Oracle® Supplier Management

User's Guide

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Primary Author: Gowri Arur

Contributing Author: Procurement Product Management Team, Procurement Development Team

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Supplier Management User's Guide.*

See Related Information Sources on page xii for more Oracle E-Business Suite product information.

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Structure

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

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

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

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

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

1

Introduction to Oracle Supplier Management

This chapter covers the following topics:

- Oracle Supplier Lifecycle Management
- Oracle Supplier Hub

Oracle Supplier Lifecycle Management

Supplier Management consists of Oracle Supplier Lifecycle Management and Oracle Supplier Hub.

Oracle Supplier Lifecycle Management (SLM) provides an extensive set of features to maintain supplier information. Additionally, Supplier Management has tools to track supplier compliance with corporate and legal requirements. Organizations can exercise proper control over suppliers throughout the lifecycle of their relationship with the organization; from initial discovery, through qualification and on-boarding, to ongoing maintenance and possible obsolescence.

A key factor in improving the quality of an organization's supplier master file is to establish proper processes to formally qualify different types of prospective suppliers. SLM enables buyers to gather any and all information required to assess a prospect and then routed the information through the organization to ensure efficient review of the supplier's credentials.

When a supplier has been approved, SLM enables organizations to gather feedback from key stakeholders as part of the overall supplier performance tracking process. In addition, SLM allows key stakeholders to identify and track critical compliance documents and attributes that need to be gathered from suppliers on a periodic basis in order for the two parties to maintain an active business relationship.

Oracle Supplier Lifecycle Management includes the following features:

- 360 Degree Supplier View
- Extended Supplier Profile

- Supplier Search
- Supplier Profile Management
- Registration and On-Boarding of New Suppliers
- Managing Supplier Qualification
- Compliance and Profile Audits
- Performance Evaluation
- Supplier Notifications

360 Degree Supplier View

One of the challenges with managing supplier information is that the pieces of information gathered about a supplier can be stored in a variety of applications and systems. Data in disparate locations can hamper organizations as they look to review supplier performance or to comply with audit requirements.

Oracle Supplier Lifecycle Management has a single repository for storing information from a variety of applications and systems. Buyers can access supplier information such as addresses, contacts, business/diversity classification, general classification, product and service categories, banking details, supplier party relationships, qualification and evaluation information, deliverables and certifications.

Extended Supplier Profile

Buyers also require to use additional supplier details in order to track supplier performance, create vendor profiles, and analyze supplier information. Oracle Supplier Lifecycle Management uses user-defined attributes (UDA) to extend the existing supplier definitions and to group them into logical profiles.

Administrators use control tools to restrict and manage user access in the extended set of profile sections.

Supplier Search

Administrators need to manage supplier information for their organizations and the advanced search capabilities of Supplier Hub enable them to search for and retrieve records.

Advanced Search enables administrators to use any of the standard and extended profile attributes as search criteria and view the results using multiple display formats. You can retrieve the profile information from the search results and then export it into a spreadsheet format. Additionally, you can personalize the advanced search criteria and display various other formats using the administrator and business user levels..

Supplier Profile Management

Most organizations maintain a team of administrators to manage administrative updates from trading partners containing changes to their company profile details. To make this process efficient, Oracle Supplier Lifecycle Management extends existing Oracle iSupplier Portal to allow supplier users online access in order to maintain a wide range of their profile details.

The supplier user can maintain standard company profile details such as address, contacts, business/diversity classifications, products and services category, and banking details. Administrators then review and approve the updates made by suppliers.

Suppliers are also able to access and update qualification and on-going compliance information that are required by the buying organization to maintain the supplier status in the system.

Registration and On-Boarding of New Suppliers

Companies use their corporate websites to enable potential suppliers register their interest in establishing a business relationship. This allows the organization to obtain key information from the supplier that can be used to determine whether they are a suitable trading partner. . The Registration form can be modified to include addresses, contacts, business classification, product and services category, banking details and any of the extended supplier profile attributes. The prospective supplier can also upload attachments as part of the registration process.

To support various qualification procedures, administrators can also create RFI documents that enable the capture of supplier profile and compliance information.

Additionally, buyers can pre-register and send invitations to prospective suppliers, requesting them to provide additional details for pre-qualification and approval using the self-service capability. To support complex or lengthy supplier registration, prospective suppliers can save their draft registration request at any time, and return to it at a later date. When a prospective supplier has registered, their request is routed through an approval hierarchy for review.

Managing Supplier Qualification

Oracle Supplier Lifecycle Management enables buyers to track new supplier requests SLM uses the Approval Management Engine to enable buyers to process approvals for supplier requests and registrations.

SLM also enables companies to support multiple channels for receiving new supplier requests and reviewing supplier credentials.

Compliance and Profile Audits

While there are regulatory requirements for some types of organization to maintain and update key supplier profile elements, Compliance and Profile Audits are also important processes among non-regulated organizations that are looking to meet corporate social responsibility standards that they have set for themselves.

Oracle Supplier Lifecycle Management enables administrators to utilize RFI (Request for Information) templates to gather and manage supplier compliance and profile information that is required on an annual basis. Administrators can outline the key compliance information that is required from suppliers. They store the feedback provided by suppliers into the supplier profile.

Performance Evaluation

Buying organizations know that employees who interact with suppliers can provide insights and feedback on the suppliers' performance. Buyers use this information from suppliers to initiate an overall assessment of a suppliers performance. This assessment, and it's results, help improve relations with suppliers. .

Oracle Supplier Lifecycle Management enables administrators to generate internal RFI documents that can be sent to key personnel within the organization to evaluate and score specific aspects of a supplier's overall performance. This enables stakeholders in a diverse range of departments, such as procurement, finance, supply chain management, manufacturing, quality, design, and legal to combine their opinions into a rating of how well the supplier is doing. The feedback gathered about the supplier is stored in the supplier profile allowing performance trends to be tracked and risk to be effectively managed.

Supplier Notifications

To assist with supplier communication, Supplier Lifecycle Management provides tools to allow notifications to be selectively communicated to a buying organization's vendors. Administrators enter notification information and then use search tools to generate the list of suppliers that are to receive the message.

Oracle Supplier Hub

Oracle Supplier Hub is a new application that provides a portfolio of Master Data Management tools to enable organizations to better manage their supplier master records. Supplier Hub can be used by organizations that need to aggregate supplier data from a range of application systems and also by organizations that run a single instance of Oracle e-Business Suite.

Oracle Supplier Hub provides comprehensive capabilities to manage supplier data: consolidating supplier information from disparate systems and business lines into one repository, cleaning and enriching data centrally, and providing the resulting data to consuming applications, enterprise business processes, and decision support systems.

Deploying Oracle Supplier Hub enables organizations to gain an understanding of the trading partners that they use to procure the various goods and services required to support their business. This understanding is essential in order to be able to carry out effective analysis, for example, of spending patterns, so that buyers can make better decisions about their company procurement policies.

To enable customers to manage supplier records across their organization, Oracle Supplier Hub supports the following deployment modes:

- **Standalone Mode - separate instance of Oracle e-Business Suite**

  This is the traditional Master Data Management deployment mode - Oracle Supplier Hub is set up in a separate instance and vendor data from an organization's source systems is loaded into the Hub in order to be processed.

- **Integrated Mode - existing instance of Oracle e-Business Suite**

  This configuration allows a customer to run the Supplier Hub functionality as part of their existing Oracle e-Business Suite R12.x transactional instance.

  > **Note:** The product is referred to as Oracle Supplier Hub Add-on for Oracle e-Business Suite when it is licensed as an option that is part of an existing e-Business Suite install.

- **Mixed Mode**

  This hybrid setup is essentially an extension of the Integrated Mode. It enables customers to run the Hub as part of an existing instance of Oracle e-Business Suite. Additionally, customers can input additional supplier records from other legacy systems in Oracle Supplier Hub in order to process data across varied legacy systems.

The main features of Oracle Supplier Hub are:

Supplier Master Profile

Oracle Supplier Hub enables an organization to gather key vendor information from heterogeneous environments and store the details in a central repository. Given the wide range of supplier information that Purchasing and Payables departments need to maintain, Oracle Supplier Hub enables buying organizations to store data for the following categories:

- **Supplier Identity**

  This refers to the attributes that uniquely identify an individual supplier - primarily the supplier name and tax reference ID and number(s).

- **Supplier Business Details**

  These attributes are typically required to capture the supplier's business information. Details such as supplier identity, location, contact, and bank account information are stored.

- **Supplier Profile Details**

  These details capture supplier profile data such as the corporate structure of the supplier, names of C-level officers, the goods and services they provide, classifications that apply to them, and 3rd party credit risk information.

- **Supplier Control Details**

  Receiving, invoicing, and payment information is captured in this category. This information is used by both the buyers and suppliers.

All data categories can be managed using the Integrated deployment mode. The Standalone and Mixed deployment modes support the Identity, Business and Profile category details.

Extended Supplier Profile

In order to analyze supplier categorized information, and to track supplier performance, buying organizations require to store additional supplier details. Buying organizations also need to use analytical tools to gain insights into supplier performance.

Oracle Supplier Hub uses the User Defined Attributes (UDA) framework that enables administrators to extend the existing supplier definitions and to group them into logical profile sections. The extended profile attributes allow disparate details to be imported from a variety of source systems. This information is captured and stored centrally along with other attribute information.

Administrators use control tools to restrict and manage user access in the extended set of profile sections.

Enhanced Supplier Classification

Buying organizations require to track classification and diversity information across their supply base in order to ensure that spending patterns can be matched to corporate social responsibility goals. To allow organizations to track a wide variety of classification and diversity information about their suppliers, Supplier Hub enables administrators to define multiple classification schemas. This classification information can be used to build reports in order to track spending patterns.

Supplier Hierarchy Management

Supply Base Analysis is used to study the relationships between the supplier and different departments of the organization. Analysts can then assess the spend patterns of the organization.

Using supplier hierarchy management, you can identify parent and child supplier company relationships across all supplier records that have been consolidated from the different units of an organization.

In addition to defining parent and child relationships, Supplier Hub allows business users to define an unlimited number of custom supplier relationship types and then use these to track relations between different suppliers. The custom hierarchy information can be viewed in a tree structure and can be utilized for various reporting and supplier management purposes.

Data Import and Source System Management

Supplier Hub provides an Import Workbench to allow administrators to set up and control the process of consolidating supplier records from other applications or systems that are part of the buying organization. The Import tools enable the supplier Identity, Business, and Profile details from multiple spoke/source systems to be cross-referenced. Batch Management capabilities then allow the administrator to control the loading of the imported supplier data into the Hub repository.

Data Quality Management

The Data Quality Management (DQM) tools in Oracle Supplier Hub provide features that allow an administrator to carry out systematic removal of duplicates and cleansing of supplier information. The DQM tools also work during supplier creation processes to prevent the creation of multiple records for the same supplier.

DQM provides tools to set up rules required to perform de-duplication tasks.

Data Enrichment using D&B Integration

The Supplier Data Enrichment tools enable organizations to enrich their supplier profile information by importing detailed information from D&B. Information packets for a supplier(s) can be gathered during the supplier registration process and also as part of general supplier profile management. Administrators or business users are able to interactively search the D&B repository and order/purchase various D&B products to enrich supplier information.

Data Publication and Synchronization

One of the primary reasons for using Oracle Supplier Hub is to establish a single definition for each supplier and then make sure that this definition is used consistently across systems.

The Supplier Data Publications feature set provides the capabilities to integrate Supplier Hub with other systems. It provides the infrastructure to initiate publication of updated supplier information. APIs also can be used by spoke systems to query and use the updated supplier information. It also provides the facility to query potential duplicate supplier records in Supplier Hub and for processing the source system supplier information into the Hub.

Common Features in Oracle Supplier Lifecycle Management and Oracle Supplier Hub

Features available in both Oracle Supplier Lifecycle Management and Oracle Supplier Hub include:

- Extended supplier profile attributes
- Setup, view, and edit extended supplier profile
- Advanced search based on extended supplier profile
- Export supplier profile into spreadsheet

If both products are installed in the same application instance, these features are integrated seamlessly.

2

Supplier Directory Services

This chapter covers the following topics:

- Overview of Supplier Directory Services
- Home Page
- Supplier Profile
- Searching for Suppliers
- Exporting Supplier Profile to a Spreadsheet
- Notifying Suppliers
- Standard Supplier Lists
- Dynamic Supplier Lists
- Collaboration Teams
- Questionnaires

Overview of Supplier Directory Services

Supplier Directory Services enables buyers and administrators to find suppliers in the system, generate a 360 degree view of their profiles, export search results to a spreadsheet, and notify suppliers.

Home Page

Navigate to Suppliers > Home and view the various options you have on the Home page.

The following buttons are available on the Home page:

- The Notify All Suppliers button enables you to send a notification to all suppliers in your supplier master. For more information, see: Notifying Suppliers, page 2-15.

- The Register New Supplier button enables you to register a new party as a supplier. For more information, see: Registering Suppliers, page 5-6.

- The Enable as Supplier button helps you to enable an existing organization/party as a supplier. For more information, see: Enabling Existing Party as Supplier, page 12-15.

- The Create Supplier button helps you to create a supplier quickly, without the registration process. For more information, see: Creating Suppliers, page 5-21.

The New Supplier Requests region shows you new supplier requests that are in progress. Requests such as new supplier requests and prospective supplier registrations are found in this region as links. See Registering Suppliers, page 5-6.

Below the New Supplier Requests region, the Supplier Profile Update Requests region enables you to view the profile update requests that are in progress. Examples of profile update requests in progress are: Supplier Address Requests, Supplier Business Classification Requests, Supplier Product and Services Requests. See Supplier Profile Pages, page 2-4.

The Draft Assessments and Published Assessments regions show you the draft assessments and published assessments with the names, numbers as links. See Overview of Assessments, page 4-1.

Quick Links

The following quick links help you to navigate to the most frequently used pages:

- Manage Assessments
  - Create Assessment
  - View/Update Assessment
  - Create Recurring Assessment Rule
  - View/Update Recurring Assessment Rules

  See Overview of Assessments, page 4-1 and Recurring or Periodic Assessments, page 4-3

- Manage Templates
  - Create
  - View / Update

  See Overview of Assessments, page 4-1

- Reusable Lists

- Standard Supplier Lists

  See Standard Supplier Lists, page 2-16.

- Dynamic Supplier Lists

  See Dynamic Supplier Lists, page 2-17.

- Attribute Lists

  See Adding Line Attributes, *Oracle Sourcing User Guide*

- Questionnaire, page 2-22

- Collaboration Team, page 2-20

- Manage Responses

  - Surrogate Response, *Oracle Sourcing User Guide*

  - Evaluation

  See Questionnaire Responses and Evaluation or Scoring, page 2-22

Supplier Search

In order to find suppliers by name, number, keywords, DUNS number, etc, the Supplier Search region is available with three search options: Simple Search, Advanced Search, and Keyword Search. For more information, see Searching for Suppliers, page 2-10.

Supplier Profile

Supplier Profile consists of key supplier information that is required to maintain business relationships between buying organizations and their suppliers. Supplier Profile includes details such as supplier identity information, addresses, contacts, , business classifications, banking details, products and services category, supplier tasks, notes, and supplier party relationships. Administrators can customize the profile based on their business requirements. Suppliers can be given access to their profile information online, so that they can update their profile details anytime. The buying organization, however, needs to approve the profile updates made by suppliers to their profile. This chapter discusses the Supplier Profile in detail. A number of customizable business processes such as Supplier Registration and Qualification Management, Supplier Compliance and Profile Audit, Item Supplier Qualification, and Supplier Performance Evaluation use supplier profile and its extensions. These processes are discussed in further details in subsequent chapters.

If you currently use Oracle Payables, Oracle Purchasing, or Oracle iSupplier Portal, then you are familiar with Supplier Profile. Supplier Lifecycle Management extends this profile and gives administrators control over suppliers' profiles so they can restrict sensitive information from suppliers as well as internal users. For example, if administrators have created some custom attributes to gather supplier performance metrics, the administrator can hide these metrics from your suppliers.

For more information on Supplier Profile in Oracle Payables, Oracle Purchasing, and Oracle iSupplier Portal, please refer to the following guides:

- *Oracle Payables User's Guide*
- *Oracle iSupplier Portal User's Guide*
- *Oracle Purchasing User's Guide*

Supplier Profile Pages

These pages contain information about suppliers, their identity, and their type of business. A significant portion of this information needs to be provided by your supplier contacts. You can give suppliers access to most of the profile details so that they can maintain the information for you. The application handles any updates that the supplier provides as change requests that require approval by an internal administrator.

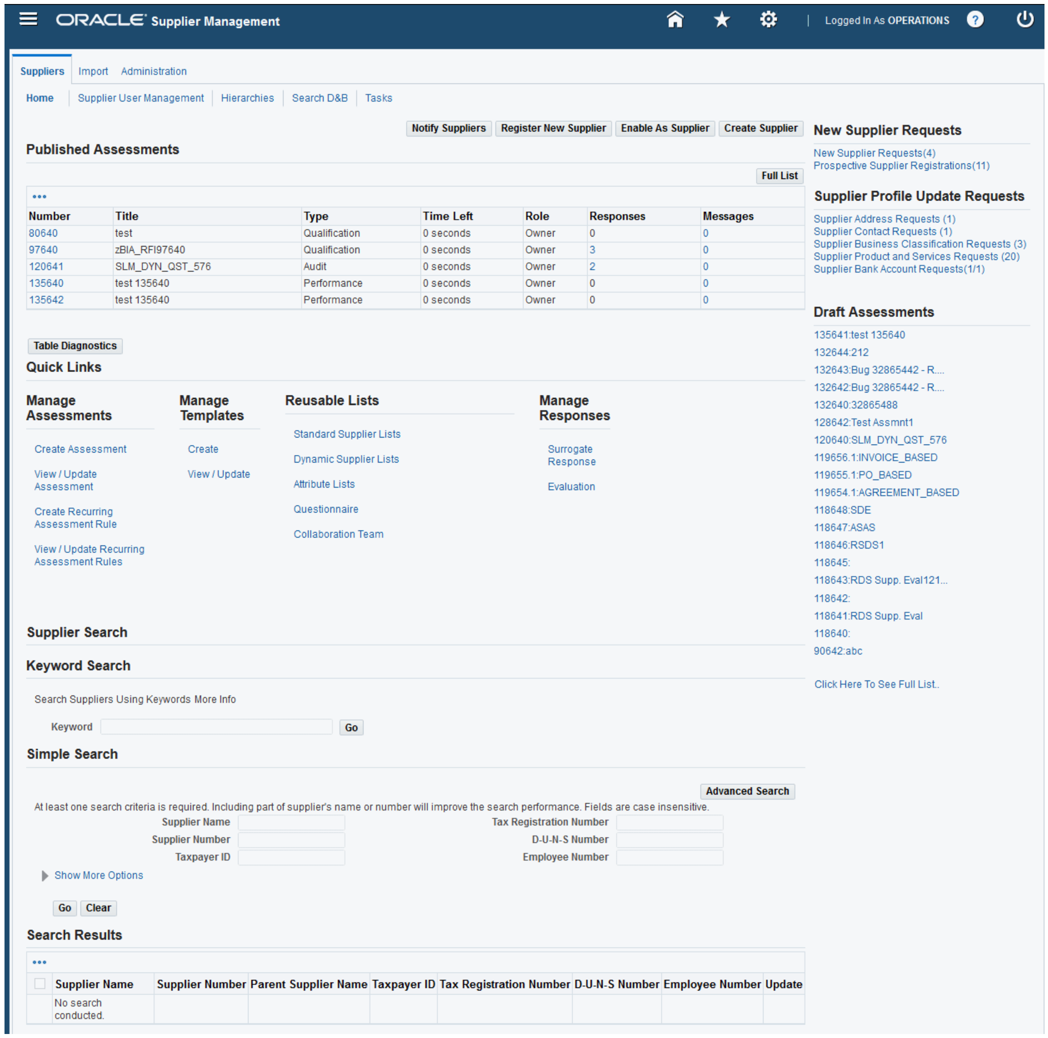
Suppliers receive notifications when you approve or reject requests for changes to the following information:

- Address Book
- Contact Directory
- Business Classification
- Product and Services Category

See "Maintaining Supplier Profile (Supplier Self-Service)", page 6-1 for information.

Log in with the Supplier Management User or Supplier Management Administrator responsibility and click Supplier Home. This opens the Supplier Home page, where you can search for suppliers. Click the supplier name link to open the supplier's profile details page. Follow the same navigation from Supplier Data Librarian and Supplier Data Librarian Super User responsibilities to access the supplier profile.

Suppliers Home Page



The following pages are visible to suppliers as well as internal administrators in the buying organization:

See Suppliers Pages Reference, *Oracle Payables User Guide* and Supplier Profile Management, *Oracle iSupplier Portal User's Guide* for descriptions of these pages.

- Organization

> **Note:** Using the Supplier Name Restriction function, a system administrator can control if a supplier management administrator can update the supplier's name. If this function is assigned to your responsibility, then the Supplier Name field becomes read-only. Only administrators who are not assigned this function can update the supplier's name.

- Tax Details
- Address Book. For information, see Address Book, *Oracle iSupplier Portal User's Guide* .
- Contact Directory. For more information, see Contact Directory, *Oracle iSupplier Portal User's Guide* . Also, see Enabling Existing Party as Supplier, page 12-15.
- Business Classification. For more information, see Business Classifications, *Oracle iSupplier Portal User's Guide*.
- Product and Services Category. For more information, see Products and Services, *Oracle iSupplier Portal User's Guide*.
- Banking Details. For more information, see Banking Details, *Oracle iSupplier Portal User's Guide*

Approval history is part of a supplier profile - all approval details, such as who approved or rejected a supplier, in what order and when, is available in every supplier profile. In the Supplier Profile page (Quick Update page), the supplier registration approval history is displayed. If there is no approval history for the supplier, the following message displays: No history found for this supplier.

Additionally, the following pages are visible to suppliers and internal users:

- Tasks: This page enables you to view, create, update, and delete tasks. See Creating, Updating, and Finding Tasks, *Oracle Common Application Calendar User Guide*.

The Contact Points page is used by internal users. Use this page to indicate the specific ways to contact the organization or person. You can create and update these types of contact points: phone numbers, e-mail addresses, and URLs.

The Party Relationships page is for internal users. This page enables you to specify the relationship between two parties, such as a contact or employee.

The General Classifications page is used to assign a classification to a supplier. See Assigning Classifications, page 9-2.

Terms and Controls: These pages provide access to all of the attributes that are used to control the business relationship you have with the supplier. This includes account code references, internal tax setups, purchasing, receiving, invoicing, and payment options. In addition, there is a Quick Update page that can be personalized to provide access to the most commonly used setup attributes for individual users or groups of users. The following pages are visible only to internal users:

- Terms and Control:
    - Quick Update - enables you to record key purchasing and payment setup information for your supplier sites. See Key Setup Information, *Oracle Payables User's Guide*.

- Accounting - enables you to specify accounting default values. See Accounting Information, *Oracle Payables User's Guide*.

- Tax and Reporting - use this page to record supplier tax information to enable three defaults during invoice entry, and to provide tax reporting information. For more information, see Tax Reporting Information, *Oracle Payables User's Guide*.

- Purchasing - enables you to enter purchasing defaults for your suppliers.

- Receiving - enables you to enter receiving defaults for your suppliers. See Receiving Information, *Oracle Payables User's Guide*.

- Payment Details - See Payment method, Payment Attributes, Specifying Separate Remittance Advice in *Oracle Payables User's Guide*.

- Payment Relationship - See Supporting Third Party Payment in *Oracle Payables User's Guide*.

- Invoice Management - See: Control Information, Payment Information in the *Oracle Payables User's Guide*.

Others: The following pages are internal to the organization, and are specific to managing supplier profiles:

- Assessment
  - Qualification and Evaluation - enables you to search, view, and act on existing qualification and evaluation RFIs.
  - Surveys - Usage of user defined supplier profile attributes and RFI Questionnaires are recommended over iSurvey for extensible supplier profile management implementations. Surveys link is provided in the Supplier Management navigation menu for customers who have been using the iSurvey functionality through other products such as iSupplier Portal. You can also see Responding to Buyer Surveys, *Oracle iSupplier Portal User's Guide*.

- Relationship Contracts: RFI Contract Clauses and Deliverables are part of Oracle Supplier Lifecycle Management. However, for using contracts for any document other than RFI type, you should purchase an appropriate Oracle Contracts product license. Any contracts and deliverables pertaining to a supplier are visible from that supplier's profile.

  You can access Contract Terms Library, which is the central library of pre-approved clauses and contract templates in Oracle Contracts product that can be used to create contracts across the enterprise. See: *Oracle Procurement Contracts Implementation and Administration Guide*.

- Qualification Deliverables: Deliverables are contractual commitments and obligations that buyers and suppliers can associate to a contract template. Buyers and suppliers can manage deliverables that represent obligations arising from the negotiation process. They indicate the success or failure of the fulfillment of the deliverable by changing the status of the deliverable for the negotiation.

  You can access Contract Terms Library, which is the central library of pre-approved clauses and contract templates in Oracle Contracts module. The Contract Terms Library can be used to create contracts across the enterprise. You can create templates that include both clauses and deliverables. See: *Oracle Procurement Contracts Implementation and Administration Guide*.

- Profile Access Control - enables you to view and update the roles attached to suppliers that provide them access to the user-defined attributes. See: Setting up Profile Access in *Oracle Supplier Management Implementation and Administration Guide* .

- Notes - enables you to view and create notes of several types. See: Setting up Tasks and Notes in *Oracle Supplier Management Implementation and Administration Guide*.

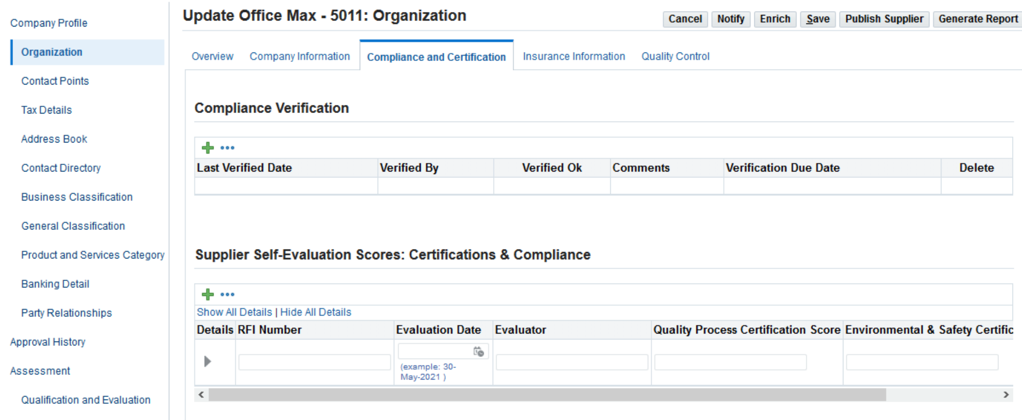
- Source Systems - enables you to maintain details of the source systems related to the supplier. See Creating and Updating Source Systems, *Oracle Trading Community Architecture Administration Guide*.

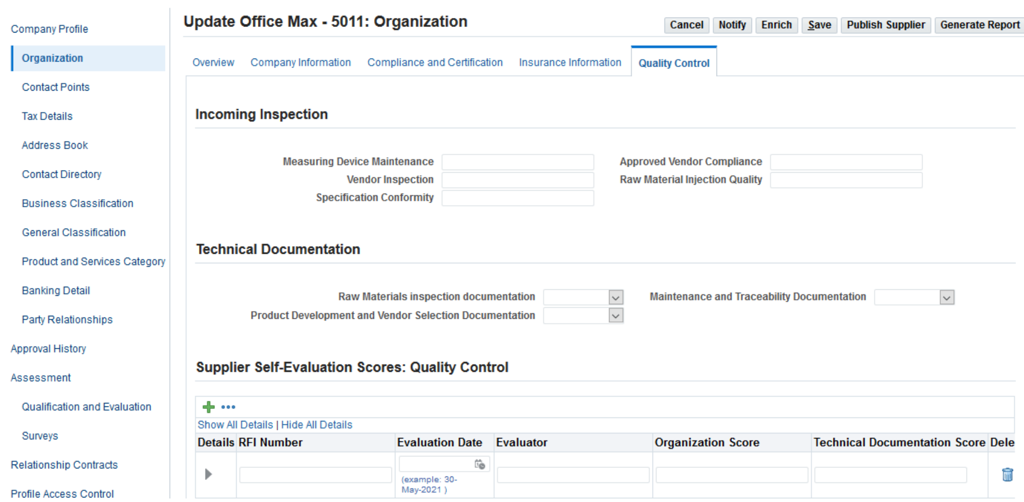
- Transactions - You can extend your view of transactions in Oracle Supplier Management to include transaction data from applications that are not part of E-Business Suite applications to provide a complete view into all supplier business transactions in your organization. This is available only from the Supplier Data Librarian responsibility. See: Setting up Transaction Views in *Oracle Supplier Management Implementation and Administration Guide*.

- Publish Event History - enables you to track the publication history of supplier information.

User Defined Attributes: Oracle Supplier Lifecycle Management enables you to maintain additional supplier information using user defined attributes. User defined attributes are aggregated in user defined attribute groups. These groups appear on the supplier profile pages where you and suppliers can maintain extended profile information based on your business requirements. For example, you could set up attribute groups to gather compliance and certification details, insurance information, business details, quality control qualifications, and any other information that meets your business requirements.

The UDA pages have the attributes differentiated: attributes to be entered by supplier and attributes to be entered by buyer.





An attribute group can be multi-row or single-row. Multi-row attribute groups enable association of multiple sets of attribute values with the same attribute group. For example, for a supplier, you can set up a multi-row attribute group called 'services', with 'service name', 'service type', and 'service frequency' as the attributes. You can associate multiple rows of services with the supplier.

You can maintain additional supplier information at one or more business entity levels such as supplier party, party site, and supplier site. At each level, you can associate the attribute group with a certain type or classification of that entity. For example, an attribute group called 'Supplier Monitor Product Attributes' created for a business entity 'Supplier Party' must apply only to those suppliers that supply monitors.

A supplier party user defined attribute can be associated with a certain type of supplier party based on the following:

- Product and Service categories such as monitors, building materials, and electronic tubes.
- Supplier type such as component manufacturer, distributor, and contract

manufacturer.

- Business classification such as women owned, small business, and minority owned.
- Custom classifications such as premium, gold, and platinum.
- Common: This association makes the user defined attribute applicable to all supplier parties.

An attribute group for capturing party site details can be associated with certain type of party sites based on:

- Country such as US, China, and India.
- Address Purpose such as RFQ, Payment, or Purchasing.
- Common: This association makes the user defined attribute applicable to all party sites.

An attribute group created for capturing supplier site details can be associated with certain type of supplier sites based on:

- Country such as US, China, and India.
- Common: This association makes the user defined attribute applicable to all supplier sites.

For setting up the user defined attributes, see "Setting up User Defined Attributes" in *Oracle Supplier Management Implementation and Administration Guide*.

Searching for Suppliers

Supplier search is available in the following ways:

- Simple search that is available from the Suppliers Home page for Supplier Management responsibilities.
- Advanced search that is available by clicking the Advanced Search button on the Suppliers Home page.
- Smart search that is available from the Suppliers Home page for Supplier Data Librarian responsibilities.

