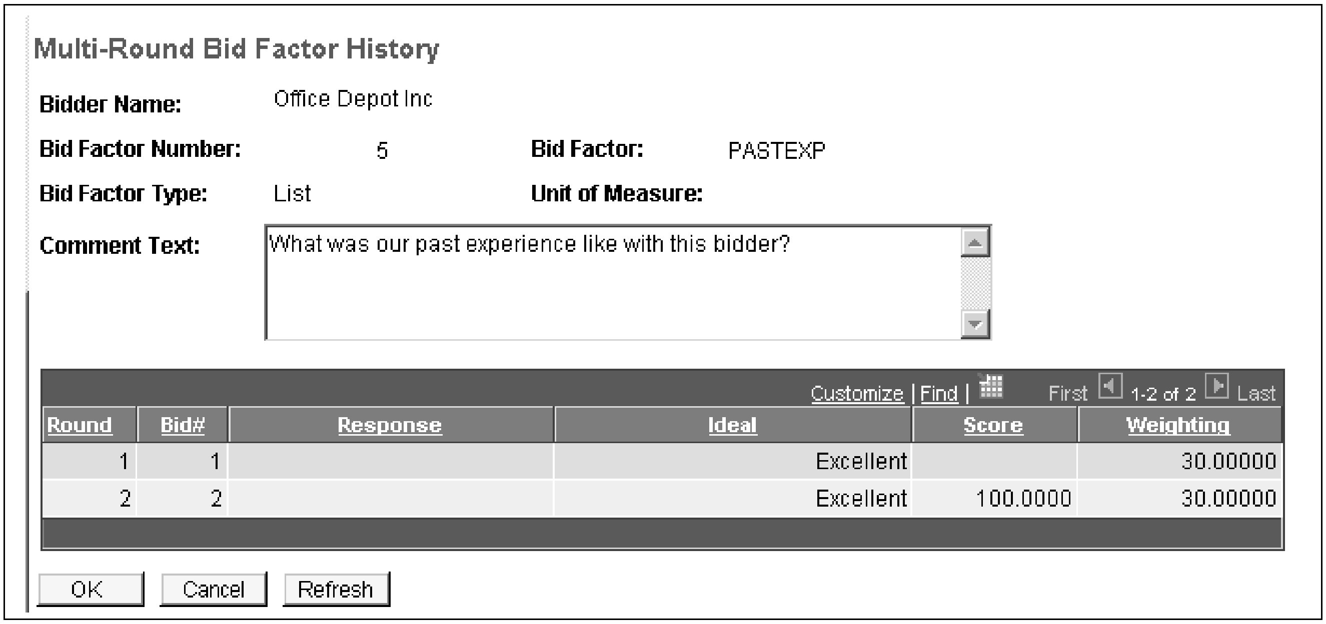
When a new round is created, the system displays a new flag on the Header Details page, so that the event creator can indicate whether the counter offer is a binding offer. If the event creator keeps the default of unselected, the system displays *This is a Non-Binding Counter Bid* on the Create Bid Response page. If the event creator selects the check box, the system displays *This is a Binding Counter Bid.*

### See Also

Chapter 7, "Creating Events," Entering Header Details, page 64

## Viewing Multiround Bid History

Access the Multi-round Bid History page.



Multi-Round Bid Factor History page

View the bid history on events with multiple rounds.

# CHAPTER 10

# Managing Events

This chapter provides an overview of event management and discusses:

- Managing events.
- Viewing bid history.
- Viewing event document status.
- Using discussion forums.

## Understanding Event Management

Manage events through a single page. You can view the status of events and the approval workflow associated with an event to see how bidding is progressing, and then process the award of the event.

Once posted, a created event's bidding begins on the specific start time. The event progresses through most of the following statuses:

- *Open:* An event that has been saved but not posted or routed for collaboration
- *Collaborating Event:* An event that has been routed for internal collaboration
- *Pending Post Approval:* An event that is awaiting approval
- *Pending Scheduled Review:* Event is awaiting an approval process review. This status occurs when approval workflow is set to scheduled.
- *Posted:* Approved event; bidding is ongoing.
- *Event Completed:* The event has ended but the update event status process has not been run yet
- *Pending Award*: Completed event, not yet awarded.
- *Collaborating Bid Analysis:* The event has been routed for internal collaboration on the received bids.
- *Awarded:* The event has been awarded and the status for all line items is Closed.
- *Not Awarded:* Event ended without the event being awarded. The status for all lines items have been manually set to Closed.
- *Canceled:* Event creator canceled the event.

For RFI events, the following event statuses include:

- *Open:* Event is newly created, not yet approved.
- *Collaborating Event:* Event has been routed for internal collaboration

- *Pending Post Approval:* Event is posted for internal approval.
- *Posted:* Approved event, bidding is ongoing.
- *Posted/Event Ended:* Approved event, event has ended but is not yet reviewed.
- *Pending RFI Review:* Status once event has ended and is awaiting review.
- *Collaborating Bid Analysis:* Event has been routed for bid analysis collaboration
- *RFI Reviewed:* Status once RFI responses have been reviewed.
- *Canceled:* The event creator canceled the event.

## Event Details

While the event is *posted*, you can invite new bidders and edit these details of the event:

- Header comments and attachments.
- Line comments and attachments.
- Event extensions.
- Reserve price.

## Status Update at Event End Date

The Update Event Status application engine process (AEAUCSTATCK) updates the status of an event from Posted to Pending Award (for auction and RFx events) or Pending RFI Review (for RFI events). You can schedule this process to run every 5 minutes; it checks to see if an event's end date has arrived. If it has, the event status is updated to Pending Award or Pending RFI Review.

This process is also used to notify event creators when the collaboration due date has passed and when an event has ended and is pending award.

### See Also

Chapter 4, "Using Workflow in PeopleSoft Strategic Sourcing," Running System Processes, page 36

## RFI Events

You can maintain RFI events using the Event Workbench. You can search for events by the RFI event format, or the RFx event type. You also view the RFI cycle for RFI events on the Event History page.

## Multiversion or Multiround Events

You can use the Event Workbench to create and edit versions of multiversion events. When you are viewing a multiversion event in the Event Workbench, the system always displays the most recent version of the event.

### See Also

Chapter 10, "Managing Events," Managing Events, page 105

## Auction Pause

If a bidder makes an error when posting a bid on an auction event or needs clarification on the auction event, the event creator may pause the event to either remove the erroneous bid or address the clarification.

You can pause an event any time while it is open for bidding. When an event is paused, the event creator may make changes to an event or elect to disallow a bid. Bidders can view a paused event and save a bid, but can't post a bid. Internal users can still enter bids on behalf of a bidder while an event is paused. If an auction is paused, the system notifies the invited bidders. The system notifies the bidders that bidding has resumed when the event is restarted.

# Managing Events

In this section, we discuss how to:

- List all the events that you are managing.
- Locate the event in the event cycle.
- Pause an event.
- Cancel an event.
- View event history.
- Create a new version.
- Check out an event to enter collaboration input.
- View bid history.
- Access event discussion forums and chat rooms.

### See Also

Chapter 13, "Analyzing Bids and Awarding Events," page 155

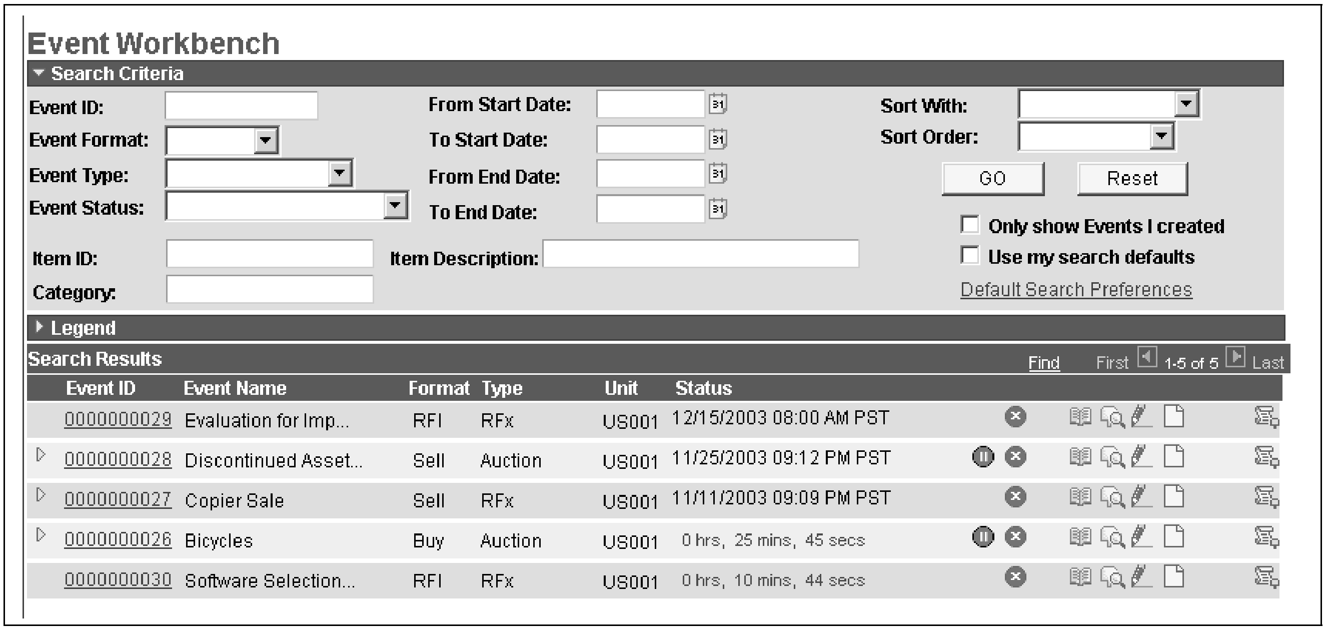
## Pages Used to Manage Events

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Event Workbench | AUC_MANAGE_EVENTS | Sourcing, Maintain Events, Event Workbench | Review a list of all created events and event details. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Event Details | AUC_CREATE_PNL | Click the specific Event ID on the Event History or Event Workbench page.<br>Click the Edit Current Version button on the Event Workbench page.<br>Click the Create New Version button on the Event Workbench page.<br>Click the View Collaboration button on the Event Workbench page. | Edit details of the event, create new version of the event, edit current version of the event, or view comments from collaborators. |
| Pause Auction/Resume Event | AUC_PAUSE_EVENT | • Click the Pause button on the Event Workbench page.<br>• Click the Resume Auction button on the Event Workbench page. | Enables an auction to be paused. Indicates that an auction is paused, and restarts it. |
| Cancel Event | AUC_MGR_CANCEL | Click the Cancel button on the Event Workbench page. | Cancel the event. |
| Event History | AUC_EVENT_HISTORY | • Sourcing, Maintain Events, Event History<br>• Click the Event History button on the Event Workbench. | View the different event stages, the version/round history of the event, and linked event lots. |
| Chat History | AUC_CHAT_LOG | Click the Chat History button on the Event History page. | Use to view the chat log for an event. |
| Default Search Preferences | AUC_MNGEVNTS_PREF | Click the Default Search Preferences link on the Event Workbench page | Set preferences for searching events. |
| Event Approval Status | AUC_WF_APPR_INQRY | Click the Event Approval button on the Event Workbench page. | Review the status of the event in the approval process. |
| Event Bid History | AUC_BID_HIST_INV | Click the View Bid History button on the Event Workbench page. | View the bid invitation status and bidding history for the specified event. |

# Listing Events

Access the Event Workbench page.




Event Workbench page

On this page you can:

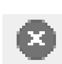
- Search and sort events.
- View event details by clicking the Event ID link.
- Display details of the line items for an event by clicking the arrow at the left of the event row.

**Only Show Events I Created** Click to show only user created events.

If available, the buttons appear to the right of each event. Availability depends on the event's status:

Pauses the auction event so that event creator can make changes while it is happening. The system only displays this button for auction events with the status of *Posted*.

Resumes a paused auction event so that bidders may continue bidding on the event. The system only displays this button when an auction event is paused.



The Cancel page is not available for events with the status of *Awarded*, *Not Awarded*, or *Cancelled*. You also can't cancel an event if the event has been partially awarded.

The Event History page is available for any event in which bids were received. This includes:

- All awarded events.
- All *Canceled* or *Not Awarded* events if bids were received.

- Auction events.
- RFx events.
- Sealed RFx events once the event has ended.

The Analyze Events page is available for the following events:

All Event Completed, Pending Award, Pending RFI Review, Awarded, RFI Reviewed, and Not Awarded events.

All Posted events except those for sealed RFx events, in which case the Analyze Events page is not available until the event has ended (Pending Award status).

Click to edit the version of the selected event on the Event Details page. If the New Event Version Required is selected for the Sourcing Business Unit, the edit version button doesn't display for any events associated with that business unit. This button is also not available for awarded events.

Click to create a new version of the selected event on the Event Details page. This button is not available for awarded events or events that are checked out by a collaborator.

Click to view collaboration input for the selected event.

Click to check out the event and add comments as a collaborator.

Indicates that the event is checked out by a collaborator to enter collaboration input. You can mouse over this button to see who has checked out the event.

Click to view the invitation and bid history for the selected event.

## Pausing and Resuming an Auction

You can pause an auction from the Event Workbench page.

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**Note.** You can only pause auction events, not RFx nor RFI events.

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To pause an auction:

1. Navigate to the Event Workbench page and select the auction to pause. You can only pause auctions that have been posted and have not ended.
2. Click the Pause button. The system takes you to the Pause Event page.
3. You must click the Pause Event button on the Pause Event page to confirm that you want the event paused. The page title changes to Resume Event, and the Resume button appears.
4. If the End Date/Time has passed, when resuming the event the system warns the event creator and lets them know how to extend the End Date/Time.

**Reason Code** Select a reason code that describes why you paused the event.

| | |
|---|---|
| **Email Comments to Bidders** | Select to indicate that the reason code comments should be sent to bidders when notified that the event is paused. The system provides the comments as a default from the selected reason code, but they can be modified. |
| **Resume** | Click to restart the event. The system notifies the bidders when the event is paused and resumed. If the email comments to bidders check box is selected, the system sends the comments along with the email notification. |

### See Also

Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up Reason Codes, page 27

## Canceling an Event

You can cancel an event by clicking the Cancel Event button.

---

**Note.** You can't cancel events that are partially awarded, or have a status of *Awarded*, *Not Awarded*, or *Cancelled*.

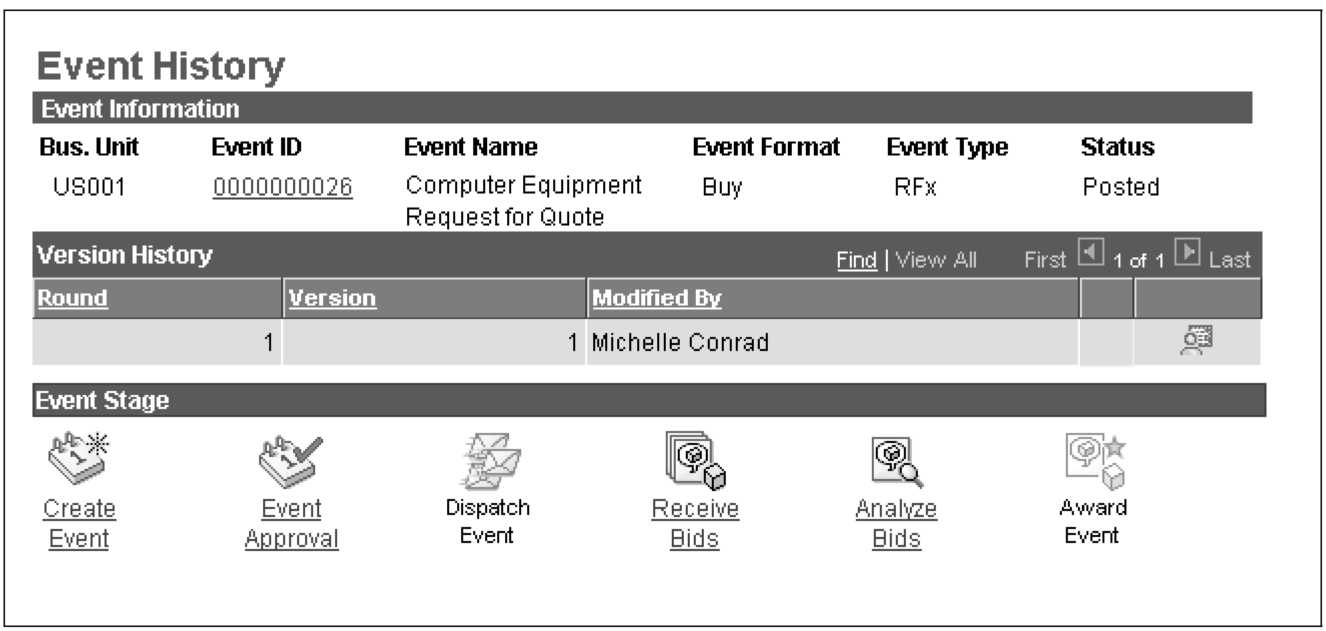
---

When you verify the cancellation request on the Cancel event page:

- If the event has been posted, email notification is generated to the invited bidders, notifying them that the event is canceled.
- The event status is updated to *Canceled.*

## Using the Event History

Access the Event History page.

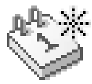



Event History page

| | |
|---|---|
|  | Click the Chat History button to view the chat log associated with the event. |

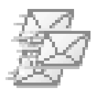
Click this button to access discussion forums.

As the event enters each stage in the cycle, the representative button is highlighted. If an event's status is *Cancelled*, none of these buttons are highlighted.

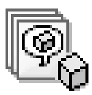


Because this is the first step in the event life-cycle, the Create Event button is highlighted for all events. Click to access the Create Event page for that event.

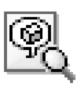
The Event Approval button is highlighted for any event that is in, or has gone through, an internal event approval process. Click to access the Event Approval Status page.



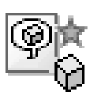
The Dispatch Event button is highlighted for any event that has been dispatched to the bidders. This button does not link you to any other pages.



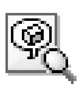
The Receive Bids button is highlighted for any event that either is or was available for bidding. Click to access a page where you can enter bids that you have received by fax, standard mail, or email.



The RFI Responses button is highlighted for any RFI event that has begun. This button is only available if the event type is RFI. Click to access a page where you can view responses to the selected RFI.



The RFI Reviewed button is highlighted for any RFI event where the RFI has been reviewed. This button is only available if the event type is RFI. Click to access a page where you can access the RFI review.

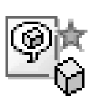


The Analyze Bids button, which you click to access the Analyze Bids page, is highlighted when you can analyze:

Any event that has ended.

Any event that is not sealed and has started.

An RFx event that is sealed and has ended.



The Award Event button is highlighted when you can determine how to award the event; that is, when the end date is reached. Click to access the Award Details page.

# Viewing the Bid History

This section discusses bid history view options.

**Note.** Bidder access to the Status/Ranking options, such as Rank, Price, Score, and Status on the Bid History page is controlled by the settings on the Header Details page.

If the event is price-only, and Display Winning Bid to Bidders is selected for the event, bidders can view bids by price. If the event is not price-only, and Display Winning Bid to Bidders is selected for the event, bidders can view bids by score. If the event is ranked, bidders are able to view bids by rank. Bidders always have access to view by Bid Status.

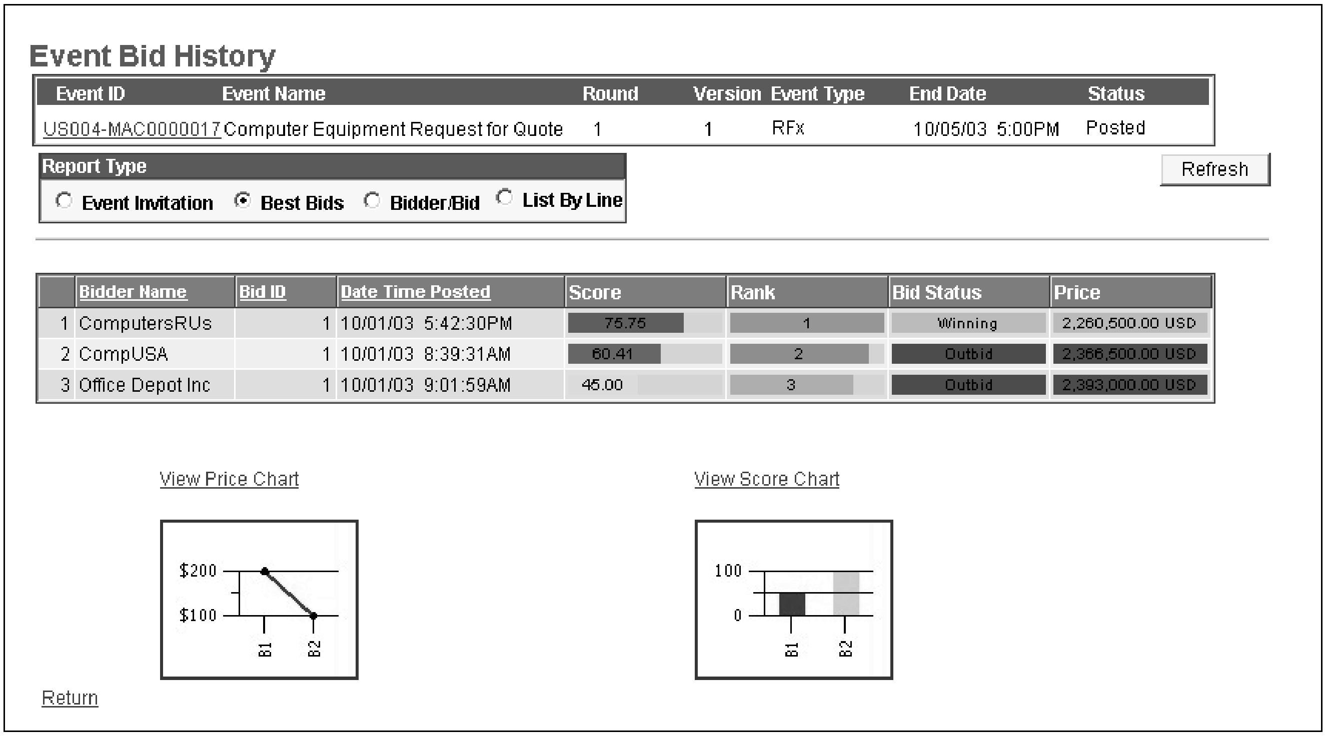
## Pages used to View Bid History

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Event Workbench | AUC_MANAGE_EVENTS | Sourcing, Maintain Events, Event Workbench | Review a list of all created events and event details. |
| Event Bid History | AUC_BID_HIST_INV | Click the View Bid History button on the Event Workbench page. | View the bid invitation status and bidding history for the specified event. |

## Viewing by Best Bids

Access the Bid History page.

You can only view by Best Bids if Bid Required on All Lines is selected on the Header Details page. If you chose to rank the event, the system displays the rank. If this is a Price only event, the system displays the total bid price for each bidder. If not, the system displays the total bid score for each bidder. If the bidder has the total winning price/score, the system displays the Bid Status as Winning, otherwise, the system displays Outbid. When accessed using the Best Bids report type, the price chart and score chart are based on the total event bid price/score. You can view the price/score for each line item when using the List by Line report type.




Example of best bid view

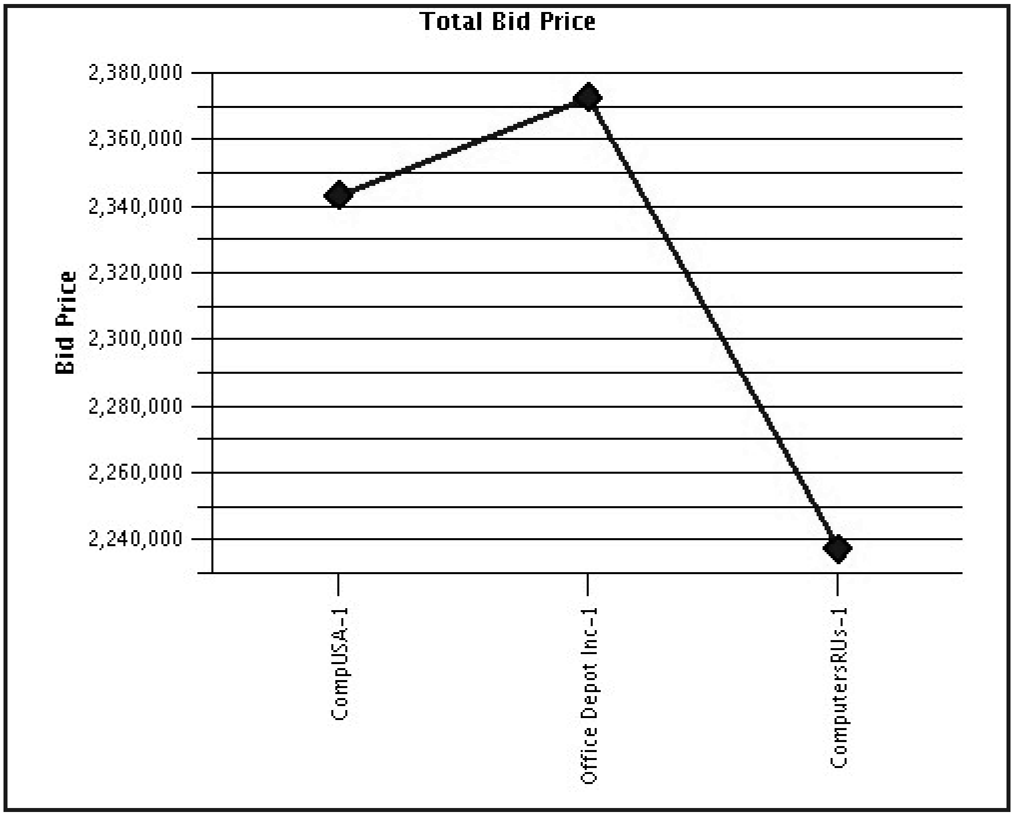
## View Price Chart

The View Price Chart shows a real-time line graph of the bidding activity on a competitive event. The system automatically refreshes the chart every 5 seconds to display the latest bids. The X-Axis represents the bidders and the Y-axis represents the bid price.

## Event Prices as of Wednesday, Oct 01, 2003 06:08:15 PM

**Business Unit:** US004 **Event ID:** MAC0000017 **Event Name:** Computer Equipment Request for Quote

**Event Start:** 10/01/2003 08:00 AM **Event Finish:** 10/05/2003 05:00 PM PST




**Winning Price:** $2237500.00 **Percent Savings:** 20.66%

| Bid Price Detail | | | |
|---|---|---|---|
| **Name** | **Bid Datetime** | **Bid Number** | **Total Price** |
| ComputersRUs | 10/01 05:42:30 PM | 1 | $2,237,500.00 |
| Office Depot Inc | 10/01 09:01:59 AM | 1 | $2,373,000.00 |
| CompUSA | 10/01 08:39:31 AM | 1 | $2,343,500.00 |
| | | Best Price | $2,237,500.00 |

Example of price chart

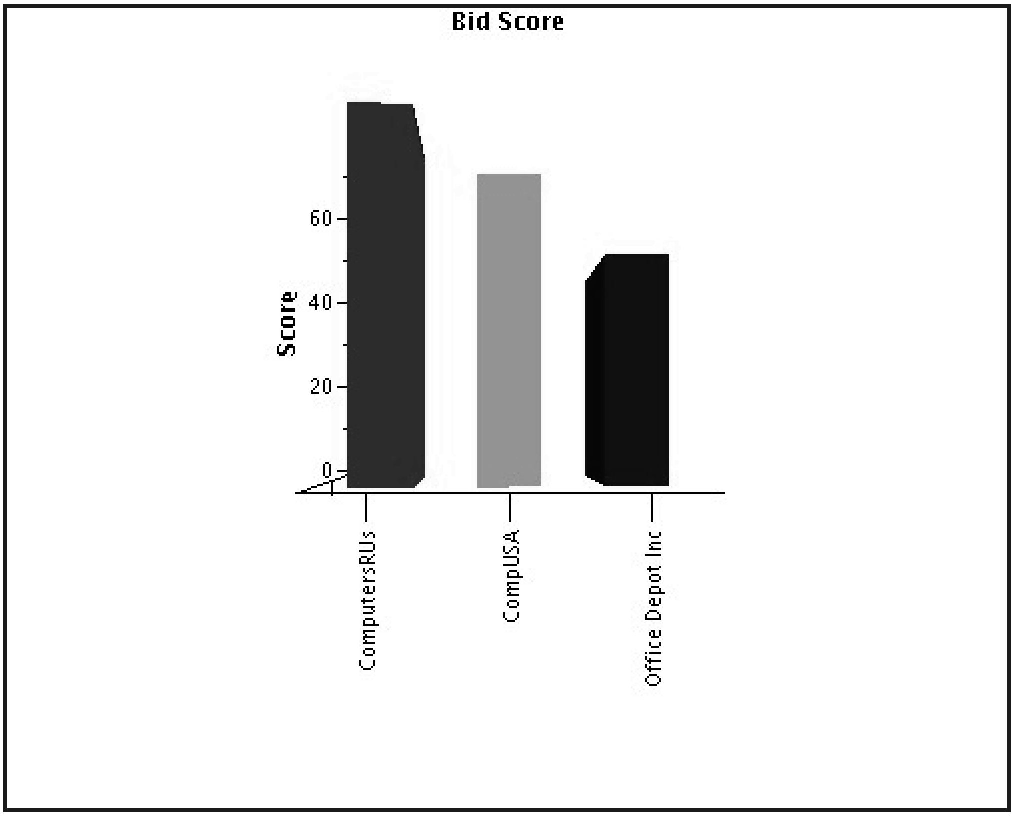
### View Score Chart

The View Score Chart displays a real-time bar graph representing each bidder's score. The X-Axis represents the bidders and the Y-Axis represents the bidder's score.

## Event Scores as of Wednesday, Oct 01, 2003 06:08:43 PM

**Business Unit:** US004 **Event ID:** MAC0000017 **Event Name:** Computer Equipment Request for Quote

**Event Start:** 10/01/2003 08:00 AM **Event Finish:** 10/05/2003 05:00 PM PST



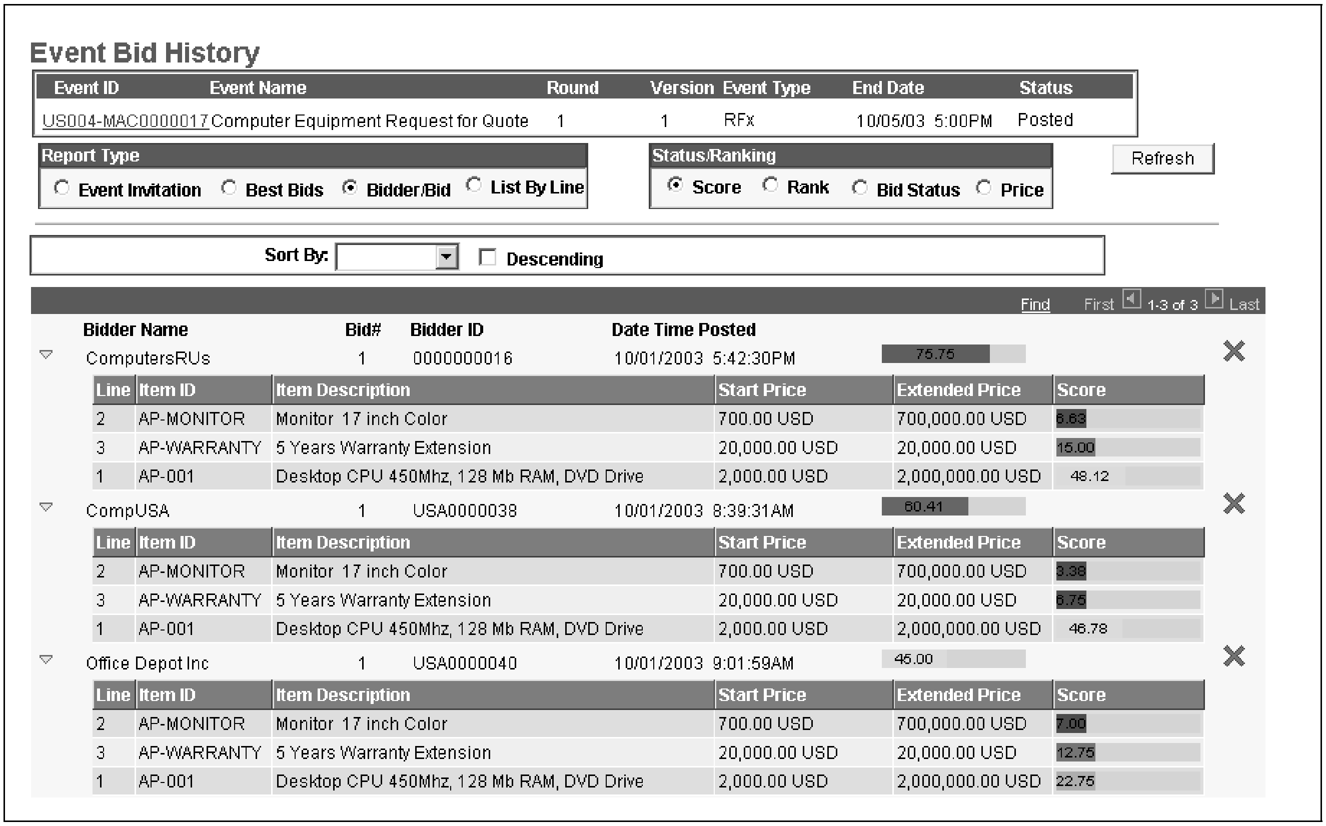

**Bid Score Detail**

| Name | Bid Datetime | Bid Number | Total Score |
|---|---|---|---|
| ComputersRUs | 10/01 05:42:30 PM | 1 | 69.745 |
| CompUSA | 10/01 08:39:31 AM | 1 | 56.906 |
| Office Depot Inc | 10/01 09:01:59 AM | 1 | 42.5 |
| | | High Score | 69.745 |

Example of score chart

## Viewing by Bidder/Bid

The bidder can view by Score if the event is not a price only event, and by Rank, Bid Status, or Price if it is a price only event. Select the Display My Bids Only check box to only display the selected bidder's bids. You can Sort by Bid ID, Date, Name, or Score. All of each bidder's bids display, but only the best bid for each bidder displays the rank or score. The Price and Score display for all bids. If Bid Required on All Lines is not selected on the Header Details page, the system only displays the score or price at the line level, not at the overall bid level. The bid status displays for the overall bid, displaying Winning if all lines have a status of Winning, or Outbid if one or more lines have a status of Outbid.



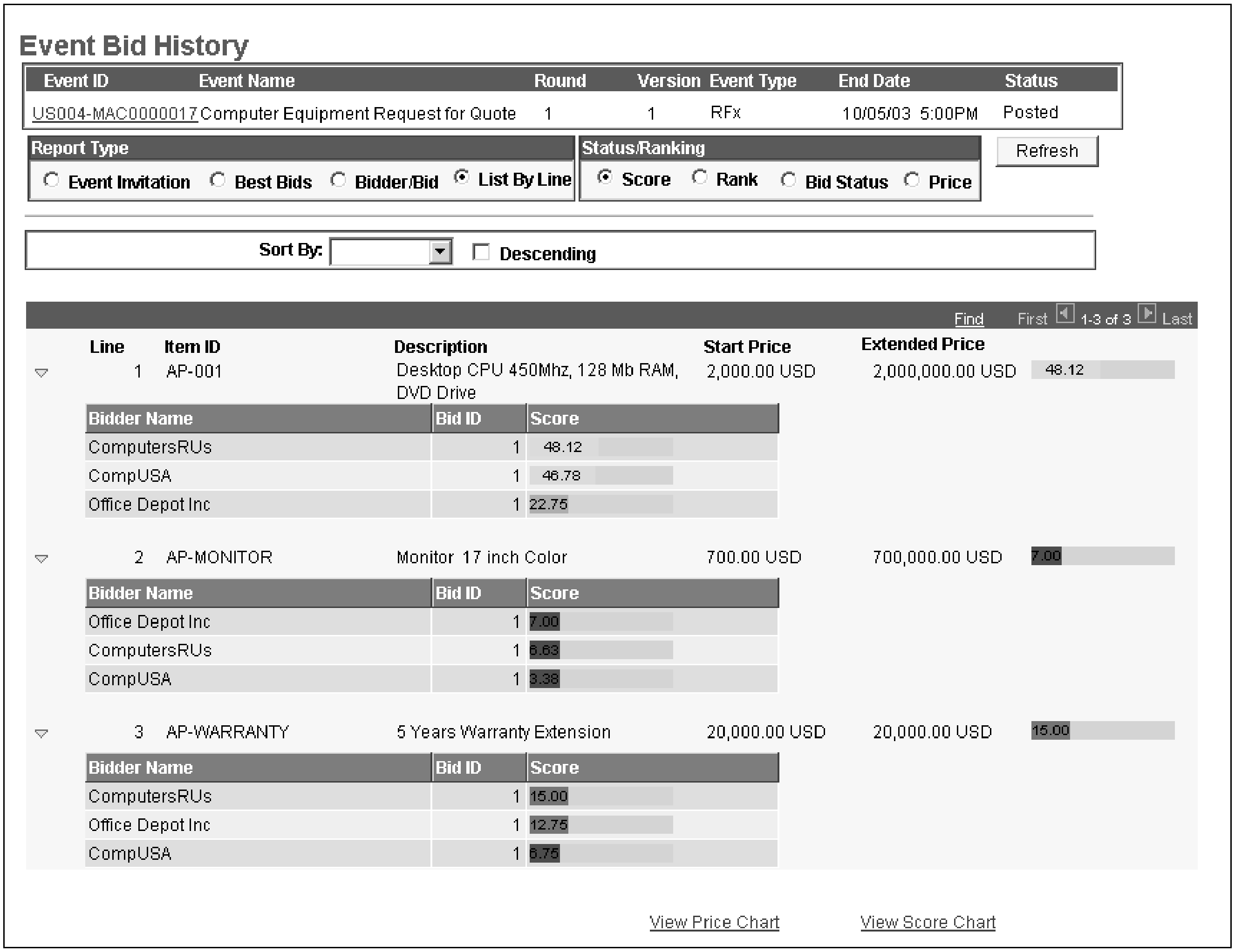

Example of bid history by bidder/bid and score.

## Viewing List by Line

The system displays all bids entered for each line. If you have selected the Display Start Price to Bidders check box on the Header Details page, the system displays the start price.

### Score View

If you select List by Line and the Score Status Ranking, you can view the score for each line.




Example of list by line in the score view

## Rank View

If you select List by Line and the Rank Status Ranking, you can view the score for each bidder’s best line bid as a ranking.

So if a bidder entered 3 bids and they are ranked 2 on line ‘1’, all 3 bids display with a rank of ‘2.’

## Bid Status View

If you select List by Line and Bid Status as a Status Ranking, you can view the score for each bidder’s best line bid by the bid status.

So if a bidder entered 3 bids and they are ranked 1 on line ‘1’, than all 3 bids for that bidder and line display as “Winning.”

## Price View

If you have selected Display Winning Bid to Bidders on the Header Details page, then you can view the score as a price on the Event Bid History page.

You can view the price of all bids based on the bidder’s best bid if Bid Required on All Lines is selected on the Header Details page.

So if a bidder entered 3 bids, one for $20,000, one for $18,000, and one for $15,000, all three bids display with a price of $15,000.

If Bid Required on All Lines is not selected on the Header Details page, the system displays the bid price for each bid on each line.

### Bidder Participation in Multiround Events

The Event Bid History page displays the event participation by round and not by version. Therefore, if the following bid situation occurred:

- Bidder A accepted on version 1 and posted a bid on version 2
- Bidder B accepted on version 2 but never posted a bid
- Bidder C declined on version 3 for round 1
- Bidder D never responded to any of the event notifications

The system displays the following on the event participation page for round 1:

- Invited Bidders: 4
- Participating Bidders: 2
- Declined Bidders: 1
- No Response: 1

### See Also

Chapter 7, “Creating Events,” Entering Header Details, page 64

Chapter 2, “Setting Up Business Units in PeopleSoft Strategic Sourcing,” Defining a Business Unit, page 12

## Using the Sourcing Document Status Inquiry

In this section, we discuss how to access and use the sourcing document status inquiry.

## Pages used to Inquire on Document Status

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Sourcing Document Status Inquiry | AUC_DOC_STATUS | • Sourcing, Maintain Events, Event Document Status<br>• Click the Document Status Inquiry link from the Go To options on the pages in the Create Events and Analyze Events components. | Inquiry into the status of documents associated with sourcing events. |

## Using the Sourcing Document Status Inquiry

Access the Sourcing Document Status Inquiry.

If there are requisitions, purchase orders or contracts associated with an event, you can view them on the Sourcing Document Status Inquiry.

If requisitions were consolidated into an event, the document status inquiry page lists each requisition. Then once the award was made, the inquiry would show the related contract, purchase order, or multiple purchase orders if the award is for an event derived from multiple requisitions. This information is only available for buy events.

### See Also

*PeopleSoft Purchasing 8.8 PeopleBook*, “Inquiring About Document Status”

# Using Discussion Forums

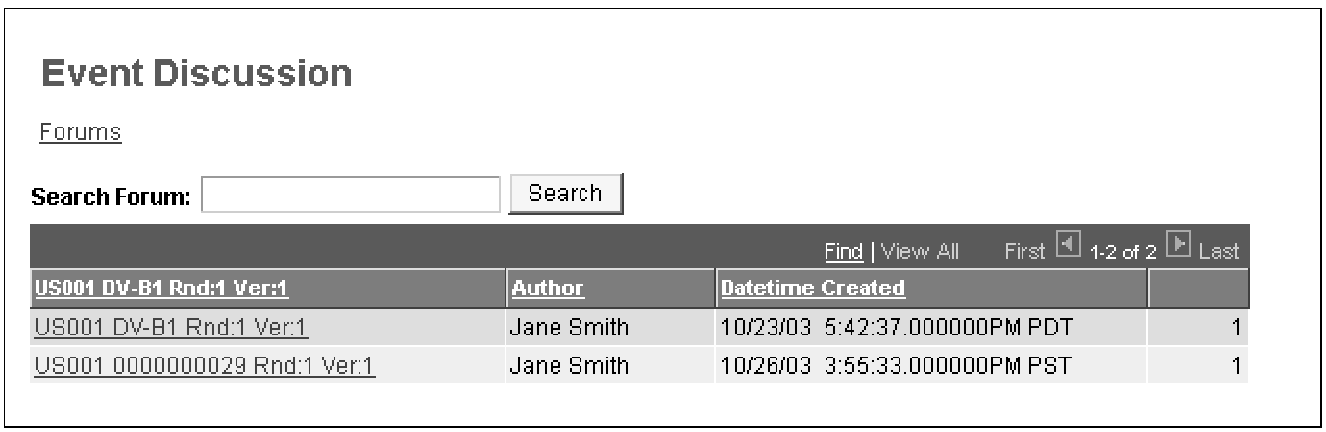
In this section, we discuss how to access and use discussion forums.