Simple Search

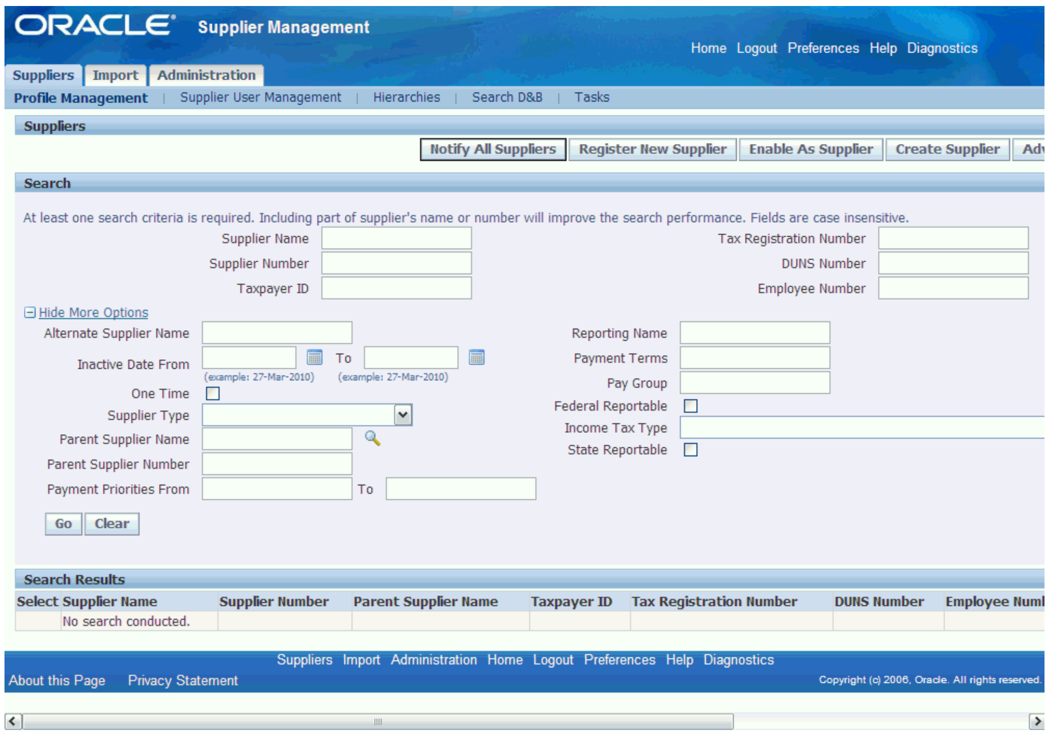
In the Search region, you can enter a wide variety of search criteria, including supplier name, supplier number, tax registration, or DUNS number. If you want to search for employee-suppliers, then select Employee as the Supplier Type.

Use the Supplier Management Administrator and Supplier Management User responsibilities.

To find a supplier using the Search region:

1. On the Suppliers home page, enter your search values into the appropriate search fields. You can enter complex criteria by entering information in several fields. Click the Show More Options link to access additional search fields if necessary.

2. Click Go. The search results appear in the table below the search fields. Use the Update button to access the details for the supplier.



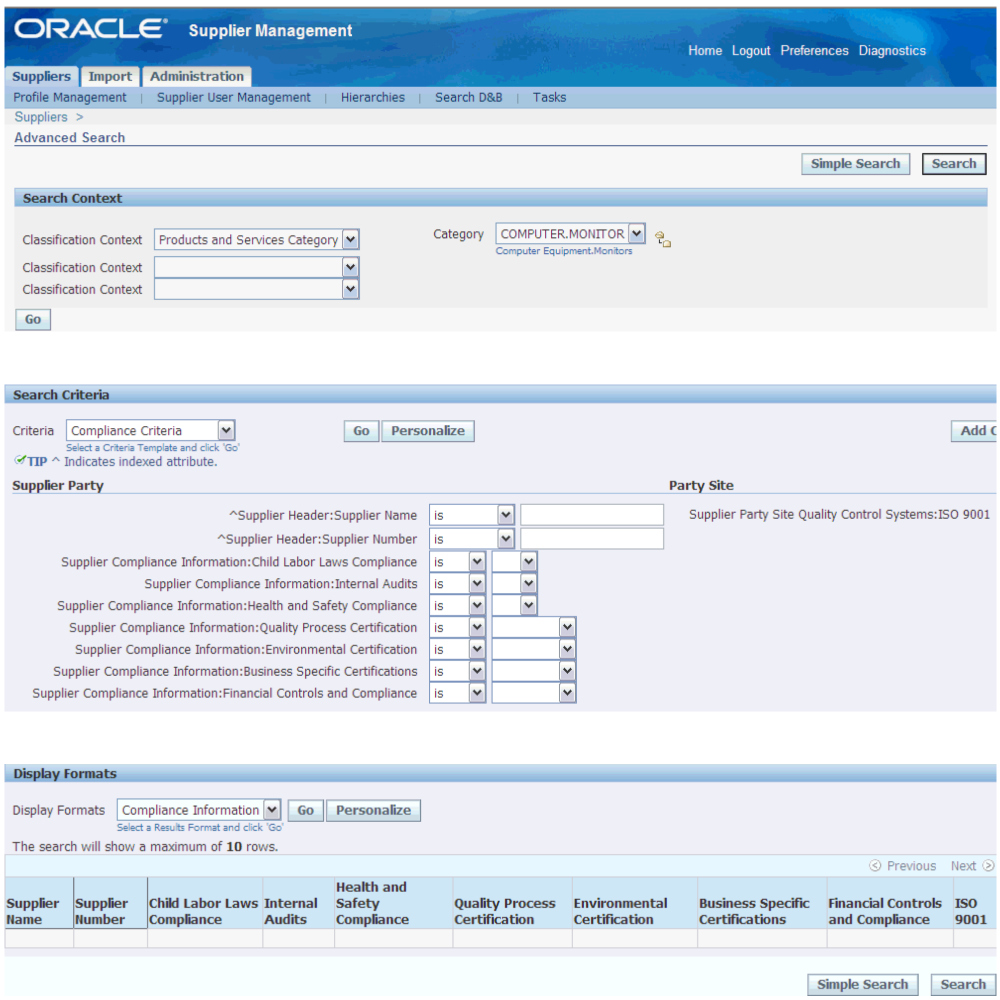
Advanced Search

Advanced search is available to run complex search queries containing multiple search criteria. Search criteria are not just limited to the supplier's name and identification information, but can include any attribute in the Supplier's profile, including user-defined attributes. This helps buyers find appropriate suppliers to invite to a negotiation event based on the requirements of that negotiation. For example if you wish to find suppliers based in the United States who supply monitors and are ISO 9001 certified but in the process of becoming environmentally compliant with general liability insurance of at least USD $3 million, you can do that using Advanced Search.

Use the Advanced Search button available on the Suppliers page to go to the Advanced Search page. Follow these steps to search:

1. **Setting the Search Context**: There are three components on this page that contribute to the search. First is the Search Context. In this dropdown, select one of the classifications from Address Purpose, Business Classification, Country, General Classification, Products and Services Category, and Supplier Type. Then select a value for that classification and click Go. This sets the context for the remaining two regions, Search Criteria and Display formats.

   Search criteria offer a convenient way to save frequently used search criteria and values. Display Formats enable you to predefine how search results are displayed. Results can be set up to show different sets of attributes of the suppliers that are returned by the search.

2. **Creating Search Criteria and Display Formats**: When you set the Search context and click Go, if there are Search criteria and Display formats for the selected search context, then the application displays them in the respective drop lists. However, in case there isn't any search criteria or display format configured, click on Personalize to create one from this page.

Personal search criteria and display formats criteria created in this manner are only available to the user who created them. Administrators can create frequently used search criteria and display formats from the Administration tab, which become available to all users. When a user and administrator define a default search criteria template for a particular search context, the user-defined search criteria template takes precedence. See: Setting up Advanced Search Criteria and Display Format in *Oracle Supplier Management Implementation and Administration Guide*.

When you create search criteria and display formats, the attribute groups available to add criteria are dependent on the search context set on the Advanced Search page. For example; consider the attribute group EPA Guidelines. EPA Guidelines is associated with Country USA so it only applies to suppliers in the US. First you must set the Search context to Country and value to US. Only then EPA Guidelines will show up in the Search Criteria creation page.

3. **Setting Mandatory Indexed Search Criteria** : Some of the attributes are indexed and this is indicated by a '^' sign next to the attribute name. The administrator can index a custom attribute when creating the attribute. At least one indexed attribute must be used in the search criteria. Also a valid operator should be used to make the index usable. Valid operators for an indexed attribute are - is, starts with, greater than, less than, after, and before. If you choose a 'contains' or 'ends with' operator, then the application ignores the indexing on that attribute.

A lock icon appears in the search results if the user searching for suppliers does not have the privilege required to view a particular attribute group. To assign privileges to users, see Setting up Profile Access in *Oracle Supplier Management Implementation and Administration Guide*.

Smart Search

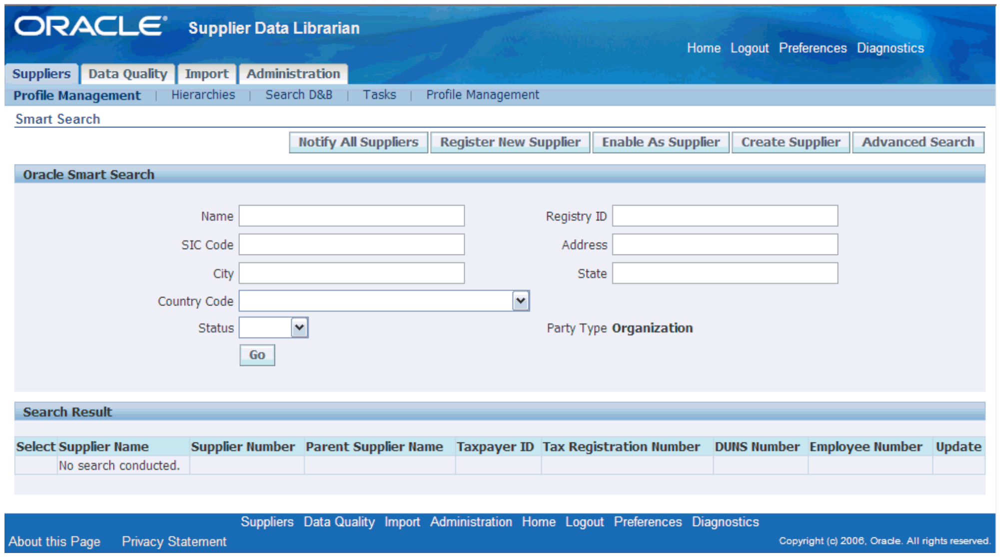
The Smart Search engine enables you to perform an exact or corresponding search based on the criteria you provide. You can choose any search criteria from Supplier Party level attributes for the smart search.

Ensure that you select the applicable attributes in the Data Quality Management (DQM) match rule as the available search criteria depends on the DQM match rule, HZ: Match Rule for Identifying Duplicates with Smart Search. Run the search with at least one criteria.

Use the appropriate Supplier Management, Supplier Hub, or Trading Community Manager responsibilities to access Smart Search.

To find a supplier using the Smart Search region:

1. On the Suppliers home page, enter your search values into the appropriate search fields.



2. Click Go. The search results appear in the table below the search fields. Use the Update button to access the details for the supplier.

You can merge suppliers using the search results. Additionally, you can publish the supplier profile using the Publish button and generate the supplier profile report using the Generate Report button. See: Publishing Supplier Profile, page 14-2 and Generating Supplier Profile Report, page 14-5.

Keyword Search

You can search for suppliers using keywords in the Supplier Home page. This page has a new Keyword Search region, where you can enter a value in the keyword field and select Go.

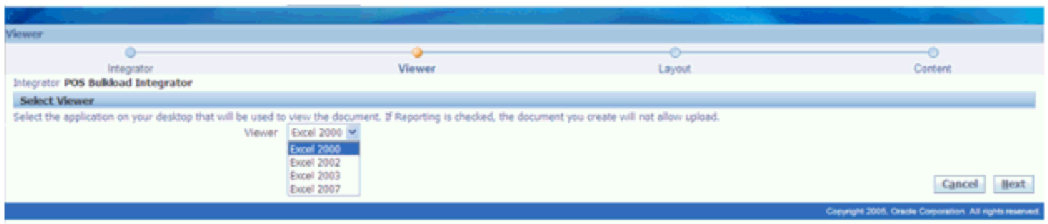
The system uses a heuristic-based text-search engine to find a match across all attributes of the supplier such as header level attributes, addresses, sites, contact directory, tax information, banking information, along with associated UDA regions. You can use the '+' operator in search. You can enter more than one keyword separated by '+'. For example: 'John Doe + Brazil + Bank of America' displays all suppliers whose profile contains all three keywords.

This page displays the search results in the Search Results region, in the same way it does for simple search. All actions available for simple search are available for search results obtained from this new keyword search method.

Exporting Supplier Profile to a Spreadsheet

Supplier Management enables you to export supplier profile information into a spreadsheet from the Advanced Search results page. Search for the supplier or suppliers whose profile information you wish to export. Then click Export All to export the entire result set to a spreadsheet. Set the display format to export the most relevant information.

> **Note:** Before performing this step, ensure to check the Trust access to Visual Basic Project and close the MS Excel application. Refer to the applicable topic in MS Excel Help to check the Trust access.



Notifying Suppliers

Many times buyers may wish to notify suppliers of required actions, change in policy, or upcoming events. Use Supplier Management User responsibility and Profile Extension subtab on the Supplier tab to notify suppliers.

To notify suppliers:

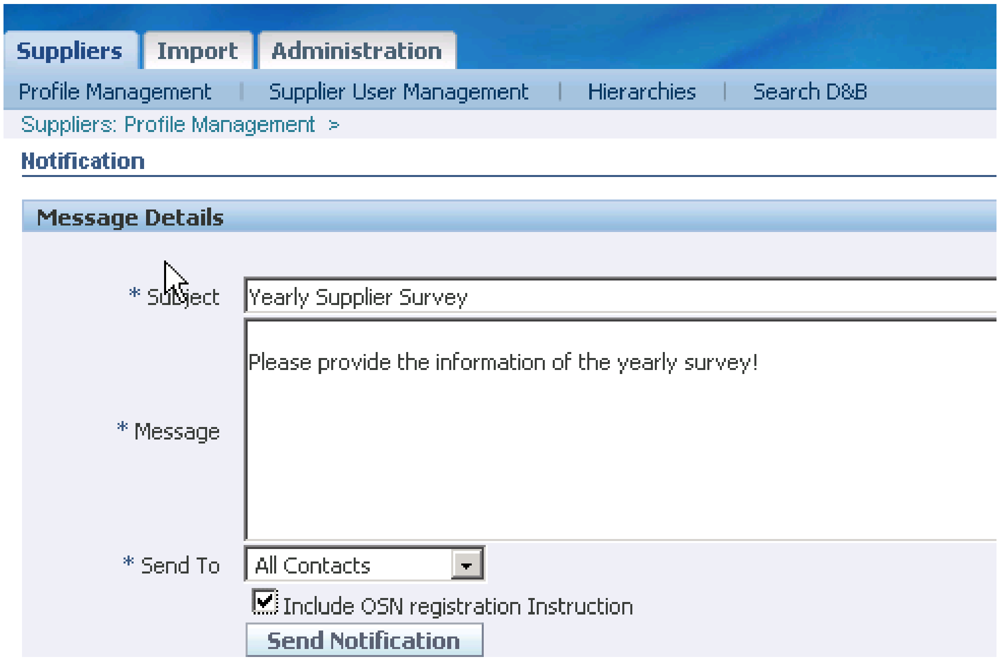
1. Click on Notify All Suppliers button to send a notification to all suppliers in the supplier master.

2. If you wish to notify a subset of suppliers, search for those suppliers using the Search region of the Suppliers page. Select the applicable suppliers and click Notify to open the Notifications page.

3. Enter subject and message to notify the selected supplier's contacts.

4. Select the applicable option in the Send To field. If you select All Contacts, then the application notifies all the selected supplier contacts. If you select Contact Users

Only, then the application sends the email and workflow notification to those contacts of suppliers that have system user accounts.



5. Optionally, select the Include OSN Registration Instruction, if you are notifying suppliers who have not yet registered on Oracle Supplier Network. See On-Boarding Suppliers on Oracle Supplier Network, page 5-23.

Standard Supplier Lists

You can create a reusable standard invitation list by navigating to the Standard Invitation Lists link using one of the two following paths:

- Suppliers > Home > Quick Links > Reusable Lists > Standard Supplier Lists
- Administration > Setup > Standard Supplier Lists

Both navigation paths open the Standard Supplier Lists with the Search region.

You can search for an invitation list using the search criteria provided. The search results display in the table below the search criteria.

Click Create Standard Supplier List to open the page Create Standard Supplier List. Enter the List Name and other required information. You can opt to make the list publicly accessible to all buyers, or private only to a single user.

Enter participants (supplier names) to the list by clicking Add Suppliers. The Create <supplier list name>: Add Suppliers page displays. You can search for a supplier by entering the supplier name in entirety or partially with a % wildcard search character.

When the suppliers are listed in the search results table, click the Select check box and then click Add to Invitation List. The supplier name displays in the top right region that is called Invitation List.

If there are multiple contacts for each site, select which contact you wish to notify from the contact list. Select the **Primary Contact** check box to identify a specific contact as the primary contact. You can add multiple contacts for a particular supplier or supplier site. If there is only one contact, then the application automatically identifies this contact as the primary.

Click Apply when you are done adding suppliers, and return to the Create Standard Supplier List page. Select supplier sites from the Supplier Sites dropdowns and enter additional email contact. Click Apply and you get a confirmation message that the supplier list is successfully created.

Using the Standard Supplier List when an Assessment is created

Use the standard supplier invitation list in an assessment. The standard supplier list is reusable, thus you could add the same set of suppliers for different purposes in an assessment. Whether your assessment is an evaluation or an audit or any other assessment, you can use the reusable standard supplier list to add suppliers to the list of invited suppliers. See Overview of Assessments, page 4-1.

Navigate to Suppliers > Home > Quick Links > Create Assessment. Select a template (Audit or Evaluation) for your assessment. The Create Assessment page displays. Enter the required fields in the header link, such as the Assessment Name, etc. Click the Suppliers link in the top left corner of the screen. The Create Assessment <assessment number>: Suppliers page displays. Add your list of suppliers by clicking Add Standard Supplier List. The Suppliers : Add Invitation List page displays. This page shows you a Search region, where you can enter search criteria to retrieve your supplier list. The supplier list information shows in the search results table. Click the Add icon to add your supplier list to the assessment. The Create Assessment <assessment number>: Suppliers page displays again, with all the suppliers listed in the Invited Suppliers region.

Additionally, you can add individual suppliers by clicking Add Supplier. The Suppliers: Add Suppliers page shows you the list of already added suppliers. You can add any other suppliers, they will be part of the assessment, however, they will not be part of the invitation list.

Dynamic Supplier Lists

Using the Standard Supplier Lists, you can create a list of frequently used suppliers. However, with a standard supplier list, you cannot convert search results into a supplier list. Additionally, the system does not update the supplier list automatically, if a supplier is added or removed from the supplier master records.

You can create a reusable dynamic invitation list by navigating to the Dynamic Invitation Lists link using one of the two following paths:

- Suppliers > Home > Quick Links > Reusable Lists > Dynamic Supplier Lists
- Administration > Setup > Dynamic Supplier Lists

Both navigation paths open the Dynamic Supplier Lists with the Search region.

You can search for an invitation list using the search criteria provided. The search results display in the table below the search criteria.

Use the search criteria to search the user-defined attributes (UDAs). Furthermore, you can define criteria at the attribute level, for example: 'Total Employees > 1000' or 'CEO Name starts with John', etc. If a supplier's attributes fulfill the criteria, then the supplier details are displayed in the search results table. At least one indexed attribute is required for the search to be conducted. The indexed attribute could be a seeded attribute or a user-defined attribute.

Dynamic supplier lists are also reusable, in the same way as are standard supplier lists. Dynamic supplier invitation lists enable you to convert a search context and search results into a supplier list. This minimizes time and effort while creating a supplier list. The system also updates dynamic invitation lists every time a new supplier is added or removed or updated from the supplier master records.

To create a dynamic supplier invitation list, navigate to Suppliers > Home > Quick Links (Reusable Lists) > Dynamic Supplier Lists. The Dynamic Supplier List page opens, with a search region. You can search for an existing dynamic supplier list or create a new list by clicking Create Dynamic Supplier List. If you click Create Dynamic Supplier List, the Create Dynamic Supplier List page opens. Enter the required fields, such as List Name, Description.

Enter a search condition in the Conditions region by clicking Add Search Conditions. The Add Conditions page opens, where you can add Search Contexts, Search Criteria, and Display Formats.

The Search Context region enables you to select a search context. A search context is a broad set of categories of criteria such as a search among business classification, products and services category, supplier type, country, address purpose, etc. When you select one or more of the search contexts, the search criteria columns dynamically refreshes, to display the appropriate search criteria. For example, if you select Business Classifications as the search context, the search criteria will automatically show you the values for business classification and you can narrow down to search to one or more specific business classification values (such as Veteran Owned, Small Business, Minority Owned, etc.).

In the Search Criteria region, you need to enter the Compliance Criteria fields such as Supplier Audit, Environmental Certification, Business Specific Certifications, Financial Controls and Compliance, etc. If you wish to update the compliance criteria columns, or not set compliance criteria as a default criteria set, click Update.

You can also create new criteria such as specific values for business classification and/or products and services, etc., by clicking Create New Criteria.

The Display Formats region enables you to customize the columns that you wish to see in the search results for the supplier. Some default display formats are available for you to use, such as Compliance Information, Insurance Information. If you wish to create a new set of columns for your specific business requirement for the search results, click Create Display Format.

Provide the name and a description for the display format. Additionally, select the number of rows you want to display per page. Optionally, set this display format as the default display format for the object by clicking Set as Default. Enter applicable details and click Apply.

In the View Columns region, specify the columns you want to display in the search results display. If you simply wish to locate a single column, then enter its name and click Find. To search for attributes by business entity and attribute group, select the business entity, click Go, then select the attribute group and click Go again. To see the results correctly, it is recommended that you add the required set of search result row identifying attributes to the display format. If you do not specifically add the search result row identifying attributes, then the application adds the attributes to the display format automatically. You can also move and remove the columns and attributes by clicking the arrow key icons from one window to another. Click Apply to return to the Add Conditions page.

In the Add Conditions page, click Search to get search results for the context, criteria and display format you specified. The list of suppliers displays in the Display Formats region. Click Save and Apply to save and apply your changes. Your dynamic supplier list can now be used in an assessment.

Executing a Dynamic Supplier List

Even though Dynamic Supplier Lists are automatically executed by the system, you can execute the Dynamic Supplier List to reflect current changes to your list of suppliers. To view the current changes in your supplier list:

- Navigate to the **Dynamic Supplier List** page.
- Click **Execute**, this opens the Execute Dynamic Supplier List <list name> page. View the results of the execution in the **List Conditions**, **Attributes and Attribute Groups**, and **Supplier Names** regions.

Using the Dynamic Supplier List when an Assessment is Created

Use the dynamic supplier list in an assessment. See Overview of Assessments, page 4-1. You could also use the dynamic supplier list in a recurring assessment rule. See Recurring or Periodic Assessments, page 4-3. Because this list is reusable, you can add the same set of suppliers for different purposes in an assessment. Whether your assessment is a performance evaluation or an audit or any other assessment, you can use the reusable dynamic supplier list to add suppliers to the list of invited suppliers.

Navigate to Suppliers > Home > Quick Links > Create Assessment. Select a template (Audit or Evaluation) for your assessment. The Create Assessment page displays. Enter the required fields in the header link, such as the Assessment Title, etc. Click the

Suppliers link in the top left corner of the screen. The Create Assessment <assessment number>: Suppliers page displays. Add your list of suppliers by clicking Use Dynamic Supplier List. The Suppliers : Add Invitation List page displays. This page shows you a Search region, where you can enter search criteria to retrieve your supplier list. The supplier list information shows in the search results table. You can only view supplier lists in the search results table, you cannot update any supplier list information here. Click the Add icon to add your dynamic supplier list to the assessment. The Create Assessment <assessment number>: Suppliers page displays again, with all the suppliers listed in the Invited Suppliers region.

Additionally, you can add individual suppliers by clicking Add Supplier. The Suppliers: Add Suppliers page shows you the list of already added suppliers. You can add any other suppliers individually; they will be part of the invitation list of the assessment only.

Collaboration Teams

The Suppliers > Home page has a link called Collaboration Team under the Quick Links > Reusable Lists region. This link opens the Collaboration Team Search page, that enables the administrator or buyer to find existing collaboration teams or create a new collaboration team. A collaboration team consists of a group of users who are involved in evaluating and/or scoring suppliers. This is applicable to the registration and qualification process, assessments (profile audit and evaluations), where suppliers need to be evaluated and/or scored.

Using an appropriate Supplier Management responsibility, navigate to Suppliers > Home > Quick Links (Reusable Lists) > Collaboration Team. The Collaboration Team Search page opens, and you can search for a collaboration team or create a new collaboration team.

Click Create Collaboration Team to open the Create Collaboration Team page. Enter the mandatory fields such as Name and Description. Select whether you wish to make the collaboration team publicly accessible or private. Select Status to make the team Active or Inactive.

In the Participants region, click Add Members. The Member column displays a search list of values that you can use to add a collaboration team member. Click the magnifying glass icon to search for, and select, the member name.

After you add the member name, you can specify if the member will also be an approver. If not, leave the Approver check box unselected. The Access column enables you to assign an access role to the collaboration team member: Full (Access), Scoring, Evaluation, Evaluation & Scoring, View Only. You can opt to remove a member by clicking the Remove icon.

If you select Scoring or Evaluation & Scoring as your access value, you need to click Manage Scoring, in order to create a scoring team. The Header Scoring Settings page opens, with the Enable Team Scoring check box selected by default.

Click the Add Another Row icon (form with a green plus sign) and in the Scoring

Teams region, enter a name and instructions for the scoring team. Click the pencil icon in the Members column to add members from the collaboration team. You could delete a scoring team, by clicking the Delete icon.

After you add members, click Apply to return to the Header Scoring Settings page.

If you select Evaluation or Evaluation & Scoring as your access value, click Manage Evaluation Settings in order to create an evaluation team. The Header Evaluation Settings page opens. You can view the teams that are already created, in the Evaluation Teams region. Click the Add Another Row icon (form with a green plus sign) to create an evaluation team. Enter a Name and Instructions, then click the Members icon. The Evaluation Team page displays, and you can add the team members to the Members region, by clicking the Add Another Row icon (form with a green plus sign) to add a team member. Click Apply to return to the Header Evaluation Settings page. Click Apply once more to return to the Update Collaboration Team page.

Using the Collaboration Team in the Assessments page

You can add the collaboration team you created, in any assessment, because the collaboration team is a reusable list. See Overview of Assessments, page 4-1.

Using the Suppliers > Home page, navigate to Quick Links (Manage Assessments) > Create Assessment. Select a template from the popup and click Apply. The Create Assessment: Header page displays. The Collaboration Team region enables you to add collaboration team members by clicking Add Collaboration Team. The Collaboration Team Search page opens, and you can find the collaboration team you created. When the collaboration team appears in the search results table, click the Add icon to add this collaboration team to the assessment.

If your collaboration team has members that are already listed in the assessment as collaboration team members, you get a warning message: if the member has a higher access role in the assessment or in the collaboration team list, that higher access role will be included in the assessment with the member name (Access roles are: Full, Scoring, Evaluation, Evaluation & Scoring, View Only). Thus if a member has Scoring access in the assessment, and Full access in the collaboration team list, then the member's name will be added from the collaboration team list with Full access. However, if a member has Scoring access in the assessment, and Evaluation access in the collaboration team list, then the member gets added with an Evaluation & Scoring access.

Click Save as Draft to continue with your assessment creation.

Some considerations to be noted for collaboration teams (scoring and evaluation) during assessment creation:

When you complete creating an assessment, a notification is sent to all the evaluation team members (provided the assessment has evaluation teams). The notification informs the evaluation team members that they have been added to the assessment as evaluation team members.

When an assessment is Closed, a notification is sent to scoring team members. The notification informs the scoring team members that they have been added to the assessment as scoring team members. Additionally, when you update the Scoring End Date for a team, a notification is sent to let the members know about the changed date.

Using Scoring in the Apply Knockout Results page

The Apply Knockout Results page has a Comments column in the Remove From Shortlist table. The Comments column shows you the comments if the suppliers are rejected on the basis of the score of a specific section. If there are two or more parallel scoring teams in parallel and both the teams enter scores that lead to supplier rejection, a link called Multiple Comments is shown in the Comments column. If you click the Multiple Comments link, a popup containing all the supplier comments are displayed for you to view.

The Supplier Registration and Qualification assessment has no comments on the supplier being rejected or shortlisted on the registration request page. If the approver wants to know more details on the assessment, the approver needs to go the Pre-Qualification and Evaluation Assessment region and click the Detail icon.

Using Scoring in the Analyze by Supplier's Score Page

This page enables you to view final scores at the supplier level, irrespective of the number of evaluators. In the Assessment: Header page, click the Analyze by Supplier's Score action in the Actions dropdown. The Analyze by Supplier's Score page displays. The sum total of score per supplier is displayed in this page. If you wish to drill down to see the details of the scores, click Compare Requirements / Questionnaire. This page shows you the final scores for all the suppliers. These scores (average of the scores provided by all the scorers for all responses entered by the evaluators) are calculated and displayed for every question and section in the questionnaire.

The Total Score for a supplier is the average of the scores for all the scorer's responses for the supplier.

Questionnaires

Using Questionnaires

In order to gather specific information from suppliers, Oracle Supplier Lifecycle Management provides buyers and administrators with the Questionnaire function that can be part of any assessment. As a buyer or administrator, you can either create a questionnaire from the assessment header, or create a reusable questionnaire list.

Login with an appropriate Supplier Management responsibility, and navigate to Suppliers > Home > Quick Links (Reusable Lists) > Questionnaire. The Reusable Questionnaire Lists page opens, and you can search for an existing questionnaire list using the Search region. You can also create a questionnaire list using Administration > Setup > Reusable Questionnaire Lists. When you create an assessment, you can create a questionnaire for that specific assessment. In the assessment header page, scroll down to the Questionnaire region and enter the questions. You can also upload and import a spreadsheet with the questionnaire in order to use the questionnaire list in the system. Once the import process is complete, you can establish the relationship between parent and dependent questions using the Manage Dependency page. Please note that the spreadsheet import and upload process can include primary and dependent questions, though the spreadsheet does not differentiate between primary and dependent questions.

Click Create Questionnaire List to create a questionnaire. The Create Questionnaire List page displays, where you need to enter a Name, a Description and specify the Status of the questionnaire (Active or Inactive).

Your questionnaire consists of sections, questions, and dependent questions, if any.

Creating a section enables you to structure and order your questions and dependent questions. Examples of sections are: Financial Information, Quality Information, General Questions, etc. Select the check box in the Section row to add a section. You can opt to add a pre-defined section, or create a new section for your specific requirement. In the Create Questionnaire List: Add Section page, select New Section or Predefined Section from the Add dropdown. After you enter a new section name or select a predefined section from the list of values provided, you can either add another section, add questions to your newly created section or return to the Create Questionnaire List page.

Create questions that are clear and unambiguous to the supplier, and meaningful to the scoring and evaluation process. The best practice for this is to select a section that you have added to the main Section, and then click Add Question. The Add Question page displays. This page shows you the section name you selected to put the question in. Enter a Name and a Description for the question in the text box and text area provided. Both are mandatory fields. An example question you could add: Enter the number of years you've been in operation.