## Pages Used to Access Discussion Forums

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Discussion Forums | AUC_MESSAGE_ENTRY | • Sourcing, Maintain Events, Event History. Click the Discussion Forums button on the Event History page.<br>• Sourcing, Maintain Events, Discussion Forums | Use to access discussion forums for the selected event. |
| Forum User Preferences | AUC_FORUM_PREF | Click the Forum User Preferences link on the Discussion Forums page. | Use to add user preferences. |
| Discussion Forums | AUC_MESSAGE_LIST | Click the Event Discussion link on the Discussion Forums page. | Lists all active forums you can access. |
| Event Discussion | AUC_MSG_REPLY_SEC | Click an event forum topic on the Event Discussion page. | Use to view an event message and post a reply. |

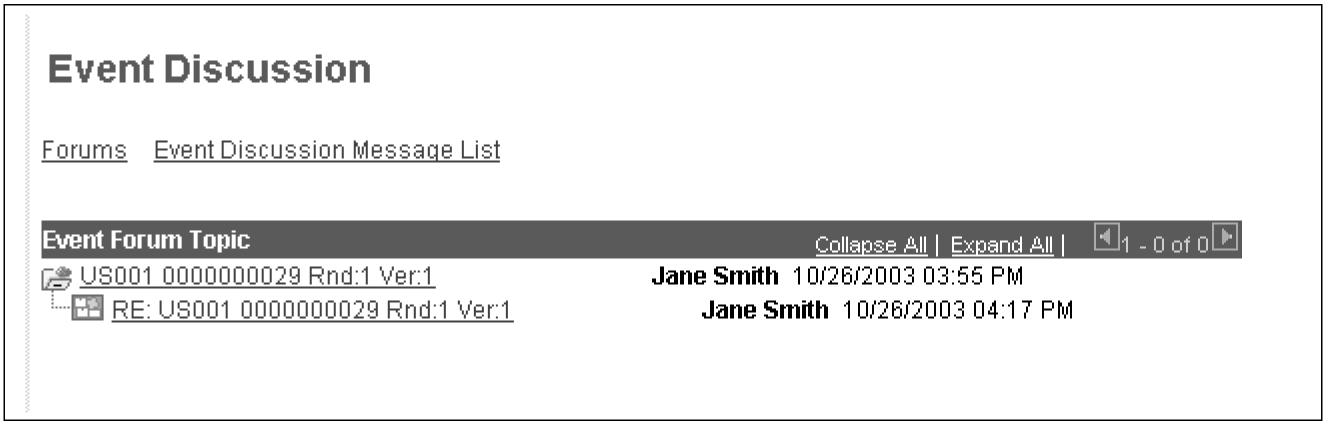
## Using Discussion Forums

Access the Event Discussion page. Click the Search button to view active events.




Event Discussion page

Click a linked event to access the discussion forum for that event.




Event Discussion - Event Forum Topic

Click an event forum topic to view an event message.


Event Discussion page

After viewing the message, click Replyto post a message to the event forum for this topic. Click Post to add the message to the discussion forum.

**Private Message** Mark the message private so that only you and the person you are replying to can see the message.

**Note.** Internal users can see all messages, so use this check box to communicate privately with the event buyer/seller without other bidders being involved.

### See Also

Chapter 3, “Preparing to Implement PeopleSoft Strategic Sourcing,” Setting Up Discussion Forums, page 24

## CHAPTER 11

# Registering and Maintaining Bidders

This chapter provides an overview of bidders and the registration homepage and discusses:

- Understanding the Registration Home Page.
- Registering to bid.
- Signing in to PeopleSoft Strategic Sourcing
- Maintaining bidder information.

## Understanding Bidders

Bidders must register, create their profile, and review terms and conditions before submitting bids.

There are two main groups bidding on events:

- Bidders you invite to view an event or who choose to view a public event; that is, people and organizations with whom you have not done business before.

  These users must become registered bidders before they can bid on any event.
- Vendors and customers; that is, people and organizations with whom you do business now.

  These people are not only registered bidders, they have advanced to the status of vendor or customer.

PeopleSoft Strategic Sourcing enables you to provide bidders with a simple registration process. For users that do not already exist in the database, the registration process collects pertinent information about them such as name, email, address, and organization information if they represent one. Registering enables them to create a user ID and password, and assigns them the role of Event Bidder. Now, the user is valid in the system and can see and bid on both public events and events to which you have invited him or her.

When bidders register, they inherit the roles assigned to a default bidder. You define a Default Bidder User ID on the User Profiles - Roles page and assign that user ID to the Default Bidder ID on the Bidder Registration Setup page.

Bidders are stored separately from vendors and customers. The recipient must be either a vendor or a customer before an event can be awarded. Since, by definition, a bidder has not yet sold to or bought from your business, the bidder tables act as a holding place until the bidder is awarded an event. Once an event is awarded to a registered bidder, PeopleSoft Strategic Sourcing updates their user ID to the correct type: vendor or customer. You would search under vendor or customer to invite this bidder to future events.

For those vendors and customers that did not start out as bidders, add the role of either Event Vendor or Event Customer to their user profile.

Vendor and customers can manually activate their categorizations, instant messaging settings, and user contact mappings.

See Chapter 11, “Registering and Maintaining Bidders,” Maintaining Vendor and Customer Registration, page 132.

If a bidder has the same standard ID (such as tax ID) or VAT ID as an existing vendor, customer, or bidder, the system transfers them to a page to resolve the issue. On that page, the system displays a summary of the duplicates, what company they relate to, and some options for resolving them.

Each customer’s user ID must be of the type *Customer* (as opposed to *Customer Contact*), so they can view events to which they have been invited.

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**Note.** All pages in this chapter are supplier facing.

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### Bidder Registration Approvals

If approvals are required for bidder registrations, the bidder is informed after registering that their registration is pending approval. The approval request is then submitted to the user with the Event Administrator role. The Event Administrator can either approve or reject the registration request. If approved, the bidder receives an email with their user ID and assigned password. If rejected, the Event Administrator selects a reason for rejecting the registration, and the bidder receives an email indicating that their request was rejected, and optionally the reason why it was rejected.

Bidder registration approval is activated on the Registration Home page.

See Chapter 3, “Preparing to Implement PeopleSoft Strategic Sourcing,” Setting Up the Registration Homepage, page 21.

### See Also

*PeopleTools 8.44 PeopleBook: Security Administration*

## Understanding the Registration Home Page

PeopleSoft Strategic Sourcing enables you to send email notifications to potential bidders, inviting them to bid on events. In the email, you can provide a link to the homepage, where you give information about the event and about how to register as a valid bidder.

## Registering to Bid

To register, a guest to the site completes and submits the information on the Bidder Registration page and agrees to the terms and conditions.

Once submitted, PeopleSoft Strategic Sourcing assigns the registrant a user ID and the appropriate bidder roles for events. The system then sends a registration confirmation email to the bidder.

The information on the bidder registration pages is based on choices made on the Bidder Registration setup page.

### See Also

Chapter 3, “Preparing to Implement PeopleSoft Strategic Sourcing,” Preparing Terms and Conditions, page 26

Chapter 3, “Preparing to Implement PeopleSoft Strategic Sourcing,” Setting Up the Registration Homepage, page 21

## Pages Used to Register a Bidder

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Bidder Registration - Preliminary Information | AUC_REGISTER_PG1 | Manage Events and Place Bids, Register Bidder | Enter preferred bidder and event types while registering to bid. |
| Bidder Registration - User Account Setup | AUC_REGISTER_PG2A | Click Next on the Preliminary Information page. | Enter user and contact information for bidding. |
| Bidder Registration - Primary Address | AUC_REGISTER_PG3A | Click Next on the User Account Setup page. | Use to enter addresses. |
| Bidder Registration - Other Account Addresses | AUC_REGISTER_PG3B | Click Next on the Primary Address page. | Create bill to, ship to, and invoice addresses. |
| Bidder Registration - Address Contacts | AUC_REGISTER_PG3C | Click Next on the Other Account Addresses page. | Associate contacts to addresses. |
| Bidder Registration - Additional Classification Information | AUC_REGISTER_PG4 | Click Next on the Bidder Registration - Address Contacts page. | Enter tax identification numbers, SIC codes, VAT information and profile questions. |
| Duplicate Information Found | AUC_DUP_ENT_PG | Enter a standard ID or VAT ID that duplicates an existing customer, vendor, or bidder. | Resolve or correct duplicate ID information. |
| Bidder Registration - Categorization Information | AUC_REGISTER_PG6A | Click Next on the Bidder Registration - Additional Classification Information page. | Enter the buy and sell sourcing categories to which events the bidder would like to be invited. |
| Bidder Registration - Terms and Conditions | AUC_REGISTER_PG6 | Click Next on Bidder Registration – Categorization Information page. | Click that the bidder agrees with the Terms and Conditions on the web site. |

## Registering to Bid

To register to bid, click the Register as a Sourcing bidder link on the Bidder Login page.


Bidder Login pagelet

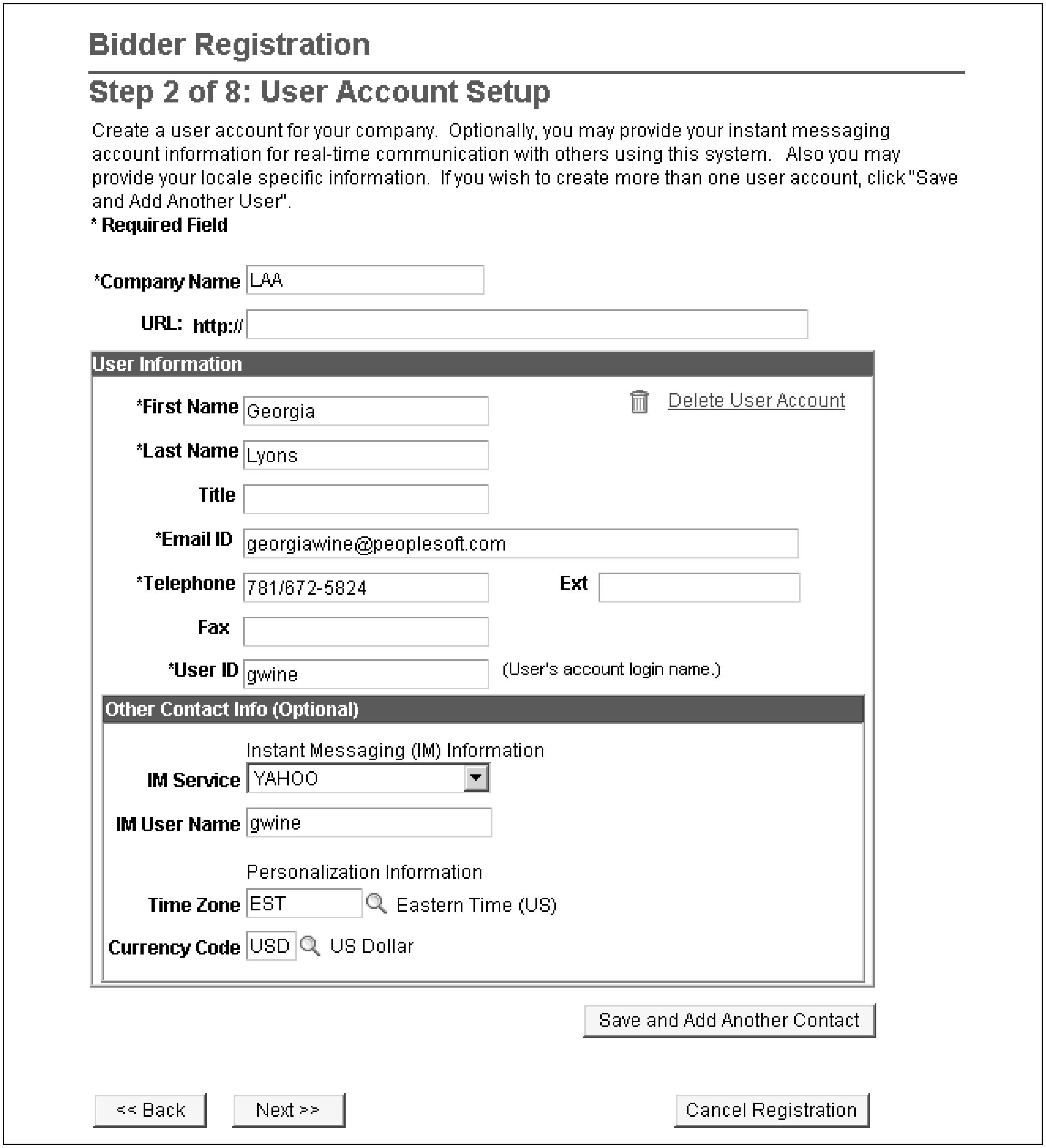
Start with the Bidder Registration - Preliminary Information page, and click Next to follow the pages through the component.

You set up some of the information on the Bidder Registration component on the Bidder Registration Setup Homepage.

See Chapter 3, “Preparing to Implement PeopleSoft Strategic Sourcing,” Setting Up the Registration Homepage, page 21.

## User Account Setup

Access the Bidder Registration - User Account Setup page.




Bidder Registration - User Account Setup

**Delete User Account** — Click to delete a user account row.

**IM Service** — Enter the instant messaging system for the contact. Options include AOL and Yahoo.

**IM User Name** — Enter the instant messaging user name for the contact.

**Time Zone** Enter the default time zone for the contact.

**Currency Code** Enter the default currency to use for the contact.

See Chapter 12, “Placing and Managing Bids,” Instant Messaging, page 138.

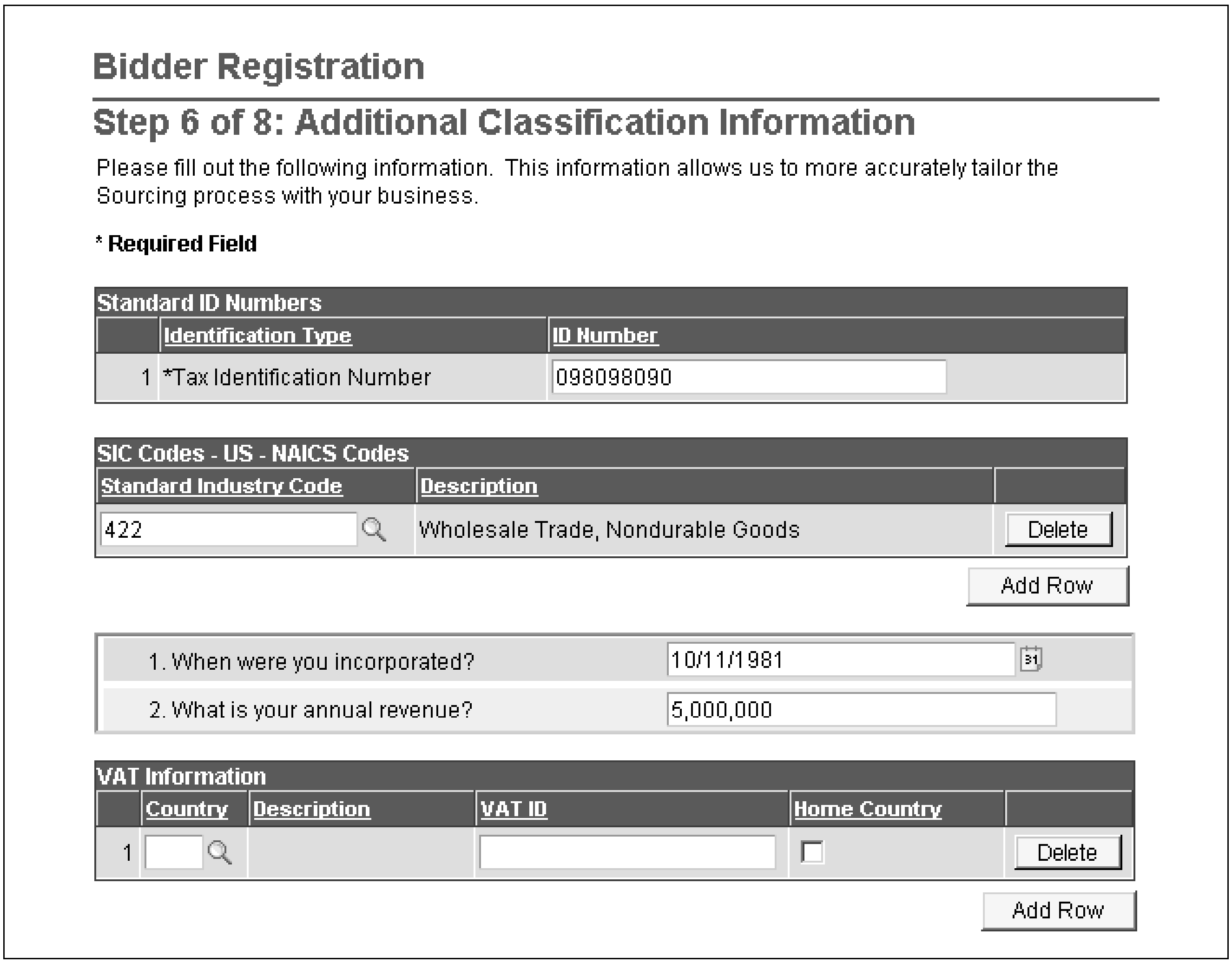
## Address Information

Access the Bidder Registration - Other Account Information page.

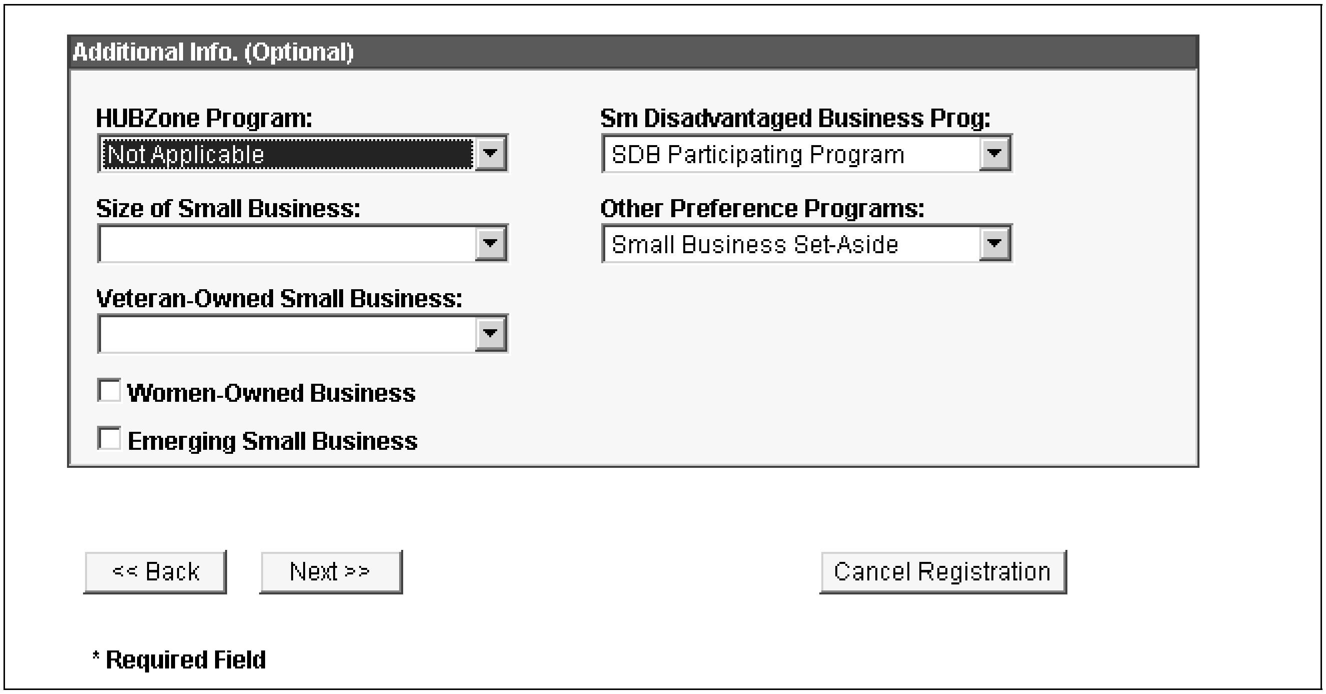
**Bill to Address, Ship To Address, Invoice Address** Select a check box for each additional address you need to add. If you select a check box, address entry fields for the additional addresses appear.

## Business Classification Information

Access the Bidder Registration - Additional Classification Information page.




Bidder Registration - Additional Classification Information page (Page 1 of 2)




Bidder Registration - Additional Classification Information page (Page 2 of 2)

**Standard ID** Any of 14 standard IDs set on the registration homepage.

***Warning!*** If the entered standard ID or VAT ID match the ID of an existing vendor, customer, or bidder, the system takes you the Duplicate ID Found page to resolve the issue.

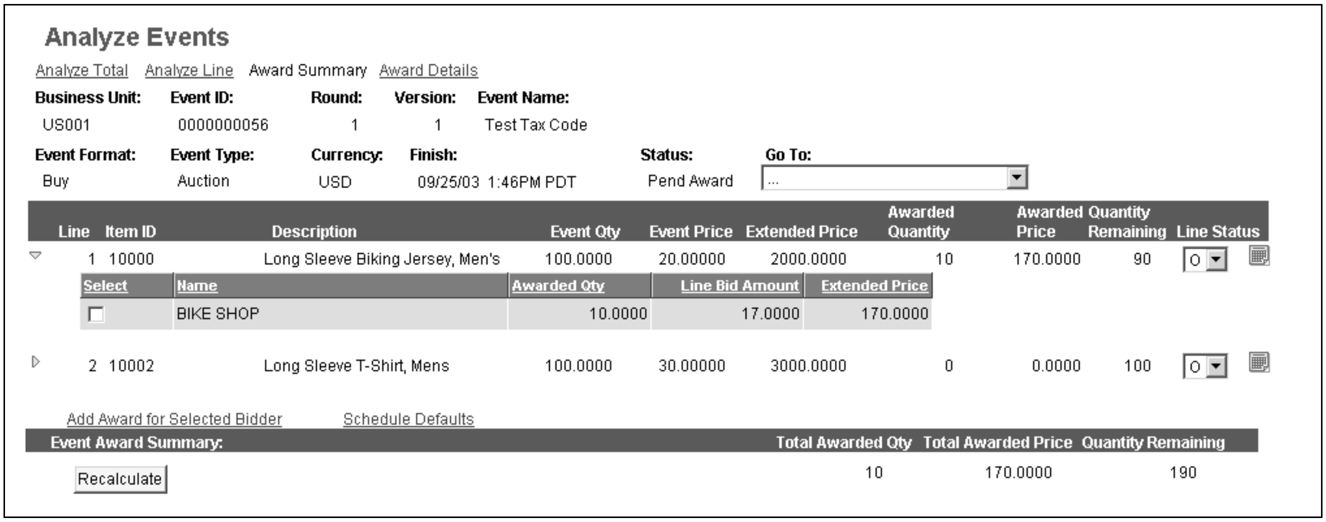
**SIC Codes** The bidder enters Standard Industry Codes related to their business.