Scroll down to the Properties region, where you can define the properties of the question. Select a question Type: Display Only, Internal Required, Internal Optional (to be used by buyers and administrators), Supplier Required, Supplier Optional (supplier responses are required or optional). Select a Value Type (Date, Number, Text, URL) for the question. For the example question (Number of years in operation), select Number as the Value Type. The Target field enables you to enter an optimum response, and compare that response with the response of the supplier. For the example question, buyers may prefer supplying organizations with 10 years of operational experience, thus you could enter 10 in the Target field. You can opt to display the target value to suppliers or not, by selecting the Display to Supplier check box. Select a Scoring Method (None, Automatic, Manual). Enter a Maximum Score and a Knockout Score for the question, by entering appropriate values.

The Acceptable Values region helps the supplier to view the acceptable values for the question and respond accordingly. For example, some questions may have a Yes/No response and it is better to specify that the acceptable values are Yes and No, otherwise the supplier may not be aware of this and enter unacceptable values in response to such a question. In our example question (Number of years in operation), acceptable values are of number type, and could range from 1 to 20. Click the Add 5 Rows icon to enter acceptable values to the question. Enter the acceptable responses in the rows provided. Alternatively, you could enter a value set. A value set is a list of pre-defined values that are likely to be used frequently as acceptable values. In the example question, a value set for 1 to 20 could be created and then used in this question. Click Apply Value Set to open the Apply Value Set page. Search for a value set, select the required value set from the search results, and click Add.

Note that in order to create a value set, navigate to Administration > Profile Extension > Value Sets. The Maintain Value Sets page opens, where you click Create to create a value set.

When you are done creating the question, click Apply and Add Question to save your work and add another question in the same section. Otherwise click Apply to return to the Create Questionnaire List page.

The Create Questionnaire List page enables you to delete a section or question, by selecting the associated check box and clicking Delete. You can also move a section or question above or below a given section or question. Select the appropriate check box and click Move. The Move Question page prompts you to select a section or question above or below which you wish to perform the move. Select a radiobutton and click Apply. In the Create Questionnaire List page, you see the section or question has been moved to the place you specified.

The Mapping button is used to map the response provided for a question to a specific attribute on a supplier's profile.

In order to add dependent questions to the Questionnaire List, you should have created the dependent question prior to creating the dependency. For example, a primary question can be: Do you have a global presence? If the supplier response to this question is Yes, the dependent question should be: Enter the number of countries you operate in. In order to define a question as a dependent question, first create the question, and then click Manage Dependencies to associate the question to a primary question as a dependent question.

The Manage Dependencies page displays, and you need to select a question from the left side of the page, in order to make it dependent or primary. The best practice is to select a question that you intend to make the primary question and then use the shuffle regions in order to select and associate the dependent question(s). You can create any number of dependent questions under a single primary question and any number of dependent questions one after another.

In the example questions, select Do you have a Global presence as your primary question. This question name and question description appear above the shuffle regions. Select an Operator from the dropdown. In this example, the available operators are Is and Is Not. Then select the Response Value. In this example the response value is Yes. The Response Value comes from the acceptable values you entered while creating the question.

Note: You need to create acceptable values in the question in the Add Question page, if you are creating dependent questions.

Click Go to enable the system to find relevant and potential dependent questions. The best possible dependent question(s) appear in the Available Questions shuffle region. If you click a question name in the shuffle regions, the Description text areas populate with the question description. Click the Move icon to move the question to the Selected Questions shuffle region. The example question that could be moved to the Selected Questions shuffle region to become a dependent question is: Provide the number of countries you operate in.

The Associated Questions region shows you the conditions and dependent questions that are now associated to the primary question. Click Apply and Add Another to add another dependent question to this primary question. Click Apply to return to the Create Questionnaire List page. This page shows you the question hierarchy (primary and dependents) that you created. Simply click on a section and drill down to the questions by clicking the expansion icon. The dependent questions are indented to the right as compared to the primary questions.

Moving Primary and Dependent Questions

Primary and Dependent Questions can be moved within or across sections with the following considerations:

If a primary question is moved, the dependent questions that are associated to the primary question are moved along with the primary question.

Note: The Move function does not enable you to make dependent questions to some other questions. If you need to create dependent questions, please use the Manage Dependencies function.

A question that is neither primary nor dependent can be moved within or across sections except that it cannot be defined as a dependent question using the Move function.

A dependent question can be moved only before or after other dependent questions under the same primary questions that share the same condition.

Scoring and Evaluation

The Questionnaire region in the Create Assessment: Header page has 2 buttons: Manage Scoring and Manage Evaluation Settings.

Click Manage Scoring in the Create Assessment: Header page. The Header: Select Scoring Settings <Assessment Number> page displays. See Overview of Assessments, page 4-1. You can enable weights (scoring with weightage calculations) and also display the scoring criteria to suppliers. The Scoring Teams region enables you to create one or more scoring teams specific to that assessment. The Enable Team Scoring check box is selected by default. Enter one or more scoring team names, instructions, and enter members for the scoring team in the same way you did when creating the collaboration team list. In the Section Assignments region, select Team Assignments from the dropdown to assign the team to the section. Select Enable Conditional Routing so that conditional routing is enabled ; otherwise the existing scoring abilities wherein every team gets to score together, are available anyway.

When you select Enable Conditional Routing, the following columns are added to the Scoring Teams region:

- Scoring Sequence: You can specify the sequence (1, 2, 3..) of the scoring team in this text box. If two or more teams are assigned the same sequence (for example, 3), then the teams will get to score the suppliers in parallel. The scoring sequence should be a contiguous sequence, without gaps. If the sequence has gaps, an error message is shown to the user. If a team is assigned for a section, then defining a scoring sequence is mandatory.

- Scoring End Date: You can enter the end date of the scoring for a given team. When this date is reached, the next scoring team is allowed to score. Note that different scoring end dates cannot be entered for teams with the same sequence number (for example, 3). A Scoring End Date is mandatory for the sections that have a team assigned to them. When a Scoring End Date for a team is the same as the system date, the next team gets the scoring team role. Users and Administrators can update the Scoring End Date before an assessment is published or even after the assessment is published. Users and Administrators can update the Scoring End Date to move it to an earlier date (provided the current Scoring End Date is not the same as the system date) or to move it to a later date. In these scenarios, the Scoring End Date for the other teams are also preponed or postponed by the same number of days accordingly.

- Forwarding Criterion (Score >=): Optionally, enter the score at (and beyond) which the scoring will be passed to the next team in sequence. If the score for a section is less than the score mentioned in this field, then the scoring process will be terminated, and the supplier is rejected. The rejection comments are displayed in the Apply Knockout Results page. If you do not enter a score here, it implies that there is no forwarding/rejecting condition, which in turn implies that irrespective of the score of that section, scoring is passed to the next team in sequence.

  Note: You may not shortlist a supplier based on the scores of an individual section, you can only reject a supplier based on the scores of an individual section.

Associating Questionnaire Lists to Supplier Profile Attributes

Supplier Profile attribute groups such as Business Classifications, Products and Services, Supplier Type, General Classifications, Country, Common, Address Purpose are used to extend the profile of the supplier in various areas. You can also add questionnaire lists to any supplier profile attribute group and attribute value, in order to associate the questionnaire list to the supplier profile attribute. For example, you could add a questionnaire list called Insurance Information to the attribute groups of General Classifications, and /or Common. Or you could associate a questionnaire list called Company Information to the attribute groups of Business Classifications or Supplier Type.

Using an appropriate supplier management responsibility, navigate to Administration > Profile Extension > Associations. If you click Associations, the first attribute group called Common is automatically highlighted, and you will see a tab called Questionnaire Lists on the Associations page. Click the Questionnaire Lists tab in the Associations page and then scroll down and click Add Questionnaire Lists. The available questionnaire lists are listed. Select one or more questionnaire lists that you wish to associate the attribute group with, and click Apply.

> **Note:** You cannot associate a questionnaire list that has a status Inactive to a supplier attribute group.

Similarly, you can navigate to other supplier attribute groups, and select an attribute group value (for example, Business Classification attribute group, with a value Small Business or Minority Owned). Click Apply to complete the association.

When the buyer sends a pre-qualification questionnaire to the supplier during registration, the questionnaire lists that are associated with the supplier's profile attribute groups and attribute values will be part of the questionnaire. For example, the buyer created an association with Business Classification (value is Small Business) and the questionnaire list called Company Information. If the new supplier to be registered has a Business Classification called Small Business, then the questionnaire list called Company Information will be sent to the supplier as part of the pre-qualification questionnaire.

Questionnaire Responses and Evaluation or Scoring

Using the Create Response page, suppliers can respond to the questionnaire. Suppliers need to respond to the primary questions first, and based on their response, the dependent questions are displayed. Dependent questions may be displayed one or more at a time, depending on the responses the supplier provides for the primary response.

Suppliers can also respond to the questionnaire by importing and uploading a spreadsheet that contains the responses. The columns that the suppliers need to enter as part of the spreadsheet response are:

- Serial Number
- Title

- Dependent Requirement
- Parent Requirement Number
- Operator
- Response for Parent Requirement
- Requirement Type
- Response Value

In the Create Response page, click Respond by Spreadsheet. The Respond by Spreadsheet displays, enabling suppliers to first download (export) a spreadsheet format. When suppliers enter the response details in the spreadsheet format, they can import and upload the completed spreadsheet into the system.

The Step 1: Export Spreadsheet region enables you, as a supplier, to select a format that you can use to download the spreadsheet. Select from XML Spreadsheet - Rich Style (.xml); XML Spreadsheet - Light-Weight Style (.xml); Tab-Delimited (.txt). You will need to save the spreadsheet format to your local drive. Enter the spreadsheet responses and save in your local drive. Then use Step 2: Import Spreadsheet to upload your spreadsheet with responses to the buyer system. Select a format : XML Spreadsheet (.xml) or Tab-Delimited (.txt). Then select your spreadsheet with responses to be uploaded, and click Import. You get a confirmation message that the spreadsheet is imported successfully. If there are errors during the import, they are displayed in the Import Errors Requirements region.

Based on the responses the supplier provides, the buyer can score or evaluate the responses in the following pages: Enter Scores page, Enter Evaluations page. If a dependent question was displayed to the supplier in the Create Response page, and the supplier entered a response, the dependent question will also be displayed in the Enter Scores page or Enter Evaluation page. If no dependent question was shown to the supplier, then no dependent questions are displayed in these pages.

Update Submitted Evaluations

Buyers can update previously submitted evaluations. A warning message is sent to evaluation team members who will attempt to update an evaluation for an RFI for which scoring has been locked.

Buyers can update an internal RFI till the RFI is closed. For other RFIs (that require suppliers to provide data) buyers can enter evaluations until the RFI is completed.

A warning message is shown to the user who attempts to update the evaluation for an RFI for which the scoring has been locked.

Online Discussions

You can send email notifications to various stakeholders using the Online Discussions option. In this way, the administrator can inform/ remind different team members about important milestones such as Lock Scoring date, date of completion of RFI / assessment, etc.

3

Supplier User Management

Managing Suppliers with Supplier User Management

Invite Supplier User

The Supplier User Administrator can invite a supplier user to register. The invited supplier user accesses the registration page using the URL included in the invitation notification. The registration page requires the supplier to enter the required information.

When the registration is submitted by the supplier user, the Supplier User Administrator receives a notification confirming the completed registration form. The Supplier User Administrator can either approve or reject the registration request. After approval, the supplier user can log in to Oracle iSupplier Portal to access the applications.

Register Supplier User

If the Supplier User Administrator already has all the required information, the supplier users can be registered directly. A notification is sent to the new supplier user along with the URL, login details, and URL that enables the supplier user to change the password. The supplier user is prompted to change the password at the first login attempt.

When the supplier user registration is approved, the supplier user can login to Oracle iSupplier Portal and access the applications.

Approve and Manage Supplier User Profile

The Approve and Manage Supplier User profile option enables Supplier User Administrators to search for supplier users that have statuses of invited, approved, or pending approval. They can also search based on the User name or first name or supplier name. They can either review the invited supplier users, and approve them, or simply manage the approved supplier user profiles.

Also, see Managing Supplier Brokers, page 3-3.

Review Warning Messages for New Registration Request or Request to Add or Update Profile

The following sections discuss the warning messages that the application displays for requests to add or update supplier profiles.

New Bank Account or Updates to Bank Account (Name and Account Number)

When a buyer or an external supplier adds a new bank account to a supplier profile or updates the existing bank account of a supplier profile, the application sends the Bank Account Change Notification. Notifications about new or updated bank accounts (such as changes to the account name or number) are sent only to users assigned the Supplier Banking Buyer Main Page (POS_SBD_BUYER_MAIN) function. If there are any concerns with the new or updated bank account, then users who receive the notification can reach out to the requester or the Supplier Management Administrator.

New Supplier Contact or Updates to Supplier Contact

When a buyer or an external supplier adds a new contact to a supplier profile or updates the existing contact of a supplier profile, the application sends the following notifications:

- Contact Add Notification
- Contact Update Notification

Notifications regarding the creation of new supplier contacts or updates to existing supplier contact information are sent only to users assigned the Supplier: Buyer View: Create & Update Contacts Page (POS_HT_SP_B_CONT_ADD) function. Users who receive the notification can verify the new or updated contact details in the Contact Directory.

Similar Taxpayer ID or Tax Registration Number

When a supplier management administrator receives a request for registration from a new supplier, the application displays a warning message about suppliers with similar taxpayer ID or tax registration number. Before approving the new registration, review and confirm whether the request details are correct for the supplier profile.

This warning message is displayed on the following New Supplier Request page. You can navigate to this page from:

- The New Supplier Requests page. Click Review for the applicable supplier request to navigate to the New Supplier Request page.

- The Prospective Supplier Registrations page. Click Review for the applicable supplier request to navigate to the New Supplier Request page.

Suspicious Email Domain in the Email Address

When a supplier management administrator receives a request for new registration, or a request to add or update profile from an external supplier, the application displays a warning message about suspicious email domain in the email address used for registration by the supplier.

This warning message is displayed on the following pages:

- New Supplier Request page for a new registration request. Before approving the new registration, review and confirm whether the request details are correct.

  You can navigate to this page from:

  - The New Supplier Requests page. Click Review for the applicable supplier request to navigate to the New Supplier Request page.
  - The Prospective Supplier Registrations page. Click Review for the applicable supplier request to navigate to the New Supplier Request page.

- Notification page for a new registration request. Before approving the registration request of the supplier, review the details of the contact by clicking the "View/Edit Registration Request" link.
- Supplier Profile Change Requests page. Click Update or Add to review the change request by the supplier.

Managing Supplier Brokers

See Managing Suppliers with Supplier User Management, page 3-1.

To facilitate easy operations, groups of suppliers typically deploy a shared services model for purchase orders and accounts receivables. Therefore, the next logical step is to ensure that a single supplier takes on the role of coordinating supplier activities. This role, where a single supplier manages multiple supplier activities, is the role of a Supplier Broker. In the following sections, you will learn how to manage and administer the Supplier Broker role in Oracle Supplier Lifecycle Management.

Buyer administrators can create supplier brokers, update contact details, associate suppliers with the supplier broker, or remove supplier associations with a broker. Supplier administrators can associate themselves to the supplier broker, or remove supplier associations with brokers.

When their details are registered in the system, supplier brokers can update their contact details or remove associations. Additionally, they can access supplier transactions such as purchase orders, agreements, work confirmations, shipping transactions, and so on.

To create, update and manage supplier brokers:

- Click **Manage Supplier Broker** and the **Supplier Broker** page appears. The page lists the current supplier brokers in the system. You can edit supplier broker information by clicking **Update** (pencil icon) in each row.

- When you click **Create**, the **Create Supplier Broker** page appears. Enter the contact information for the supplier broker in the first region.

  Then enter the user name for the supplier broker. The supplier broker will use this user name to log in to Oracle iSupplier Portal. Enable the iSupplier Portal Broker Access responsibility that needs to be assigned to supplier brokers so that they can manage multiple supplier activities.

- Finally, in the **Supplier Association** region, select the suppliers that you want to associate to this supplier broker. To select a supplier, click the **Add Another Row: Supplier Association**icon (icon with the green plus sign). Search for the supplier that you want to associate, and then add as many suppliers as required. Click **Apply** to save your changes, and return to the **Manage Supplier Broker** page. A message confirms that the supplier broker creation was successful.

- The **Update Supplier Broker** page enables you to edit supplier broker information.

- Remove supplier associations in this page using the **Delete** icon in the Supplier Association region for each supplier record. Click **Apply** to save your changes and return to the **Manage Supplier Broker** page.

Buyer administrators can inactivate a supplier broker or enter an end date, that will inactivate the supplier broker. Thus, the inactive supplier broker cannot access Oracle iSupplier Portal to perform any actions or tasks.

4

Assessments

Overview of Assessments

Assessments are documents that you (as a buyer or administrator) create in order to estimate or appraise supplier profiles or performance and overall relationship with the buying organization. Assessment documents gather information from suppliers and then proceed to evaluate or score or simply appraise and audit suppliers. Assessments have the following phases in their lifecycle: initiating assessments, evaluation, closing of assessments, scoring, score locking and completing assessments.

Using Oracle Supplier Lifecycle Management, you can create three types of assessments:

- Supplier Profile Audit: Administrators can gather and manage supplier compliance and profile information that is required on a periodic basis. This information becomes part of the supplier profile.

- Supplier Performance Evaluation: The buying organization requests those personnel who interact with suppliers to evaluate and score specific aspects of a supplier's overall performance. A consolidated performance evaluation is then created and used to assess the supplier's significance to the buying organization.

- Supplier Registration and Pre-Qualification: During the registration of a supplier, the buyers can also ensure that the supplier meets or qualifies with the requirements of the buying organization. This assessment enables buyers to ensure that the suppliers are evaluated and assessed at the time of registration.

User Procedures

Using an appropriate Supplier Management responsibility, navigate to Suppliers > Home > Quick Links (Manage Assessments) > Create Assessment.

Click **Create Assessment** and a popup displays, prompting you to select a template. Select an assessment template from the drop-down and click **Apply**.

The **Create Assessment: Header** page opens, and you can enter the assessment details in the following pages:

- **Header**: Enter questionnaires, collaboration teams, approvers here.
- **Controls**: Determine the controls for your assessment.
- **Suppliers**: Invite suppliers for this assessment. In the Suppliers tab, if there are multiple contacts, you can select the **Primary Contact** check box to identify a specific contact as the primary contact. If there is only one contact, then the application automatically identifies this contact as the primary.
- **Mapping**: Map evaluation assessment to the supplier. User defined attributes (UDA) enable buyers to manage additional supplier information. Typically, the administrator creates UDAs and associates them with supplier profiles. See Setting Up User Defined Attributes, *Oracle Supplier Management Implementation and Administration Guide* for more information.

  When you click the **Mapping** link, the Define Profile Mappings for Assessment page appears. Use this page to map the responses from an external supplier to a specific attribute on a supplier's profile for the assessment. If the administrator has added a questionnaire list to a supplier profile, then this questionnaire is also available for you to map.

For information about assessment components, see:

- Collaboration Team, page 2-20
- Questionnaire, page 2-22
- Controls, *Oracle Sourcing User's Guide*

Save your assessment as a draft (Save as Draft) and click **Review** and then Submit for Approval. When the approvers complete their approval of the assessment, click Publish in order to publish the assessment. An assessment must be published so that it can be visible to suppliers.

Approvals for Assessments

Use either Collaboration Teams or Approvals Management Engine (AME) to ensure the assessments are approved by multiple approvers in the organization.

Oracle Approvals Management Engine (AME) is used to manage and define approvals for SLM Assessments. The seeded Transaction Type called Assessment Approval is used to enable AME Approvals for Assessments. AME uses the Document Total or Item Category to set the approval hierarchy. Use the Administration tab > Update Assessment Style page to start using AME for assessment documents. For a specific negotiation style, navigate to the Approval Controls region, and select the AME Transaction Type value as Assessment Approval. This value is defaulted in the dropdown. If you would like to use the collaboration team approval list instead, leave the value in the drop-down blank. If you prefer AME to be used in the withdrawal of negotiations process, click the Allow Document Withdrawal check box. If you need withdrawal notifications to be sent to approvers, click the Send Withdrawal Notifications to all Approvers check box.

For more information on approvals using the Collaboration Teams, or AME Approvals, see: *Oracle Sourcing User's Guide.*

Related Topics

Recurring or Periodic Assessments, page 4-3

Recurring or Periodic Assessments

See Overview of Assessments, page 4-1.

As an administrator or buyer, you can specify that you want periodic or recurring assessments that will go out to supplier after a regular time interval. You can specify the time interval after which the assessment will be sent to suppliers. Or you can specify an event (Purchase Order Close, Agreement Approval, Invoice Approval, or Invoice Paid) after which the assessment will be sent to suppliers. The recurring assessment also enables you to specify various milestones to automate the creation of recurring assessments. When you enter the rules for creating such an assessment, the system automatically creates the periodic assessment and sends it to the suppliers when the milestones are reached. When you set up the Assessment Events and Milestones correctly, Assessments governed by the specific Recurring Assessment Rule are executed with minimal manual intervention.

This topic provides information about:

- Using the Manage Recurring Assessments page, page 4-3
- Creating a recurring assessment rule, page 4-4
- Scheduling the Manage Recurring Assessment request, page 4-6

Using the Manage Recurring Assessments Page

The Search region in the Manage Recurring Assessments page enables you to search for the assessment rule you created. Enter search criteria such as title, periodicity, assessment rule number, etc., and click **Go**. The assessment rules that match the search criteria are displayed in the search results region.

The search results region enables you to select one rule and either update it or put it on pause mode. If you select an assessment rule by clicking the radio button and then click the **Update** button, the **Update Recurring Assessment Rule** page opens, enabling you to update the rule information.

If you select an assessment rule by clicking the radio button and then click the **Pause** button, you get a warning message that this current assessment cannot be paused; only subsequent recurring assessments will be paused. You are prompted to click Yes or No to continue with the assessment pause or not. If you click Yes, the assessment is paused. To restart a paused assessment, click Restart Assessment in the Update Recurring Assessment Rule page.

The search results region shows you the assessment rule number, Title, Event (Time based or event based), Event (only applicable for event based assessment rules), Rule Status (Paused or Published), Next Assessment Status (N/A for paused assessments), Draft Assessments, Open Assessments, Completed Assessments (click on the number link to see the relevant assessments popup that shows you the number and title. Click an assessment number to open the assessment in the Create Assessments page). Please note that the assessment number is derived from the assessment rule number. For example, if the assessment rule number is 1212, the assessments created from this rule are numbered 1212.1, 1212.2 and 1212.3 and so on. The Created By and Creation Date columns show you the user who created the assessment rule and when the assessment iteration was created.

The Manage Draft Assessments page (Suppliers > Home > Quick Links (Manage Assessments) > View / Update Assessments shows you all the draft assessments, including recurring assessments. The Manage Draft Assessments page has a column called Periodic, which displays Yes for recurring assessments, and No for non-recurring assessments. You can update a draft recurring assessment the same way you would update a non-recurring assessment.

Creating a Recurring Assessment Rule

Using an appropriate Supplier Management responsibility, navigate to Suppliers > Home > Quick Links (Manage Assessments) > Create Recurring Assessment Rule. Specify a template (this is mandatory) from the popup and click Apply. The Create Recurring Assessment Rule page is a page that enables administrators and buyers to create the rules for a periodic or recurring assessment. When you create and publish the rules in the rule page, recurring assessments are automatically created by the system on a periodic or event-based basis, thereby eliminating a lot of your time and effort to create such assessments.

The Header region enables you to enter the header information for the rule page. Enter a title and description for the rule, as you would do for any draft assessment. Provide a brief description of the purpose of the creation of this assessment so that the assessment team has enough information before they review the assessment. The template (for example, audit or performance evaluation) and assessment type are defaulted, based on the template name you selected in the template popup window. Additionally, the buyer name and operating unit (this is updateable) are also defaulted for you.

Using the Assessment Events Region

The Assessment Events region enables you to specify if the assessment rule should be time-based or event-based.

- A time based assessment rule is based on the dates you specify, and the subsequent days/dates that the system calculates using the days/dates you have specified. Thus in a time based assessment rule, you first need to enter the Supplier List (this contains static and dynamic supplier lists) and Start Date.

- An event-based assessment rule sends recurring assessments when the selected event is triggered. For example, purchase order closure, agreement approval, when invoice approval is reached or invoice is paid. The system then automatically sends the assessment to the supplier. For example, by creating an invoice-based assessment rule, you can send a recurring assessment for all paid invoices for a particular supplier or supplier list that are greater than the threshold amount or the invoice amount. You can use this assessment internally to assess the payment terms of the supplier and other factors.

    - Select Purchase Order or Agreement from the **Event** field and then select a purchase order number or agreement number. The current status of that document (purchase order or agreement) is defaulted in the Status field. Select a Target Status from the drop-down list. For example, if the status of the purchase order is Incomplete, then select the Target Status as Finally Closed. When this purchase order status reaches Finally Closed, an assessment is sent to the suppliers.

    - Select Invoice in the **Event** field and then select a supplier or a supplier list. You cannot select both. The functional currency defaults from the operating unit. In the **Invoice Amount** field, specify the invoice amount threshold that will be considered to send the assessment to the supplier. You can specify a range for the threshold amount. Select Approved or Paid as the invoice status based on, which an assessment is initiated.

      Note that the first time when you create invoice events and run the Manage Recurring Assessment concurrent request, the request creates assessments for all the rules that meet the events' criteria. If assessments are sent once, then when subsequently the request is run, it considers only those rules, which match invoices that are created after the concurrent request is run the first time. This is to avoid sending assessments to the same supplier repeatedly.

For both time-based and invoice event-based assessment rule, specify a Start Date for assessment creation and enter the number in the Repeat Every field. For example, you may want to repeat the rule every 5 days or 4 weeks or 3 months. Also indicate the Repeat Until frequency - either a date or a number of occurrences (for example, repeat the rule every 5 days, repeat until 31-Dec-2017, or repeat 10 times).

Using the Assessment Milestones Region

Using the **Assessment Milestones** region, indicate the publish, close and complete milestones. Enable the system to calculate the publish, close and complete milestones by specifying the following:

- Number of days the assessment remains as a draft before it can be published.
- Number of days the assessment is open for suppliers to respond.
- Number of days the assessment is open for suppliers to respond. Number of days the assessment is open for evaluation and scoring teams to provide feedback.

Select the **Receive Notification when Draft Assessment** is created check box if you require a notification when the draft assessment is created.

Click **Save as Draft** if you need to save the assessment rule page. If you are done, click **Publish**. After the assessment rule is published, you return to the Suppliers > Home page. Click the **View / Update Recurring Assessment Rules** link to open the Manage Recurring Assessment Rules page.

Scheduling the Manage Recurring Assessment Request

You must schedule the Manage Recurring Assessment concurrent request to run at specific intervals. To run the request, use the Supplier Management responsibility and navigate to the Concurrent Requests subtab in the Administration tab. The concurrent request considers the recurring assessment rules set in the application and verifies whether rules' criteria meet before generating assessments. This concurrent request includes a single "Validate only" parameter, which is optional. To review your concurrent request, click the **View Requests** link to navigate to the **Requests** page. For your request ID, click the **Details** icon link and then **View Log** to review the details.

5

Managing Supplier Registration and Qualification

This chapter covers the following topics:

- Overview of Supplier Registration and Qualification Management
- Using Self-Service Supplier Registration
- Registering Suppliers
- Managing New Supplier Qualification
- Approving New Suppliers
- Registering Supplier Users
- Creating Suppliers
- On-Boarding Suppliers on Oracle Supplier Network

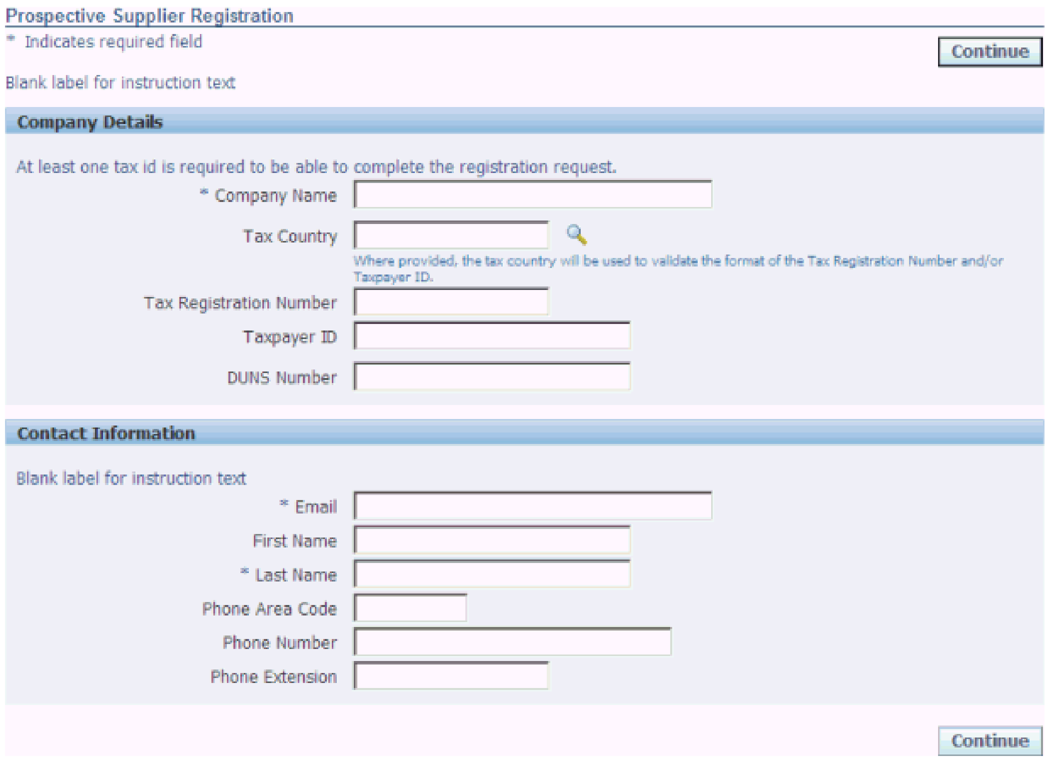
Overview of Supplier Registration and Qualification Management

Supplier Registration and Qualification Management are used to manage new trading partner relationships. With Oracle Supplier Lifecycle Management, new suppliers register with the buying organization to indicate their interest in establishing a business relationship. The buying organization accepts or rejects the new supplier registration based on supplier's qualifications and risk evaluation. During this process, suppliers are required to provide their details online and also answer any queries from the buying organization. Information gathered before evaluation is saved for later reference in the supplier's profile once the supplier is approved. Maintaining supply base in this manner significantly reduces the volume of forms and constant interaction between the two organizations.

Using Self-Service Supplier Registration

The Self-Service Supplier Registration feature allows buyer organizations to accept unsolicited supplier registration requests from their company's web page. The web page redirects suppliers to a registration page where they can register by providing their primary company details.

You must have a valid Supplier Lifecycle Management license for using Self-Service Supplier registration. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.



Multiple business groups within the buying organization can accept and process separate registration requests. Each business group must create a URL of their own and post it on the company's website. See Create Striped Registration Page Links in *Oracle Supplier Management Implementation and Administration Guide*.

During on-boarding configuration, administrators can determine if user accounts are created by default, using the Create User Account check box on the Supplier Onboarding Configuration page. This check box is available at the global and operating unit levels.

As an internal user, when you create the pending supplier request record, the Create User Account check box is now editable, even for the primary contact.

This check box is a defaulting control. The system accesses this value when the primary contact is being created, either by prospective supplier or internal user.

As primary contacts no longer need to have user accounts created, the system processes the primary contacts without needing to create the user account. While approving such a supplier, the application does not use the user-account creation process and does not send the notification with iSupplier credentials to the supplier.

> **Note:** You cannot delete the primary contact regardless of user account creation.

You can associate address to contacts while creating contacts using the Create button in the Contacts Directory section of the Prospective Supplier Registration: Additional Details page and or while updating contacts in the Update Contact page. All addresses that you define using the Create button in the Address Book section of the Prospective Supplier Registration: Additional Details page are available for linking with contacts.

The address-contact association can be done by the user only if the administrator has selected the Contact Address Association check box in the Supplier Onboarding Configuration page.

Click the Continue button to see a detailed registration form, which contains address book, contact directory, business classifications, products and services, custom attribute pages and attachments regions. If the user has been assigned the correct privileges and function security, the user will be able to view the UDA attributes on the page. If a supplier registers via a proxy user, the supplier has the same privileges as the proxy user. The supplier can fill in all these regions and submit it by clicking Register or Save for Later. Save for later action presents a URL to the supplier, which must be saved for accessing the request later.

After completing the registration, suppliers receive a confirmation that the request has been submitted for review. This creates a prospective supplier registration request in the buyer's system. Log in with Supplier Management User or Supplier Management Administrator responsibility and click on the Supplier Home menu. Click the Prospect Supplier Registration link in the To Do List region. This link is not available from Supplier Data Librarian and Supplier Data Librarian Super User responsibilities. A new supplier request is created with Status as 'Pending Approval'.

> **Note:** The supplier has the option of saving the registration form for registering at a later date by clicking Save For Later button. Save For Later action also creates a Prospective Supplier Registration request, in the same way as Register action does. But the status of the request is set to 'Draft'.
>
> If the request is in Draft status for very long, open the new supplier request and click Notify to remind the supplier of pending registration. You may wish to expedite the process and Register the supplier yourself without waiting for the supplier to register. To do so, open the request and click on Register yourself.

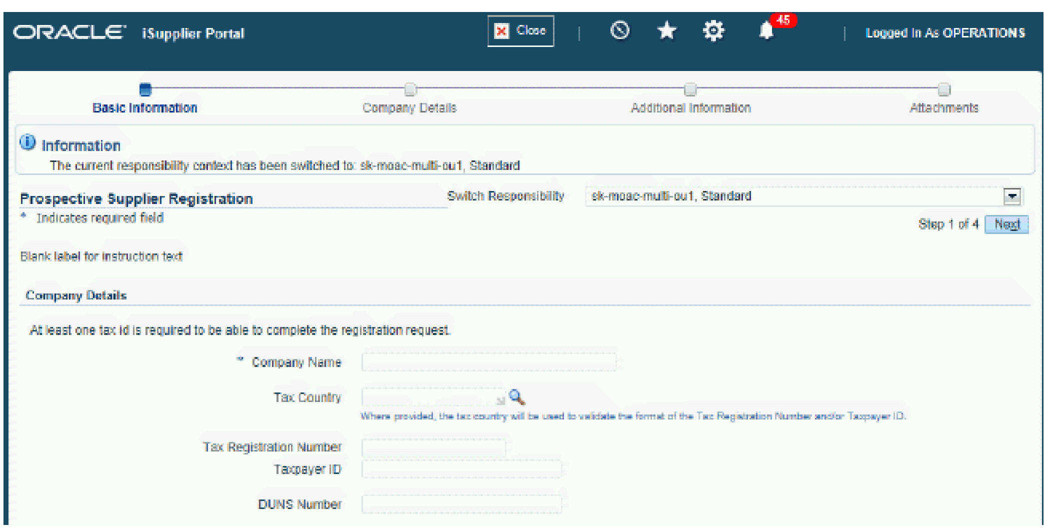
After you or the supplier click the Register button, you can review the supplier request. See Managing New Supplier Qualification for steps to review the request before approval.

Use streamlined Prospective Supplier Registration process

Oracle Supplier Lifecycle Management has guided navigation for the prospective supplier registration process. This helps to make it intuitive for users.

The progress indicators for the prospective supplier registration process are as follows:

- Basic Information
- Company Details
  - Address Book
  - Contact Directory
  - Business Classification
  - Products and Services
  - Banking Details
  - General and Industrial
- Additional Information (which encompasses all the user defined attributes)
- Pre-Qualification RFI
- Attachments



Prospective Supplier Registration Process navigation:

- Except for the Basic Information step, supplier administrators can enable or disable the other steps using the Supplier Onboarding Configuration page. Pre-Qualification RFI is displayed only if the RFI has been created. The system displays all user defined attribute (UDA) pages enabled in on-boarding configuration globally or for the specific operating unit under one node called the Attributes Page.

- Supplier administrators can set the value of the profile option POS: Supplier Registration UDA Page Display Layout to select the display option for UDAs under the indicator called Additional Information. They can select one of the following as the value of the profile option: Flow or Tabbed (default).

View Prospective Supplier Registration Status

Suppliers can view the status of their registration on the Registration Status page. This page displays summary information of the registration request and the historical activity on the request. Every status change on the supplier request is recorded here. When the buyer administrator enters a 'note to supplier', the note shows up in this page too.

If suppliers click the Save for Later button in the Prospective Supplier Registration page, the registration is saved to be used at a later point in time. A Registration Status link displays, which opens the Registration Status page.

If buyers send a notification to the suppliers as part of the prospective supplier registration process, the notification contains a link that opens the Registration Status page.

Based on the current status of the registration request, suppliers can perform the following actions:

Status	Action
Draft	Suppliers can update their information using the progress indicator based registration pages.
Pending Approval	No action required.
Approved	No action required.
Rejected	Suppliers can use the registration request with pre-filled information to enter applicable data.

Registering Suppliers

A buyer can register the supplier in the system. The system sends an invitation to the supplier to register. You must have a valid Supplier Lifecycle Management license for registering suppliers in this manner. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

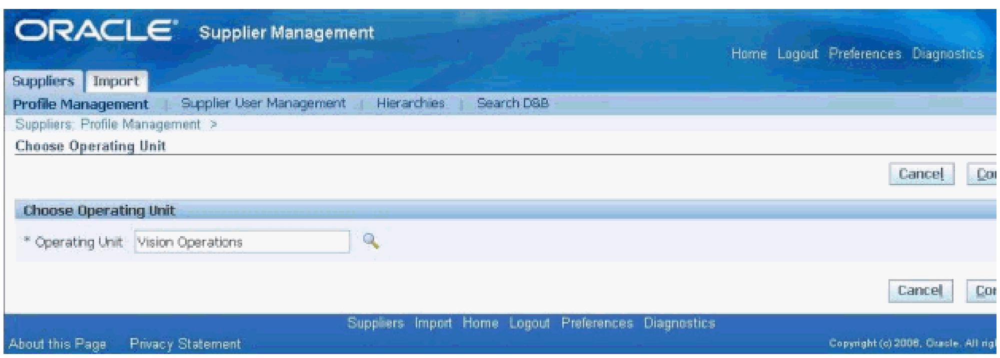
A buyer invitation is different from Self-Service Supplier Registration in that it is buyer initiated. A buyer may create a supplier invitation in one of the following ways:

- Supplier Management User sends registration invitation to supplier user.
- Sourcing Buyer sends registration invitation to supplier user.

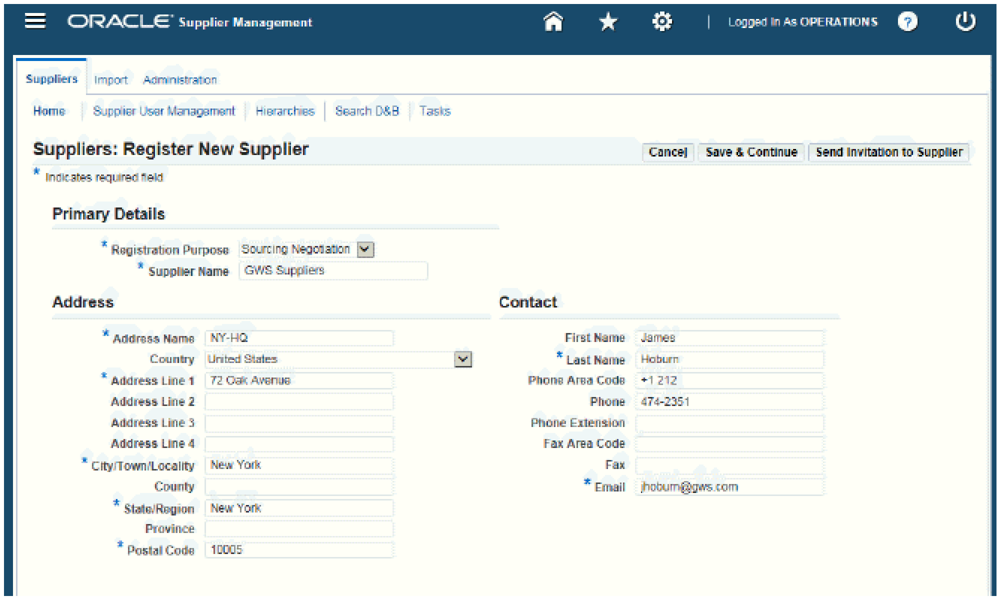
A Supplier Management user can create the supplier invitation. This creates a New Supplier Request, that requires approval by the Supplier Management Administrator before a new Supplier is created in the Supplier Master.

To invite new suppliers, use the Supplier Management User responsibility and Profile Management sub tab on the Suppliers tab and follow these steps:

1. Click Register New Supplier to open the Choose Operating Unit page.



2. Select the applicable operating unit for the prospective supplier and click Continue to open the Suppliers: Register New Supplier page.



3. Enter applicable information and click Register. The application sends a notification to the supplier with a URL that leads to the Registration form. The registration form contains Address Book, Contact Directory, Business Classifications, Products and Services, custom Attribute pages and Attachments regions. Supplier can enter information in all these regions and submit it by clicking Register.

   The **Registration Purpose** for a supplier could be any of the following values:

   - Sourcing Negotiation
   - Emergency Payee
   - Non-Catalog Request (from Oracle iProcurement)
   - Contractor Request (from Oracle iProcurement)
   - Spot Buy Request (from Oracle iProcurement)

   For more information on the preceding regions, see: *Oracle iSupplier Portal User Guide*. Additionally, for details on Address Purpose and Contact Purpose, please see: *Oracle iSupplier Portal User Guide*.

4. Log in with Supplier Management User or Supplier Management Administrator responsibility and click on the Supplier Home menu. Click the New Supplier Requests link in the To Do List region. This link is not available from Supplier Data Librarian and Supplier Data Librarian Super User responsibilities. A new supplier request is created with Status as 'Supplier to Provide Details'. At this point, wait for the supplier to enter information in the registration form and register.

Note: If the supplier does not respond for a long period, open the new supplier request from the New Supplier Requests link. Click on Notify to remind the supplier of pending registration. If you wish to expedite the process and Register the supplier even before the supplier responds, open the request and click on Register yourself.

5. When prospective suppliers create contacts as part of filling the prospective supplier registration form, they can associate contacts to addresses. Using the Create button in the Contacts Directory section of the Prospective Supplier Registration: Additional Details page and or while updating contacts in the Update Contact page, prospective suppliers can associate contacts to addresses. All addresses that they define using the Create button in the Address Book section of the Prospective Supplier Registration: Additional Details page are available for linking with contacts.

   Important: As a buyer, when you create or update a contact, you can select the contact purpose using the **Purpose** dropdown list in the Contact Purpose region. To enable you to select an appropriate purpose, your system administrator must create the value using the CONTACT_ROLE_TYPE lookup type. See Standard Profile, *Oracle Supplier Management Implementation and Administration Guide*.

6. During on-boarding configuration, administrators can determine if user accounts are created by default, using the Create User Account for this Contact check box on the Supplier Onboarding Configuration page. This check box is available at the global and operating unit levels.

   As an internal user, when you create the pending supplier request record, the Create User Account check box is now editable, even for the primary contact. This check box is a defaulting control. The system accesses this value when the primary contact is being created, either by prospective supplier or internal user.

   As primary contacts no longer need to have user accounts created, the system processes the primary contacts without needing to create the user account. While approving such a supplier, the application does not use the user-account creation process and does not send the notification with iSupplier credentials to the supplier.

   Note: You cannot delete the primary contact regardless of user account creation.

7. The Supplier to Provide Details action is available in the Actions dropdown in Supplier request review page. Note that during the registration process, there will not be any action such as Supplier to Provide Details. Instead, the action during the

registration process is Send Invitation to Supplier. After the registration is done, the buyer/approver will be able to use the Supplier to Provide Details action.

8. After you click Register New Supplier, the Suppliers: Register New Supplier page shows. This page three buttons - Cancel, Send Invitation to Supplier, and Save and Continue. The buttons are described as follows: **Save and Continue** saves the information and takes the requester to the next page which is the New Supplier Request page where the requestor can enter more information and use actions such as Register, Save, or Cancel, etc. Note that clicking this button will neither send any invitation to the supplier nor will it change the status of the request; the request remains with a status of Draft. **Send Invitation to Supplier** saves the information and sends an invitation notification to the supplier to register. This button also changes the status of the request to Supplier to Provide Details.

   Please note that for supplier on-boarding that is initiated by Spot Buy requesters, use the Create Supplier, Invite Supplier, Register New Supplier, and Cancel buttons to complete the on-boarding process.

9. Note that the UDA pages are separate for attributes to be entered by supplier and attributes to be entered by buyer only, on the request review page.

10. After you or the supplier clicks the Register button, you can review the supplier request. This review process is called Qualification Management. See Managing New Supplier Qualification, page 5-9.

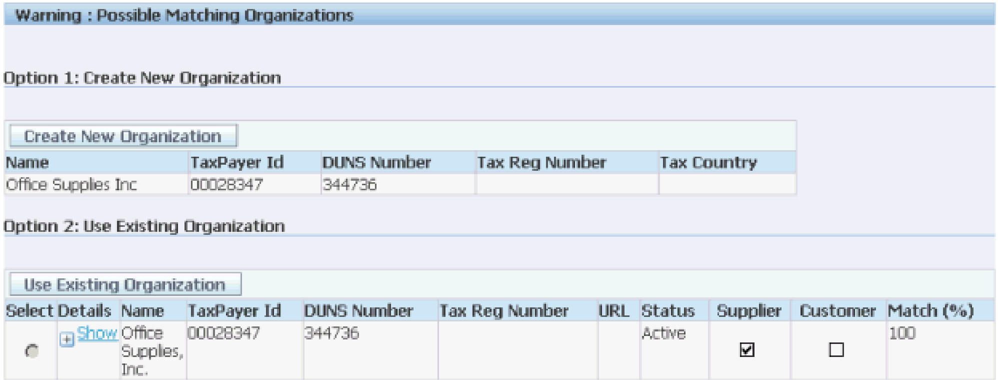
Managing New Supplier Qualification

Qualification Management is the process of assessing a new supplier's qualifications before approving their registration request. You must have a valid Oracle Supplier Lifecycle Management license for managing new supplier qualification. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

With Oracle Supplier Lifecycle Management you can gather any amount of information from prospective suppliers, before approving the registration request. This provides a powerful way to screen prospective suppliers at the beginning of the relationship, even before they are created in the system. This allows only qualified suppliers who meet corporate compliance and quality standards into the Supplier Master and eliminates any unqualified, fake, or unwarranted entries from being created.

Open the registration request from the Prospective Supplier Registrations link or the New Supplier Requests link from the Suppliers Home page. Note that the request status is Pending Approval at this stage. Follow these steps for reviewing suppliers:

1. If the supplier already exists in the Supplier Master or exists only as a Trading Community Architecture (TCA) party, then the system displays the supplier organization in the Possible Matching Organizations region.



If the matching organization is a supplier that already exists in the Supplier Master, reject the new supplier request. However, if the matching organization is a TCA party (and not a supplier), select the applicable TCA party and click Use Existing Organization.

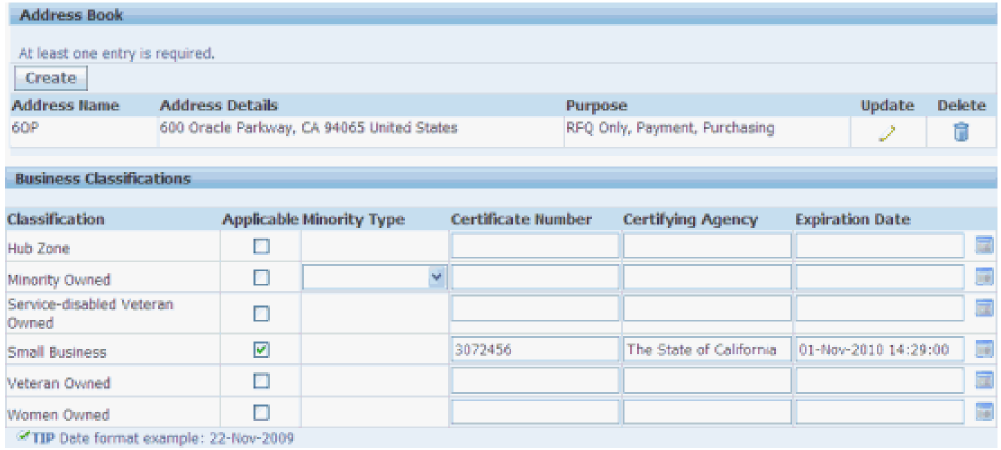
> **Note:** When you select Use Existing Organization action on an existing TCA party, then the application enables the TCA party as a supplier in the Supplier Master. All other information such as address and contacts provided by the supplier during registration is also saved to the supplier's profile.

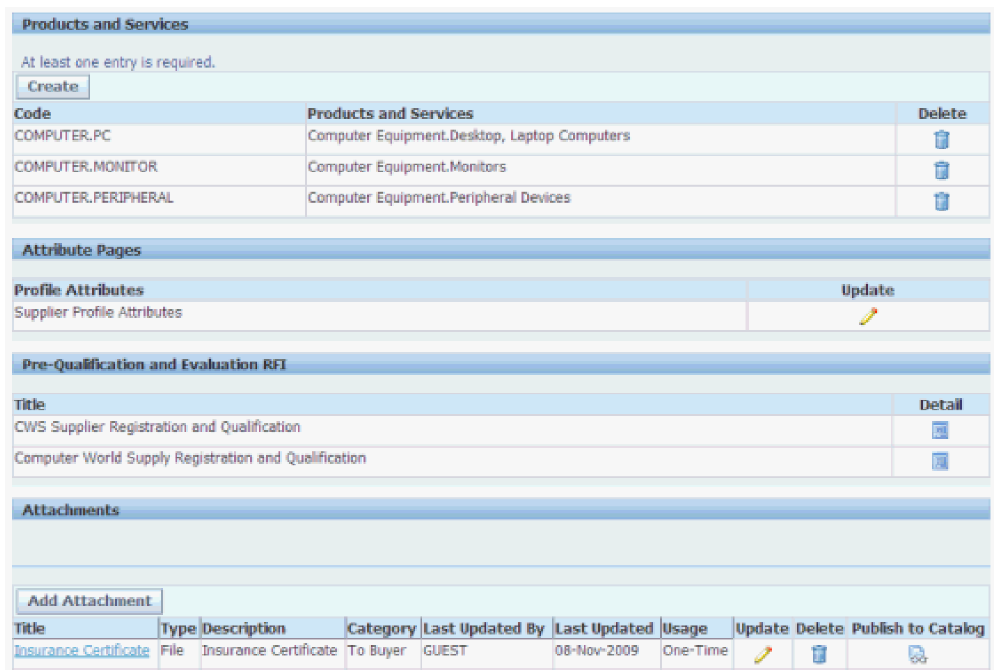
If no matching organizations exist, click Create New Organization to create a new organization for the supplier. This action does not approve the supplier but only tells the system that a new organization should be created for the supplier on approval.

Click Save. This commits the Use Existing Organization or Create New Organization action.

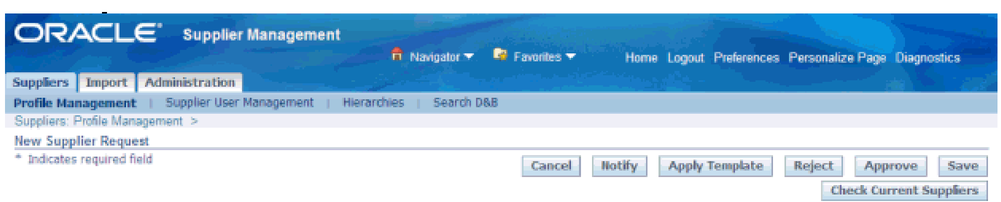
2. Review and update the Address Book, Contact Directory, Business Classifications, Products and Services, custom Attribute pages and Attachments region provided by the supplier.

   Prospective suppliers can associate address to contacts while creating contacts using the Create button in the Contacts Directory section of the Prospective Supplier Registration: Additional Details page and or while updating contacts in the Update Contact page. All addresses that they define using the Create button in the Address Book section of the Prospective Supplier Registration: Additional Details page are available for linking with contacts.





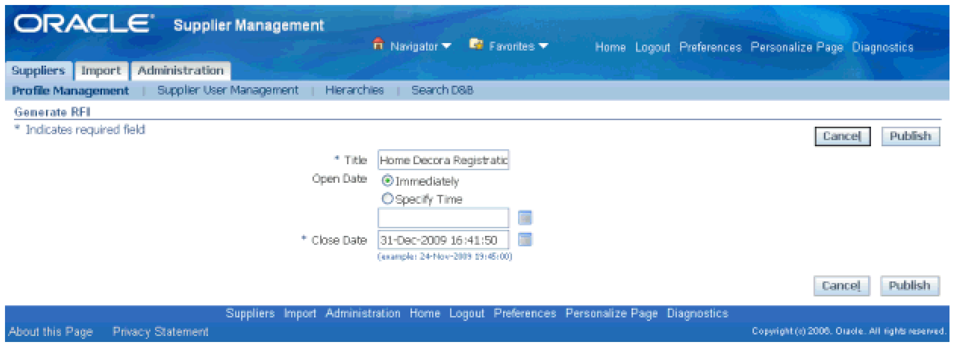
Some of the actions you can perform from the registration request page while reviewing are described below:



- Notify - Enter a message in the Note to Supplier field. Click on the Notify button to send the note to the prospective supplier's email address used for registration.

- Send Pre-Qualification Questionnaire - Send a pre-configured questionnaire to the supplier. The questionnaire is actually a request for information (RFI) document.

  Note that the best practice in this scenario is to first send an invitation to register to the supplier and then send the Action Required: Please fill out the Supplier pre - qualification questionnaire notification to the supplier.

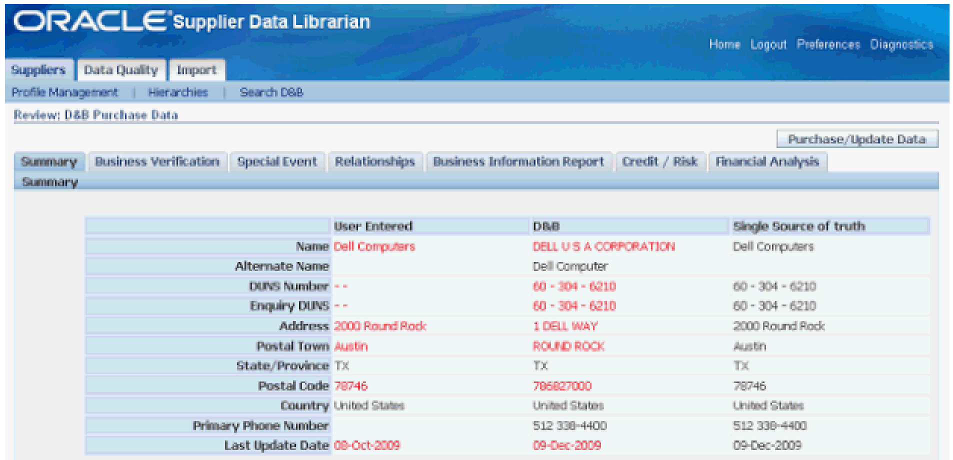
  

  You can add requirements to the RFI based on your business criteria for qualifying suppliers. While adding requirements, you can mark internal requirements as mandatory to ensure that internal scoring or evaluation teams enter scores / comments before submitting their response. Collaboration team members will have to provide a score or comment to one or more requirements, before submitting their response. You can also control the type of response the supplier provides. You may either pre-fill responses in each requirement or allow free text response, based on your preference. Using pre-filled (predefined) responses, you can attach an automatic score to each response. That way, when the supplier selects one of the predefined values, a score is automatically assigned to that response. Link the RFI template from the Registration Onboarding Configuration page and then publish it during the Supplier Registration process by clicking Send Pre-Qualification Questionnaire from the registration request page. This takes the user to the Publish RFI page.

  Publishing the RFI sends an email notification to the supplier with a link to the registration form. The RFI is shown on the registration form under Pre-Qualification and Evaluation RFI.

  See Setting up RFI Template for Qualification Management in *Oracle Supplier Management Implementation and Administration Guide*.

- Enrich -Purchase D&B reports on business verification, business information credit risk, and financial analysis of the supplier before approval. This mitigates the risk of approving suppliers going out of business, suppliers on any type of debarment list or involved in fraudulent, bribery, or money laundering activities.



- You must have a valid Supplier Hub license for using third party integration. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide* and Setting Up Third Party Data Integration in *Oracle Trading Community Architecture Administration Guide*.

3. Click Send Pre-Qualification Questionnaire to create a Request For Information. Provide the Close Date as future. Click Publish to publish the RFI. A notification with a link to the RFI is sent to prospective supplier to request to provide more detail. The prospective / new supplier request status is set to 'Supplier to Provide Details'. Supplier uses the link to create a response to the RFI.

Responding to an RFI

When the buyer publishes the RFI, Supplier Lifecycle Management sends a notification with a link to the RFI to the prospective supplier to provide more detail. The supplier uses the link to create a response to the RFI. See: Managing New Supplier Qualification, page 5-9

The purpose of an RFI is to gather information on goods and services a supplier company provides. RFIs may or may not be concerned with line price or costs. Buyers use responses to an RFI to qualify suppliers early in the procurement process.

To respond to an RFI:

1. Use the Sourcing Supplier responsibility and navigate to the Sourcing Home page.

2. Select the open invitation in the Your Company's Open Invitation area.

3. From the Actions field, select Create Response.

4. On the Create Response page, enter response values for the requirements and lines. Since the purpose of an RFI is to obtain product and service related information for

a negotiation line, most negotiation lines in an RFI have attributes defined. These line attributes identify the questions the buyer has about a particular line.

5. Click Continue.

6. From the Review and Submit page, click View Supplier Profile Attributes.

7. Return to the Review and Submit page and submit the response.

Evaluating Suppliers

When the RFI response is received, you need to open the RFI and review responses. The RFI may be set up with internal as well as external requirements. Internal requirements are created to involve internal users from various departments to review the supplier request. While adding requirements, you can specify internal requirements as mandatory to ensure that internal scoring or evaluation teams enter scores / comments before submitting their response. See Set up RFI Template for Qualification Management in *Oracle Supplier Management Implementation and Administration Guide*.

To evaluate and approve a supplier, follow these steps:

1. Since suppliers do not have user accounts yet, they can only respond by opening the RFI from the registration form URL from the Pre-Qualification and Evaluation RFI section. They must open the RFI and create a response. After receiving the supplier's response, open the RFI from the Pre-Qualification and Evaluation RFI section in the registration request.

2. If you have set up internal users, then notify all internal users. To notify RFI collaborators:

    1. Select Manage Collaboration team from the Action drop down and click Go.

    2. Select All or some collaborators and click Notify.

    3. Optionally, create a Task with Target Date for each evaluator and click Apply. The task shows up in the Incomplete Tasks region on the evaluator's Negotiations home page.

    Evaluators enter evaluations, by opening the RFI from Negotiations page and by selecting Enter Evaluations from the Actions dropdown.

3. Select Analyze by Response from the Action list and click Go to open the Analyze by Response page. Click on the supplier response number link to review supplier responses. If internal evaluators are involved, select all internal evaluator responses and click Compare Requirements to view a side-by-side display of all internal evaluator responses.

4. The Compare Requirements table in the Analyze by Response page shows the

supplier responses to both primary and dependent questions. Dependent questions are indicated with a blue icon. If a specific dependent question is not applicable for a supplier, "N/A" is indicated in the relevant row/column. The corresponding score is blank for a not applicable dependent question.

5. Close the RFI. Select Close RFI from the Action drop down on the RFI details page and click Go. Select a close date and click Apply. The application displays the RFI Details page.

6. Select Analyze by Response from the Actions dropdown and click Go to open the Analyze by Response page. The score you see is applied based on automatic scoring and weights set up for requirements. See Oracle Supplier Management Implementation and Administration Guide for setting up RFI for registration. Optionally, provide score for any requirements setup with manual scoring.

7. Select Manage Scoring Teams in the Action dropdown. Click Lock Scoring to close further analysis and evaluation. The application brings you back to the RFI page.

   Note: The lock scoring action calculates the overall score for supplier(s) in the RFI. This includes automatic scores based on supplier's responses, evaluation responses and any manual scoring of the supplier or evaluator responses. The lock scoring action shortlists suppliers in the RFI. All suppliers who participated in your negotiation are initially included in the shortlist. You must remove the supplier from the list by changing its status.

8. If any requirements were created with knockout scores, select Apply Knockout Results from the Action list to apply knockout scores assigned during evaluation. Once you apply the knockout values, the response is removed from the shortlist. To view the short-listed suppliers based on evaluation scores, select Analyze by Response from the action dropdown.

9. Select Complete as the Action in order to complete the qualification process, and click Submit. The Complete action is significant in the qualification management process if the RFI requirements have been mapped to the supplier profile attributes. You create mappings to save supplier and internal user responses in the supplier's profile. See 'Mapping RFI Requirements and Category Line Attributes' with Supplier Profile and 'Mapping RFI Item Lines with Item Supplier Profile attributes' in *Oracle Supplier Management Implementation and Administration Guide*.

   Completing the RFI triggers the synchronization of RFI responses with the supplier profile for all types of RFI documents, except registration and pre-qualification RFIs. In case of a registration and pre-qualification RFI, the Complete action of the RFI is not enough to trigger synchronization. The supplier must first be approved along with completing the RFIs, in any order, to trigger the synchronization process.

Approving New Suppliers

After evaluating the supplier, the next step is to approve or reject the supplier. By default all Supplier Management users in the buying organization have the authority to approve or reject suppliers. You need to set up a set of approvers to approve or reject suppliers. To set up an approval hierarchy, see Setting up Supplier Approval in *Oracle Supplier Management Implementation and Administration Guide*.

You must have a valid Supplier Lifecycle Management license for approving supplier users. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

Navigate to new supplier registration request, and approve or reject the prospective supplier registration. Before approving the new supplier request, review and confirm whether the request details are correct. For a request for new registration, the application displays a warning message about suspicious email domain in the email address of the supplier. For information about reviewing the warning messages, see Review Warning Messages for New Registration Request or Request to Add or Update Profile, page 3-3.

On approval, the application sends an invitation to Oracle Supplier Network to the supplier. See On-Boarding Suppliers on Oracle Supplier Network, page 5-23.

The Approval History link in the Supplier Profile page (Quick Update page), displays the supplier registration approval history. If there is no approval history for the supplier ,an appropriate message displays to tell the user that no approval history has been found for the supplier.

Reinstate a Rejected Supplier Request

The buyer administrator can either re-submit a rejected registration request or ask the supplier to provide the latest information and re-submit the request. The buyer administrator can edit the previously submitted request to the supplier and resubmit the request. The system sends the Request Reopened Notification Message (supplier's view) to the supplier's primary contact to inform them about the decision of buying organization to reconsider their registration request and to send the URL of the Registration request status page. The supplier administrator can edit the request that was submitted earlier by entering the latest information and resubmit the request. Additionally, the buyer administrator can update the information pertaining to the primary contact in case the primary contact has changed. The reopened request follows the same approval process as a new request does.