The bidder enters answers to any profile questions. For example, you may have to indicate how many years your company has been in business. If the profile questions are required, the bidder must answer to successfully register.

See Chapter 3, “Preparing to Implement PeopleSoft Strategic Sourcing,” Setting Up the Registration Homepage, page 21.

## Categorization Information

Access the Bidder Registration - Categorization Information page.




Bidder Registration - Categorization Information page

Bidders select categories of types of events to which they'd like to receive invitations.

Bidders see buy or sell events depending on what event type was selected on the Bidder Registration: Preliminary Information page.

See Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up Bidder Categorization Trees, page 19.

# Signing In to PeopleSoft Strategic Sourcing

This section discusses signing in to PeopleSoft Strategic Sourcing and resetting your password.

## Understanding Signing In to Strategic Sourcing

Anyone, such as guests, registered bidders, and vendors and customers, can enter PeopleSoft Strategic Sourcing as guests; that is, they do not need to enter a logon name or password to browse public events. However, they must log in or register if they have not previously done so, to:

- View non-public events to which they have been invited.
- Bid on any event.

After logging in, the system displays customized My Sell Events, My Buy Events and My Event Discussions pagelets for registered bidders.

### See Also

Chapter 12, "Placing and Managing Bids," page 135

# Resetting Passwords

This section discusses resetting your password.

## Page Used to Reset Passwords

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Reset and Send Forgotten Password | AUC_RESET_PASS_PG | Click the I forgot my password link on the Bidder Login pagelet. | Reset a password and receive an email with a new password. |

## Resetting Passwords

For bidders that remember their user ID but can't remember their password, enter the user ID on the Reset and Send Forgotten Password page. The system resets the password and sends the new password to the user.

# Maintaining Bidder Information

In this section we discuss how you and bidders can access and update personal contact information.

## Pages Used Maintain Bidder Information

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Maintain Sourcing Contact Information | AUC_USER_CONTACTPG | Manage Events and Place Bids, Maintain My User Contact | Bidders enter their contact information for their company, and indicate the preferred contact. |
| Main | AUC_BIDDER_MAIN_PG | Manage Events and Place Bids, My Bidder Profile | Enter and maintain general bidder information, including bidder type, status, and minority business information.<br>**Note.** Only bidders can access bidder profiles, not vendors and customers. |
| Addresses | AUC_BIDDER_ADDR_PG | Manage Events and Place Bids, My Bidder Profile | Enter and maintain bidder addresses, including the main address, bill to address, ship to address, and invoice address. |
| Contacts | AUC_BIDDER_CONT_PG | Manage Events and Place Bids, My Bidder Profile | Enter and maintain bidder contacts. |
| Identifications | AUC_BIDDER_IDS_PG | Manage Events and Place Bids, My Bidder Profile | Enter and maintain bidder ID numbers such as tax identification number, SIC codes, VAT information, and any profile questions. |
| Strategic Sourcing Tree | AUC_SELF_CAT_PG | Manage Events and Place Bids, My Categorizations | Bidders can view or change their self-categorizations to indicate the types of events for which they want to receive invitations. |
| Maintain Instant Messaging Settings | AUC_BIDDER_IM_PG | Manage Events and Place Bids, My IM Settings | Bidders enter their instant messaging user name and service. |
| Maintain Sourcing Contact Information | AUC_USER_CONTACTPG | Manage Events and Place Bids, Maintain My User Contact | Use to associate a company contact with the vendor user ID. |
| Terms and Conditions | AUC_VIEW_TERMS | View Terms & Conditions | View terms and conditions after registering to bid. |

## Maintaining Vendor and Customer Registration

Existing vendors and customers can add additional registration settings. This is necessary to use chat and to receive event invitations geared towards their interests.

To maintain vendor and customer registration:

1. Access the Categorization page.

Select desired categories.

2. Access the Maintain Sourcing contact page.

   Add contacts.

3. Access the IM Settings page.

   Update IM settings.

4. Associate vendor user IDs to vendor contact names on the Maintain Sourcing Contact Information page.

# CHAPTER 12

# Placing and Managing Bids

This chapter provides an overview of bidding and discusses how:

- Bidders view pagelets that show available events.
- Bidders search for events to bid on.
- Bidders place bids.
- You can create bid responses on behalf of a bidder.
- Bidders view their bidding activity.
- Bidders can optionally view the award details for an event.

## Understanding Bidding

When the created event is posted, bidders receive notification of the event. They can place bids based on the parameters that you have set for the event, browse events based on various search and sort criteria, and receive notifications about the status of the event. For bidders who enter their bids using fax or mail, you can enter the faxed or mailed bids online for them.

PeopleSoft Strategic Sourcing enforces the event rules that you set and maintains a bid history audit trail.

When a bidder posts a bid, PeopleSoft Strategic Sourcing:

- Verifies that the event end date has not passed.
- Saves any changes that the bidder has made, if a previous bid is being updated.
- Verifies that bid responses have been entered for each required bid factor.

Depending on the situation, other responses can occur when a bid is posted. Here are some of the possible scenarios and how posting is affected. :

### Auction Event

The system verifies that the posting is the best bid received so far:

- If the bid currency is not the same as the event currency, it converts the bid price to the event currency to determine whether the bid is a winning bid.
- If the bid does not score higher than the current winning bid, it lists their score compared to the winning score on the Create Bid Response page. The bidder can choose to post a bid that does not beat the current winning bid or revise their bid to obtain a higher score.

- If the bid scores higher than the current winning bid, it generates email notification to the previous high bidder with information that they have been outbid.

Auction event options depend on the combination of several different settings on the Creating Events Header Details page.

- If the Price Only check box is selected on the Header Details page, then the bidder is competing based solely on price, not on score.
- If the Price Only check box is not selected on the Header Details page, then the bidder is competing based on score.
- If Bid Required on All Lines is selected on the Header Details page, then the bidder is competing based on total event price or total event score.
- If Bid Required on All Lines is not selected on the Header Details page, then the bidder is competing based on each line's unit bid price or line score.
- If the Scoring Option is set to Must Beat Winning Bid, then the bidder must always beat either the total winning bid (which again is determined as either the total event winning price or total event winning score) if bid required on all lines is selected. If Bid Required on All Lines is not selected, then the bidder must beat each line's winning unit bid price or winning line score for the lines that the bidder bids on.
- If the Scoring Option is set to Must Beat Own Bid, then the bidder must always beat either their own previous total bid price or score if bid required on all lines is selected or their last unit bid price or line score if bid required on all lines is selected. The bidder is not alerted if their bid does not score higher. Instead, depending on the options on the header details page, the bidder can either see the winning score on the create response so can know whether their bid beats the winning bid or if the winning bid is not displayed to the user, then they can see their rank or bid status after posting their bid.
- If Display Winning Bids is not selected, bidders see either their bid status or bid rank. Bidders can't see the winning bid.

See Chapter 7, "Creating Events," Entering Header Details, page 64.

## Event Extension is Enabled

Checks to see whether the posted bid is within the last bid received time frame and what number of extensions are set on the event:

- If the posted bid date is not within the last bid received time frame, the event end date is not updated.
- If the posted bid time is within the last bid received time frame and the number of extensions has not already been allocated, the event end date is extended based on the parameters set on the event.
- If the posted bid time is within the last bid received time frame, but the number of extensions has already been allocated, the end date is not updated.
- If the event has events lots associated with it, the Preview, Start, and End Dates are updated for all subsequent event lots when an event extension is triggered.

## Event is a Sealed, RFx

The calculated score is not visible to the bidder.

The event originator cannot view either bids or bid history until the event end date is reached.

### Event is an RFx but not a Sealed Bid

The calculated score is not visible to the bidder.

The event originator can view the bid once it is posted.

### RFI Events

When you bid on RFI events, you only respond to header bid factors, there are no line bid factors.

If the RFI is being scored, the calculated score is not visible to the bidder.

## Bidding on Behalf Of Another Bidder

Internal users can save and edit bids they have entered on behalf of another bidder. They can also upload XML bids on behalf of other bidders.

## Bidder Price Adjustments

If bidding on an event that includes user-defined price adjustments, bidders enter their bid prices based on the predefined tiers. Otherwise, if the event specifies bidder defined price adjustments, the bidders can define their own price tiers. When entering the price tier response, bidders indicate whether the tier pricing is adjusted based on a flat-dollar amount or based on a specified percentage. If the bidder enters a negative amount that applies to the price tier, that amount is subtracted from the base price to determine the net bid price for the tier. If the bidder enters a negative percentage that applies to the price tier, the percentage is multiplied against the base price to determine the discount amount, and that amount is subtracted from the base price to determine the net bid price for the price tier. The discount percentage is automatically calculated and displayed if the bidder enters a discount amount. In the same manner, the discount amount is automatically calculated and displayed if the bidder enters a discount percentage. The bidder can enter the discount percentage or the discount amount.

The bidders can also specify whether the price terms are based on a quantity ordered to date or based on the current order quantity. If the bidders select quantity to date, the cost per item is based on a cumulative quantity ordered. If the event is awarded to a contract and there are multiple releases (orders) against the contract, the price is based on the cumulative ordered quantity of the orders related to the contract. If instead the bidders select current order quantity, the price is based on the quantity that relates to the specific release against the contract.

## Entering Bids with Optional Quantities

If an event line is marked as quantity optional, for example for a services type of request, bidders are not required to enter the quantity for that bid. An enterprise could solicit bid for consulting, and may decide that they want bidders to quote a flat amount for the entire implementation, instead of offering consultants at a rate per hour. In this case, the bidders enter an amount, but not a quantity.

## Bid Factors

If the event creator used functional bid factors, and information already exists for a bidder, the response to the functional bid factor automatically populates on the response page. Bidders may not change responses that are automatically populated. If the information does not exist, the response isn't populated and therefore the bidder may enter the response.

Upon posting a bid, the system verifies that all required bid factors have been responded to, and alerts the bidder if a required bid factor was not answered. The system also verifies that the mandatory responses were provided for bid factors with a mandatory response requirement, and alerts the bidder that their bid is disqualified if the mandatory response is not provided. Bids that are disqualified are not eligible to be awarded.

## Bid Rankings

PeopleSoft Strategic Sourcing ranks individual bids for auction events, and provides the option to enable bidders to view their ranked bids. Bidders can see where their best-posted bid ranks compared to the best bids from other bidders. For example, a bidder can view their bid ranking as 4th out of all the bids received. Whenever a new bid is posted, the system recalculates the rank.

Bidders can also view how many suppliers have bid at least once on an auction. A bidder can see that their best bid ranks 4th out of 9, thus indicating to the bidder that 9 bidders have bid on the event thus far. In cases where bidders may view the bid history for an event, the system displays the rank on the bid history versus the price or score. Event creators can use ranking in situations where they don't want to reveal what the leading bid price is, but still need to convey to the bidder where the bidder stands in the bidding process.

## Event Lots

If multiple events are linked together in lots, you must bid on them in order. After bidding on the first event, the system provides a link to the next event in the linked lot list on the Bid Confirmation page.

## Bid Uploads

If the event has the option to download bids, the system creates an XML document and attaches it to the event. A bidder can detach the XML document and use Excel 2002 or higher to open the document and view it in spreadsheet format. Once the bidder has created the bid response and is ready to upload, they save the spreadsheet as a XML document. The bidder then uploads the XML document into the PeopleSoft Strategic Sourcing and registered as an incoming bid.

Internal users can upload bids when bidding on behalf by of another bidder. It's the same process as entering a bid on behalf - the user just selects to upload a bid instead of entering a new bid.

## Multiround Events

Bidders always bid on the most recent round and version of events. The system displays the round or version number on the Create Bid Response page.

If a new round is created for an event where you have already entered a bid, the system displays a Counter Event button on the Event Details page.

## Instant Messaging

To facilitate collaboration between event owners and bidders, we provide chat or instant message capabilities between event creators and bidders. Bidders can initiate chats with an event owner, which enables bidders to receive immediate responses on questions or clarifications for a selected event. This is especially critical during auction events, which are often time-sensitive.

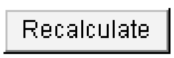
Optionally, internal collaborators may also chat among themselves during the collaboration process. Multiple collaborators can participate in a single chat.

We use the PeopleTools MultiChannel Framework (MCF) technology infrastructure to support multiple interaction channels for PeopleSoft users who must respond to incoming requests and notifications on these channels.

# Common Elements Used in This Chapter


The Save button enables the bidder to save their response. Clicking this button does not submit the response to the event.


Click the Post button to submit any bids and information the bidder has entered. Upon posting, the bidder receives a confirmation email containing the bid details.




Click the Recalculate button to compute the score based on the response values. Clicking this button does not submit the response to the event.

**Worst, Best** and **Ideal** — The range of preferred responses to the bid factor.

# Using PeopleSoft Strategic Sourcing Pagelets

In this section, we discuss the supplier facing pagelets that bidders see when they log in to view and bid on events.

- My Sell Events
- My Buy Events
- My Event Discussions

Pagelets appear whether the bidder is a vendor, bidder or customer.

### See Also

Chapter 11, “Registering and Maintaining Bidders,” page 123

## Pages Used to View Strategic Sourcing Events

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| My Sell Events (external) | AUC_MY_AUC_PGLT_W | Opens on login | Displays events to which the bidder has been specifically invited to bid, or which are open to all bidders.<br>The bidder clicks the Event Name to access the Create Bid Response page, on which he can enter or update his bid.<br>The events on the My Sell Events pagelet are the event creator's buy events; for items and services to buy from an individual or organization |
| My Buy Events (external) | AUC_MY_AUC_PGLT_W | Opens on login | Displays events to which the bidder has been specifically invited to bid, or which are open to all bidders.<br>The bidder clicks the Event Name to access the Event Details page, on which he can enter or update his bid.<br>The events on the My Buy Events pagelet are the event creator's sell events; for items and service to sell to an individual or organization. |
| My Event Discussions (external) | AUC_PE_EVT_FORUM | Opens on login. | Displays discussion for events to which the bidder is invited.<br>Click See All Authorized Forums to access all discussion forums. |

# Placing Bids

In this section, we discuss how bidders:

- Enter bid responses.
- Enter a bid during preview period.
- Save a bid.
- Update a bid.
- Cancel a bid.

## Pages Used to Place Bids

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| View Events and Place Bids | AUC_RESP_INQ_AUC | Manage Events and Place Bids, View Events and Place Bids, Search Events | Bidder searches for events on which to bid. |
| Event Details page | AUC_RESP_INQ_DTL | Select an event from the View Events and Place Bids page. | Used to view a summary of the sourcing event. From this page, bidders can choose to enter a bid or review a counter offer, upload a bid, accept or decline an event invitation, view the bid history for the event or view the bidder's entire bidding activity across all events. |
| Create Bid Response | AUC_RESP_BID_HDR | Click the Bid on Event button on the Event Details page. | Use to enter a bid response for RFI events. |
| Create Bid Response | AUC_RESP_BID_NUHD | • Click the Bid on Event or Counter Bid button on the Event Details page.<br>• Sourcing, Event Responses, Create Bidder Response | Respond to header bid factors for auction and RFx events. |
| Question Comments and Attachments | AUC_RESP_COMHF_SEC |  Click the Response Line Comments button on the Create Bid Response page. | View or add comments and attachments about the question. |
| Search Bidder Activity | AUC_BID_ACT_SRCH | Sourcing, Event Responses, Search Bidder Activity | Used by internal users to view the bidding activities for a selected bidder. |
| General Comments and Attachments | AUC_RESP_COMH_SEC | Click the Add General Comments and Attachments link on the Create Bid Response page. | View or add general comments and attachments about the event. |
| Header Bid Factor List page | AUC_RESP_LBFHD_SEC |  Click the Bid Factor List button on the Create Bid Response page. | Enables bidders to select responses for header list bid factors. |
| Cancel Bid | AUC_RESP_CANCEL | Click the Cancel Bid button on the Create Bid Response page. | Enables bidders to cancel saved bids or cancel posted bids for RFx and RFI events |
| Create Bid Response - Line | AUC_RESP_BID_NULN | Click the Bid button on the Create Bid Response page. | Respond to bid factors for each line item. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Line Bid Factor List page | AUC_RESP_LBFLN_SEC |  Click the Bid Factor List button on the Create Bid Response - Line page. | Enables bidders to select responses for line list bid factors |
| Line Comments and Attachments | AUC_RESP_COMLN_SEC | Click the Bid Line/Comment/Attachments link from the Create Bid Response page. | Add comments for bid lines. |
| Price Component Breakouts | AUC_RESP_PCMPT_SEC |  Click the Price Component Breakouts button on the Create Bid Response page. | Use to enter all components of the bid price, such as cost, profit, shipping, tax, and so forth. |
| Price Breaks | AUC_RESP_PBRK_SEC | Click the Price Breaks link on the Create Bid Response page. | Used to enter price breaks based on volume for each line. |
| Shipping Address | AUC_RESP_SHIP3_SEC | Click the Ship to or Ship From Address button on the Create Bid Response page. | Use to view the shipping address |
| Bid Confirmation | AUC_RESP_BID_CONF | Appears after you have submitted a bid. | Displays confirmation that the bid has been submitted. If bidding on event linked in lots, this is where you access the next event in the lot. |
| Decline Event Invitation | AUC_RESP_BID_INV | Click the Decline Event button on the Event Details page. | Select a reason for declining the event and optionally enter additional comments. |
| Upload Bid | AUC_BP_UPLOAD_SEC | Click the Upload button on the Event Details page. | Use to upload a previously created bid response in Excel or XML. |
| Bid Search For | AUC_RESP_INQ_BIDS | Click the Edit button on the Event Search for page next to the pertinent event. | Bidders can edit a saved bid or cancel a saved bid for any event type (RFI, RFx, Auction). Bidders can edit a previously posted bid for RFI or RFx events if the allow edit of posted responses is selected on the Header Details page. See Chapter 7, “Creating Events,” Entering Header Details, page 64. |
| Bid Activities page | AUC_BID_ACT_PG | Click the Event Activity button on the Event Details page. | Used by bidders to view their personal bidding activities for all events. |

## Using Event Details

Access the Event Details page.

| | |
|---|---|
| **Bid on Event** | Click to enter a bid response. |
| **Accept Invitation** | Accepts the invitation to bid on this event. This can be used if the bidder is not ready to prepare their bid, but would like to indicate their intention of participating in the event. Bidders are not required to accept the invitation before preparing their bid. After you accept the invitation, you are returned to the Strategic Sourcing Events search page. You must return to Event Details and click the Bid on Event button to enter the bid. You can accept event participation when bidding on behalf of another bidder. |
| **Decline Invitation** | Declines the invitation to bid on this event. You can decline event participation when bidding on behalf of another bidder. If you decline the event, you enter a reason code.<br><br>If a bidder was invited to an event and declines the event invitation, they can continue receiving updates on the event. Also, if a bidder declines the event invitation, they can accept the invitation later and enter a bid for that event. |
| **Edit Bid** | Click to modify or view an existing bid for the event. |

**Note.** Bidders can edit a saved bid or cancel a saved bid for any event type (RFI, RFx, Auction). Bidders can edit a previously posted bid for RFI or RFx events if the editing posted responses is permitted on the Header Details page.

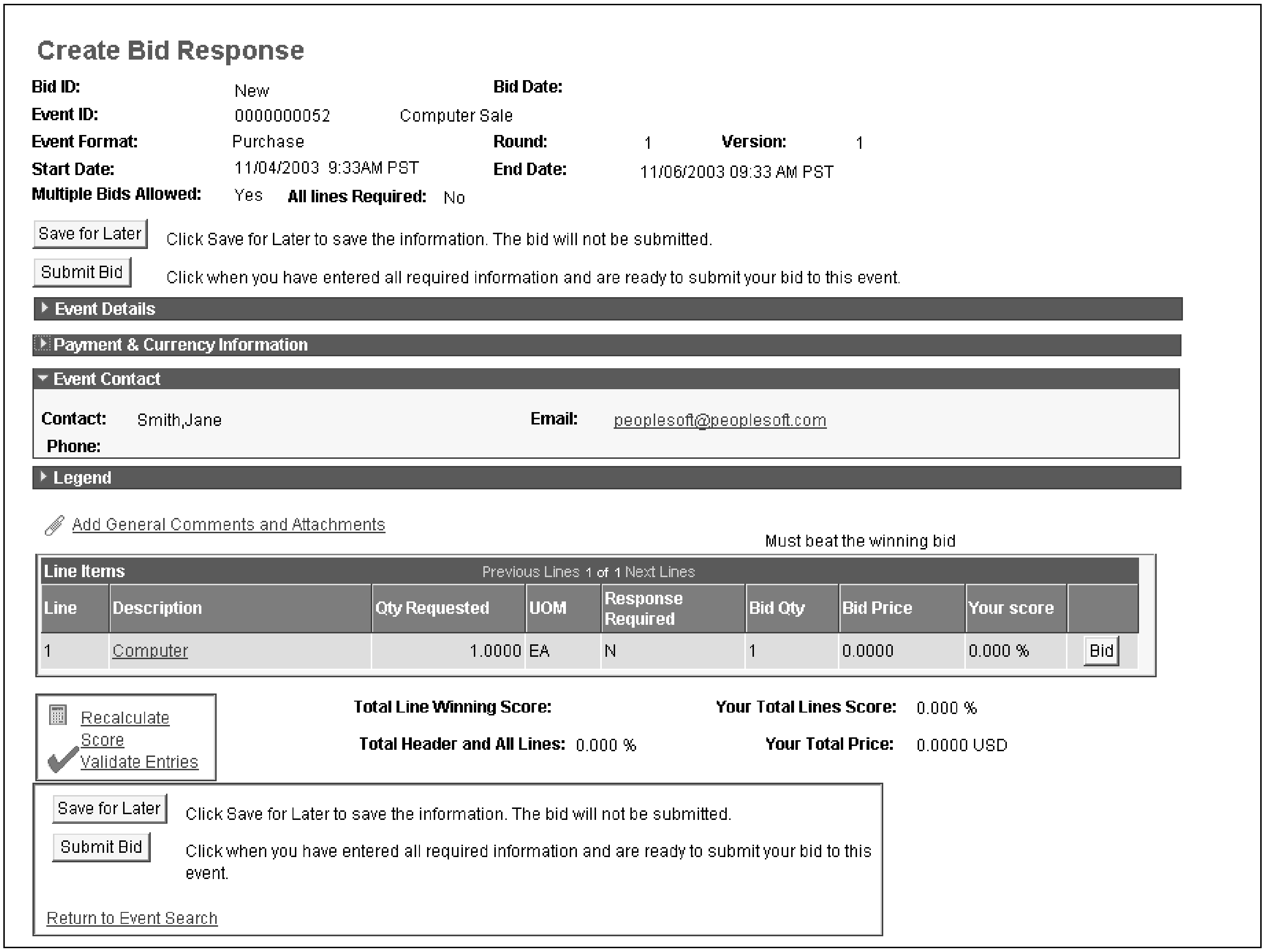
| | |
|---|---|
| **Event Activity** | Click to access previous bids using the Bid Activities page. |
| **Discuss Event in Forum** | Click to enter the event discussion forums. |
| **Bid History** | Click to view previous bids submitted for this event using the Event Bid History page. |
| **Upload** | Click to upload a bid from an Excel or XML file. This access |
| **Award Details** | Click to view information about the event award. |
| **Request Live Chat** | Click to chat with the event creator. |

### See Also

Chapter 7, "Creating Events," Discussion Forums, page 59

## Entering Bid Responses

Access the Create Bid Response page.



## Create Bid Response

**Bid ID:** New **Bid Date:**
**Event ID:** 0000000052 Computer Sale
**Event Format:** Purchase **Round:** 1 **Version:** 1
**Start Date:** 11/04/2003 9:33AM PST **End Date:** 11/06/2003 09:33 AM PST
**Multiple Bids Allowed:** Yes **All lines Required:** No

Save for Later Click Save for Later to save the information. The bid will not be submitted.

Submit Bid Click when you have entered all required information and are ready to submit your bid to this event.

**Event Details**

**Payment & Currency Information**

**Event Contact**

**Contact:** Smith,Jane **Email:** peoplesoft@peoplesoft.com
**Phone:**

**Legend**

Add General Comments and Attachments

Must beat the winning bid

**Line Items** Previous Lines 1 of 1 Next Lines

| Line | Description | Qty Requested | UOM | Response Required | Bid Qty | Bid Price | Your score | |
|---|---|---|---|---|---|---|---|---|
| 1 | Computer | 1.0000 | EA | N | 1 | 0.0000 | 0.000 % | Bid |

Recalculate Score
Validate Entries

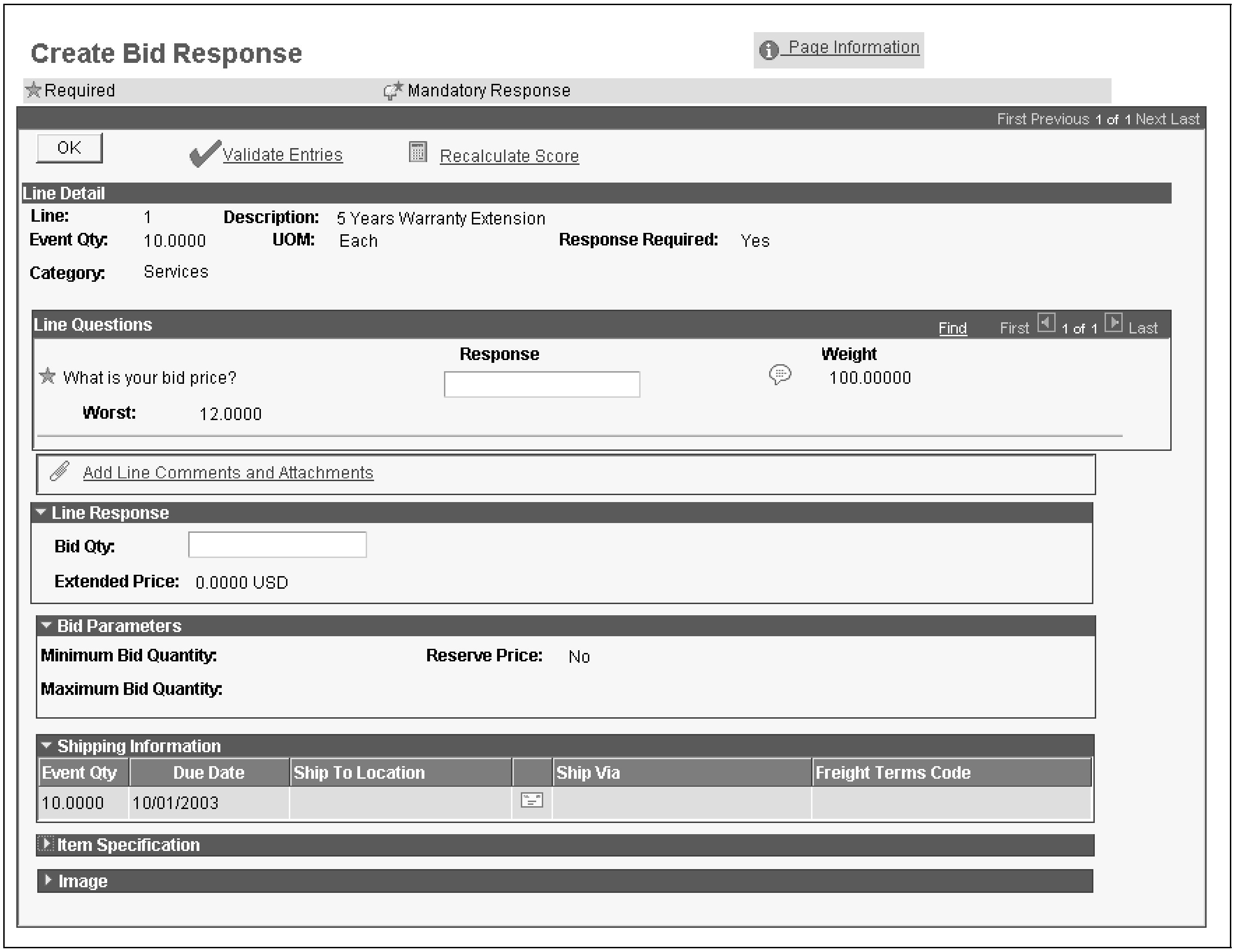
**Total Line Winning Score:** **Your Total Lines Score:** 0.000 %
**Total Header and All Lines:** 0.000 % **Your Total Price:** 0.0000 USD

Save for Later Click Save for Later to save the information. The bid will not be submitted.

Submit Bid Click when you have entered all required information and are ready to submit your bid to this event.

Return to Event Search

Create Bid Response - Header Information




Create Bid Response - line information

**Discuss Event in Forum** Click to access discussion forums to discuss the event with other users.

**Request Live Chat** Click to initiate chat with the event creator using the Multichannel Framework.

**Recalculate Score** After entering all of the bid information, the bidder clicks the Recalculate Score link, which calculates and, if the event is an auction, displays the score. The bidder can now analyze the bid, based on the score received, and change the price offered or answer a bid factor question differently to obtain a better score.

**Validate Entries** Click to validate the bid for errors prior to saving or posting a bid.

**Response** The bidder's enters their answer to the bid factor.

 Enter any comments related to the bid factor response.

**Bid** Click to access the Enter Line Bid Details page for the line.

## See Also

Chapter 7, "Creating Events," Price Adjustments, page 58

## Entering Price Components

Access the Price Components page.

For each designated component, enter the best Unit Price, Component Quantity, and the system calculates the Component price.

## Entering Price Adjustments

Access the Price Breaks page.

**OK** Click to return to the Create Bid Response page. Clicking OK does not submit the bid; the bidder must click the Submit button on the Create Bid Response page.

**Cumulative Order Quantity** Price adjustments are based on the total quantity for the awarded contract.

**Individual Order Quantity** Price adjustments are based on a specific order released from a contract.

**Rapid Entry** Click to turn on deferred processing so that the page doesn't refresh as you enter responses in each field.

**Ignore Errors** Click this button to ignore calculation errors when saving. Errors must be fixed before posting a bid.

See Chapter 7, "Creating Events," Price Adjustments, page 58.

### Line Detail Group Box

**Bid Quantity** Enter the quantity of items on which you are bidding. This field is edited again with the minimum and maximum bid quantity fields entered during event creation.

If the requested line quantity required is set to "yes" on the header details, the system automatically populates the line quantity in the bid quantity.

See Chapter 7, "Creating Events," Entering Header Details, page 64.

**Line Weight** The relative importance of the line item to the overall event. If the event creator does not set specific weightings, each line is weighted equally.

**Total Line Score** The sum of the bidder's scores for the bid factor responses for this line.

**Note.** This is only applicable for auction events.

**Your Score** The bidder's score for this line item; the line weighting multiplied by the total line score.

**Note.** This is only applicable for auction events.

**Current Winning Score** The best score that any bidder has achieved for this line item.

**Note.** This is only applicable for auction events.

### Line Response Group Box

**Worst** If an auction event has Bid Price as the only bid factor, and a bid increment was set by the Event Creator, the Worst field displays the current required bid. This current required bid is the last posted bid amount plus or minus (depending on whether the event is a sell or a buy) the bid increment. Any new bid, if it is for the entire event quantity, must be equal to or better than the Worst amount.

## Uploading Bids

Access the Event Details page.

**Upload** If you have downloaded a bid package Excel spreadsheet or XML file, and have used the bid package to enter the bid, click to upload the completed bid into PeopleSoft Strategic Sourcing. This accesses the Upload Bid page.

### File Selection

Access the Upload Bid page.

To upload a bid:

1. Open the Excel version of the event that you have been working with.
2. Select File, Save as, and save the spreadsheet as an XML spreadsheet type.
3. Click the Select XML File button, and select the XML Spreadsheet that was just saved.
4. Verify the path is correct and click the Upload button.

### See Also

Chapter 7, “Creating Events,” Bidder Downloads, page 59

## Entering Bids for RFI Events

Access the Strategic Sourcing Events search page. Select the Request for Informationcheck box and search for RFI events. Select an RFI event to access the Event Details page. Click the Bid on Event button to enter an RFI response. RFI events only display event header information and header bid factors since there are no lines in RFIs.

**Bid on Event** Click this button to access the Create Bid Response page to enter RFI responses.

## Entering a Bid During Preview Period

If an event has a preview period, a bidder can enter and save a bid even though it cannot be posted. Responses are ready for posting as soon as the start time for the event is reached.

1. The bidder enters the bid but clicks the Save button, not the Post button (which is unavailable during preview).

2. When the start time arrives, the bidder accesses the bid for that event, and clicks the Post button to post the event.

---

**Note.** Saved bids are *not* automatically posted when the start time arrives. The bidder must access the bid and post it.

---

## Saving a Bid

The bidder can click the Save for Later button at any time to save his bid before posting it. This is helpful to protect data already entered, take a break from the work, or research the answer to a certain bid factor.

To return to the bid and complete it, the bidder must access the Search Event page to edit the particular bid.

## Updating a Bid

How a bidder, after entering a first bid on any event, updates his bid depends on the event type:

- On auction events, the bidder enters a new bid on the event. This provides a bidding trail for the event creator.
- On RFx events, the bidder edits the original bid.

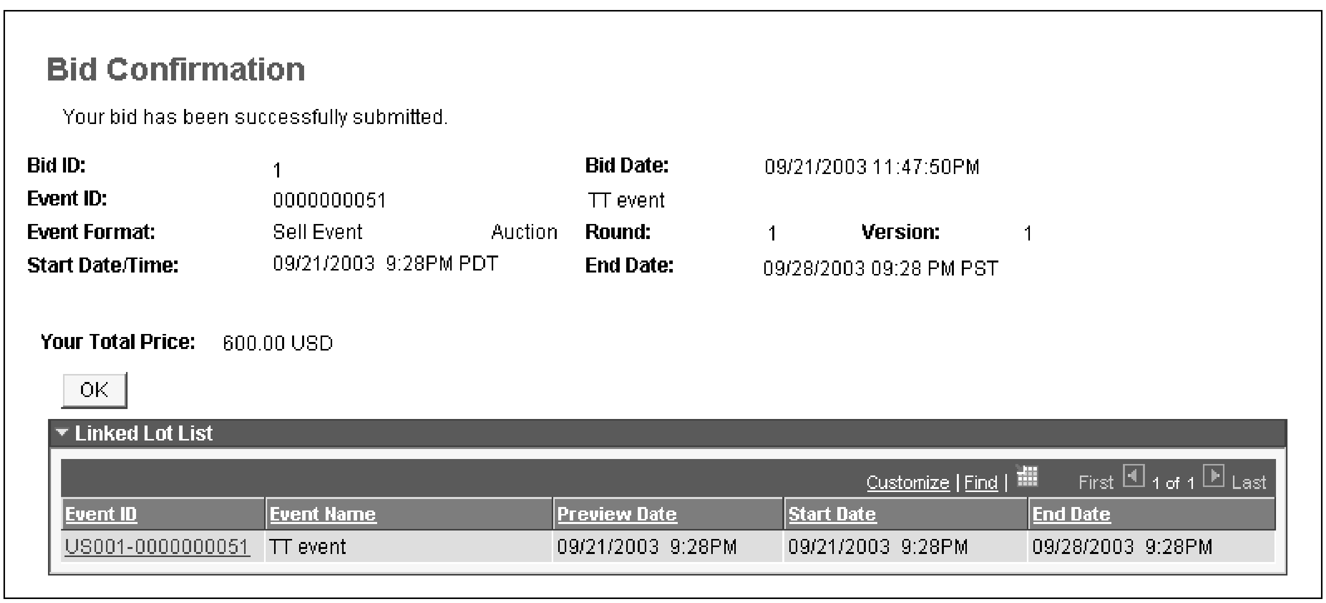
## Canceling a Bid

To cancel a bid for an event, the bidder accesses the Search Events page, clicks the Edit button for the specific event, then clicks the Cancel button.

Posted bids for auction events cannot be canceled.

## Bidding on Linked Events

Access the Bid Confirmation page by submitting a bid.




Bid Confirmation page with linked lot list

If the event you bid on is linked to one or more other events in a lot, you must bid on them in order. The system provides a link to the next event in the linked lot list on the Bid Confirmation page. The end date and time of the first event is the start date and time of the second event, and so forth.

## Viewing Rankings and Scores

Depending on the settings the event creator selected for the event, you can view rankings and scores on the Create Bid Response page. These settings are defined on the Header Details page.

Bidders can optionally view:

- Start prices
- The winning bid.
- Bid History page.
- Current round and version.
- The identity of all bidders.
- Bid rank.
- Number of bids.
- Header score, line score, and combined total score (only for auction events.

### Bidder Display Options

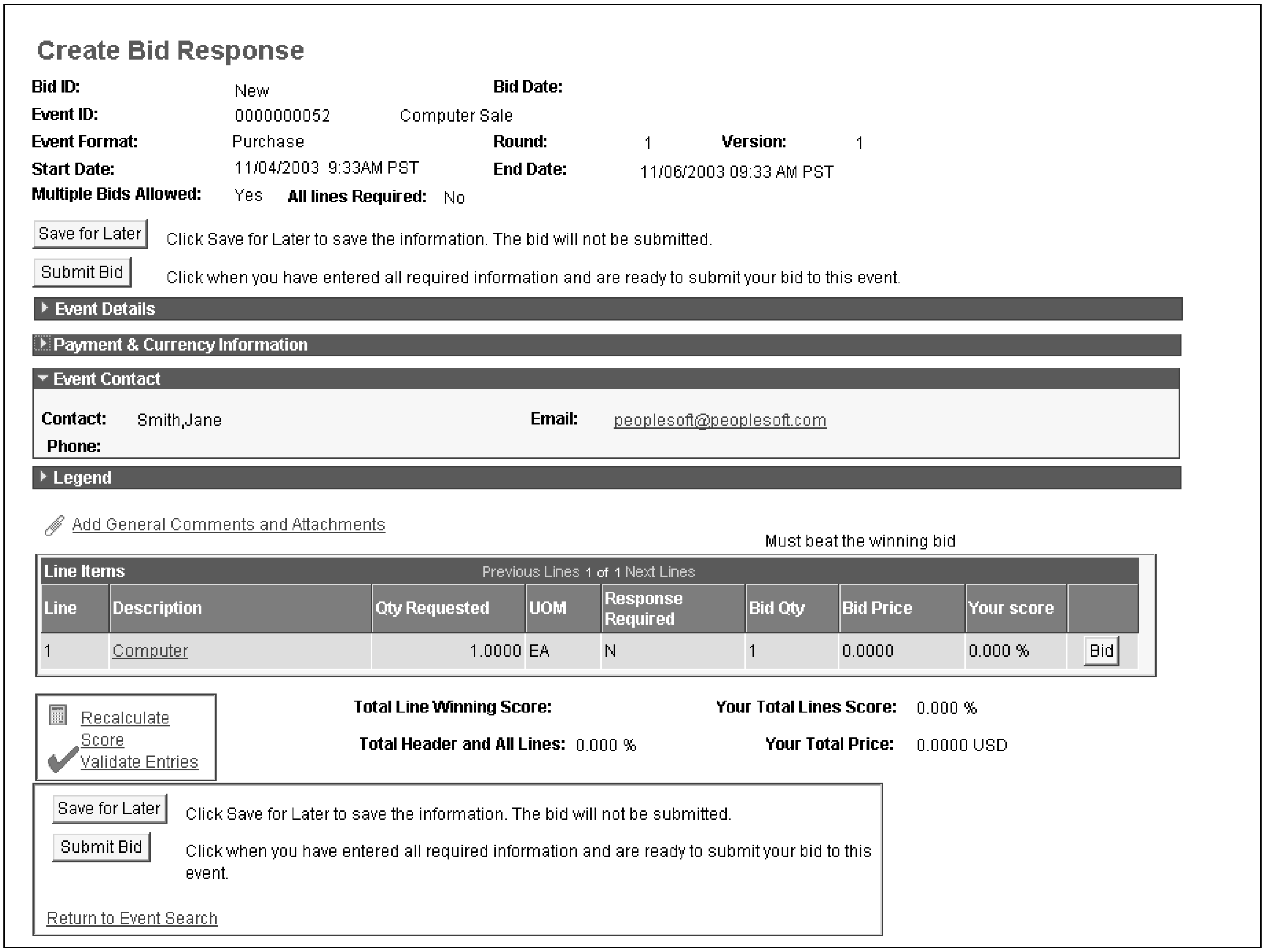
The event creator sets up bidder display options on the Header Details page in the Creating Events component.

See Chapter 7, "Creating Events," Entering Header Details, page 64.

### Beating Own Bid or Best Bid

The system displays whether or not a bidder must beat their best bid price or score or the winning bid price or score, based on the Header Details page.

If Display Start Price to Bidders is not selected on the Header Details page, and the bidder must beat their own bid, then each bidder sets their own start price based on their initial bid price.




Create Bid Response page example showing that the bidder must the winning bid.

## Bids Required on All Lines

If Bid Required on All Lines is selected, and the bidder must beat their own previous bid, the system compares the total score/price from the best previous bid to the current bid and ensures that the current score/price is better than the previous score/price. In this case, it's possible for a bidder to bid higher on one or more line items on the subsequent bid as long as the overall total bid price/score is better than the previous bid. If the current bid does not beat their previous bid, the system issues an error and does not allow the bidder to post the bid.

If bid decrements are entered during event creation, apply the bid decrements to the bidder's previous bid on each line that has a decrement. This only applies if the bid required on all lines check box is not selected on the Header Details page.

See Chapter 7, "Creating Events," Entering Header Details, page 64.

If the system is not set to Display Start Price and the bidder must beat their own bid, then each bidder sets their own start price based on their initial bid price. So if a line has a price of $2,000, one bidder may enter an initial bid price of $2,500, and another bidder may enter an initial bid price of $3,000. From that point forward, each bidder must beat their previous bid price.

If the bidder must beat the current winning bid, compare the total score/price from the winning bidder to the current score/price for the bidder and ensure that the bidder's current total score/price beats the current winning total score.

### Bids Not Required on All Lines

If Bid Required on All Lines is not selected, and the bidder must beat their own previous bid, the system compares the line score/price from the bidder's best previous bid to the current bid and ensures that the current line score/price is better than the previous line score/price for each line bid on.

If the current bid does not beat their previous bid, the system issues an error and does not allow the bidder to post the bid. Any defined bid decrements must be applied to the bidder's previous best bid for each line. The bid decrement is applied to the Max Unit Bid Price. Therefore, if a bidder entered an initial unit bid price of $2,000 and the bid decrement is $200, the Max Unit Bid Price would be updated to reflect $1,800 ($2,000 - $200) on the subsequent bid.

If the bidder must beat the current winning bid, the system compares each line score/price from the winning bidder(s) to the current line score/price for the bidder and ensures that the bidder's current line score/price beats the current winning line score/price for each line bid on.

If the current bid does not beat the current winning bid for all lines bid on, the system issues an error. Again, apply the bid decrement to the current winning bid for each line.

### Price Only Events

If the event is price-only and bids are not required on all lines, the system compares the unit bid price of each line to determine whether the bid beats the last bid or current winning bid. If the event is price-only and bids are required on all lines, the system compares the total bid price to determine whether the bid beats the last bid or current winning bid. If the event is not price-only, the system compares the score to determine whether the bid beat the last bid or the current winning bid.