When a rejected supplier's request is reopened, the buyer administrator cannot reject it again. However, an approver can reject this request again. If a rejected supplier is reconsidered, the system assigns the Draft status if:

- The buyer administrator has decided to reconsider the request and clicked the Reopen button on the rejected supplier's registration request.

- On clicking the Save button, the status remains as Draft.

If the request is reopened, administrators can perform the following actions to move the request forward:

- Return to Supplier - Notify the supplier contact to edit the previously submitted request and resubmit the request with the latest information. This can be done if the information provided by the supplier needs to be updated.
- Submit - Edit the current request and submit it for approval without asking the supplier for any details.
- Send Pre-Qualification questionnaire - Attach RFI.
- Send Status Link - Send the registration request's status link to the supplier.
- Save - Save the registration request to work on it later.

Reviewing RFI Synchronization with Supplier Profile

When the buying organization approves the supplier, the supplier information is created in the Supplier Master. Open the supplier profile from the main Supplier page. The profile captures all the data gathered during registration process. If you used a Registration and Pre-Qualification RFI template during registration, then notice how RFI responses from suppliers and internal users have been recorded in the custom attribute pages according to the mappings set up in the RFI template. This profile is now available to you, as well as to the supplier for self-service profile maintenance. If you wish to register more supplier users, see Registering Supplier Users, page 5-17. You can create more custom attribute pages and gather additional information from suppliers by conducting a Supplier Profile Audit. See the Managing Supplier Profiles chapter for profile maintenance features of Oracle Supplier Lifecycle Management.

Registering Supplier Users

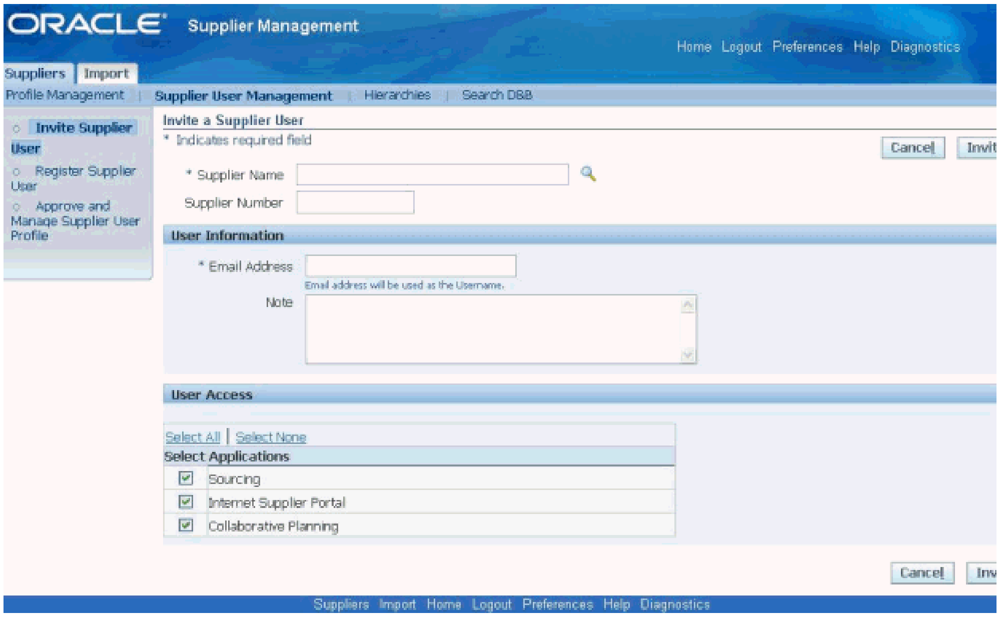
When the supplier is registered, you may wish to invite more supplier users to register or if you have the required user information, register them yourself. You must have a valid Supplier Lifecycle Management license for registering supplier users. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

To manage supplier users, use the Supplier Management User or Supplier Management Administrator responsibility and the Supplier User Management sub tab on the Supplier tab. This feature is not available to Supplier Data Librarian and Supplier Data Librarian Super User responsibility users.

Inviting Supplier Users

You can invite a supplier user to register as a point of contact for a supplier. Complete the following steps:

1. Click Invite Supplier User link to open the Invite a Supplier User page.



2. Use this page to select the user's supplier company, enter the supplier user contact details, and specify the user access to applicable Oracle applications.

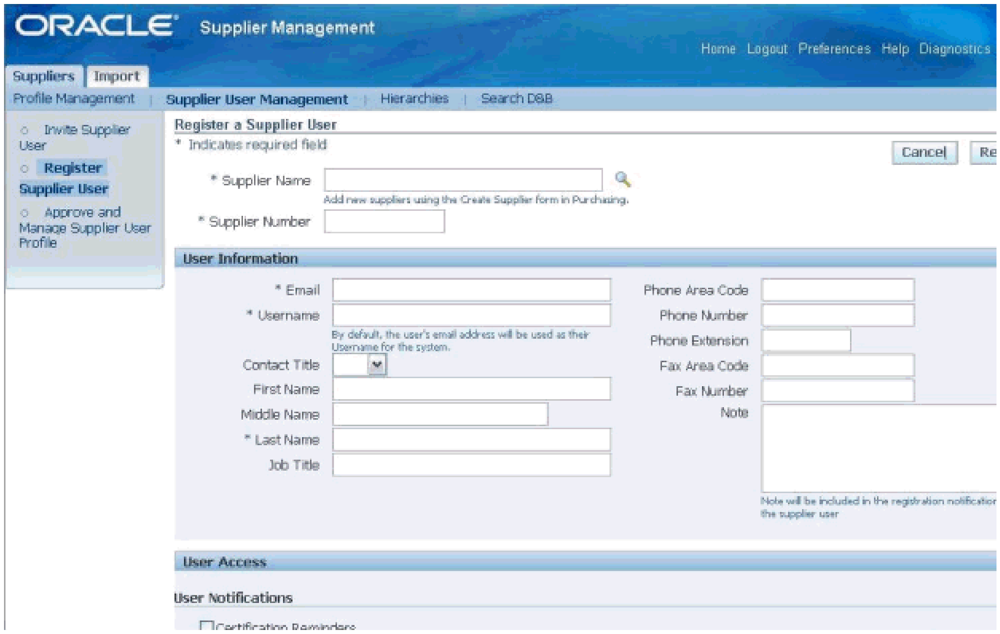
3. Click Invite to send the user an email invitation to register. After the supplier user responds to your invitation to register, the application sends the user a notification containing system access information.

A supplier user who receives the invitation to access Oracle Supplier Management can register by providing name, job title, contact details etc. or forward the invitation to another user in the supplier company. For example, you may send an invitation to the Vice President of Sales within the supplier organization; the vice president can forward it to the appropriate person in the company. The user who responds can change any of the details except the name of the supplier company for whom they are registering. If you have multiple site definitions for the supplier company, or if the supplier company has multiple subsidiaries, you can give the supplier user access to view information for multiple site definitions.

Registering Supplier Users

You can directly register a supplier user if you have enough information about the user. In this case, the user receives an email notification with the URL, username, and URL for changing the password.. Complete the following steps:

1. Click Register Supplier User link to open the Register a Supplier User page.



2. Enter the applicable information and click Register. The user receives an email notification with the URL, user name, and URL to use in order to change the password.

3. If you have multiple site definitions for your company, or if the supplier has multiple subsidiaries, then you can give the supplier user access to view the multiple site definitions.

4. Select Certification Reminders check box in the User Notification region to designate the user to receive business classification reminder notifications.

Approving and Managing Supplier User Profile

Use the Approve and Manage Supplier User Profile link to approve prospective supplier users. After approving the users, you can manage the user profile. Complete the following steps:

1. Search for the user using the Supplier User Profile Management page.

2. Select the View icon for the applicable supplier user in the search results region to open the Manage User Profile page.

3. Update the user account as required and click Apply.

Adding Adhoc Approvers

As a buyer, you can add a new approver or an FYI approver during the supplier registration approval process using the Manage Approvals action.

As a current approver, you can also add a new approver or an FYI approver during the supplier registration approval process using the Manage Approvals action.

Both buyer and current approver need to note that they can only add a new approver or an FYI approver only after current approver group(s), and not before or between current approver group(s).

Prospective Supplier Registration Approval Workflow

Oracle Supplier Lifecycle Management uses Oracle Approvals Management for supplier approval. Supplier registration goes through multiple levels of approval and approvers can approve or reject a request.

Using the prospective supplier registration approval workflow, the To-Do Approval Notifications feature provides action-required notifications for approval, which ensures that all related workflow features are enabled. The approval workflow enables administrators to track their pending tasks better and supports key workflow features like vacation rules, forwarding, and requesting additional information. Additionally, the approval workflow enables administrators to set vacation rules and forward the approvals.

The approvals mechanism is similar to that found in Oracle iProcurement. Approvals happen from the new Prospective Supplier Registration Approval Notification page and the Supplier Request page. The system uses AME parallel approval for prospective supplier registration. If AME is enabled, the application displays the AME approval flow graphically. If AME is not enabled, all users who have subscribed to the supplier registration notification receive the approval notification.

The prospective supplier registration approval notification page displays status history and notification history. When the buyer approves or rejects a prospective supplier, the system notifies the supplier. If rejected, the system informs the supplier the reason for rejection, which is captured in Note to Supplier. In this scenario, rejection is permanent and cannot be revoked. If the administrator does not want to reject and would like to send it back to the supplier to update their request / enter additional information, administrators can use the return to supplier after entering a note to the supplier.

If you have navigated to the Supplier Request page from the notification, the system takes you back to the notification when you click Save or Cancel. This page displays AME approval flow graphically.

The buyer administrator's task flow for approvals is as follows:

- The administrator receive an action-required notification when assigned the task of processing this request.
- The administrator opens the notification and clicks View / Edit Registration request. Administrators can update the registration request.

- After making the required changes, the administrator clicks Save. The administrator then returns to the notification from where the registration request was opened.
- The administrator can approve / reject / re-assign the notification.

Supplier Registered Supplier Users

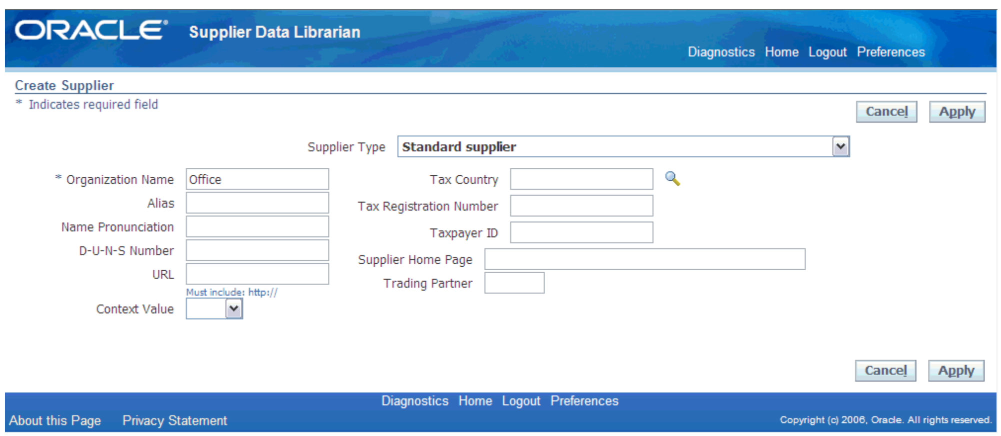
A supplier user with Supplier Profile and User Administrator responsibility can register more supplier users. This administrator can create new user accounts. When the account is created, the user receives a notification containing system access information.

Creating Suppliers

You can create a supplier without going through the process of registration and approval, if your business requirements need you to create a supplier quickly. The application adds the supplier to the Trading Community Architecture (TCA) registry directly and you can initiate business with the supplier immediately.

To create a supplier, go to the Suppliers Home page and follow these steps:

1. Click Create Suppliers on the Suppliers page to open the Create Suppliers page.



2. Select the type of supplier.
3. Optionally enter Alias, Name Pronunciation, and D-U-N-S number.
4. Optionally, specify the country of origin for tax purposes.
5. Optionally enter the supplier's tax identification number in the Taxpayer ID field; for example, an individual's social security number, or a corporation or partnership's federal identification number/federal tax ID.
6. Optionally enter the value-added tax (VAT) registration number in the Tax.

7. Registration Number field if you are entering a VAT supplier.

8. Click Apply.

   The application checks for duplicate records to prevent duplicate supplier creation in the system. The administrator must set up duplicate identification before matching organizations are found during supplier creation. See Setting up Duplicate Prevention in *Oracle Supplier Management Implementation and Administration Guide*.

   After verifying that the new supplier does not exist in the system, the application creates the supplier record, assigns a supplier number, a registry ID number, and opens the Suppliers: Quick Update page.

Tracking New Supplier Requests

Track new supplier requests from the Suppliers: Home page, by clicking the New Supplier Requests link. The search page for New Supplier Requests appears. Enter search criteria such as Supplier Name, Tax Registration Number, Status, or Registration Purpose. Select any of the following values from the Registration Purpose dropdown:

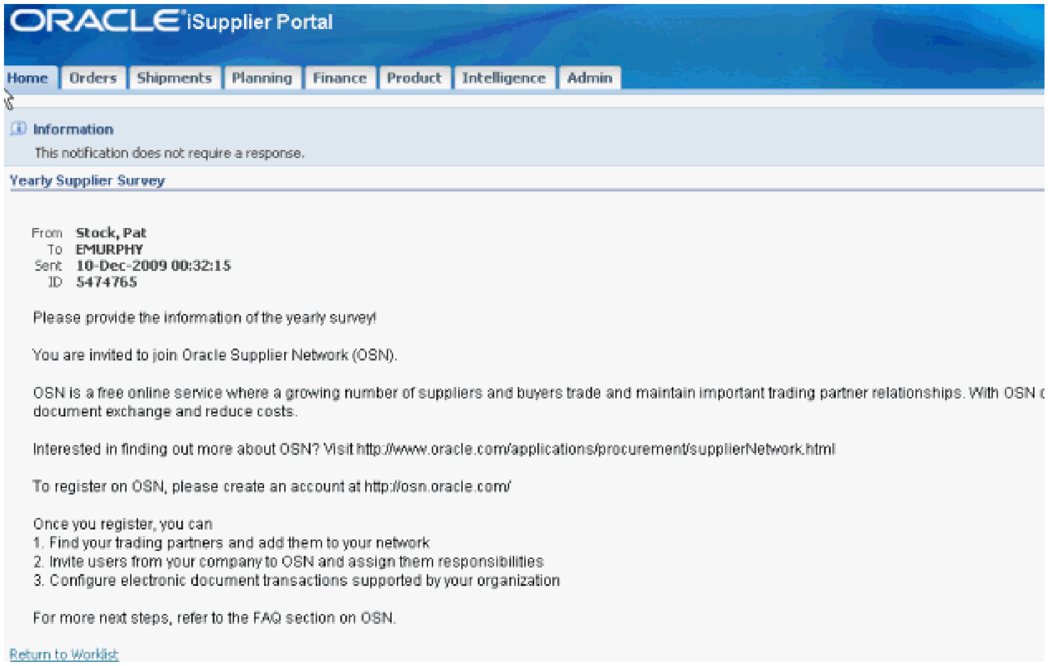
- Contractor Request (from Oracle iProcurement)
- Emergency Payee
- Non-Catalog Request (from Oracle iProcurement)
- Sourcing Negotiation
- Spot Buy Request (from Oracle iProcurement)

In the search results table, you can:

- Review the new supplier request. Click Review to navigate to the New Supplier Request page of the supplier where you can enter more information and use actions such as Register, Save, or Cancel.
- Send Status Link: Send the registration request's status link to the supplier.
- Delete: You can delete the registration request that you had initiated and is in the Draft status. When a draft registration exists, administrators cannot create another supplier with the same name. If you decide not to proceed with a registration request that is in the Draft status, then click the Delete icon to remove the registration request from the New Supplier Requests page.

On-Boarding Suppliers on Oracle Supplier Network

Oracle Supplier Network (OSN) enables electronic document transformation and routing between companies through a single connection point that Oracle hosts and manages. OSN also enables buying organizations to allow direct connectivity to their Oracle iSupplier Portal sites for supplier users to access. Oracle Outsourcing hosts OSN to provide a high availability connection for trading partner collaboration, which greatly simplifies the process of creating and managing a complex multi-point integration. When a new supplier registration is approved in Oracle Supplier Lifecycle Management, an automated invitation to OSN is sent to the supplier.



On accepting the buyer's invitation, a supplier automatically becomes a trading partner of the buyer. The two trading partners can now begin exchanging electronic documents. See *Oracle Supplier Network User Guide*.

6

Managing Supplier Profiles

This chapter covers the following topics:

- Maintaining Supplier Profile (Supplier Self-Service)
- Periodic Supplier Profile Audit
- Enriching Supplier Profile
- Managing Deliverables
- Managing Supplier Material Qualification
- Managing Supplier Tasks and Notes

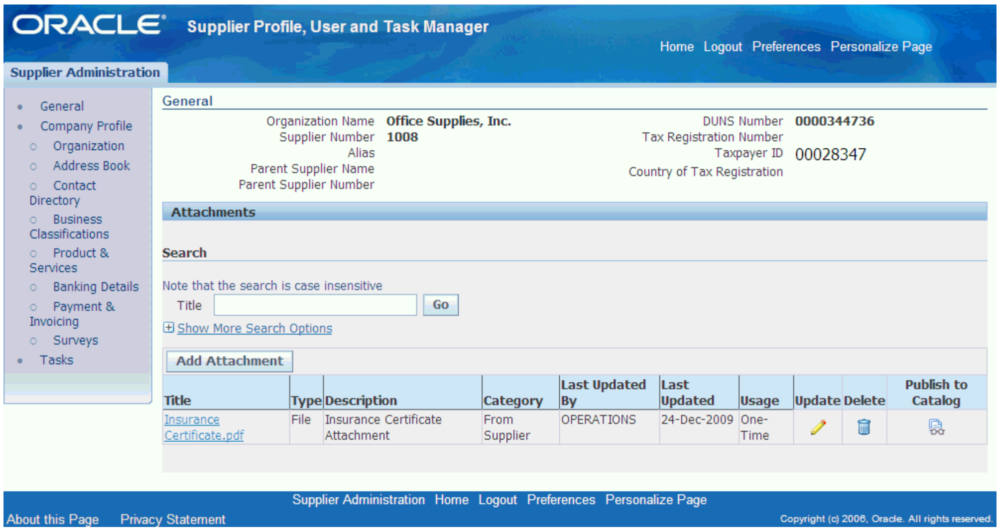
Maintaining Supplier Profile (Supplier Self-Service)

When supplier user accounts are created, supplier users have access to their profile online. Supplier users are responsible for adding new information and ensuring that existing information is up to date. Using Supplier Profile, suppliers can provide the buying organization with key details about the company, such as location and contact information, major business classifications, banking details, and category information. Additionally, supplier users can update tasks using the Supplier Profile, User and Task Manager responsibility. Enabling suppliers to enter and update this information makes it easier for both suppliers and buyers to perform their administrative tasks.

Supplier can view the following pages of the profile:

- Organization
- Tax Details
- Address Book
- Contact Directory
- Business Classification

- Product and Services Category
- Banking Detail
- Tasks
- Any custom attribute pages that the buyer wishes to display to the supplier.

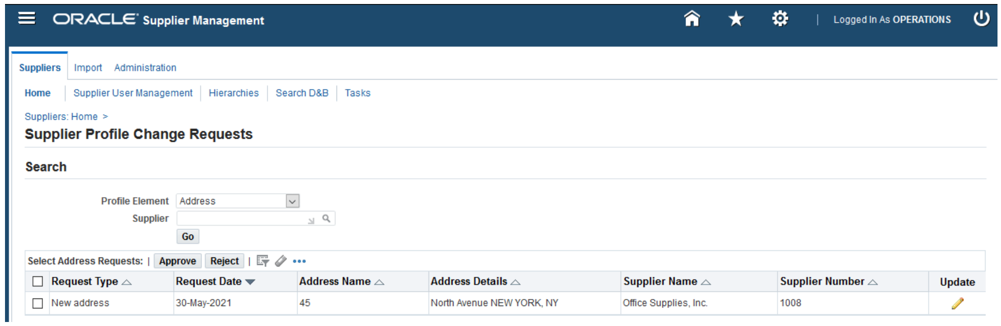


Suppliers can enter new information or change existing information using the Supplier Profile Manager responsibility. Changes to Addresses, Contacts, Business Classifications, Products and Services and Bank Accounts go through an approval mechanism. Any new or updated entries are logged in the buyer system as change requests. A buyer administrator must approve these change requests before the change is displayed on the profile.

To approve or reject a change request:

1. Navigate to the Supplier Home page. Click any one of the change requests.

   The Supplier Profile Change Requests page appears.



If it is a change request for address details, then you can update the change request, if required. You can modify the changes made by the supplier before approving them.

2. Select the appropriate change request and click Approve or Reject. The Supplier Profile Change Request page appears.

3. Enter a justification for approval or rejection.

   Note: You must provide a justification if you reject the change request. This information tells the supplier the reasons for rejection.

4. Submit the request.

After you approve the changes, the supplier profile displays these changes.

Suppliers receive notifications when you approve or reject change requests for the following information:

- Address Book
- Contact Directory
- Business Classification
- Product and Services Category

Approval notifications to suppliers are for information purposes only. Rejection notifications include a link to the details so that the supplier can make appropriate changes based on the buyer's feedback.

Periodic Supplier Profile Audit

With Supplier Lifecycle Management, a buying organization can perform compliance and profile audits to gather additional information from suppliers on a periodic basis. They gather information on certifications, quality controls, cost effectiveness measures, customer support services or any other data relevant to their business processes.

When suppliers provide the requested information, the buying organization set up an internal evaluation team to verify that the certifications are valid, and in compliance with their corporate compliance policy. The evaluation team may include members from various departments such as operations, finance, legal etc. Evaluation team members may be requested to answer questions such as:

- "Please comment on the supplier's response"
- "Have you verified that the supplier is ISO 9001 certified?"

Or they may be asked to evaluate the supplier's responses by scoring each response.

Follow these steps to complete the supplier compliance and profile audit:

1. Create a Request for Information (RFI) document either by using the RFI template or Reusable Requirements list set up by the administrator. See: Implementing Supplier Compliance and Profile Audit in *Oracle Supplier Management Implementation and Administration Guide*. Creating the RFI is similar to creating a RFI template. See Setting up RFI Template for Qualification Management in the *Oracle Supplier Management Implementation and Administration Guide*.

2. Set the RFI Open and Close Dates. Once you have created the RFI, click on Review, and then Publish the RFI.

3. You can specify internal requirements as mandatory and ensure that the internal teams provide the response to these requirements. Collaboration team members will have to provide a score or comment to one or more requirements, before submitting their response. In the Add Requirement page, select the Internal Required value in the Type field to make a requirement mandatory, so that internal users will respond.

   - If you have specified an internal requirement as Internal Required, then the system ensures the following: In the Enter Scores page, the internal team member has to enter a value in either the Score or Internal Note fields for requirements that are marked mandatory. If the internal user attempts to submit scores without entering responses for a mandatory requirement, an error message is displayed.

   - In the Enter Evaluations page, the internal team member has to enter a value in the Response Value field for mandatory requirements. The system displays an error message if the internal user tries to submit scores without entering responses for any mandatory requirement.

4. Suppliers access the RFI and respond to the audit questionnaire. Await the supplier responses to your audit questionnaire.

5. Review supplier response and score. See Evaluating Supplier in Managing New

Supplier Qualification, page 5-9.

6. Review RFI synchronization with supplier profile.

Example - Supplier Compliance and Profile Audit

An organization wishes to verify suppliers' corporate compliance on an ongoing basis. The organization creates the following single-row user defined attribute in the Supplier Profile:

Attribute Group	Attributes (Data Type)	Data Level	Association Level
Quality Policy	• Quality Policy and Compliance (Char) • Periodic Quality Process Auditing (Char) • 4M Management (Char)	Supplier Party	Common

Notice that this user defined attribute is defined at the Supplier Party data level, which means that it applies to the Supplier's organization as a whole, instead of Party Sites or Supplier Sites. Additionally, this user-defined attribute has a Common association level, which means it applies to all Suppliers in the Supplier Master and not to any particular classification of suppliers.

During Supplier Profile Compliance and Profile Audit, the buyer creates a RFI. The RFI contains the following requirements for the supplier:

Requirement Section	Requirement Type	Requirements (Response Type)
Quality Policy and Systems	Required	• Does your organization have well defined Quality Policy that is followed through quality procedures as per standards? • Is there a Quality process audit system in place such as internal and external audits etc. on periodic basis? • Is there a 4M (Man, Method, Machine, and Material) management system well in place that informs customers about any 4M changes along with proper inspection?

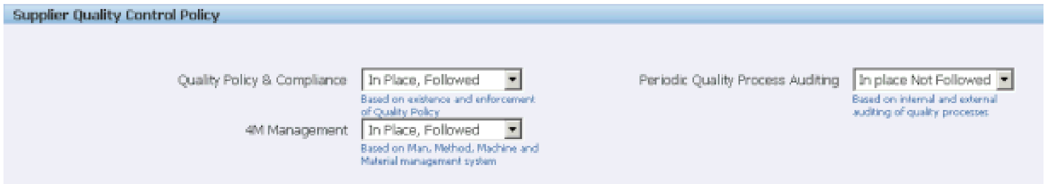
The requirements are mapped to user-defined attributes in the RFI. Note that mapping can be created from RFI Template or Reusable Requirements List as well.

RFx Section	RFx Requirement	RFx Response	Supplier Profile Data Level	Supplier Profile Association level	Supplier Profile Attribute Group	Supplier Profile Attribute
Quality Policy and Systems	Does your organization have well defined Quality Policy that is followed through quality procedures as per standards?	Value	Supplier Party	Common	Quality Policy	Quality Policy and Compliance

RFx Section	RFx Requirement	RFx Response	Supplier Profile Data Level	Supplier Profile Association level	Supplier Profile Attribute Group	Supplier Profile Attribute
Quality Policy and systems	Is there a Quality process audit system in place such as internal and external audits etc. on periodic basis?	Value	Supplier Party	Common	Quality Policy	Periodic Quality Process Auditing
Quality Policy and systems	Is there a 4M (Man, Method, Machine, and Material) management system well in place that informs customers about any 4M changes along with proper inspection?	Value	Supplier Party	Common	Quality Policy	4M Management

When the supplier responds to the RFI is completed, the supplier's response is synchronized with Quality Policy user defined attribute.

Supplier Profile showing Quality Policy user defined attribute



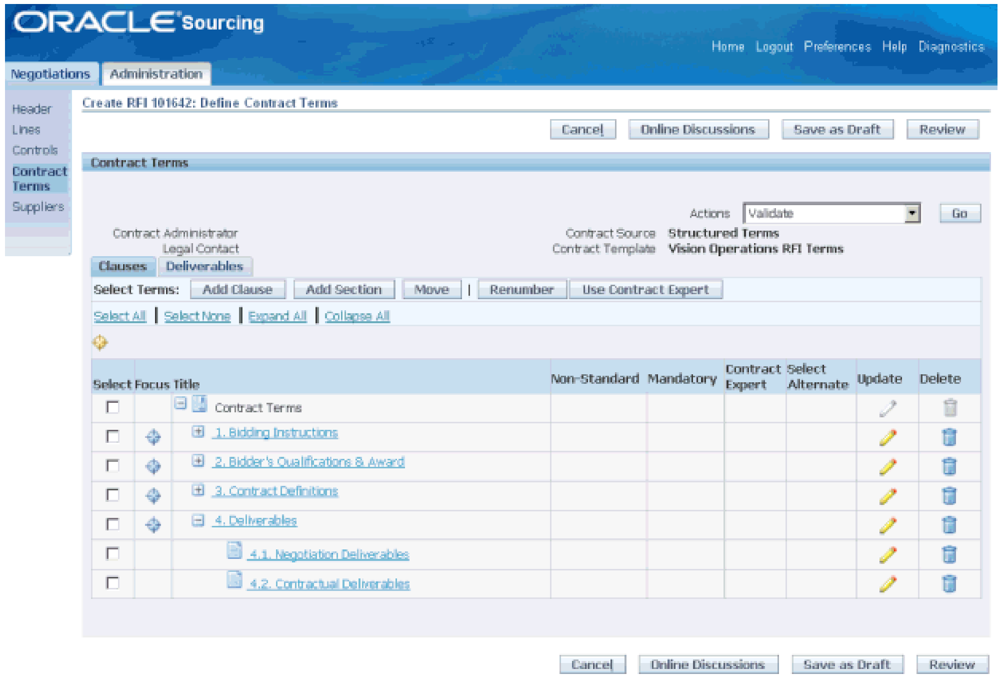
This example presents a simple case in which you gather quality policy and control information from a supplier. You can customize the RFI in any manner to align compliance and profile audit with your business requirements. For example, you may opt to do one of the following:

- **Create collaboration team and internal requirements**: Create a collaboration team to involve internal users from different departments in your organization. Add requirements that are 'Internal' in the compliance and profile audit RFI. Internal requirements are only visible to internal users who are part of the collaboration team.

- **Save responses from internal team**: Responses from internal users can also be mapped to supplier profile user defined attributes. For example, the RFI may contain an internal requirement such as: Have you verified that the supplier follows quality controls? Response by the internal user may be mapped to user-defined attributes that may be created by buyers. When the RFI is completed, the internal user's response will be saved to the user-defined attribute and displayed in the Supplier's profile.

  See Example - Mapping a Multi-row user defined attribute with RFI Requirements in *Oracle Supplier Management Implementation and Administration Guide*.

- **Add contracts and deliverables**: The Contract Terms Library is the central library of pre-approved clauses and contract templates that can be used to create contracts across the organization. You can create templates that include both clauses and deliverables.



You can create templates from Contracts Terms Library Administrator responsibility to create contract terms template. See: Enabling Oracle Procurement Contract Deliverables in *Oracle Supplier Management Implementation and Administration Guide*.

- **Create item line requirements**: Just as you would add requirements to RFI, you can add item lines to the RFI. Item lines are requirements with respect to a product or services category or an item. Suppliers respond to these item line requirements in the same way as they would respond to other requirements. Supplier responses can be mapped to product category or item attributes in Oracle Product Information Management (PIM) product if you have PIM installed in the same instance as Supplier Lifecycle Management. See: Managing Supplier Material Qualification, page 6-12.

Enriching Supplier Profile

You can buy D&B information for approved suppliers either from the Search D&B page or directly from the Supplier's profile details page. From the supplier's profile page, click Enrich to open the Review: D&B Purchase Data page. This page shows a side-by-side view of user-entered, D&B and Single Source of Truth data. See: Single Source of Truth Overview in *Oracle Trading Community Architecture User Guide*.

You must have a valid Supplier Hub license for using third party integration. See: Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide* and Setting Up Third Party Data Integration in *Oracle Trading Community Architecture Administration Guide*.

Managing Deliverables

If you have Oracle Supplier Lifecycle Management, the only business document types with deliverables management information are RFIs. With Oracle Contracts you can manage deliverables of all other business documents. See: Enabling Oracle Procurement Contract Deliverables in *Oracle Supplier Management Implementation and Administration Guide*.

Set up deliverables on supplier approval for validity tracking:

For approved suppliers, you can use deliverables to track validity of various documents and profile attributes. See: Add contracts and deliverables in Periodic Supplier Profile Audit, page 6-3.