### Disclose Winning Bid

If the Disclose Winning Bid check box is not selected, the Score Option must be Beat Own Price, since you can't beat the best price if you don't know what it is.

## Creating Bidder Responses

If you receive bids by mail, fax, or phone you can enter the information into PeopleSoft Strategic Sourcing on behalf of the bidder. The bidder must be a registered and invited bidder and is treated by the system as any other bidder.

To create a bidder response:

1. Collect the bid information from the bidder.
2. Access the Search Criteria page from the Create Bidder Response menu.
3. To find the correct event and bidder, you can enter an Event ID or select an Event Format, Event Type, Event Name, or Bidder Type.

4. Click the Search button. The system displays the event information including version and round, and the name of the bidder, customer, or vendor.
5. Click the linked Event ID for the bidder.
6. Click the Enter a New Bid button to manually enter the bid, or click the Upload Bid button to upload a bid from Excel or XML.

## Pages Used to Create Bidder Responses

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Create Bidder Response | AUC_RESP_OBO_SRCH | Sourcing, Event Responses, Create Bidder Response | Search for the event on which the bidder wants to place a bid. |
| Enter Bid on Behalf of | AUC_RESP_OBO_SEL | Click the linked Event ID for the specific event. | Link to the Create Bid Response page where you enter the bidder's bid factor responses. |
| Upload Bid | AUC_BP_UPLOAD | Click the Upload button on the Event Details page. | Use to upload a previously created bid response in Excel or XML. |

# Reviewing Bids

This section discusses how to review bidder activity.

## Pages Used to Review the Bid Activity of a Bidder

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Search Bidder Activity | AUC_BID_ACT_SRCH | Sourcing, Event Responses, Search Bidder Activity | Search for bidders' responses to events. |
| Bid Activities | AUC_BID_ACT_PG | Sourcing, Event Responses, Search Bidder Activity<br>Click a linked Bidder Name on the Search Bidder Activity page. | Review events that a bidder has been invited to, has bid on, and has been awarded. |
| Create Bid Response | AUC_RESP_BID_NUHD | Expand the appropriate Event ID on the Bidder Activity page, then click the View Details button next to the appropriate bid. | Review the details of a bid that the bidder entered. |
| My Event Activity (external) | AUC_BID_ACT_PG | Manage Events and Place Bids, My Event Activity | Bidders can use to view their own bidding activity. |

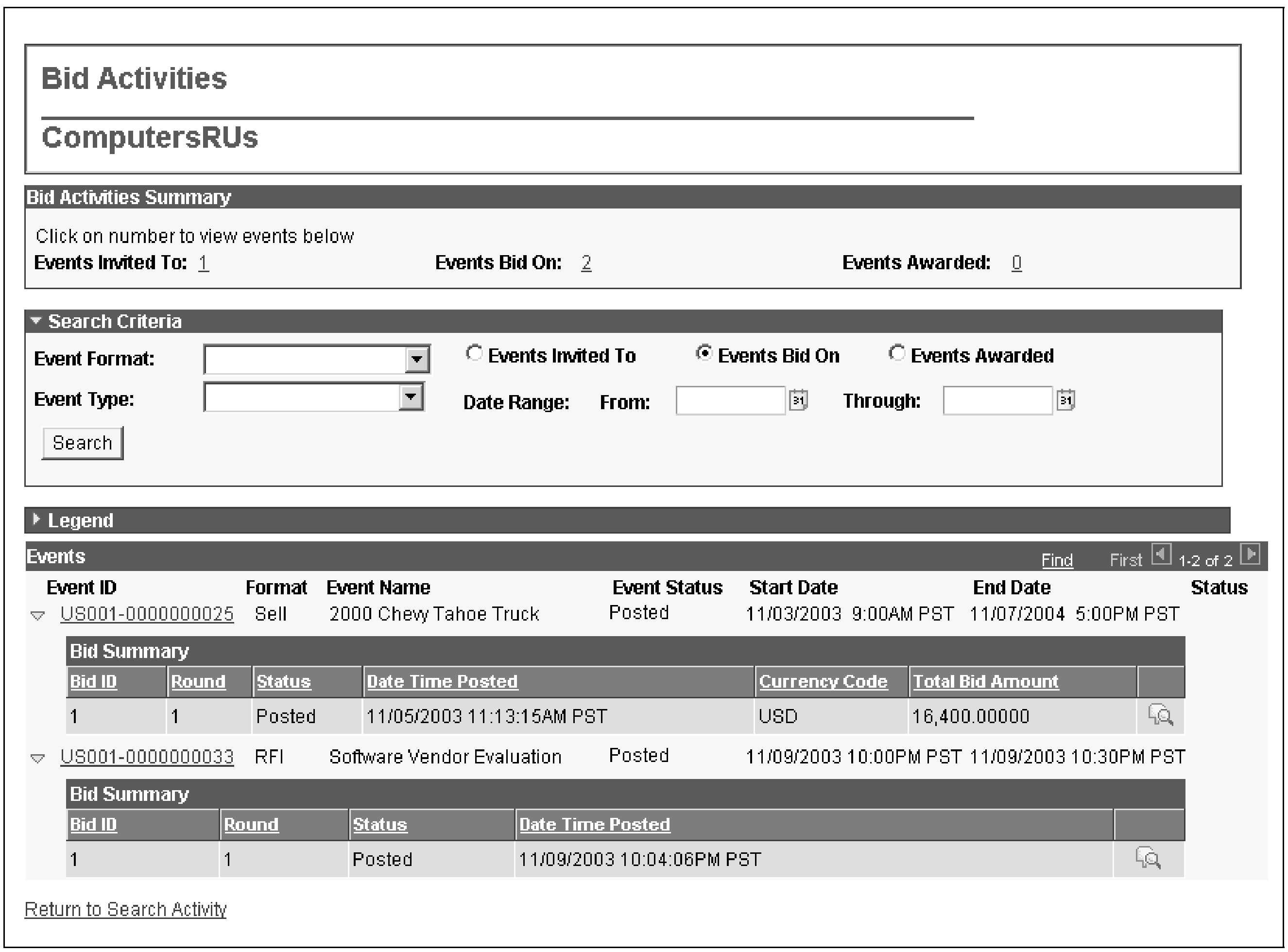
## Reviewing Bidder Activity

To review bidding on an event by a specific bidder:

1. Enter Business Unit, Bidder Type, or ID on the Search Bid Activities page.
2. Access the Bid Activities page by clicking the name of the company whose bidding activity you want to review.
3. Click one of the categories in the Search Events group box to populate the Events group box with specific events.

   You can view the number of events that a bidder was invited to or awarded or that the bidder bid on. The system displays bids for the bidder across all sourcing business units.
4. In the Events group box, expand the event line to view the details of the invitation, bid, and award. If the award is for a consolidated requisition, the system displays an award for each purchase order that is created to the awarded bidder.

Here is an example of the Bid Activities page:




Bid Activities page

## Bidders Reviewing Their Bids

Access the My Event Activity page.

Bidders use My Event Activity to view their own bidding activities. It includes the same information for each bidder as the Bidder Activity page, except that bidders can only see their own bids.

Bidders can view their event status, and navigate to events by clicking the linked event ID.

# CHAPTER 13

# Analyzing Bids and Awarding Events

This chapter provides overviews of bid analysis, countering and rejecting bids, and event awards and discusses how to:

- Review the bid activity of a bidder.
- Analyze scores.
- Award events.
- Post awards.

## Understanding Bid Analysis

PeopleSoft Strategic Sourcing enables you to analyze responses from bidders.

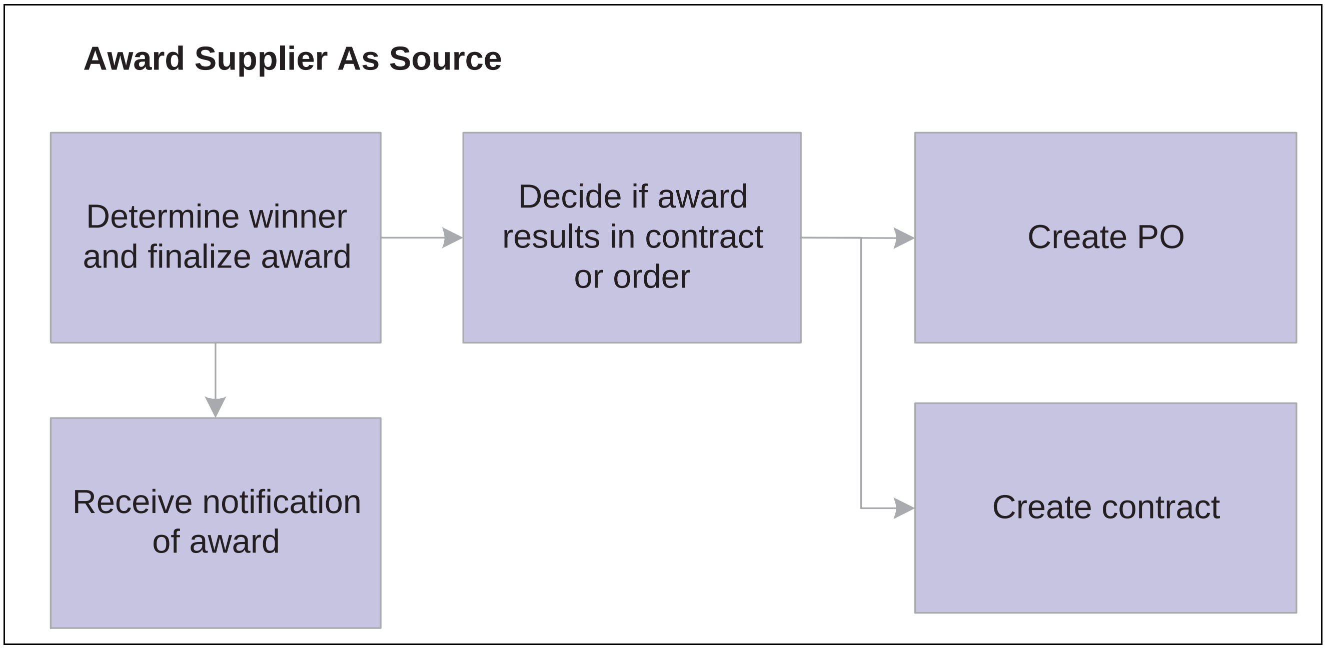
You can analyze bids at any time during an event, or you can wait until it ends. In the case of a sealed RFx event, you must wait until the end of the event to analyze and award the event. If the event is an RFx event, you can change weightings to test what-if scenarios to determine how changing the weighting of bid factors affects the bidders' scores.

When analyzing events, you can sort the information using different criteria. For example, you can sort by score to display the best bid.

When the event closes, evaluate the bid responses and award the event to the best bidder or bidders. PeopleSoft Strategic Sourcing enables you break down awards to the line level, and award by quantity or by percentage to one or more bidders per line.

## Understanding Event Awards

Once you have analyzed bids and selected the best bid, PeopleSoft Strategic Sourcing enables you to award the winning bid.




Awarding Supplier process

To award suppliers:

1. The buyer determines the winner and finalizes the award.
2. The system informs the winning and outbid suppliers.
3. The buyer determines whether the award results in a contract or a PO.
4. The system creates a PO or a contract.

## Award Splitting

You can split awards among bidders in two ways:

- Split by percentage.

  The percentage must be based on the line quantity and cannot exceed 100 percent. For example, suppose that you award one bidder 75 percent and another bidder 25 percent. In that case, the award is 75 percent of each line item based on the price bid by the first bidder and 25 percent of each line item based on the price bid by the second bidder.

- Split by quantity.

  The quantity awarded cannot exceed the quantity bid. For example, if the event involves buying 100 items but the bidder submits a bid to sell you 75 items, you can award the a purchase order for no more than 75 items.

### Award Splitting Rules

There are several rules impacting award splitting:

- If a line is marked as quantity does not apply, the award can be split across multiple bidders. The award quantity is therefore be a decimal (.4) instead of a whole number. The total awarded quantity for a line marked quantity not applicable cannot exceed 1. Meaning we could split an award across 3 bidders as: Bidder 1 - .5, Bidder 2 - .4, Bidder 3 - .1. If the award is made to a purchase order, the PO line is marked as amount-only and therefore the line quantity on the awarded purchase order is automatically set to 1.

- If a sourcing line is an item by description and is not marked quantity not applicable, you can award a decimal quantity. Meaning if the sourcing line had a quantity of 2, the user can award the following: Bidder 1 - awarded 1.25, Bidder 2 - awarded .75. When the purchase orders are created, they are created for the same quantity as designated on the award (1.25, .75)
- If a sourcing line is an item from the item master table, then we check the unit of measure setting on the item setup to determine whether a decimal is allowed. This is based on whether the unit of measure for the item as a Quantity Precision setting of decimal or whole number. If decimal, the user may award the quantity using a decimal. Otherwise, the awarded quantity must be a whole number.

## Multiversion Events

As soon as you post a new version of an event, the old version is no longer available for bidding. Therefore, the current version is always the version analyzed. If bid factors were added to a version, the system shows all the bids, but only the bids received on the most recent version includes responses to the new bid factor.

## Multiround Events

Multiround events are usually used for RFx events, when an event creator wants to start with a large pool of vendors and create another round with the most desirable vendors to continue negotiations. You counter entire bids or bid lines to create a new round. Optionally, you can reject bids that won't be carried forward to the next round and select a reason for the rejection.

## RFIs

When an RFI event ends, its status is Pending RFI Review. The event owner can then review the RFI responses. For RFI events, the system only displays the Analyze RFI page with header information, since there is no line information. Once the event owner has reviewed all of the RFI responses, the event owner sets the status to RFI Reviewed. This is the equivalent of the Awarded event status for Buy and Sell events.

## Event Awards from Consolidated Requisitions

If the system consolidates an event from requisitions across multiple PeopleSoft Purchasing business units, upon award, the system creates one purchase order for each Purchasing business unit associated with the consolidated requisitions. You can view the entire history of this event, from requisition, through event creation and purchase order creation, using the Auction Document Status page.

## Awards for Quantity Optional Events

If an event is marked as quantity optional, bidders are not required to enter the quantity for that bid. Quantity optional bids are awarded by percentage, and the system updates the purchase order or contract to indicate the item is amount-only. When you award a quantity optional event, the award quantity is one.

## Analysis Collaboration

Collaborators can be invited to collaborate on the analysis of received bids once an event has ended. If collaborators participated in event creation collaboration, they are included on the collaborator list for bid analysis collaboration. Collaborators can enter scores to hidden bid factors, change bid factor weightings (if a non-auction event), and manually score text based responses. The system calculates an average score based on the input of all the collaborators.

### See Also

Chapter 8, “Using Event Collaboration,” Collaborating on Event Analysis, page 93

# Analyzing Scores

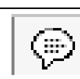
This section discusses how to:

- Sort bids.
- Add bid factors.

### See Also

Chapter 5, “Creating and Using Bid Factors,” page 39

## Pages Used to Analyze Scores

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Analyze Total | AUC_AWARD_PG | • Click an event link on the Manage Events page.<br>• Sourcing, Maintain Events, Analyze Events | Review each bidder’s overall bid and score.<br>**Note.** PeopleSoft Strategic Sourcing enforces rules for various types of events. If the event is a sealed event, you cannot access the Analyze pages before the event end date. |
| Event Bid Factors | AUC_BID_FAC_PNL | Click the Add/Edit Bid Factors button on the Analyze Total page. | Add header bid factors during analysis to see how various factors and weightings affect the final scoring. |
| Score Text Bid Factors | AUC_AWARD_HTXT_SEC |  Click the Text Bid Factor Score button on the Analyze Line page. | Use to manually score text bid factor responses and incorporate this score into the total score. |
| Pick List Bid Factor | AUC_HDR_LST_BF_SEC |  Click the List Bid Factor button on the Analyze Line page. | Used for analysis collaborators to add list bid factor input for hidden bid factors. |
| Response Factor Comments/Attachments | AUC_AWD_COMHF_SEC |  Click the Comments button associated with each bid factor. | View comments and attachments associated with the response factor. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Vendor Information | AUC_AWARD_VNDR | Click the linked bidder name on the Analyze Total page or the Analyze Line page. | View bidder details such as contact and address information. |
| Edit Reason Code Details | AUC_AWD_RSN_SEC | Click the Reason Details button that displays after you have disallowed or rejected a bid or line. | Edit comments associated with a reason code. These comments are added to the rejection or disallow notifications sent to bidders if the Email Comments check box is selected. |
| Response Header Comments/Attachments | AUC_AW_HD_CMMT_SEC | Click the Header Comments button on the Analyze Total page. | View or add comments for each response line. |
| Header Bid Factor List | AUC_HDR_BF_LST_SEC | Click the Bid Factor List Items button on the Analyze Total page. | View list bid factors and their weightings. |
| Bid Analysis Export | AUC_ANL_EXP | Access the Go To Analyze Export link. | Export and email bid data for offline analysis. |
| Discussion Forums | AUC_MESSAGE_ENTRY | Access the Go To Discuss Event in Forum link. | Discuss the event in a discussion forum. |
| Document Status Inquiry | AUC_DOC_STATUS | Access the Go To Document Status Inquiry link. | View the history of an event, including the status of a document associated with an event, such as requisitions copied into an event, and the PO or contracts that were awarded from the event. |
| Header Comments and Attachments | AUC_COMM_SEC | Click the Go To Header Comments link on the Analyze Total page. | Enter award comments to send to the bidder or include in the award. |
| Header Standard Comments | AUC_STD_COMM_SEC | Click the Standard Comments link on the Header Comments and Attachments page. | Enter default standard comments to display in the award header. |
| Event Collaboration Details | AUC_EVENT_COLLAB | Click the Invite Collaborators link on the Analyze Totals page. | Invite collaborators to participate in analyzing bids. |
| Find Collaborators | AUC_COLLAB_SRCH | Click the Find Collaborators link on the Invite Collaborators page. | Search for collaborators and select those you want to collaborate on an event. |
| Price Component Detail | AUC_AWD_CLB_PRCMPT | Click the Price Component Detail button on the Analyze Line page. | View price component detail entered by each collaborator. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Analyze Line | AUC_AWARD_LN_PG | Click the Analyze Line link on the Analyze Total page. | Review each bidder's bid for each line item in the event. |
| Line Bid Factor Comments | AUC_AWD_LN_FCT_CMT | Click the Line Bid Factor Comments button on the Analyze Line page. | Use to view comments associated with bid factors. |
| Line Bid Factor List | AUC_LN_BF_LIST_SEC | Click the Bid Factor List Items button on the Analyze Line page. | Use to view weightings for bid factor lists. |
| Item Description | AUC_ITEM_2_DESCR | Click the item description link on the Analyze Line page. | View a detailed description of the item associated with the selected line. |
| Line Comments and Attachments | AUC_COMM_LN_SEC | Click the Line Comments and Attachments button on the Analyze Line page. | Insert comments or attach files that relate to the line item. You can display the comments and attachments to the bidders. |
| Multi-Round Bid Factor History | AUC_BFL_HIST_SEC | Click the View Bid History button on the Analyze Total page. This button only displays if the event includes multiple rounds. | Displays bid factor history for multiround events. |
| Price Break Details | AUC_AWD_PBK_SEC | Click the View Price Breaks button on the Analyze Line page. | Use to view the price break adjustments during bid analysis. |
| Price Component Detail | AUC_AWD_PRCMPT_DTL | Click the View Price Component Detail button on the Analyze Line page. | For events requiring price component detail, view the bidder's price component entries. |

## Viewing Bids

Access the Analyze Total page.

**Round to View** For multiround events, select the event round that you want to view.

**Sort Bids By** On both the Analyze Total page and the Analyze Line page, you can sort the bids to display responses by *Bidder Name, Header Score, Total Bid Amount,* or *Total Event Score.*

**View Factor Responses** Select and click the Analyze button to view the bid factor responses when analyzing bids.

| | |
|---|---|
| **View Factor Scores** | Select and click the Analyze button to view the bidder's scores for each bid factor when analyzing bids. |
| **Display Withdrawn Bidders** | Click to include bidders that have withdrawn from bidding. |
| **Display Disqualified Bids** | Click to include bids that you have marked as erroneous and canceled. |

## Adding Bid Factors

You can add bid factors during analysis to see how various factors and weightings affect the final scoring. You can do this from the Analyze Total page or the Analyze Line page, depending on whether you are adding a header bid factor or a bid factor for a line item.

To add bid factors during analysis:

1. Access the appropriate page, either the Analyze Total page or the Analyze Line page, depending on the bid factor that you are adding.
2. Click the Add Bid Factor button to access the Bid Factors page.
3. Add the bid factor or factors to consider, and set their weightings.

   For example, you might enter the bid factor *Working Relationship with Bidder.*
4. Clear the Display check box so that the new bid factors do not appear to the bidders.
5. Click the OK button to set the bid factor and return to the Analyze Totals page or the Analyze Line page.
6. Enter an answer for the bid factor.

   For example, for the bid factor *Working Relationship with Bidder,* you would enter an evaluation of each bidder; for instance, an *8* for one bidder and a *2* for another.
7. Click the Recalculate button to score the event with the new bid factor in the equation.

## Exporting Bid Analysis Data

Access the Bid Analysis Export page.

To create a bid analysis export:

1. Enter the email addresses of those you would like to receive the export.
2. Click the Create Analysis Export button. At this point, the system saves the Analyze Events pages and initiates a process to create the Bid Analysis Export file and email the data to the designated recipients.
3. Once you receive the email, open the XML attachment in Microsoft Excel.

## Analyzing Events Linked in Lots

Access the Analyze Total page.

| | |
|---|---|
| **Next Lot** | Click to access the next event in the lot in a new window. |
| **Previous Lot** | Click to access the previous event in the lot in a new window. |

## Multiround Events

Access the Analyze Total page.

For a multiround event, the system automatically displays the current round and version, and you can move between rounds. by selecting the Round to Viewbutton on the Analyze Total, Analyze Line, Analyze Summary, or Award Details page. If the business unit is set to award previous rounds, you have the option to select a previous round for award. You can also view the bid history for all rounds on the Multi-Round Bid History page.

### See Also

Chapter 2, “Setting Up Business Units in PeopleSoft Strategic Sourcing,” Defining Business Units, page 12

## Countering Bids

Access the Analyze Total page.

To counter bids and create a new round:

1. For each bidder that you wish to counter, change the Bid Action value to *Counter*.
2. You can change the Bid Action value to *Reject* for any bidders you don’t want to include in the next round. You can select a reject reason code for why the bid is not being carried forward to the next round, and can enter comments and email the comments to the rejected bidders so they know why their bid was rejected.
3. Select Create New Round on the Go To menu.
4. The system opens the Event Details page in a new window, provides the existing event ID including the event data, and increments the round number by 1. The bidders you countered are listed on the Invite Bidders page. The system also takes the best values of the bidders and that becomes the worst bid for the next round.

## Disallowing a Bid

In general, you disallow a bid during auction events to correct a bid that was erroneously entered. For example, the bidder could have made a typo in the bid price. Rejecting is typically used for RFx events to indicate that the rejected bid is not being carried forward to the next round.

To disallow a bid from the Analyze Total page:

1. Navigate to the Analyze Total page. Select *Disallow* from the Award Event options
2. Select a Reject Reason Code as to why the bid was being disallowed.
3. View and update the comments related to the selected reason code and indicate whether the comments should be included in the email notification to the bidder.
4. The system sets the bid status to Disallowed, recalculates scores would to exclude the disallowed bid, and sends the bidder an email notification indicating that the bid was disallowed. Also, the disallowed bid no longer appears on the Event Bid History page.

# Awarding Events

This section discusses how to:

- Award the bid as a total event or a percentage of the event.
- Award the bid according to line items.
- Review a summary of the award.
- Verify shipment schedules.
- Post the award.

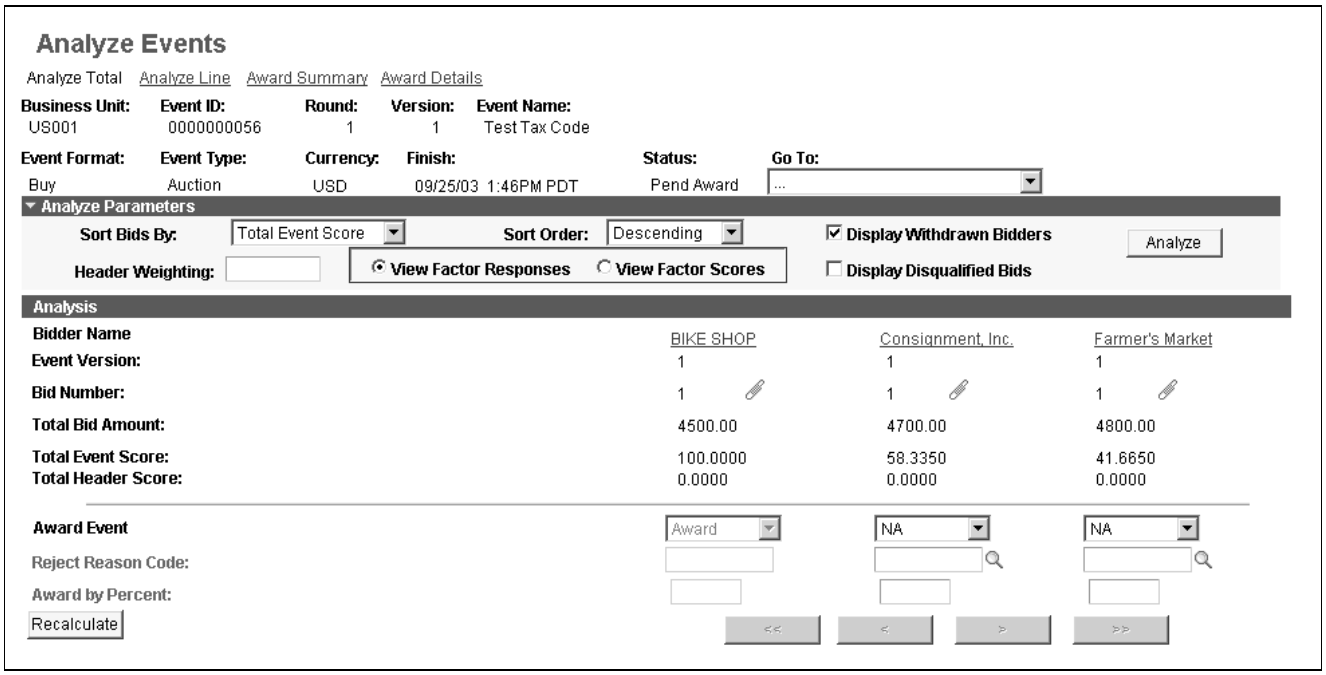
## Pages Used to Award Events

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Analyze Total | AUC_AWARD_PG | Sourcing, Maintain Events, Analyze Events. | Award the bid as a total event or a percentage of the event. |
| Header Comments | AUC_COMM_SEC | Click the Header Comments link on the Analyze Total page. | Use to enter comments to send to bidder or include in the award. You can also view attachments and include them in the award. |
| Header Bid Factor List | AUC_HDR_BF_LST_SEC | Click the Bid Factor List Items button on the Analyze Totals page. | View header bid factor lists. |
| Analyze Line | AUC_AWARD_LN_PG | Select the Analyze Line link on the Analyze Total page. | Award the bid according to line items. |
| Award Summary | AUC_AWARD_SUM_PG | Select the Award Summary link on the Analyze Total page. | Review the award summary by line item. |
| Event Line Defaults | AUC_CREATE_DFLTS | Click the Schedule Defaults link on the Award Summary page. | Review or change default shipping information. |
| Award Schedules | AUC_AWARD_SHIP_SEC |  Click the Shipping button for the relevant line item on the Award Summary page. | Schedule shipping information. |
| Ship to Detail | AUC_AWARD_SHTO_SEC | Click the Select link on the Award Schedules page. | Look up ship to location information, and apply it to the award schedule. |
| Award Details | AUC_AWARD_DTL_PG | Select the Award Details tab on the Analyze Total page. | Review the award details, select whether award is a purchase order or a contract, and post the award. |
| Bidder Information | AUC_AWARD_VNDR | Click the link for the bidder on the Analyze Total page or the Analyze Line page. | Review the bidder details such as contact and address. For vendors and customers, you can select a different contact or address for the award. |

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Auction Document Status | AUC_DOC_STATUS | Click the Document Status Inquirylink on the Award Details page. | View procurement documents associated with this award. |
| Contract | CNTRCT_HDR | Click the linked awarded contract ID on the Award Details page. | Create and maintain contracts. |
| Purchase Order | PO_LINE | Click the linked awarded purchase order ID on the Award Details page. | Create and maintain purchase orders. |
| Award PO List | AUC_AWARD_PO_SEC | Click the Award PO List link on the Award Details page. | View all the purchase orders associated with an award. |

## Awarding the Bid as a Total Event or Percentage of the Event

Access the Analyze Total page.




Analyze Total page

**Note.** Entries that you make on the Analyze Total page override entries that you made on the Analyze Line page. Likewise, entries on the Analyze Line page override entries on the Analyze Total page.

**Bid Action**

Select a status for each bid:

Select *Award* to award the event to the selected bidder.

Select *Counter* to invite the bidder to the next round of the event.

Select *Disallow* to disallow the bid and remove it from the event. Used in situations such as when a bidder has made an erroneous bid on an auction event and their bid needs to be canceled.

Select *Reject* to reject but not disallow the bid. The system notifies the bidder that the bid was not accepted. Used in situations with multiround events when a bid is not being carried forward to the next round.

Click to add an award for an event. The system takes you to the Award Summary page, and displays the quantity remaining to be awarded for a line.

This button is only available if you have partially awarded an event or line, and have remaining quantities to be awarded.

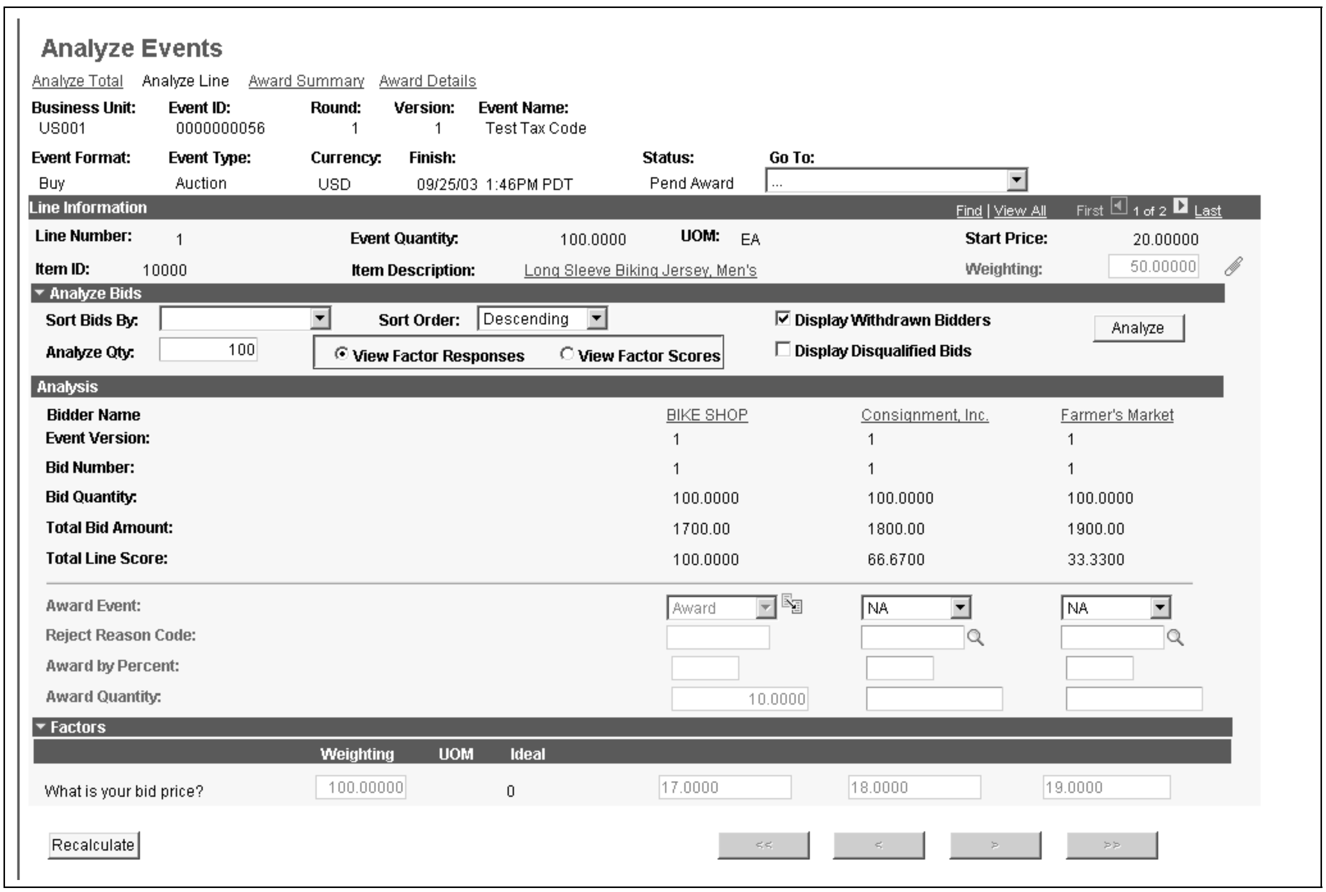
**Award by Percent**

Enter amounts under the bidders' names to split the event among bidders. The percentage amounts must total no more than 100 (but they can be less than 100 if you do not sell or buy the entire quantity proposed in the event).

The Analyze Total page and the Analyze Line page update each other. That is, if you select the Award option for a particular bidder on one page, the check boxes on the other page are also selected for those items.

## Award the Bid According to Line Items

Access the Analyze Line page.




Analyze Line page

**Note.** Entries that you make on the Analyze Line page override entries that you made on the Analyze Total page. Likewise, entries on the Analyze Total page override entries on the Analyze Line page.

### Line Information

**Display Disqualified Bids** Select to display bids that have been disqualified. If the bid has been disqualified, the user isn't able to award to the bidder, therefore the system changes the award quantities and percentages to read-only.

### Analysis

**Bid Action** Select a status for each line:

Select *Award* to award the event to the selected bidder.

Select *Counter* to invite the bidder to the next round of the event.

Select *Disallow* to disallow the bid and remove it from the event.

Select *Reject* to reject but not disallow the bid. The system notifies the bidder that the bid was not accepted.

**Award by Percent** Enter amounts below the bidders' names to split the event among bidders. The percentage amounts must total no more than 100 percent, but they can be less than that if you do not sell or buy the entire quantity proposed in the event. Note that the percent awarded cannot exceed the quantity bid for a selected bidder.

**Award Quantity** Enter a quantity below the bidders' names to split the event among bidders. The amounts must total no more than the event's stated amount, but they can be less than the stated amount if you do not sell or buy the entire quantity proposed in the event. Note that the quantity awarded cannot exceed the quantity bid for a selected bidder.

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**Note.** You must enter either the award percent or the award quantity, but not both.

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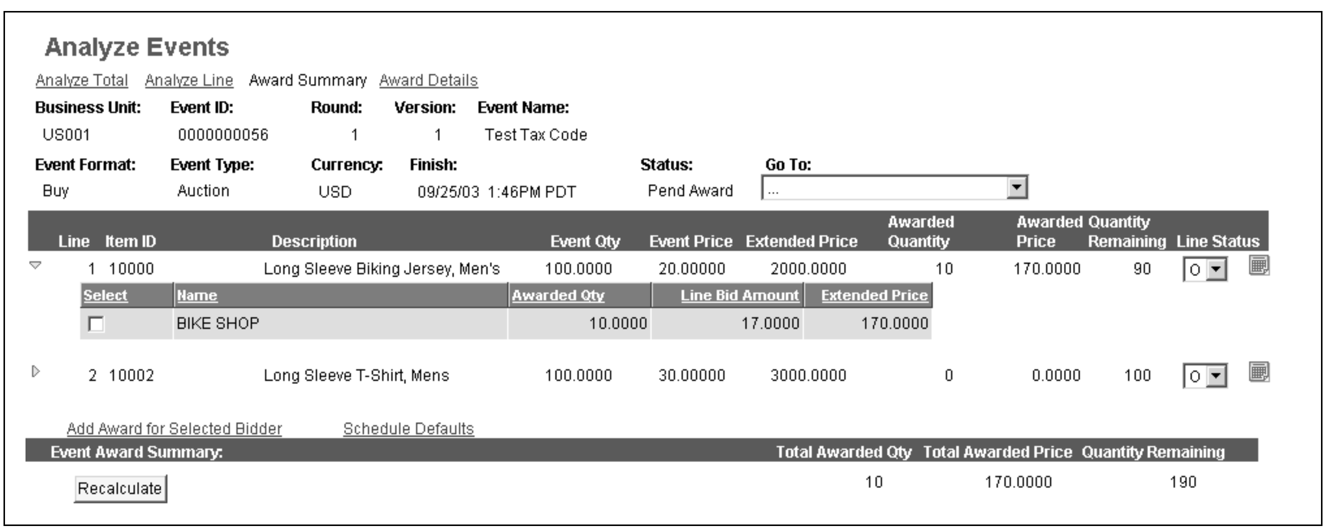
## Reviewing a Summary of the Award

Access the Award Summary page.




Analyze Summary page

**Note.** Some fields on this page do not appear until you have entered award data on either the Analyze Total page or the Analyze Line pages.

**Awarded Quantity**

Displays the award quantity that you specified on the Analyze Line page.

**Add Award for Selected Bidder**

Select a bidder and click to add new row and enter an award quantity for that bidder. Once an award has been posted for a bidder, any subsequent awards for the round to the same bidder must be made through this process.

**Line Status**

Displays whether the line is available for additional award if there is a remaining quantity. Values are:

*O* (*Open*): The line is still available for award. If any lines are open, the overall event status cannot be *Awarded*.

*C* (*Closed*): The line is no longer available for award. If the awarded line quantity equals the event line quantity, the line status is *Closed*.

If the awarded line quantity is less than the event line quantity and the line status is set to *Closed*, the remaining quantity is not available for award.

Lines that have been closed with a remaining quantity can be reopened by setting the line to *Open.* The event status is updated to *Pending Award.*

If all lines have a status of *Closed*, and at least a portion of the event has been awarded, the overall event status is *Awarded*.

If all lines have a status of *Closed*, and none of the lines have been awarded, the overall event status is *Not Awarded.*

## Verifying Shipment Schedules

Access the Award Schedules page.

Enter the following required values.

**Physical Nature**

Select to specify nature of the event. Options are *Good* and *Service.* The system uses the value to calculate value-added tax (VAT) by differentiating between goods and services. This is only required for buy events. This value is based on the item or item category, but you can override it.

**Where Performed**

Select to indicate where a service is most often performed. This field becomes available when you select *Service* as the physical nature. Options are *Buyer's, Ship From, Ship To,* or *Supplier's.* This is only required for buy events. This value is based on the item or item category, but you can override it.

**Award quantity**

Displays the same distribution ratio as the awarded quantity. For example, suppose that the original line item has a quantity of 100, Schedule 1 is awarded a quantity of 75 (or 75 percent), and Schedule 2 is awarded a quantity of 25 (or 25 percent). The awarded quantity is 75. Consequently, the Schedule 1 award quantity is 56 (75 percent of 75), and the Schedule 2 award quantity is 19 (25 percent of 75).

**Note.** If the line was awarded with a decimal quantity, the award quantity would display the decimal.

**Note.** If requisitions are associated with an event and you are partially awarding the event, the requisition are filled based on the requisition schedule due dates. The schedules with the earliest due dates are filled first.

# Posting the Award

There are two types of events:

- Buy events.

  These are awarded when you create a purchase order or contract, including details about the event items and the winning bid.

- Sell events.

  These are awarded when you determine the purchaser of the asset or assets of the event. You must follow internal billing and shipping procedures to complete the sale.

## Page used to Post Awards

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Award Details | AUC_AWARD_DTL_PG | Click the Award Details link on the Analyze Total page. | Review the award details, select whether award is a purchase order or a contract, and post the award. |

## Viewing Award Details

Access the Award Details page.

Bidders can view award details when the event status is awarded, and the Display Bids check box on the Award Details page is cleared.

The system provides these settings as a default based on selections on the Strategic Sourcing Installation Options page.

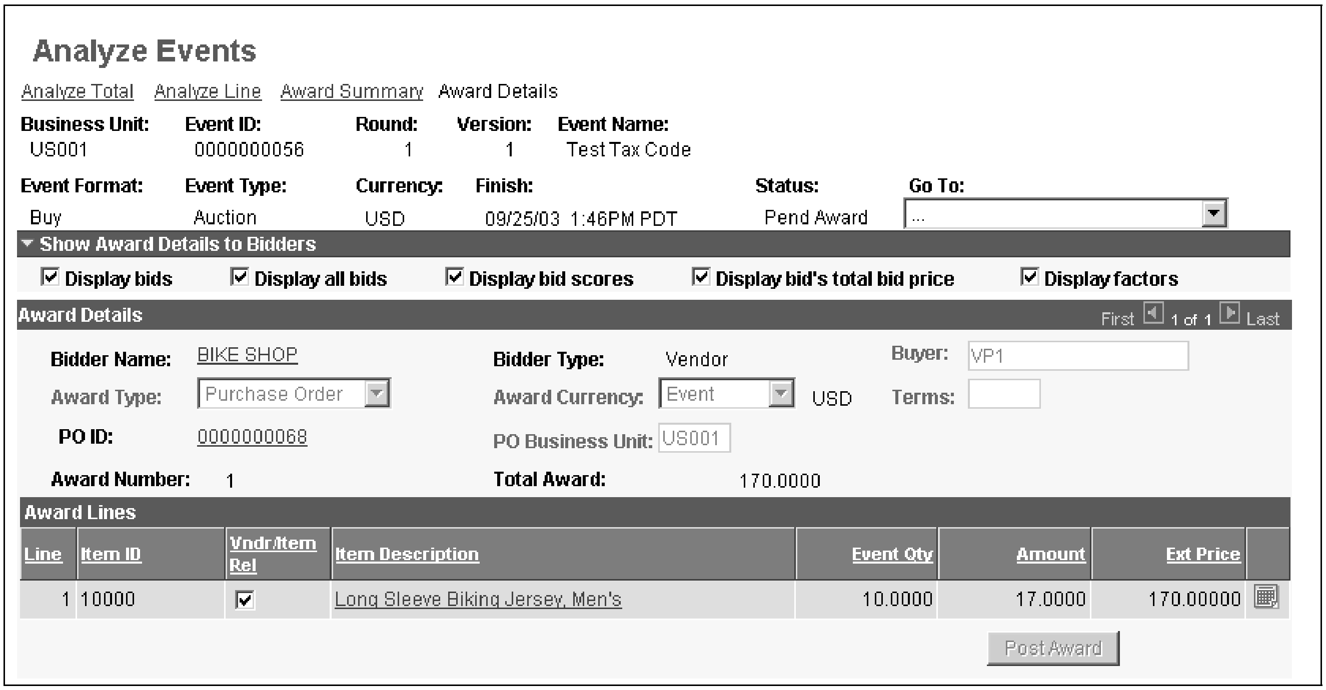
| | |
| --- | --- |
| **Display bids** | Select to display the award details to bidders. |
| **Display all bids** | Select to display all bids to bidders. If not selected, only the awarded bids display. |
| **Display bid scores** | Select to display the bid scores to bidders. |
| **Display bids total bid price** | Select to display the total bid price for each bid. |
| **Display factors** | Select to display bid factor responses to bidders. |

### See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining PeopleSoft Strategic Sourcing Installation Options

## Posting the Award

You use the Awards Detail page to post the award.