You can search for deliverables that exist in many business documents, using various search parameters. Access the Manage Deliverables page that enables you to view or update deliverables across business documents, using one of the following methods:

- Click the Deliverables link in the Negotiations Home Page.
- Open a supplier's profile and click on Deliverables in the left pane.

The search results show summary information for each retrieved deliverable, such as the status, responsible party, contact, and the due date. In addition, an alert marker indicates if the deliverable is overdue, or if the responsible party failed to perform the deliverable.

> **Note:** The term 'overdue' applies to deliverables where the due date has passed, and the deliverable status is either Open or Rejected. For an internal user who logs on, the only deliverables that are visible and manageable are those where the user is either the Internal Contact or the Requestor. For an External User logging on, the only deliverables that are visible and manageable are those where the user is the External Contact.

After viewing the results, you can perform one or more of the following, for each deliverable:

- View details of the deliverable.
- Update the status of the deliverable.
- Add attachments to the deliverable.

You can also delete attachments to deliverables in a business document.

> **Note:** This does not delete attachments to deliverables as defined in the

business document, and visible in the Deliverables tab of the Contract Terms page.

Steps:

1. In the Manage Deliverables page, you can search for deliverables using a combination of all or part of the following search parameters (the parameters marked * are not available for deliverables managed through Oracle iSupplier Portal):
   - Deliverable Name
   - Status
   - Due Date From
   - Due Date To
   - Responsible Party*
   - Deliverable Type*
   - Document Type
   - Document Number

2. Click Go to perform the search. The results show the following for each deliverable:
   - Deliverable Name
   - Deliverable Type
   - Document Type
   - Document Number
   - Responsible Party
   - Contact
   - Due Date
   - Status

   If the deliverable is overdue, or if the responsible party failed to perform the deliverable, an icon appears in the Alert column of the results. Each row also has an Update icon, to allow you to update the deliverable.

3. You may perform any of the following operations:

   - Click the links on Deliverable Name or Document Number to see further details of the deliverable or document. When you choose to view deliverable details, you will be able to switch to update mode, in order to update the status of the deliverable.

   - Click the Update icon to update the status of the deliverable.

Managing Supplier Material Qualification

Supplier Material Qualification is the process of gathering products and services category and item related information from Suppliers using a Request For Information (RFI). Buyers generally use this process before a sourcing award event to shortlist qualified suppliers.

With Oracle Supplier Lifecycle Management, it is possible to carry out a request for information with the following additional features:

- Relate category level requirements with user defined attributes in the Supplier Profile.

- Approve Category Lines from RFI to automatically create them in Approved Suppliers List.

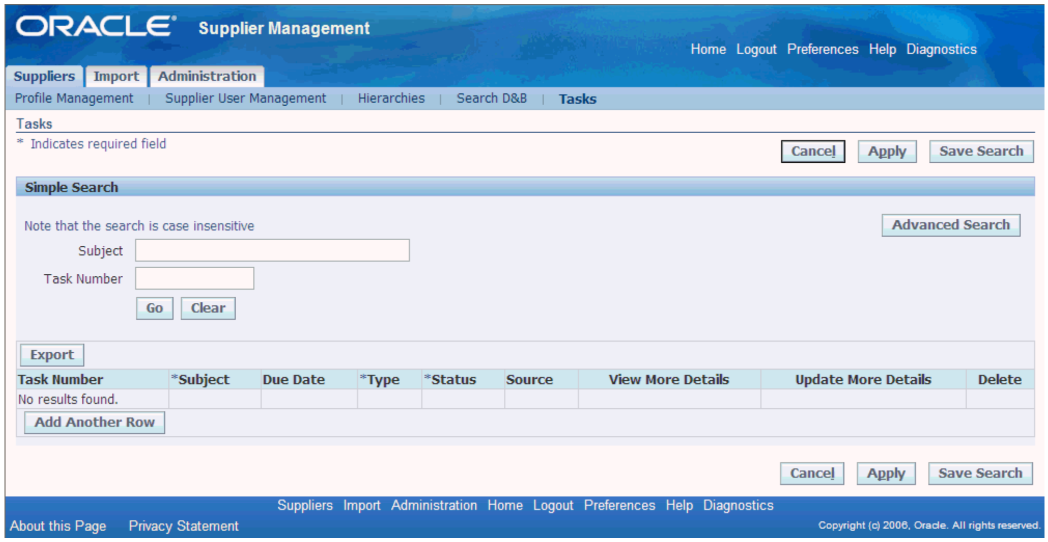
- Relate item level requirements with Oracle Product Information Management Item attributes, that are also user defined.

See: Mapping RFI requirements and Category Line Attributes with Supplier Profile and Mapping RFI Item Lines with Item Supplier Profile Attributes in *Oracle Supplier Management Implementation and Administration Guide*.

Managing Supplier Tasks and Notes

Manage tasks, defined as the lowest units of work, that are related to the organization or person, using the Oracle Applications Framework tasks features from Oracle Common Application Calendar. Supplier Management enables you to view, create, update, and delete tasks from the supplier details page. Additionally, Supplier Management enables you to manage notes. See: Supplier Profile, page 2-3.

Use the Supplier Management Administrator or Supplier Management User responsibilities and the Tasks subtab on the Supplier tab to search for tasks. Export the task information using the Export button on the Tasks page.


ORACLE Supplier Management
Home Logout Preferences Help Diagnostics
Suppliers Import Administration
Profile Management | Supplier User Management | Hierarchies | Search D&B | Tasks
Tasks
* Indicates required field
Cancel Apply Save Search
Simple Search
Note that the search is case insensitive
Advanced Search
Subject
Task Number
Go Clear
Export
Task Number *Subject Due Date *Type *Status Source View More Details Update More Details Delete
No results found.
Add Another Row
Cancel Apply Save Search
Suppliers Import Administration Home Logout Preferences Help Diagnostics
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7

Managing Supplier Performance

This chapter covers the following topics:

- Overview of Supplier Performance Management
- Evaluating Supplier Performance

Overview of Supplier Performance Management

Organizations are constantly seeking high performance from their suppliers, so they can source a bigger portion of their requirements from cost- effective, and responsive suppliers. At the same time, they reduce business with under-performers or retire them completely. Supplier Lifecycle Management provides a mechanism to evaluate supplier performance and gather key performance metrics such as supplier responsiveness, technical performance, quality control performance, and cost performance.

Supplier performance evaluation is an internal process, where experts within various departments are invited to provide evaluation of suppliers that they deal with. With Supplier Lifecycle Management, you can ask a team of internal evaluators to submit supplier performance metrics that your organization uses to track supplier performance . You have the flexibility of customizing requirements from internal evaluators. In some cases these metrics may be subjective, while in other cases, the metrics may be absolute values. For example, you may ask internal evaluators to key in the on-time delivery supplier information or ask them about the overall performance of the supplier.

All information gathered from internal evaluators is saved and can be made readily available in the supplier's profile. You can also hide supplier performance evaluations from suppliers and internal users by using the relevant profile option settings. . When you set up a template with evaluation metrics, you can use the same template on a periodic basis to evaluate other suppliers.

Evaluating Supplier Performance

The process of evaluating a supplier's performance is as follows:

1. Create an RFI using the Performance Evaluation RFI Template or Reusable requirements set up by the Supplier Management Administrator. See Implementing Supplier Performance Evaluation in *Oracle Supplier Management Implementation and Administration Guide*

   The RFI created for supplier performance evaluation should be created with the predefined negotiation style called Supplier Performance Evaluation. Only internal requirements should be added to gather supplier performance evaluations from internal users. Optionally, you can associate scores with internal requirement responses.

   While adding requirements, you can specify internal requirements as mandatory to ensure that internal scoring or evaluation teams enter scores / comments before submitting their response. Collaboration team members will have to provide a score or comment to one or more requirements, before submitting their response.

   In the Add Requirement page, select the Internal Required value in the Type field to make a requirement mandatory, so that internal users will respond.

   If you have specified an internal requirement as Internal Required, then the system ensures the following:

   - In the Enter Scores page, the internal team member has to enter a value in either the Score or Internal Note fields for requirements that are marked mandatory. If the internal user attempts to submit scores without entering responses for a mandatory requirement, an error message is displayed.

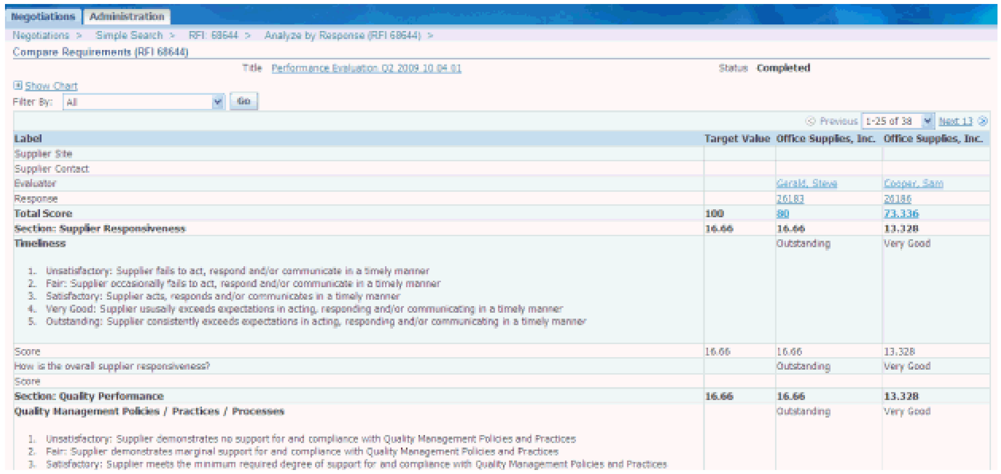
   - In the Enter Evaluations page, the internal team member has to enter a value in the Response Value field for mandatory requirements. The system displays an error message if the internal user tries to submit scores without entering responses for any mandatory requirement.

   If you wish to save the resulting metrics in the supplier's profile, then you must set up relations between RFI responses and supplier profile user defined attributes. To map the exact evaluator responses, associate the response value. If you have defined automatic scores for responses or if the RFI owner assigns scores to evaluations, you can map individual requirement scores, section scores as well as the total score to user defined attributes in the supplier's profile.

   See Example- Mapping multi-row user defined attributes with RFI Requirements section values and total score in *Oracle Supplier Management Implementation and Administration Guide*.

2. Add existing suppliers to RFI. This does not notify the supplier as in case of a profile audit RFI, but creates an evaluation for each included supplier. Create an evaluation team with members from various departments to assign the task of evaluation. Publish the RFI. Select Open Date and Close Date

3. Evaluators receive a notification about the RFI. See Evaluating Suppliers in Managing New Supplier Qualification, page 5-9.



The difference between registration flow and performance evaluation flow is that suppliers do not respond to the RFI, therefore only internal evaluators can create responses to the RFI. On completing the RFI, the application synchronizes all RFI responses with the supplier profile on the basis of the mappings. The approval step is not required for synchronization.

4. Classify suppliers based on performance evaluation score. See Assigning Classifications, page 9-2.

8

Notifications

This chapter covers the following topics:

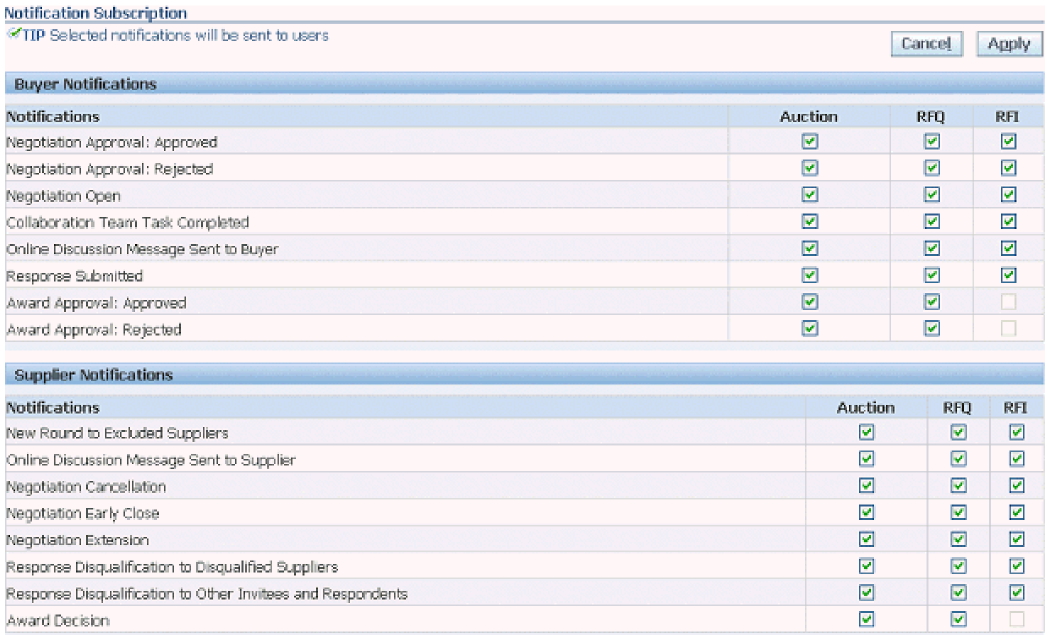
- Overview of Notifications
- Subscribing to Notifications
- Notifying Suppliers
- Notifying Internal Users
- System Notifications

Overview of Notifications

One of the key elements of Oracle Supplier Management is enhanced communication between suppliers and buyers. Oracle Supplier Management generates a large number of notifications that appear throughout the supplier lifecycle. However, many of these notifications vary in relevance depending on the business process followed by the buying organization. Oracle Supplier Management has a notification framework that allows administrators to easily enable or disable notifications system-wide.

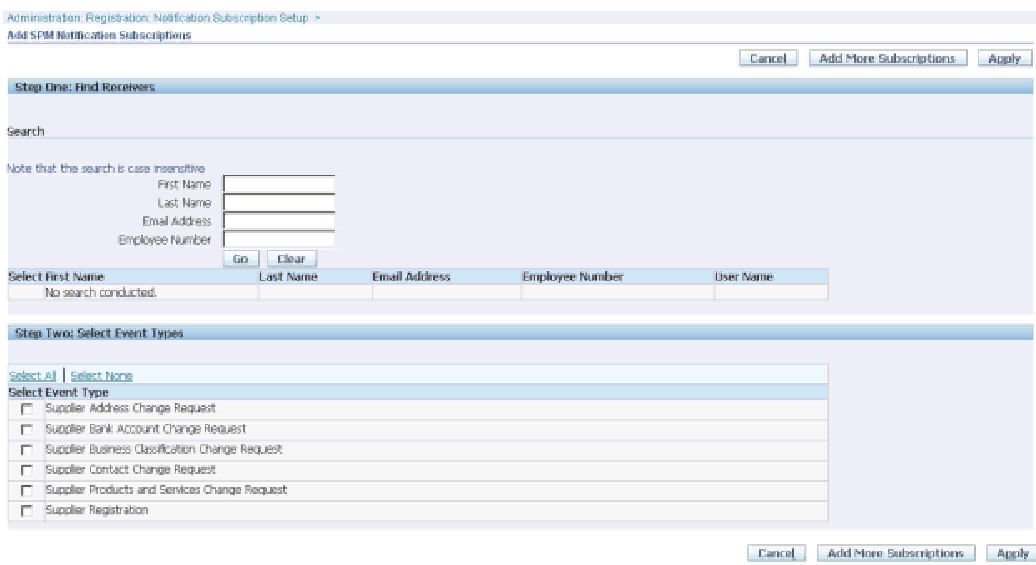
Subscribing to Notifications

The Supplier Management administrator can set up notification subscriptions. The first set of notifications is related to request for information (RFI) documents that are used often in Supplier Lifecycle Management during supplier registration, or supplier compliance and profile audit, or during supplier performance evaluation.



For descriptions of these notifications and the detailed messages, please see Appendix C in *Oracle Sourcing Implementation and Administration Guide*. The administrative task of setting up these notifications is covered in Setting up Notification Subscriptions chapter in *Oracle Supplier Management Implementation and Administration Guide*.

The other set of notifications are specific to supplier profile and registration. Supplier Management Administrator can subscribe users to any notifications from this page.



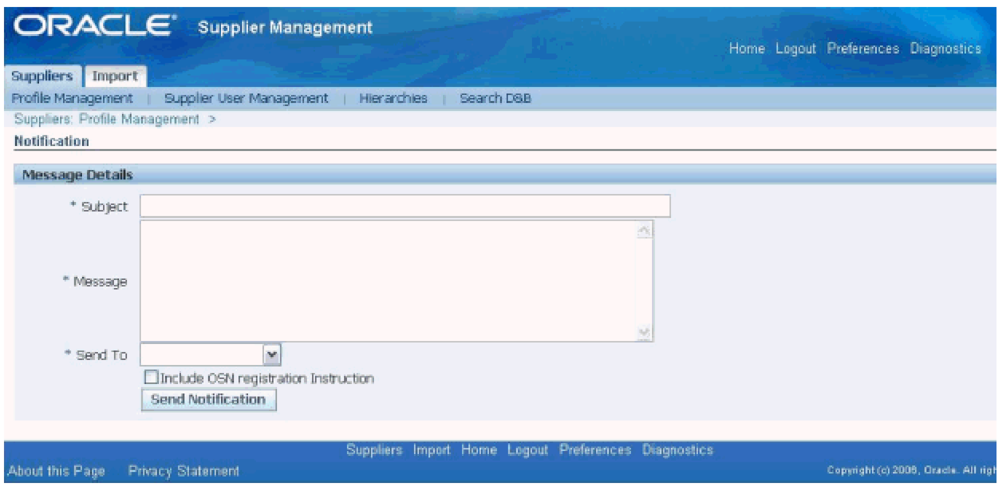
The administrative task of setting up these notifications for various users is covered in Setting up Notification Subscriptions in *Oracle Supplier Management Implementation and Administration Guide*.

Another set of notification subscriptions is event-based notifications. See Setting up Business Events in *Oracle Supplier Management Implementation and Administration Guide* for business events supported by Supplier Management. Subscribe to any of these business events for notifications. For more information on creating notifications, see the *Oracle Workflow User's Guide*.

Notifying Suppliers

You can notify all or a subset of your registered suppliers using Oracle Supplier Management. Navigate to the Supplier Home page. To notify suppliers:

1. Click on Notify All Suppliers button on top to notify all suppliers. To notify a subset of suppliers, search for suppliers using the Search region of the Suppliers page. Select the suppliers you wish to notify and click Notify button above the search results table to open the Notifications page. Or open a supplier's profile details page and click Notify.



2. Enter subject and message to send email and workflow notification for the selected supplier's contacts.

3. Select the applicable option in the **Send To** field. If you select All Contacts, then the application notifies all the contacts of the selected suppliers. If you select Contact Users Only, then the application only notifies those contacts of selected suppliers that have system user accounts.

   Note that you can select only one contact from the dropdown.

   Select a specific purpose to send the notification to all contacts assigned to the purpose. For example, if you select Emergency as the contact purpose, the notification is sent to all contacts assigned to the purpose Emergency.

   If you select a value from the **Contact Purpose** dropdown list, and the value has no assigned users, an error message appears.

4. Optionally, select the Include OSN Registration Instruction, if you are notifying suppliers who have not yet registered on Oracle Supplier Network.

You can also send notifications to prospect suppliers from the registration request page. Open the registration request and enter a message in the Note to Supplier field. Click on the Notify button to send the note to the prospect supplier's email address used for registration.

Notifying Internal Users

Administrators have the option of notifying a group of internal users. To notify a group of internal users, navigate to the Administration tab from the Supplier Management Administrator responsibility and Supplier Home menu. Click on the Security sub tab and find the group you wish to notify. Click on Send Email to Members. This opens up your default mail client with member email addresses copied in the To field.

Buyer Administrators or owners of a sourcing document can notify document collaborators of pending tasks. To notify RFI collaborators, open the sourcing document:

1. Select Manage Collaboration team from the Action drop down and click Go.

2. Select All or some collaborators and click Notify.

3. Optionally create a Task with Target Date for each evaluator. The task shows up in the Incomplete Tasks region on the evaluator's Negotiations home page.

System Notifications

Any notifications that are generated by default by the system fall into this category. Following are the list of system notifications in Oracle Supplier Management:

- When a Supplier Management User or Sourcing Buyer invites a supplier user to register, an e-mail notification is sent to supplier user containing the URL for the registration page.

- When a Supplier Management User or Sourcing Buyer approves or rejects the registration request, a notification email is sent to supplier user indicating registration status. A user ID and URL that enables supplier users to change their passwords is also sent in the notification.

- When a Buyer publishes a RFI, all participating suppliers are notified via a workflow notification.

- When an evaluation is available to team members, a notification is sent to them, informing them that they can access the evaluation.

- A notification is sent to all team members (individuals/members in Collaboration Team) whenever the evaluation dates or duration is changed.

9

Managing Supplier Classifications

This chapter covers the following topics:

- Supplier Classifications
- Assigning Classifications

Supplier Classifications

Classify organizations using classification schemes, which include a class category and a class code. The class category is a broad subject that you can classify entities in, and the code, or classification, is a specific value of the category. You can use standard industrial classifications, including SIC, NACE, and NAICS codes.

Use Supplier Data Librarian Super User responsibility, Supplier Home menu, Administration tab and Classifications sub tab to access Classifications page. You must have a valid Supplier Hub license for classifying suppliers. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

See Classifications Overview in *Oracle Trading Community Architecture Administration Guide*.

To manage classifications for the selected organization, you can:

- **Assign**: Assign classifications of the selected category. See Assigning Classifications, page 9-2.
- **Update**: You can update only the classification's end date.
- **Remove**: Assign the classification an end date of today. The removed classification is immediately inactive.
- **View History**: View and optionally restore previously removed classifications so that they are again active classifications for the organization or person

Assigning Classifications

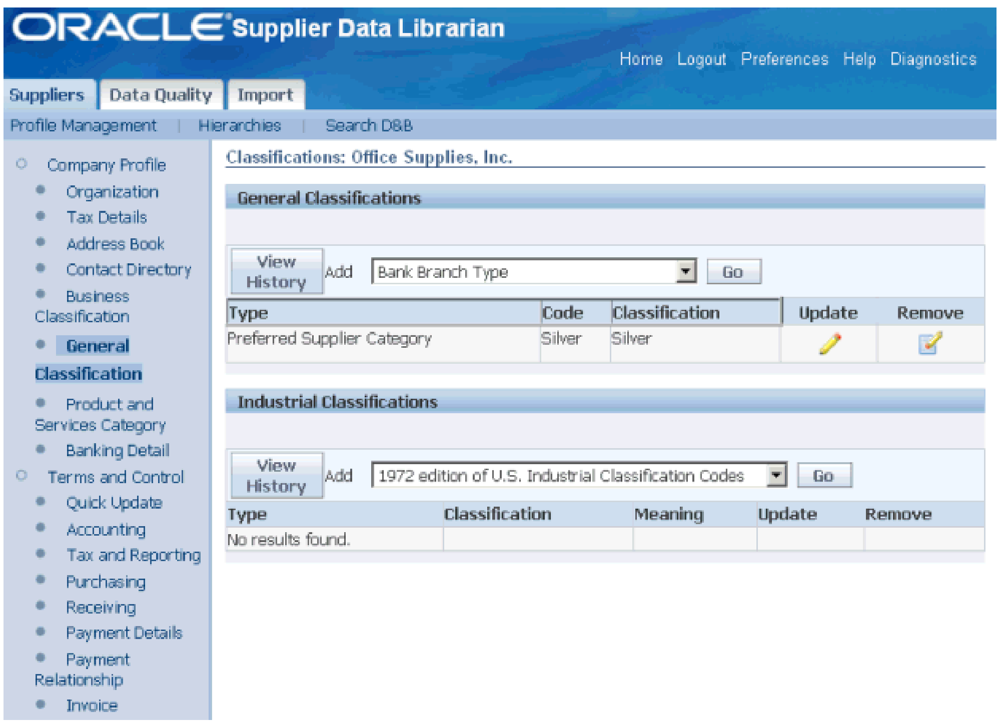
Classifications enable better categorization of suppliers in the Supplier Master based on your business needs and corporate policies. For example, after evaluating the supplier's performance, you can classify them as premium, preferred, or not suitable suppliers. You must have a valid Supplier Hub license for classifying suppliers. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

To manage supplier classifications:

1. Search for a supplier in the Search region on the Suppliers page.

2. Select the applicable supplier in the Search Results region and click the Update icon to open the Update page for the specific supplier.

3. Click General Classification link to open the Classifications page. Use this page to specify general and industrial classificationsfor the suppliers.



10

Managing Supplier Hierarchy

This chapter covers the following topics:

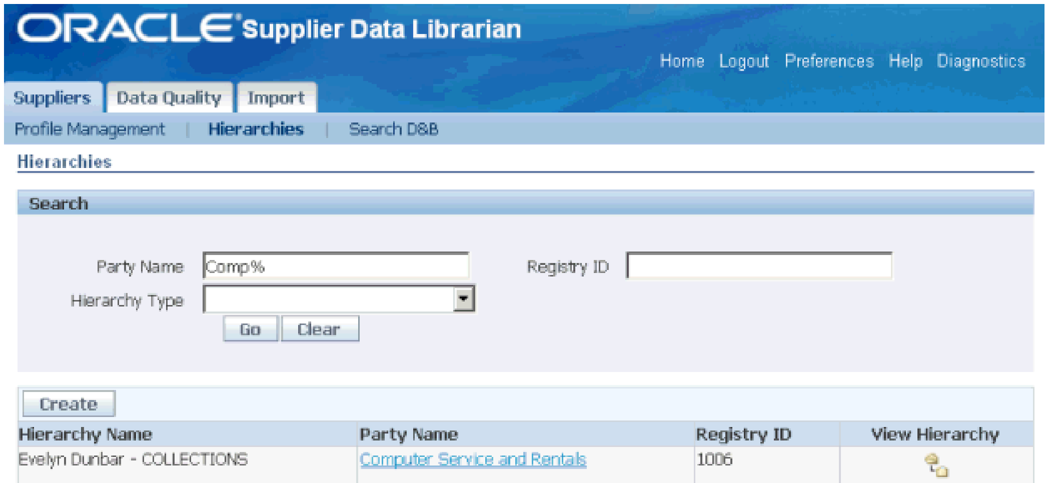
- Supplier Hierarchy

Supplier Hierarchy

A hierarchy is a collection of parties associated with a particular hierarchical relationship type at a given point in time. The hierarchy shows relationships between organizations in a tree structure. For example, you can get a visual representation of a corporate structure. See Relationships Overview, *Oracle Trading Community Architecture User Guide*.

Oracle Supplier Management allows consolidating supplier hierarchy details from source systems. If source systems do not have any supplier hierarchy details, then you can create hierarchies in Supplier Management.

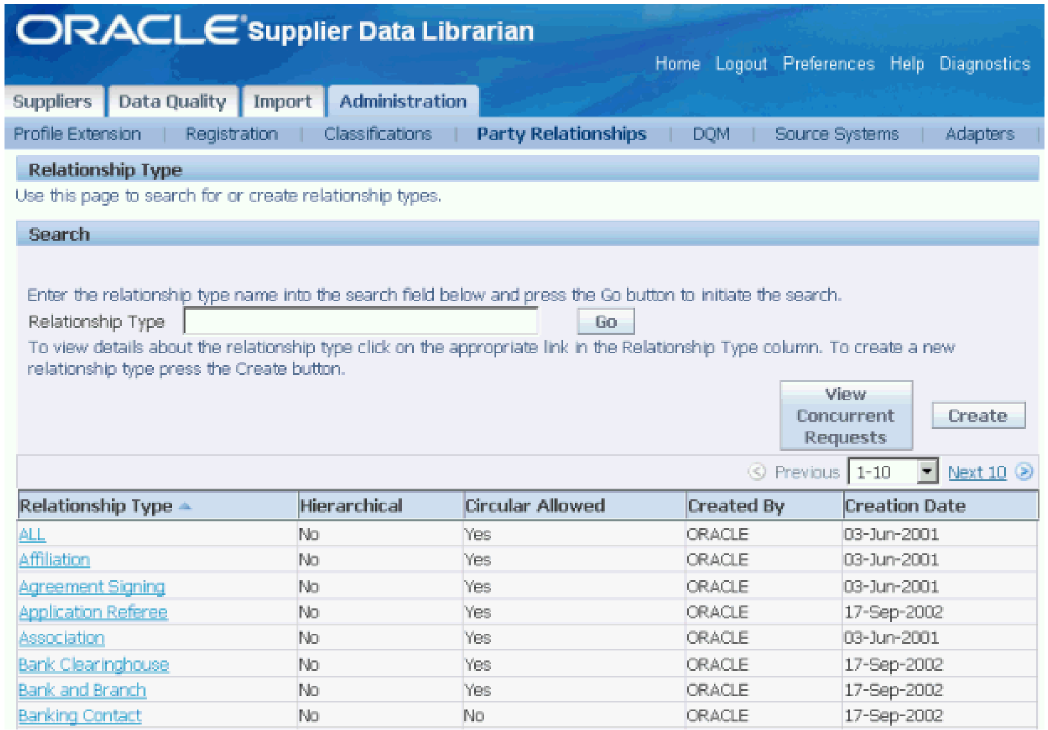
Use the Supplier Data Librarian responsibility and the Hierarchies sub tab on the Suppliers Home menu to view and create supplier hierarchies. This page is also accessible from Supplier Management User and Supplier Management Administrator responsibilities, but you must have a valid Supplier Hub license to set up supplier hierarchies. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.



See:

- Hierarchies Overview, *Oracle Customers Online User Guide*
- Creating Hierarchies, *Oracle Customers Online User Guide*
- Viewing and Updating Hierarchies, *Oracle Customers Online User Guide*

Supplier Data Librarian Super User can create relationship types from the Relationships subtab in the Administration tab.



See Administering Relationships, *Oracle Trading Community Architecture Administration Guide*.

11

Managing Supplier Import and Source Systems

This chapter covers the following topics:

- Bulk Import
- Bulk Import Process
- Running Batch Load

Bulk Import

Bulk import is the process of loading supplier data in bulk from legacy, third party, or other external sources into the Supplier Master, which includes TCA Registry. In Oracle Supplier Data Librarian responsibility, you can use Batch Import to transfer batches of data from the interface tables into the Supplier Master. A batch is a set of data to be loaded into the Supplier Master at one time. The data in one batch must be from the same data source. With Batch Import, you can review and control the import process. Supplier import process provides validations and optional de-duplication to ensure the quality of information being imported.

Using the Supplier Import feature, you can import the following supplier information:

- Organization Party
- Address
- Contact
- Classification
- Relationships
- User Defined Attributes

Additionally, you can import child entities including supplier product and services category associations, business (diversity) classifications, bank detail, and additional tax details.

The import process creates a party in the TCA registry and enables the created TCA Parties in the Supplier Master as suppliers. You can also use the supplier import process to enable existing TCA Organization parties as suppliers in the Supplier Master using the batch import functionality described above.

See Bulk Import Process, page 11-2.

Bulk Import Process

For an overview, see Bulk Import, page 11-1.

Follow these steps to import suppliers using the Batch import process:

1. Define Prerequisites, page 11-2

2. Generate Batches, page 11-3

3. Load data into interface tables, page 11-3

4. Define Import , page 11-8

   For information about import formats, see Defining Item Catalog Import Formats, *Oracle Product Hub Implementation Guide*.

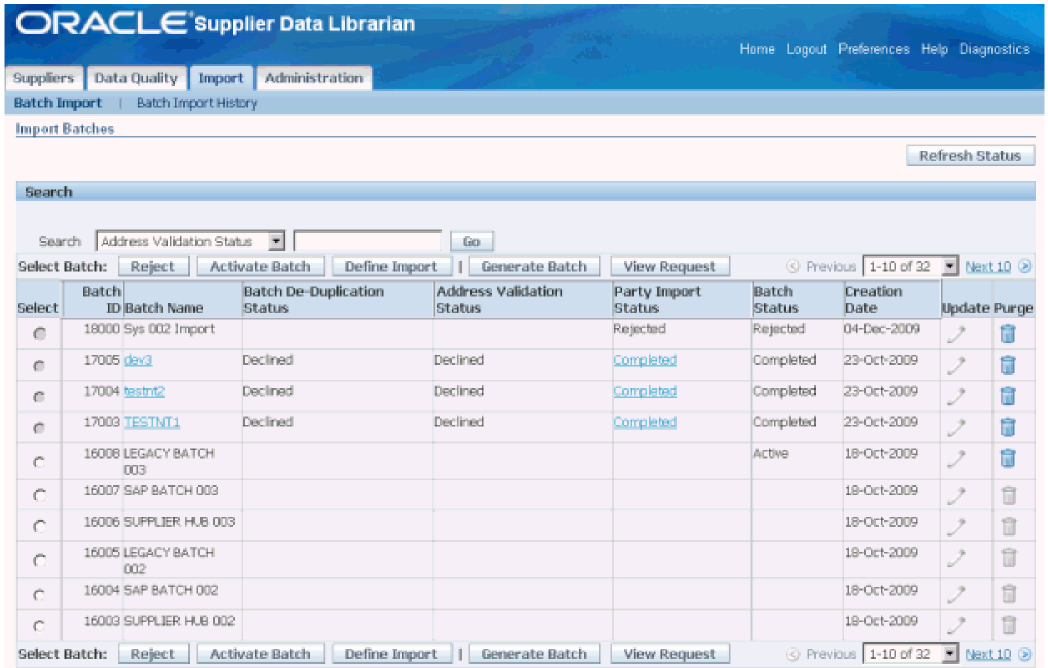
5. View and Update the Batch , page 11-17(Update works only if Pre-import only was run)

6. Purge Data from interface tables, page 11-17

Define Prerequisites

Define Source Systems. This is required before creating batches since a batch is created for importing from a specific source system. See Source System Management in *Oracle Trading Architecture Administration Guide*.

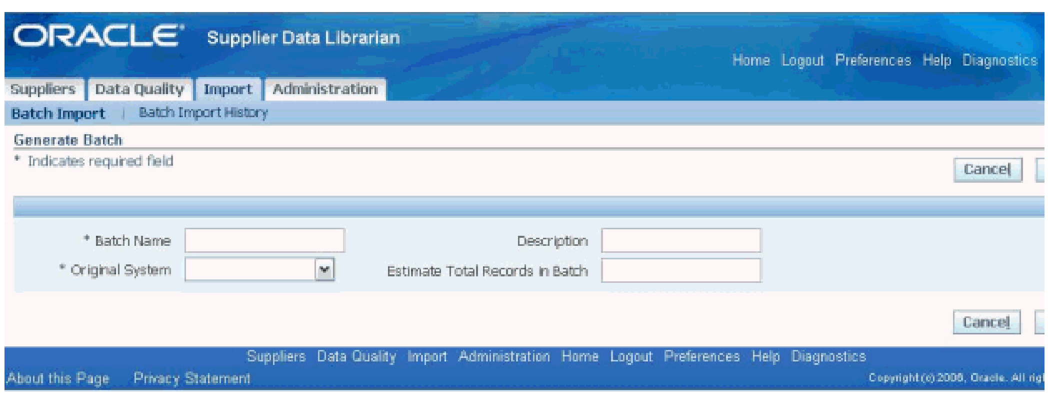
Log in with Supplier Data Librarian or Supplier Data Librarian Super User responsibility and click on Supplier Home menu. Navigate to the Import tab to create batches for import. Import tab is also visible from the Supplier Management User and Supplier Management Administrator responsibilities.



Generating Batches

Generate batches after setting up the source systems. Create import batches before loading data into the import interface tables. After a batch is generated, you can use any available loading tools to populate TCA interface tables. A generated batch initially has no batch status.

Click Generate Batch on the Import Batches page to open the Generate Batch page. See Generating Batches in *Oracle Customer Data Librarian User Guide*.



Loading Data into Interface Tables

Use the batch ID of the import batch to load supplier data into interface tables. See Loading Data into the Interface Tables in *Oracle Trading Architecture User Guide*. Please note that File Load feature of TCA is not available in Supplier Hub.

Integrated supplier import program imports the data from several TCA and AP interface tables; therefore upload data into these interface tables. See: Defining Imports, page 11-8.

Importing using Spreadsheet

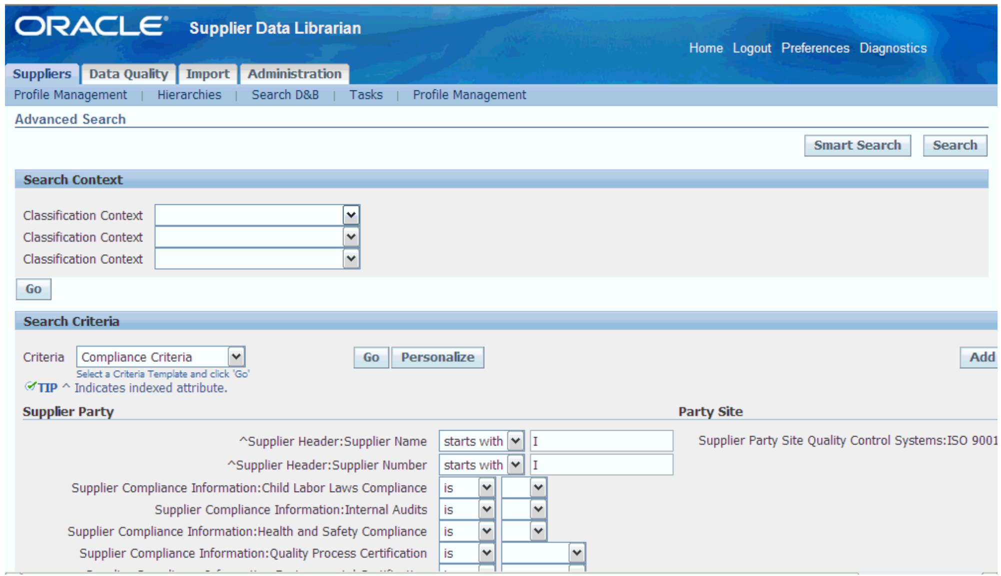
Supplier Hub enables you to import supplier details such as organization (HZ party), person, address, contact, supplier, supplier site, supplier contact, user defined attributes using a spreadsheet. Spreadsheet import uses display formats that enable you to load different set of data for a given batch into the interface tables.

While searching for supplier information, data librarians can select the search criteria and display format. The application retrieves the data in the selected format and data librarians can import data into the interface tables using these formats used for the spreadsheet. See Setting up Search Criteria and Display Formats in the *Oracle Supplier Management Implementation and Administration Guide*.

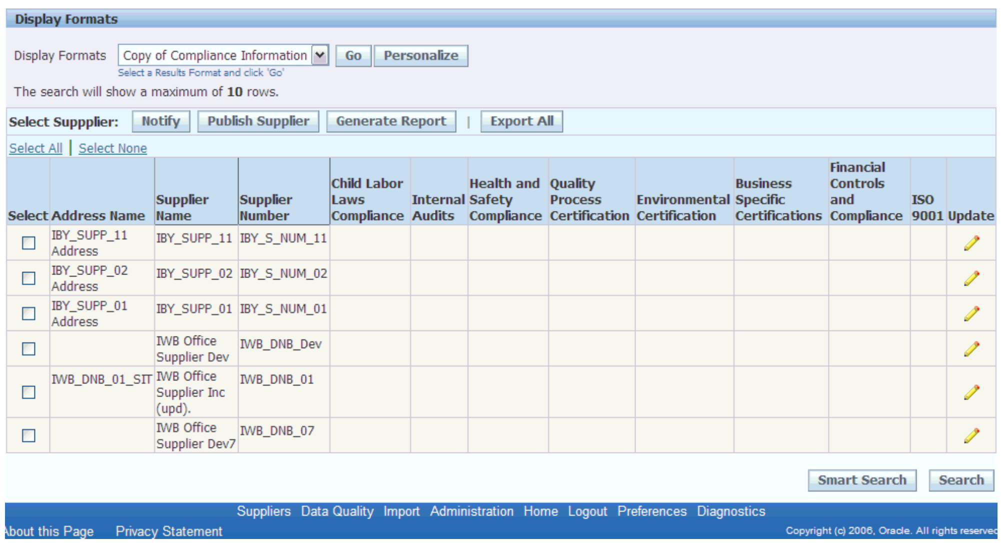
Use the Data Librarian Super User responsibility and the Import tab to process the batch.

To import supplier data using a spreadsheet, complete the following:

1. Click Generate Batch and enter a batch name and source system.
2. Click Apply and ensure to note the batch ID.
3. Click Advance Search available on the Supplier Home page.
4. Select Search Criteria, Display Format, and click Search.

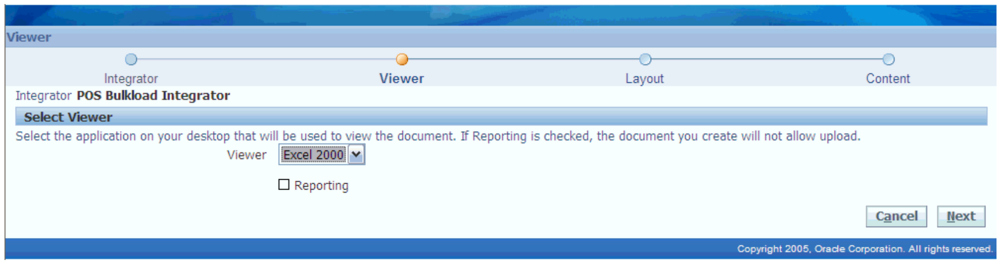


5. Click on Export All button.

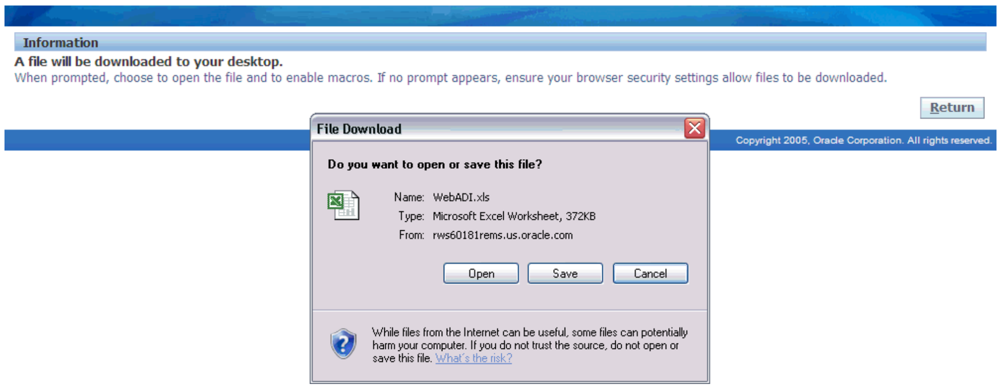


Note: Before you perform this step, ensure to check the Trust access to Visual Basic Project if you are using MS Office XP, 2003, 2007. See: Setting up Spreadsheet Import in *Oracle Supplier Management Implementation and Administration Guide*.

6. Select Excel version.



7. Save the exported excel file on your PC.

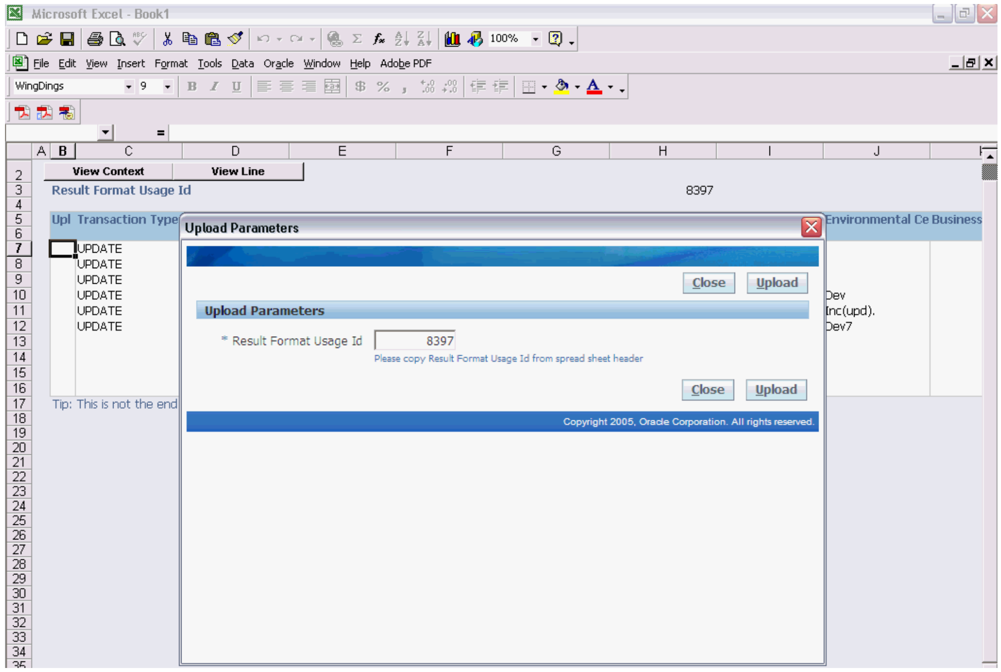


8. Open the saved excel file and click on Enable Macro.

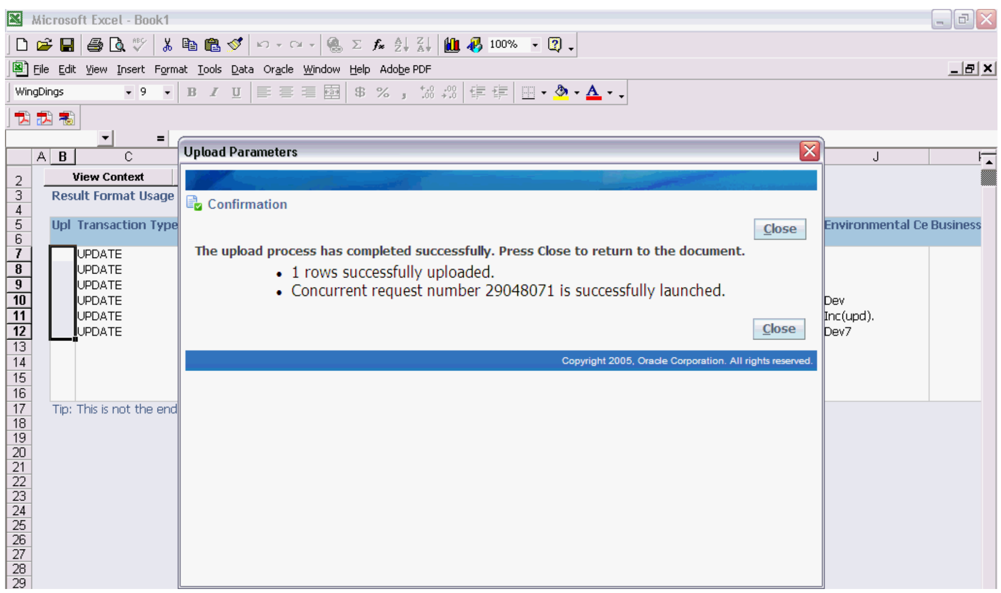
9. Modify the record as required and save.

10. Click Add-Ins tab > Oracle > Upload or Oracle tab > Upload based on your MS Excel version to upload the modified excel file.

11. Click in the Result Format Usage ID field in the Upload Parameters window. The application displays the import batch ID in this field.



12. Click Upload. The application confirms the successful completion of the concurrent program. Note the number.



13. Navigate to Administration > Concurrent request > View request and search for the concurrent request ID. Click Refresh button till concurrent program gets completed with normal status.

14. Click Import and select the Batch number that you received after generating the

batch.

15. Click Activate Batch.

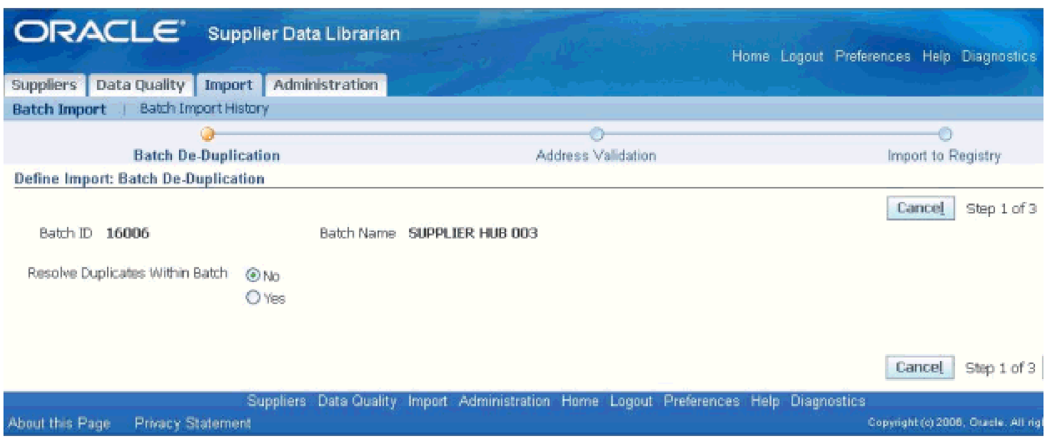
16. Select the batch and click Define import. Verify the batch gets submitted for the import and complete with normal status. Search for the supplier and notice the modifications that you had made and imported using the spreadsheet import format.

Activating the Batch

After data is loaded into the interface tables for this batch, activate the batch on the Import Batches page, and then proceed to define the import. This step is optional, but active a batch to see the total number of records in the interface tables for that batch.

Defining Import

Select a batch in the Import Batches page and click Define Import to open the Define Import: Batch De-Duplication page.



> **Note:** To perform address validation during import (one of the pre-processing steps), you must insert data into HZ addresses interface table (HZ_IMP_ADDRESSES_INT) and not in the AP addresses interface table (AP_SUPPLIER_SITES_INT).

See Defining Imports in *Oracle Customer Data Librarian User Guide*.

Import Program: Defining the batch automatically triggers batch import. In case of Supplier Hub, the concurrent program run is **Integrated Supplier Import** program instead of Import Batch to TCA Registry program.

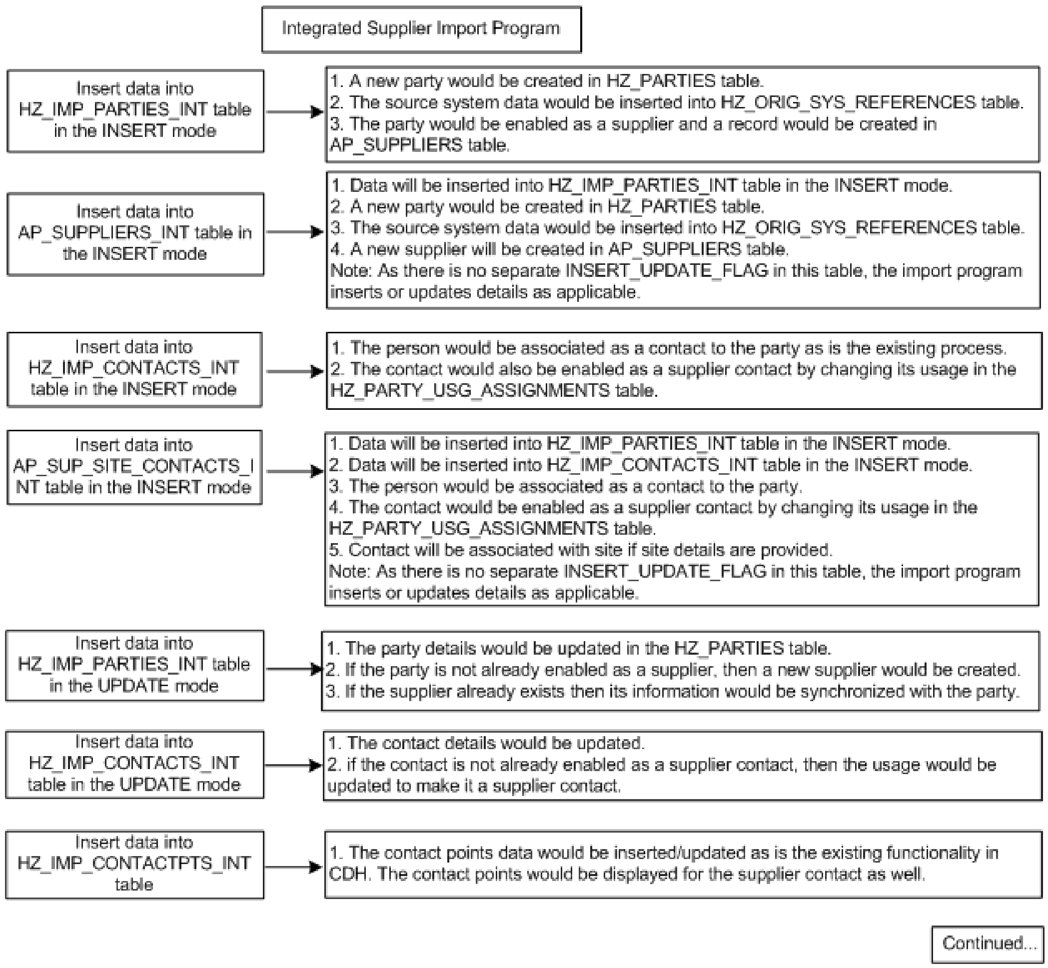
The 'Integrated Supplier Import' concurrent program first runs 'Import Batch to TCA Registry' program, which imports all the party information like party, address, contact, classification and relationships into the TCA registry. See Import Batch to TCA Registry, *Oracle Trading Architecture User Guide* for details on 'Import Batch to TCA Registry' program provided by TCA. When Party Import status is 'Completed', Integrated Supplier Import program automatically enables the imported party as a supplier in the Supplier Master.

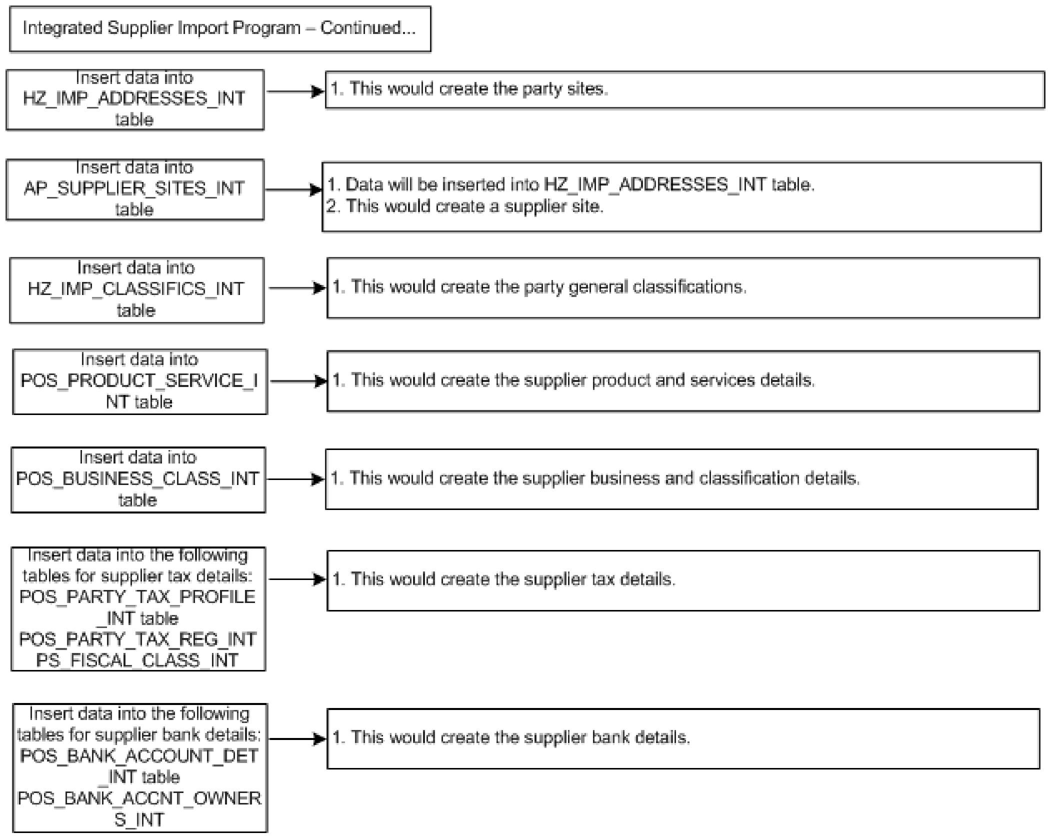
The integrated import program processes the data from the TCA interface tables and creates the entities in the HZ tables. It also creates the corresponding supplier related entities in the AP tables and synchronizes them with the HZ data.

If the data is inserted into the HZ_PARTIES_INT table in the insert mode and the import program is executed, then a new party is created and it is enabled as a supplier. If the processing mode is update, then the corresponding party data is updated. If the party is already enabled as a supplier, then the supplier information would be synchronized with the updated information from the party tables. If the party being updated is not already enabled as a supplier, then a new supplier would be created with the updated information.

If the data is inserted into the HZ_IMP_CONTACTS_INT table, then the person would be associated as a contact to the party and it would also be enabled as a supplier contact. In the update mode the contact details would be updated. If the contact were not already enabled as a supplier contact then it would be enabled.

If the data is inserted into AP interface tables and not the HZ interface tables, then Integrated Supplier Import program will insert data from AP interface tables to HZ interface tables as a part of preprocessing (AP_SUPPLIERS_INT to HZ_IMP_PARTIES_INT, AP_SUPPLIER_SITES_INT to HZ_IMP_ADDRESSES_INT, AP_SUP_SITE_CONTACT_INT to HZ_IMP_CONTACTS_INT). The 'Integrated Supplier Import' concurrent program first runs 'Import Batch to TCA Registry' program, which imports all the party information like party, address, contact, classification, and relationships into the TCA registry. After the party import program is completed, it creates supplier and supplier related entities in AP tables.


Integrated Supplier Import Program
Insert data into HZ_IMP_PARTIES_INT table in the INSERT mode
1. A new party would be created in HZ_PARTIES table.
2. The source system data would be inserted into HZ_ORIG_SYS_REFERENCES table.
3. The party would be enabled as a supplier and a record would be created in AP_SUPPLIERS table.
Insert data into AP_SUPPLIERS_INT table in the INSERT mode
1. Data will be inserted into HZ_IMP_PARTIES_INT table in the INSERT mode.
2. A new party would be created in HZ_PARTIES table.
3. The source system data would be inserted into HZ_ORIG_SYS_REFERENCES table.
4. A new supplier will be created in AP_SUPPLIERS table.
Note: As there is no separate INSERT_UPDATE_FLAG in this table, the import program inserts or updates details as applicable.
Insert data into HZ_IMP_CONTACTS_INT table in the INSERT mode
1. The person would be associated as a contact to the party as is the existing process.
2. The contact would also be enabled as a supplier contact by changing its usage in the HZ_PARTY_USG_ASSIGNMENTS table.
Insert data into AP_SUP_SITE_CONTACTS_INT table in the INSERT mode
1. Data will be inserted into HZ_IMP_PARTIES_INT table in the INSERT mode.
2. Data will be inserted into HZ_IMP_CONTACTS_INT table in the INSERT mode.
3. The person would be associated as a contact to the party.
4. The contact would be enabled as a supplier contact by changing its usage in the HZ_PARTY_USG_ASSIGNMENTS table.
5. Contact will be associated with site if site details are provided.
Note: As there is no separate INSERT_UPDATE_FLAG in this table, the import program inserts or updates details as applicable.
Insert data into HZ_IMP_PARTIES_INT table in the UPDATE mode
1. The party details would be updated in the HZ_PARTIES table.
2. If the party is not already enabled as a supplier, then a new supplier would be created.
3. If the supplier already exists then its information would be synchronized with the party.
Insert data into HZ_IMP_CONTACTS_INT table in the UPDATE mode
1. The contact details would be updated.
2. if the contact is not already enabled as a supplier contact, then the usage would be updated to make it a supplier contact.
Insert data into HZ_IMP_CONTACTPTS_INT table
1. The contact points data would be inserted/updated as is the existing functionality in CDH. The contact points would be displayed for the supplier contact as well.
Continued...



Understanding the Suppliers Open Interface Tables

When you run the Integrated Supplier Import program using Define Import > Submit, then this integrated program calls the AP interface import programs. The import process picks up the data in AP interface tables for processing based on the SDH_BATCH_ID column for which the import process is running. For further information on AP supplier interface tables, see Understanding the Supplier Open Interface Tables in *Oracle Payable's Reference Guide*.

See: How To Import Multi-Row UDA - User Defined Attributes For Suppliers (Doc ID 1364130.1) on *MyOracle Support*.

The AP supplier interface tables have additional columns to support the Integrated Supplier Import program.