Award Details page

To create a purchase order or contract:

1. In the Award Type field, select *Purchase Order* or *Contract*, depending on the type of award.
2. The system provides the Buyer and Terms as a default from the Header Details page. If no Buyer is set on the Header Details page, the system checks to see if the user posting the award is a buyer and provides that value as a default. If the user is not a buyer, then the user must select a Buyer before posting the award.

   See Chapter 7, "Creating Events," Entering Header Details, page 64.
3. You must select a Purchasing BU to post the award. However, if requisitions are associated with the event and the requisitions are across multiple PO Business Units, the system uses those PO Business Units to create the related purchase order awards.
4. Click the Post Award button. The system enables the Post Award button only if the user was given the authority to award on the User Preferences page.

   See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Defining User Preferences," Creating Strategic Sourcing User Preferences.

   - If lines remain open (status is *O*), the event status remains *Pending Award* until you close all of the lines.

- Once all the lines have been awarded, the status changes to *Awarded.* The winning bidder and the other bidders are notified of the award.

**Note.** The awarding user must have the ability to create purchase orders, contracts, and vendors to award buy events.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook,* “Defining User Preferences,” Defining Procurement User Preferences.

- If you are awarding to a registered bidder, a new customer or vendor ID is created. From this point forward, you search by customer or vendor to invite the bidder to future events.

**Note.** The system doesn’t prompt the user. Instead there is a Vndr/Item Rel check box on the Award Details page for each line item that if selected, creates an item vendor relationship for each selected line.

- When a buy event is awarded and posted, the system populates the Purchase Order/Contract ID field on the Award Details page with the appropriate ID.

**Note.** If multiple purchase orders are created for one award, the system displays the Award PO List link, which enables you to view all of the purchase order IDs.

- If you are awarding to more than one bidder on an event, you must post each award separately.

5. Complete the appropriate transaction:
   - If you have awarded a purchase order, the system displays the Purchase Order component in PeopleSoft Purchasing. The system creates multiple purchase orders for one award if requisitions were consolidated across multiple Purchasing Business Units.
   - If you have awarded a contract, the system displays the Contract component in PeopleSoft Purchasing.
   - If you are awarding to a purchase order from an external purchasing application, when you click the Post Award button, PeopleSoft Strategic Sourcing initiates the Purchasing message (SAC_PS_PO_EIP) to generate the outbound XML message to an external purchasing system or PeopleSoft EnterpriseOne. The system won’t send any data to Enterprise Purchasing. You can’t award to a contract.

**Note.** For awards to an external purchase order, a schedule can have only one line. You can’t include attachments and comments on awards to an external purchase order.

## Unit of Measure Considerations

Event creators can select any unit of measure for the line items included in events. An item/unit of measure relationship does not have to be defined at that point. However, when the event creator awards the event, an item/unit of measure order relationship has to exist for the awarded item/UOM. If it does not exist, the system issues an error explaining that the relationship must be created before posting the award. You can’t post the award until the relationship has been established. You create this relationship on the Units of Measure page.

See *PeopleSoft Managing Items 8.8 PeopleBook,* “Working With Items,” Using Units of Measure.

### Canceling a PO or Contract for an Awarded Event

If the event is partially awarded, the system updates the remaining quantity open to indicate that the remaining quantity is available to be sourced. If you manually close the line on Award Summary, the event status changes to awarded.

After you have awarded an event to a purchase order or a contract, the system retains links to the purchase order and contract as a former sourcing event. In the event that any of the following happens to a sourcing event awarded to a purchase order or contract:

- The purchase order or contract is canceled.
- The purchase order or contract line is canceled.
- The purchase order schedule is canceled.
- Quantities associated with the line or schedule are reduced.

The system prompts you to see if you'd like move that quantity back into the PeopleSoft Strategic Sourcing award. If yes, the quantity is put back to the award and then you can either re-award the quantity to another bidder or manually close it on the Award Summary page by setting the Line Status to Closed.

### See Also

*PeopleSoft Purchasing 8.8 PeopleBook*, “Creating Purchase Orders Online”

*PeopleSoft Purchasing 8.8 PeopleBook*, “Managing Requests for Quotes,” Creating POs or Contracts from RFQs

*PeopleSoft Asset Management 8.8 PeopleBook*, “Converting to PeopleSoft Asset Management,” Loading Retired Assets

*PeopleSoft Asset Management 8.8 PeopleBook*, “Retiring Assets”

## Sale Events When Using PeopleSoft Asset Management

If the event involves the sale of an asset managed through PeopleSoft Asset Management, PeopleSoft Strategic Sourcing automatically populates the Asset Management interface table (INTFC_FIN) to show the proceeds amount as equal to the award amount.

You then need to run the Transaction Loader process (AMIF10000) in PeopleSoft Asset Management to create the retirement transaction for the asset. PeopleSoft Asset Management then sends this information to PeopleSoft Billing to create an invoice for the asset sale.

# APPENDIX A

# Delivered Workflows for PeopleSoft Strategic Sourcing

This appendix discusses delivered workflows for PeopleSoft Strategic Sourcing.

### See Also

*PeopleTools 8.44 PeopleBook: PeopleSoft Workflow*

*PeopleTools 8.44 PeopleBook: Using PeopleSoft Applications*

Chapter 4, "Using Workflow in PeopleSoft Strategic Sourcing," page 31

Chapter 7, "Creating Events," page 53

## Delivered Workflows for PeopleSoft Strategic Sourcing

This section discusses PeopleSoft Strategic Sourcing workflow. The workflows are listed alphabetically by workflow name.

## Event Approval

The section discusses the Event Approval workflow.

### Description

| | |
|---|---|
| **Event Description** | The Event Status on the Approval page changes to *Posted* if the event is approved, and the Approval Statuschanges to *Approved* . If the Event is pending further approval, the Event Status remains at *Pending Post Approval* and the Approval Status remains at *Pending*. |
| **Action Description** | Depending on the configured rules, the workflow sends an email and worklist entry to the role defined in the Approval Rules Setup component. This role is defined as part of a larger rule that can be grouped with other rules in a sequence. Each Rule contains criteria that is validated when the event is posted. If the rule criteria is met, the system routes an approval email and worklist entry to the role defined for that rule. Both the email and the worklist entry link to the approver page where you can approve or deny the event. |
| **Notification Method** | Email and Worklist |

### Workflow Objects

| | |
|---|---|
| **Role** | Configurable |
| **Email Template** | Sourcing Event Approval |

## Analysis Collaboration

The section discusses the Analysis Collaboration workflow.

### Description

| | |
|---|---|
| **Event Description** | Notifies collaborators that an event is ready for them to enter their input on the analysis pages. |
| **Action Description** | Notifies collaborators that they have been invited to provide analysis input. |
| **Notification Method** | Email and worklist |

### Workflow Objects

| | |
|---|---|
| **Role** | Collaborator |
| **Template** | Sourcing Analysis Collab |

## Approver Notice

The section discusses the Approver Notice workflow for bidder registration approval.

### Description

| | |
|---|---|
| **Event Description** | A bidder registers and registration approval is activated. |
| **Action Description** | Notifies bidder registration approver to review and approve a bidder's registration application. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder registration approver |
| **Template** | Sourcing Approval |

### See Also

Chapter 3, "Preparing to Implement PeopleSoft Strategic Sourcing," Setting Up the Registration Homepage, page 21

## Bid Cancellation

The section discusses the Bid Cancellation workflow.

### Description

| | |
|---|---|
| **Event Description** | Bidder cancels bid. |
| **Action Description** | Confirms to a bidder that he has canceled his bid. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Bid Cancellation |

## Bid Notification

The section discusses the Bid Notification workflow.

### Description

| | |
|---|---|
| **Event Description** | A bidder creates an event response and submits the bid. |
| **Action Description** | Notifies a bidder that he has successfully posted a bid. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Bid Notification |

## Bid Rejection

The section discusses the Bid Rejection workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator changes the Award Status to rejected on the Analyze pages. |
| **Action Description** | Notifies a bidder that his bid is no longer being considered for award. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Bid Rejection |

## Collaboration Completion

This section discusses the Collaboration Completion workflow.

### Description

| | |
|---|---|
| **Event Description** | The collaboration due date passes or all invited collaborators have provided their input. |
| **Action Description** | Notifies the event creator that the collaboration has ended either because the collaboration due date has passed or all invited collaborators have provided the necessary input. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Event Creator |
| **Template** | Collaboration Completion |

## Collaboration Notice

This section discusses the Collaboration Notice workflow.

### Description

| | |
|---|---|
| **Event Description** | Collaborators are added to an event and the event is routed. |
| **Action Description** | Notifies collaborators that they have been invited to collaborate on an event |
| **Notification Method** | Email and worklist |

### Workflow Objects

| | |
|---|---|
| **Role** | Collaborator |
| **Template** | Collaboration Notice |

## Collaboration Removal

This section discusses the Collaboration Removal workflow.

### Description

| | |
|---|---|
| **Event Description** | A collaborator is removed from the Invite Collaborators page. |
| **Action Description** | Notifies a collaborator that his participation in the collaboration is no longer required. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Collaborator |
| **Template** | Collaborator Removal |

# Disallowed Bid Email

This section discusses the Disallowed Bid Email workflow.

## Description

| | |
|---|---|
| **Event Description** | On the Invite Bidders page, select Delete to remove a bidder from an event. |
| **Action Description** | Notifies a bidder that his bid was disallowed and therefore is canceled. |
| **Notification Method** | Email |

## Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Bid Disallow |

# Duplicate Entity Contact Info

This section discusses the Duplicate Entity Contact Info workflow.

## Description

| | |
|---|---|
| **Event Description** | A registrant enters the same information as an existing company, and requests a summary of the individual company and its duplicate information. |
| **Action Description** | Notification email sent to registrants who enter information that coincides with an existing company. The email contains company name, duplicate information, and company contact information. |
| **Notification Method** | Email |

## Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Sourcing Duplicate Information |

# Event Analysis Export Email

This section discusses the Event Analysis Export Email workflow.

## Description

| | |
|---|---|
| **Event Description** | In the Analyze component, navigate to the Analyze Export page. Click the Export button after filling out the email address. |
| **Action Description** | Sends an XML version of the bid analysis to selected users. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Event Analysis Export |

## Event Approval

This section discusses the Event Approval workflow.

### Description

| | |
|---|---|
| **Event Description** | The Event Status on the Approval page changes to Posted if the event is approved, |
| **Action Description** | Depending on the configured rules, the workflow sends an email and worklist entry to the role defined in the Approval Rules Setup component. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Configurable |
| **Template** | Sourcing Event Approval |

## Event Cancellation

This section discusses the Event Cancellation workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator cancels a posted event. |
| **Action Description** | Notifies invited bidders that a posted event has been canceled. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Event Cancellation |

## Event Edited

This section discusses the Event Edited workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator creates a new version of a posted event. |
| **Action Description** | Notifies bidders that a previously posted event has been edited. |

| | |
|---|---|
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Event Edited |

## Event Extension

This section discusses the Event Extension workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator extends the end date on an event. |
| **Action Description** | Notifies invited bidders that the event end date has been extended |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Event Extension |

## Event Interest Invitation

This section discusses the Event Interest Invitation workflow.

### Description

| | |
|---|---|
| **Event Description** | Bidders indicate the types of public events to which they'd like to be invited, and the event creator creates a public event |
| **Action Description** | Notifies non-invited bidders that a public event was posted in which they may be interested based on their self-categorization preferences. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Event Interest |

## Event Invitation

This section discusses the Event Invitation workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator posts an event and invites bidders. |
| **Action Description** | Notifies invited bidders that they have been invited to participate in a sourcing event. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Event Invitation |

## Event Lot Update

This section discusses the Event Lot Update workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator updates event lot dates. |
| **Action Description** | Notifies bidders that associated event lot dates have been updated. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Event Lot Update |

## MCF Agent Creation Notification

This section discusses the MCF Agent Creation Notification workflow.

### Description

| | |
|---|---|
| **Event Description** | An event queue has been created for an event, and the event creator has been created as a MultiChannel Framework agent. |
| **Action Description** | Notifies the event creator that he has been created as a MultiChannel Framework agent, which enables internal users to chat real-time with bidders using the MultiChannel Framework. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Event Creator |
| **Template** | MCF Agent Creation |

## New Contact Added

This section discusses the New Contact Added workflow.

### Description

| | |
|---|---|
| **Event Description** | A bidder adds a new contact in the Maintain Bidder pages. |
| **Action Description** | Confirms to the bidder that a new contact has been added. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Sourcing New Contact |

## Non-Winning Bidder

This section discusses the Non-Winning Bidder workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator changes the Award Status for the bidder to rejected on the Analyze pages. |
| **Action Description** | Notifies non-awarded bidders that they were not selected for award. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Sourcing New Contact |

## Outbid Notice

This section discusses the Outbid Notice workflow.

### Description

| | |
|---|---|
| **Event Description** | A bidder submits a better bid than other bidders. |
| **Action Description** | Notifies a bidder that he has been outbid on one or more sourcing event lines. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Outbid Notice |

# Pause Notification

This section discusses the Pause Notification workflow.

## Description

| | |
|---|---|
| **Event Description** | The event creator pauses a posted event. |
| **Action Description** | Notifies invited bidders that an auction event has been paused. |
| **Notification Method** | Email |

## Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Pause Notification |

# Registration Approval

This section discusses the Registration Approval workflow.

## Description

| | |
|---|---|
| **Event Description** | The registration approver approves a bidder. |
| **Action Description** | Notifies the bidder that their registration request was approved, or notifies the registration approver that a bidder registration has been submitted for review. |
| **Notification Method** | Email |

## Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Sourcing Approved |

# Registration Denial

This section discusses the Registration Denial workflow.

## Description

| | |
|---|---|
| **Event Description** | The registration approver denies a bidder. |
| **Action Description** | Notifies the bidder that their registration request was denied. |
| **Notification Method** | Email |

## Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Sourcing Denied |

## Resume Notification

This section discusses the Resume Notification workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator resumes a paused posted event. |
| **Action Description** | Notifies invited bidders that a paused auction event has been resumed. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Resume Notification |

## RFI Event Invitation - Edited

This section discusses the RFI Event Invitation - Edited workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator creates a new version of a posted RFI event. |
| **Action Description** | Notifies bidders that a posted RFI event has been edited. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | RFI Event Edited |

## RFI Invitation

This section discusses the RFI Invitation workflow.

### Description

| | |
|---|---|
| **Event Description** | The event creator posts a RFI event and invites bidders. |
| **Action Description** | Notifies bidders that they have been invited to a Request for Information (RFI) event. |
| **Notification Method** | Email |

### Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | RFI Invitation |

# Winning Bidder

This section discusses the Winning Bidder workflow.

## Description

| | |
|---|---|
| **Event Description** | The event creator changes the Award Status to Awarded on the Analyze pages. |
| **Action Description** | Notifies awarded bidders that they were selected for award. |
| **Notification Method** | Email |

## Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Winning Bidder |

# Withdrawal Notification

This section discusses the Withdrawal Notification workflow.

## Description

| | |
|---|---|
| **Event Description** | The event creator counters an offer, and the bidder withdraws his bid. |
| **Action Description** | Confirms to a bidder that he has withdrawn from one or more event lines on a countered offer. |
| **Notification Method** | Email |

## Workflow Objects

| | |
|---|---|
| **Role** | Bidder |
| **Template** | Withdrawal Notification |

# Glossary of PeopleSoft Terms

**absence entitlement** This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

**absence take** This element defines the conditions that must be met before a payee is entitled to take paid time off.

**accounting class** In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

**accounting date** The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

**accounting split** The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

**accumulator** You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

**action reason** The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

**action template** In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

**activity** In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

| | |
|---|---|
| **agreement** | In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination. |
| **allocation rule** | In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules. |
| **alternate account** | A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments. |
| **AR specialist** | Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items. |
| **arbitration plan** | In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced. |
| **assessment rule** | In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action. |
| **asset class** | An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification. |
| **attribute/value pair** | In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree. |
| **authentication server** | A server that is set up to verify users of the system. |
| **base time period** | In PeopleSoft Business Planning, the lowest level time period in a calendar. |
| **benchmark job** | In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources. |
| **book** | In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets. |
| **branch** | A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager. |
| **budgetary account only** | An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account." |
| **budget check** | In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning. |
| **budget control** | In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it. |
| **budget period** | The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar. |
| **business event** | In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. |

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

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| **business unit** | A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions. |
| **buyer** | In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system. |
| **catalog item** | In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities. |
| **catalog map** | In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog. |
| **catalog partner** | In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content. |
| **categorization** | Associates partner offerings with catalog offerings and groups them into enterprise catalog categories. |
| **channel** | In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event. |
| **ChartField** | A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth. |
| **ChartField balancing** | You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction. |
| **ChartField combination edit** | The process of editing journal lines for valid ChartField combinations based on user-defined rules. |
| **ChartKey** | One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination. |
| **checkbook** | In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions. |
| **Class ChartField** | A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.* |
| **clone** | In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change. |
| **collection** | To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object. |

**collection rule** In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

**compensation object** In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

**compensation structure** In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

**condition** In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

**configuration parameter catalog** Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

**configuration plan** In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

**content reference** Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

**context** In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

**control table** Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

**cost profile** A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

**cost row** A cost transaction and amount for a set of ChartFields.

**current learning** In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

**data acquisition** In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

**data elements** Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

**dataset** A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

**delivery method** In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

**delivery method type** In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

**directory information tree** In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

**document sequencing** A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

**dynamic detail tree** A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

**edit table** A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

**effective date** A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

**EIM ledger** Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

**elimination set** In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

**entry event** In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

**equitization** In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

**event** A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

**event propagation process** In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

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| | Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit. |
| **exception** | In PeopleSoft Receivables, an item that either is a deduction or is in dispute. |
| **exclusive pricing** | In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions. |
| **fact** | In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table. |
| **forecast item** | A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage. |
| **fund** | In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual. |
| **generic process type** | In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report. |
| **group** | In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).<br><br>In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes. |
| **incentive object** | In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on. |
| **incentive rule** | In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation. |
| **incur** | In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities. |
| **item** | In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).<br><br>In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.<br><br>In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. |
| **KPI** | An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined. |

**LDIF file** — Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

**learner group** — In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

**learning components** — In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

**learning environment** — In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

**learning history** — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

**ledger mapping** — You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

**library section** — In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

**linked section** — In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

**linked variable** — In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

**load** — In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

**local functionality** — In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

**location** — Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

**logistical task** — In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

**market template** In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

**match group** In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

**MCF server** Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

**merchandising activity** In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

**meta-SQL** Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

**metastring** Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

**multibook** In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

**multicurrency** The ability to process transactions in a currency other than the business unit's base currency.

**national allowance** In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

**node-oriented tree** A tree that is based on a detail structure, but the detail values are not used.

**pagelet** Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

**participant** In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

**participant object** Each participant object may be related to one or more compensation objects.

See also *compensation object.*

**partner** A company that supplies products or services that are resold or purchased by the enterprise.

**pay cycle** In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

**pending item** In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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| **PeopleCode** | PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed. |
| **PeopleCode event** | An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page. |
| **PeopleSoft Internet Architecture** | The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser. |
| **performance measurement** | In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting. |
| **period context** | In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts. |
| **plan** | In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions. |
| **plan context** | In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them. |
| **plan template** | In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition. |
| **planned learning** | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs. |
| **planning instance** | In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan. |
| **portal registry** | In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references. |
| **price list** | In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges. |
| **price rule** | In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met. |

**price rule condition** In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

**price rule key** In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

**process category** In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

**process group** In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

**process definition** Process definitions define each run request.

**process instance** A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

**process job** You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

**process request** A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

**process run control** A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

**product category** In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

**programs** In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

**progress log** In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

**project transaction** In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

**promotion** In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

**publishing** In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

**record group** A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

**record input VAT flag** Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

**record output VAT flag**
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

**reference data**
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

**reference object**
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

**reference transaction**
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

**regional sourcing**
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

**relationship object**
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

**remote data source data**
Data that is extracted from a separate database and migrated into the local database.

**REN server**
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

**requester**
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

**role**
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

**role user**
A PeopleSoft Workflow user. A person’s role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

**roll up**
In a tree, to roll up is to total sums based on the information hierarchy.

**run control**
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

**run control ID**
A unique ID to associate each user with his or her own run control table entries.

**run-level context** In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

**search query** You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

**section** In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

**security event** In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

**serial genealogy** In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

**serial in production** In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

**session** In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

**session template** In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

**setup relationship** In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

**share driver expression** In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

**single signon** With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

**source transaction** In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

**SpeedChart** A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

**SpeedType** A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

**staging** A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

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| **statutory account** | Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField. |
| **step** | In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run. |
| **storage level** | In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels. |
| **subcustomer qualifier** | A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles. |
| **Summary ChartField** | You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters). |
| **summary ledger** | An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting. |
| **summary time period** | In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total. |
| **summary tree** | A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built. |
| **syndicate** | To distribute a production version of the enterprise catalog to partners. |
| **system function** | In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger. |
| **TableSet** | A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same. |
| **TableSet sharing** | Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier. |
| **target currency** | The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes. |
| **template** | A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template. |
| **territory** | In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants. |
| **TimeSpan** | A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather |

than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

**trace usage**

In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

**transaction allocation**

In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

**transaction state**

In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

**Translate table**

A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

**tree**

The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

**unclaimed transaction**

In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

**universal navigation header**

Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

**user interaction object**

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

**variable**

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

**VAT exception**

Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

**VAT exempt**

Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

**VAT exoneration**

Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

**VAT suspension**

Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

**warehouse**

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

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| **work order** | In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order. |
| **worksheet** | A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information. |
| **worklist** | The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item. |
| **XML schema** | An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks. |
| **yield by operation** | In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis. |
| **zero-rated VAT** | Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery. |

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