AP_SUPPLIERS_INT - the following columns are available in this table for storing batch id, party id, and original system references:

- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- SDH_BATCH_ID

- PARTY_ID

AP_SUPPLIER_SITES_INT - the following columns are available in this table for storing batch id, party id, and original system references:

- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- PARTY_SITE_ORIG_SYSTEM
- PARTY_SITE_ORIG_SYS_REFERENCE
- SUPPLIER_SITE_ORIG_SYSTEM
- SUP_SITE_ORIG_SYSTEM_REFERENCE
- SDH_BATCH_ID
- PARTY_ID
- LOCATION_ID

AP_SUP_SITE_CONTACT_INT - the following columns are available in this table for storing batch id, party ids, and original system references:

- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- PARTY_SITE_ORIG_SYSTEM
- PARTY_SITE_ORIG_SYS_REFERENCE
- SUPPLIER_SITE_ORIG_SYSTEM
- SUP_SITE_ORIG_SYSTEM_REFERENCE
- CONTACT_ORIG_SYSTEM
- CONTACT_ORIG_SYSTEM_REFERENCE
- SDH_BATCH_ID
- PARTY_ID
- PER_PARTY_ID
- REL_PARTY_ID

- RELATIONSHIP_ID
- ORG_CONTACT_ID

Mandatory Columns for Supplier Open Interface Tables

Mandatory columns for HZ_IMP_PARTIES_INT

- BATCH_ID
- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- PARTY_TYPE
- ORGANIZATION_NAME
- PERSON_FIRST_NAME
- PERSON_LAST_NAME
- CREATION_DATE (Needed in case of de duplication; this date can be sysdate)

Mandatory columns for AP_SUPPLIERS_INT

- VENDOR_INTERFACE_ID
- SDH_BATCH_ID
- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- VENDOR_NAME
- SEGMENT1 (Same as PARTY_ORIG_SYSTEM_REFERENCE)

Mandatory columns for AP_SUPPLIER_SITES_INT

- VENDOR_SITE_INTERFACE_ID
- VENDOR_SITE_CODE
- ADDRESS_LINE1
- COUNTRY
- ORG_ID and/or OPERATING_UNIT_NAME
- PARTY_ORIG_SYSTEM

- PARTY_ORIG_SYSTEM_REFERENCE
- PARTY_SITE_ORIG_SYSTEM
- PARTY_SITE_ORIG_SYS_REFERENCE
- SDH_BATCH_ID

Mandatory columns for HZ_IMP_ADDRESSES_INT

- BATCH_ID
- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- SITE_ORIG_SYSTEM
- SITE_ORIG_SYSTEM_REFERENCE
- ADDRESS1
- CITY
- COUNTRY
- PARTY_SITE_NAME (this is same as VENDOR_SITE_CODE)

Mandatory columns for AP_SUP_SITE_CONTACT_INT

- VENDOR_SITE_CODE (if it is site contact)
- ORG_ID and/or OPERATING_UNIT_NAME
- FIRST_NAME
- LAST_NAME
- AREA_CODE (if present)
- PHONE (if present)
- EMAIL_ADDRESS (if present)
- FAX_AREA_CODE (if present)
- FAX (if present)
- VENDOR_CONTACT_INTERFACE_ID

- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- PARTY_SITE_ORIG_SYSTEM (if it is site contact)
- PARTY_SITE_ORIG_SYS_REFERENCE (if it is site contact)
- CONTACT_ORIG_SYSTEM
- CONTACT_ORIG_SYSTEM_REFERENCE
- SDH_BATCH_ID

Mandatory columns for POS_PRODUCT_SERVICE_INT

- SDH_BATCH_ID
- SOURCE_SYSTEM
- SOURCE_SYSTEM_REFERENCE
- PS_INTERFACE_ID (unique for table)
- REQUEST_STATUS
- SEGMENT1, SEGMENT2, SEGMENT3, SEGMENT4, SEGMENT5, SEGMENT6, SEGMENT7, SEGMENT8, SEGMENT9, SEGMENT10, SEGMENT11, SEGMENT12, SEGMENT13, SEGMENT14, SEGMENT15, SEGMENT16, SEGMENT17, SEGMENT18, SEGMENT19, SEGMENT20 (Depending upon segment definition)
- SEGMENT_DEFINITION

Mandatory columns for POS_BANK_ACCOUNT_DET_INT - at Supplier Level

- BANK_ACCOUNT_INTERFACE_ID
- COUNTRY_CODE
- ALLOW_INTERNATIONAL_PAYMENTS
- BATCH_ID
- SOURCE_SYSTEM
- SOURCE_SYSTEM_REFERENCE
- BANK_NAME
- BRANCH_NAME

- BANK_ACCOUNT_NUMBER
- ACCOUNT_NAME

Mandatory columns for POS_BANK_ACCOUNT_DET_INT - at Party Site Level

- BANK_ACCOUNT_INTERFACE_ID
- COUNTRY_CODE
- ALLOW_INTERNATIONAL_PAYMENTS
- BATCH_ID
- SOURCE_SYSTEM
- SOURCE_SYSTEM_REFERENCE
- BANK_NAME
- BRANCH_NAME
- BANK_ACCOUNT_NUMBER
- PARTY_SITE_ORIG_SYS
- PARTY_SITE_ORIG_SYS_REF
- ACCOUNT_NAME

Mandatory columns for POS_BANK_ACCNT_OWNERS_INT

- BANK_NAME
- BANK_COUNTRY_CODE
- BRANCH_NAME
- ACCOUNT_NUMBER
- SOURCE_SYSTEM
- SOURCE_SYSTEM_REFERENCE
- ACCOUNT_OWNER_NAME
- BATCH_ID
- PRIMARY_FLAG

- BANK_ACCOUNT_INTERFACE_ID
- BANK_ACCT_OWNER_INTERFACE_ID

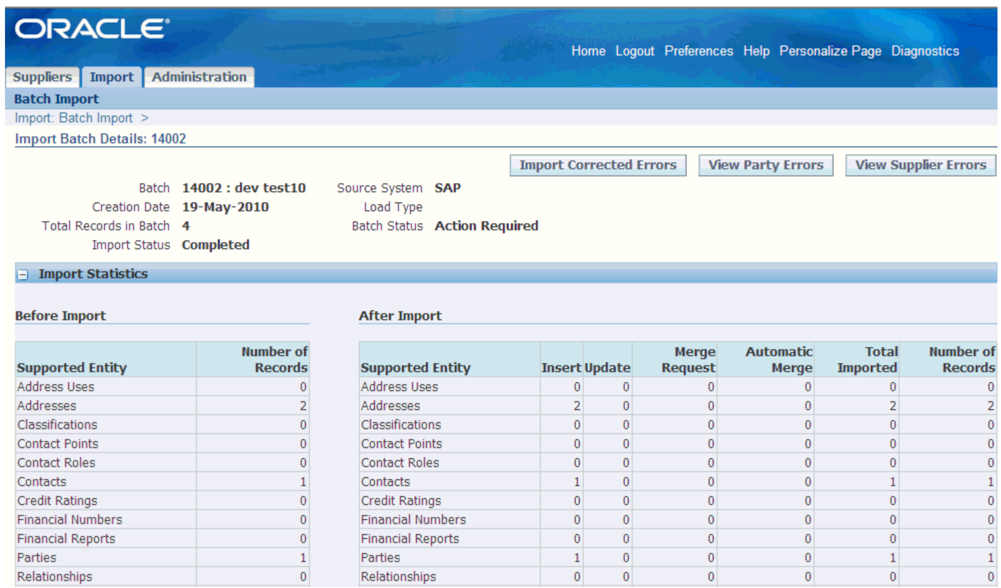
Viewing and Updating the Batch

To view or update import batch requests:

1. Search for the batch on the Batch Import page.

2. Select the batch in the search results region to review import results after the import process completes.

3. To view import errors, click the View Party Errors and View Supplier Errors buttons on the batch detail page.



Supported Entity	Number of Records
Address Uses	0
Addresses	2
Classifications	0
Contact Points	0
Contact Roles	0
Contacts	1
Credit Ratings	0
Financial Numbers	0
Financial Reports	0
Parties	1
Relationships	0

Supported Entity	Insert	Update	Merge Request	Automatic Merge	Total Imported	Number of Records
Address Uses	0	0	0	0	0	0
Addresses	2	0	0	0	2	2
Classifications	0	0	0	0	0	0
Contact Points	0	0	0	0	0	0
Contact Roles	0	0	0	0	0	0
Contacts	1	0	0	0	1	1
Credit Ratings	0	0	0	0	0	0
Financial Numbers	0	0	0	0	0	0
Financial Reports	0	0	0	0	0	0
Parties	1	0	0	0	1	1
Relationships	0	0	0	0	0	0

   A concurrent request is submitted for generating the error report for the batch. Click the Refresh button, until the concurrent request gets completed and then click the Output icon to view the error report.

4. To update a batch, select the batch in the search results region, and click the Update icon. You can only update a batch if the batch has a status of Action Required.

See Viewing or Updating Import Batches in *Oracle Customer Data Librarian User Guide*. Additionally see Resolving Import Errors in *Oracle Customer Data Librarian User Guide*.

Purging Data from Interface Tables

Purge import batches to permanently remove all records in the batch from the import interface tables, as well as internal tables such as staging and error tables. You can purge any batch, imported or not, except those that have pre-import processes or the import process running.

You usually purge batches:

- After a satisfactory number of records are successfully imported into the TCA Registry from that batch.
- If the batch is rejected and you do not plan to import that set of data using another import batch.

Purging the interface tables improves import performance. To archive imported data, you should copy the data to a set of custom tables. See TCA Import Batch Purge in *Oracle Trading Architecture User Guide*.

Running Batch Load

Use the batch load process to update D&B information for a large number of parties on a regular schedule or whenever you need. You can update all parties, gather data only for new parties, or update parties that have not been updated since a specified date.

To import DNB data with Import Workbench, ensure the following:

- The HZ: Third Party Data Integration Enabled for Organization Profile Entity profile option has a value of Yes. See Setting up Bulk Import, *Oracle Supplier Management Implementation and Administration Guide*.
- Run the Third Party Data Integration Program whenever there are display rule changes.

Batch retrieval and loading of D&B information is usually a regularly scheduled, automated process that you set up and run. To complete the D&B import, see Batch Loading in *Oracle Trading Community Architecture User Guide.* Instead of running "Import Batch to TCA Registry", run the Integrated Supplier Import from Supplier Data Librarian responsibility to transfer data from interface tables into the Supplier Master.

Additionally, see the following:

- Searching for Import Batches in *Oracle Customer Data Librarian User Guide*
- Managing Import Batches in *Oracle Customer Data Librarian User Guide*
- Viewing Batch Import History in *Oracle Customer Data Librarian User Guide*

12

Managing Supplier Data Quality

This chapter covers the following topics:

- Overview of Managing Supplier Data Quality
- Identifying Duplicates in New Supplier Request
- Identifying Duplicates During Supplier Creation
- Identifying System Duplicates
- Using Automerge
- Creating Merge Request
- Enabling Existing Party as Supplier
- Purging Suppliers
- Maintaining Parties

Overview of Managing Supplier Data Quality

Supplier Management is built on the foundation of Oracle Trading Community Architecture (TCA). Therefore, a supplier entity is also a party entity in TCA. TCA provides an advanced framework for matching parties to discover possible duplicates and merge duplicates. All these features can be leveraged to find and merge duplicate suppliers, but you must keep in mind that a TCA party merge only merges data related to a party. A supplier entity is associated with more information than a TCA party entity. For example, supplier entity can have associated transactions such as purchase orders and invoices (in case of Integrated Supplier Hub mode). When merging suppliers, first merge these transactions and then merge the parties.

Data Quality Management can be accessed using the Supplier Data Librarian or Supplier Data Librarian Super User responsibility, or Trading Community Manager responsibility; navigate to the Data Quality tab to perform the following tasks. See Guidelines for Purchasing Required Licenses in the *Oracle Supplier Management Implementation and Administration Guide.*

Identifying Duplicates in New Supplier Request

Oracle Supplier Management enables you to prevent duplicate supplier creation in the system during new supplier registration. See Managing New Supplier Qualification, page 5-9.

The administrator must set up duplicate identification before matching organizations are found during registration. See Setting up Duplicate Prevention in *Oracle Supplier Management Implementation and Administration Guide*.

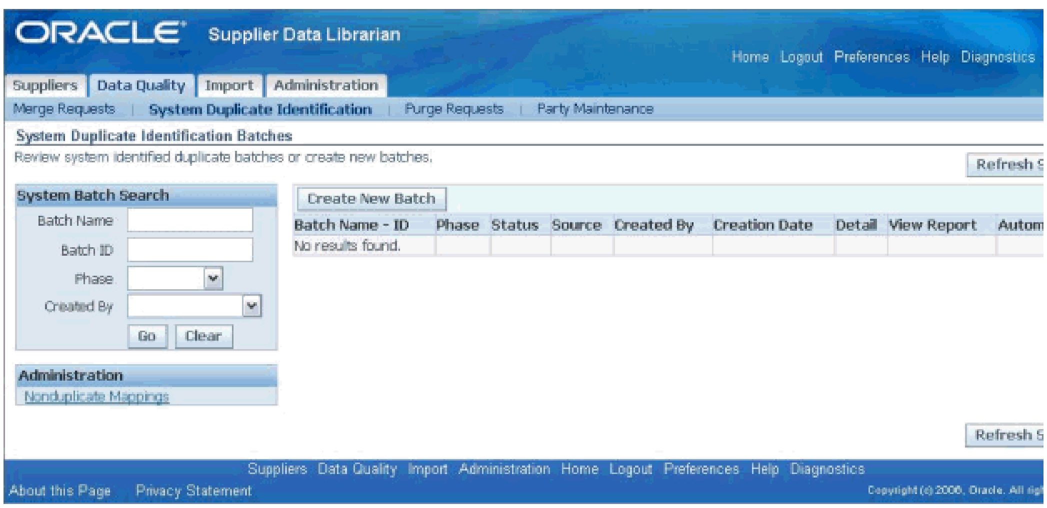
Identifying Duplicates During Supplier Creation

Oracle Supplier Management enables you to perform an online duplicate check during supplier creation. See Creating Supplier in Managing New Supplier Qualification, page 5-9.

Identifying System Duplicates

System Duplicate Identification (SDI) feature lets you create SDI batches that contain potential sets of duplicates. De-duplication runs a program to identify duplicates based on criteria that you specify. You can use any duplicate set in a batch as the basis for a new merge request. See System Duplicate Identification in *Oracle Payable's User Guide*.

To identify duplicate records, click the System Duplication Identification sub tab to open the System Duplicate Identification Batches page.



Using Automerge

You can run Automerge as part of creating SDI batches to automatically merge definite duplicates. This process bypasses manually creating, mapping, and submitting merge requests for obvious duplicates. Parties in the SDI batch that are not merged are included in a new batch, for manual review at a later time.

Creating Merge Request

You can create merge requests:

- Registry ID: By selecting specific parties. From a Registry ID list of values, you select at least one party to include in your new merge request.
- Smart Search: Using Smart Search to find potential duplicates. Smart Search provides a list of parties based on your criteria. You select at least one party to include in a new merge request.
- System Duplicates: From duplicate sets in a System Duplicate Identification (SDI) batch.

A SDI batch contains sets of duplicates that de-duplication identifies based on your criteria for the batch. You select duplicate sets from any batch to create one or more merge requests.

> **Note:** To create a merge request of type Single, use any of the methods to create a request with only the party that you want to cleanse.

In your new merge request, you cannot include parties that already belong to either another merge request or a merge batch in Oracle Trading Community Architecture Party Merge. A message would inform you if you select such a party. See Creating Merge Batches, Oracle Trading Community Architecture User Guide.

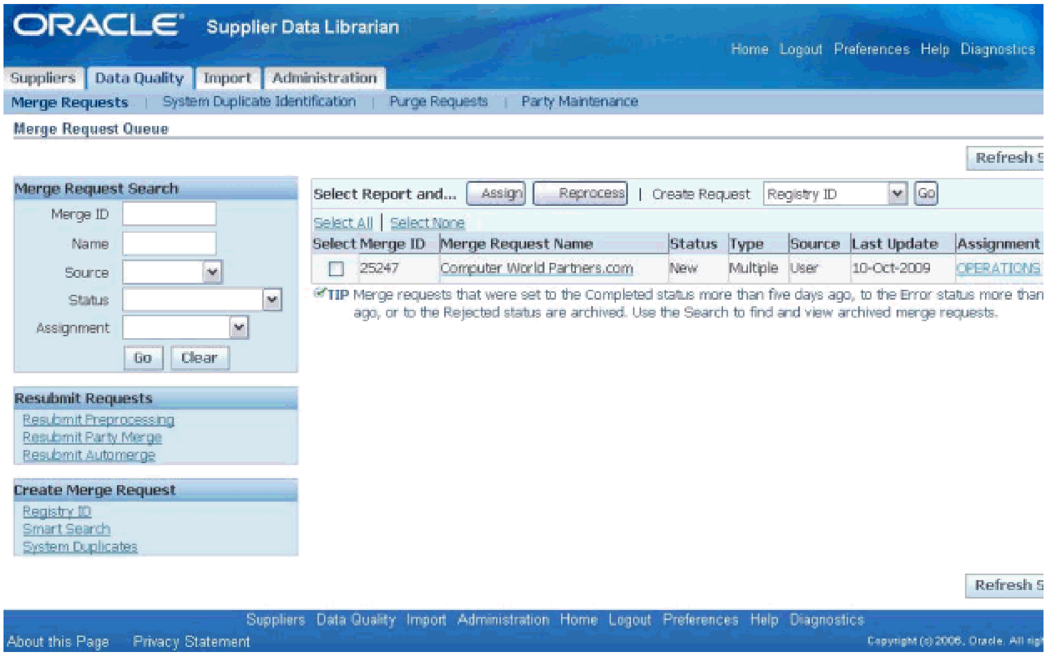
Before you submit the new request for creation with the System Duplicates or Registry ID method, you can still remove parties from multiple type requests. You do not delete the party from the TCA Registry, and the party is available to be included in other SDI batches, duplicate sets, or merge requests.

After you submit a new merge request, the Create Merge Batch process runs to create the merge request. Depending on the request type, the name of your new merge request is:

- Multiple: The name of the master party.
- Single: The name of the one party in the request.

For merge requests of type Multiple, the HZ: Merge Master Party Defaulting profile option determines the master party, which remains after the merge. You can change the master party when you map the merge request. See Creating Merge Requests and Reviewing Merge Requests in *Oracle Customer Data Librarian User Guide.*

Use the Merge Requests sub tab on the Data Quality tab to create merge requests.



In case of Integrated Supplier Hub, where other Oracle E-Business Suite products like Purchasing, Accounts Payable are running in the same instance with Supplier Management, you must merge supplier transactions before supplier parties can be merged. Supplier transaction merge combines transaction data like invoices, POs for different supplier (supplier sites) into single supplier/site.

See Supplier Merge Program in *Oracle Payable's User Guide*.

OA Framework page for Supplier Merge

Users can submit the supplier merge concurrent request using the OA Framework pages for Supplier Merge. With this page, users need not navigate to the Payables Supplier Merge window to perform a supplier merge operation. They can use the OA Framework pages in Oracle Supplier Hub.

For more information on the merge process details, please refer to the *Oracle Payables User's Guide.*

For more information on the party merge process, please refer to the *Oracle Customer Data Librarian User Guide.*

Merging Supplier Transactions

Supplier management administrators and data librarians can perform smart searches to find duplicate supplier party records in the system and can merge or cleanse to create the supplier master. Incase of Standalone Supplier Data Hub, as there are no PO or invoice transactions, there is no need to merge supplier transactions prior to submitting supplier party merge request. If there are no defined supplier sites, then you can submit the supplier party merge request. However, incase of Integrated EBS instance with both Supplier Data Hub and any of the other EBS products like Purchasing, Payables, Sourcing, the supplier management administrators and data librarians can perform smart searches to find duplicate supplier party records in the system and use the Merge Supplier button to first merge the transactions and then submit the supplier party merge request. This button is available if you have set the POS: SM: Supplier Data Hub Configuration profile option as Integrated EBS and defined supplier sites. If the profile is set to Standalone and there are no supplier sites defined, then the Merge Supplier button is not available.

Use the Supplier Data Librarian responsibility and Supplier Merge menu to merge supplier transactions. See Supplier Merge Program in *Oracle Payable's User Guide*.

Example of Supplier Transaction Merge

This example explains the Supplier Transaction Merge process. In this example, two suppliers Computer Supplier Inc. and Computer Supply Inc. are merged into one golden record for Computer Supplier Inc. Supplier Transaction Merge is applicable in case of Integrated Supplier Hub, where other EBS products like Purchasing, Accounts Payable are running in a same instance with Supplier Hub. Supplier Transaction Merge merges transaction data like invoices, POs in for different supplier (supplier sites) into single supplier/site.

The following table shows how different invoices and POs for different sites are merged under single site after Supplier Transaction Merge applicable in integrated Supplier Hub installation only:

Supplier 1 - Computer Supplies Inc.	Supplier 2 - Computer Supply Inc.	Supplier Master - Computer Supplies Inc.

Invoice
• Supplier site: CSICA
  • 10-3456
  • 10-3574
• Supplier site: CSITN
  • 10-6785
  • 10-9864
  • 10-4355
  • 10-4435
	Invoice
	• Supplier site: CSICA
	  • 40-6754
	  • 40-4522
	  • 40-4523
	• Supplier site: CSITX
	  • 40-9877
	  • 40-9222
	  • 40-5445
	  • 40-9983
		Invoice
		• Supplier site: CSICA
		  • 10-3456
		  • 10-3574
		  • 40-6754
		  • 40-4522
		  • 40-4523
		• Supplier site: CSITN
		  • 10-6785
		  • 10-9864
		  • 10-4355
		  • 10-4435
		• Supplier site: CSITX
		  • 40-9877
		  • 40-9222
		  • 40-5445
		  • 40-9983

Supplier 1 - Computer Supplies Inc.	Supplier 2 - Computer Supply Inc.	Supplier Master - Computer Supplies Inc.

Purchase Order
• Supplier site: CSICA
  • 20-5686
  • 20-4674
• Supplier site: CSITN
  • 20-7975
  • 20-6864
	Purchase Order
	• Supplier site: CSICA
	  • 60-7678
	  • 60-4436
	  • 60-6332
	  • 60-6567
	• Supplier site: CSITX
	  • 60-7863
	  • 60-9767
		Purchase Order
		• Supplier site: CSICA
		  • 20-5686
		  • 20-4674
		  • 60-7678
		  • 60-4436
		  • 60-6332
		  • 60-6567
		• Supplier site: CSITN
		  • 20-7975
		  • 20-6864
		• Supplier site: CSITX
		  • 60-7863
		  • 60-9767

Merge Dictionary Overview

The merge dictionary enables supplier management administrators and data librarians to merge supplier profile details like product and service category, business classifications, bank details, UDA, and other child entities. Supplier management administrators and data librarians can customize the merge dictionary. See: Merge Dictionary Overview in *Oracle Trading Community Architecture Administration Guide*.

Managing Merge Request

Aside from reviewing merge requests, you can:

- Assign requests to specific users
- Unassign requests

- Reject requests

See Merge Requests Overview in *Oracle Customer Data Librarian User Guide*.

Mapping and Submitting Merge Request

For each merge request, you map the duplicate information to determine the results of the merge. For both Single and Multiple type requests, you map address and relationship information. De-duplication can provide default suggestions for either mapping.

For Multiple type requests, you also map party profile attributes, which describe the party. For example, for the D-U-N-S Number attribute, you specify which number from the duplicate set should remain after the merge. After reviewing your mapping, you can submit the merge request for the Party Merge process.

See Mapping Merge Requests in *Oracle Customer Data Librarian User Guide*.

Default Rules for Merging Extended Supplier Profile Attributes

The merge process copies the UDA defined at supplier party, party site, and supplier site levels into the target supplier. The merge includes the attribute groups associated at base/common, supplier type, business classification, product and services, general and industrial classification, country and address purpose.

The merge process uses the following rules while merging UDA details:

- If a valid UDA attribute group for the supplier does not have any value for the entire attribute group, then the value is copied fully from the source to target supplier for the entire attribute group. However, if there are some attribute values already defined for an attribute group in the target supplier, then in that case only the attribute values that are empty for the attribute group in the target supplier are populated with the source supplier record attribute value.

- When there are more than one source supplier records to be merged with a target supplier record for a given attribute group, then for the attribute value copying order, the source supplier UDA record for a given attribute group that is created latest is used to populate the target supplier UDA record for the same attribute group first. This is overlaid with the next latest supplier UDA record for the same attribute group in the merge source supplier list as the overlaying is done based on creation date of an attribute group in the descending order for all the source supplier records for a given attribute group.

- Incase of multi row attribute group, if the attribute group key information is matched then, the merge process applies the first two rules; else, it creates a new row.

- Incase of party site level UDA, if the source supplier party site is moved as a new party site for the target supplier from party merge, then the UDA information is transferred based on the above mentioned rules.

- Both incase of Standalone Hub and Integrated EBS, as part of the party merge process, if the target TCA party is currently not a supplier organization, then the target party organization is enabled as supplier.

Example of Supplier Party Merge

This example explains the Supplier Party Merge process. In this example, records of two supplier parties - Computer Supplier Inc and Computer Supply Inc, are merged to form a golden record. The merger creates one record for supplier Computer Supplies Inc. (selected as master) with all its detail and some additional detail added from other record Computer Supply Inc. The Supplier Party Merge process merges party profile, address, contact, general classifications, contact points, party relationships, supplier profile, supplier site, products and services, bank details, business classification, and user defined attributes at the 3 levels. Supplier Party Merge process is applicable in standalone and integrated Supplier Hub installation.

The following table shows how different supplier parties are merged to form a single source of truth:

Supplier 1 - Computer Supplies Inc. (target)	Supplier 2 - Computer Supply Inc. (source)	Supplier Master - Computer Supplies Inc.
Party Profile • Registry ID: 1006 • Party Source System: PSFT • DUNS Number: • Organization Name: Computer Supplies Inc. • Tax Payer ID: 3463465 • Tax Registration Number: AEF-12684	Party Profile • Registry ID: 1142 • Party Source System: JDE • DUNS Number: 02- 274-0997 • Organization Name: Computer Supply Inc. • Tax Payer ID: • Tax Registration Number:	Party Profile • Registry ID: 1006 • Party Source System: PSFT, JDE • DUNS Number: 02- 274-0997 • Organization Name: Computer Supplies Inc. • Tax Payer ID: 3463465 • Tax Registration Number: AEF-12684

Supplier 1 - Computer Supplies Inc. (target)	Supplier 2 - Computer Supply Inc. (source)	Supplier Master - Computer Supplies Inc.

Address
• Party Site 1: 3OP
  • Address: 300 Oracle Parkway, Redwood City, CA 94065, US
  • Site Usage: Pay
• Party Site 2: 3SHD
  • Address: 301 Summit Hill Drive, Chattanooga, TN 37401US
  • Site Usage: RFQ Only
	Address
	• Party Site 1: 3OP
	  • Address: 300 Oracle Parkway, Redwood City, CA 94065, US
	  • Site Usage: Purchasing
		Address
		• Party Site 1: 3OP
		  • Address: 300 Oracle Parkway, Redwood City, CA 94065, US
		  • Site Usage: Pay
		• Party Site 2: 3SHD
		  • Address: 301 Summit Hill Drive, Chattanooga, TN 37401US
		  • Site Usage: RFQ Only

Contact • Contact (For Party Site 1): Joe • Contact (For Party Site 2): Bryan	Contact • Contact (For Party Site 1): Morris • Contact (For Party Site 2): Allec	Contact: • Contact (For Party Site 1): Joe, Morris • Contact (For Party Site 2): Bryan • Contact (For Party Site 3: Allec
General Classifications • Preferred Supplier Category: Gold	General Classifications • Supplier Business Type: Americas	General Classifications • Supplier Business Type: Americas • Preferred Supplier Category: Gold

Supplier 1 - Computer Supplies Inc. (target)	Supplier 2 - Computer Supply Inc. (source)	Supplier Master - Computer Supplies Inc.
Contact Points • Email: joe.smith@csi.com	Contact Points • Phone: 415-289-3762	Contact Points • Email: joe.smith@csi.com • Phone: 415-289-3762
Party Relationships • Subsidiary Of: CompUSA	Party Relationships • Employer Of: Joe Smith	Party Relationships • Subsidiary Of: CompUSA • Employer Of: Joe Smith
Supplier Profile • Supplier Number: 3427 • NIC: TX24535 • Customer Number: 7785678	Supplier Profile • Supplier Number: 3456 • NIC: TX24535 • Customer Number: 9678678	Supplier Profile • Supplier Number: 3427 • NIC: TX24535 • Customer Number: 7785678

Supplier Site
• Supplier Site 1
  • Name: CSICA
  • OU: Vision SFO
• Supplier Site 2
  • Name: CSITN
  • OU: Vision LA
	Supplier Site
	• Supplier Site 1 Name: CSICA
	• OU: Vision SFO
		Supplier Site
		• Supplier Site 1
		  • Name: CSICA
		  • OU: Vision SFO
		• Supplier Site 2
		  • Name: CSITN
		  • OU: Vision LA

Supplier 1 - Computer Supplies Inc. (target)	Supplier 2 - Computer Supply Inc. (source)	Supplier Master - Computer Supplies Inc.
Bank Details • Account Number 1: 224-125-09 • Account Number 2: 224-456-09	Bank Details • Account Number 1: 223-137-09 • Account Number 2: 211-443-77	Bank Details • Account Number 1: 224-125-09 • Account Number 2: 224-456-09 • Account Number 3: 223-137-09 • Account Number 4: 211-443-77
Supplier - Business Classification • Minority Owned	Supplier - Business Classification • Small Business	Supplier - Business Classification • Minority Owned • Small Business
Supplier - Product and Services • Monitor	Supplier - Product and Services • Keyboard	Supplier - Product and Services • Monitor • Keyboard

Supplier 1 - Computer Supplies Inc. (target)	Supplier 2 - Computer Supply Inc. (source)	Supplier Master - Computer Supplies Inc.

Supplier Level UDA
• Single row: Supplier Insurance Policy Detail
  • Insurance Company: AIG
  • Contact Phone: 7462983489
  • Experience Modification Rate: 0.3
  • Contact Name: Jenna Smith
  • Policy Number: 000021763821
• Multi row: Supplier Business References
  • Reference Name
    1. Sales Reference
    2. Customer Ref
  • Contact Name
    1. Jim Hills
    2. Steve Swank
  • Contact Phone
    1. 9872653789
    2. 6279872651
  • Contact Email
	Supplier Level UDA
	• Single row: Supplier Insurance Policy Detail
	  • Insurance Company: AIG
	  • Contact Phone: 7462983480
	  • Contact Name: Jake Murphy
	• Multi row: Supplier Business References
	  • Reference Name
	    1. Sales Reference
	  • Contact Name
	    1. Jim Hills
	  • Contact Phone
	    1. 9872653789
	  • Contact Email
	    1. jim@vodafone.com
		Supplier Level UDA
		• Single row: Supplier Insurance Policy Detail
		  • Insurance Company: AIG
		  • Contact Phone: 7462983489
		  • Experience Modification Rate: 0.3
		  • Contact Name: Jenna Smith
		  • Policy Number: 000021763821
		• Multi row: Supplier Business References
		  • Reference Name
		    1. Sales Reference
		    2. Customer Ref
		  • Contact Name
		    1. Jim Hills
		    2. Steve Swank
		  • Contact Phone
		    1. 9872653789
		    2. 6279872651
		  • Contact Email

Supplier 1 - Computer Supplies Inc. (target)	Supplier 2 - Computer Supply Inc. (source)	Supplier Master - Computer Supplies Inc.
1. jim@vodafone.com 2. steve.swank@cat.com • Business Volume 1. 1.8 2. 4.5 • Years of Business 1. 7 2. 8		1. jim@vodafone.com 2. steve.swank@cat.com • Business Volume 1. 1.8 2. 4.5 • Years of Business 1. 7 2. 8
Supplier Address Level UDA • Single row: Supplier Party Site Quality Control Procedures • Address Name: LOS ANGELES • Follows Documented Quality Control Process: Y • Quality Instructions Easily Accessible: Y • Process Adherence Audits: Y		Supplier Address Level UDA • Single row: Supplier Party Site Quality Control Procedures • Address Name: LOS ANGELES • Follows Documented Quality Control Process: Y • Quality Instructions Easily Accessible: Y • Process Adherence Audits: Y

Supplier 1 - Computer Supplies Inc. (target)	Supplier 2 - Computer Supply Inc. (source)	Supplier Master - Computer Supplies Inc.

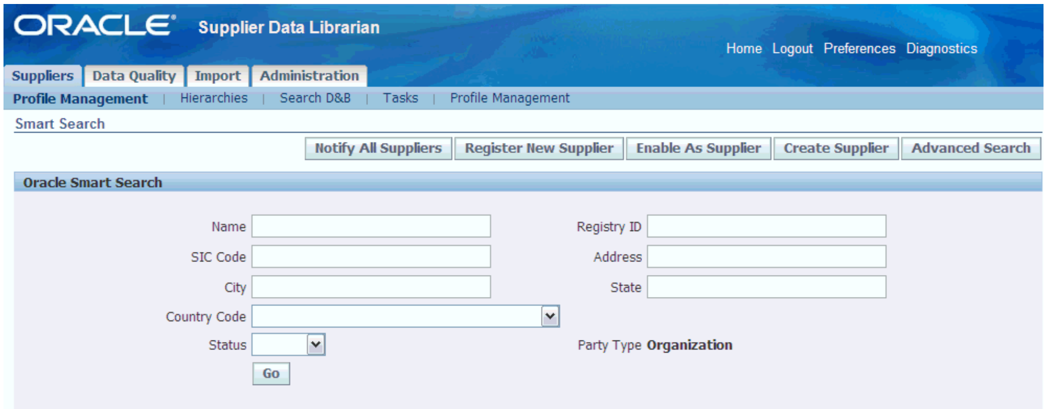
Supplier Site Level UDA
• Single row: Supplier Site Logistics Information
  • Address Name: LOS ANGELES
  • Standard Delivery Time Guarantee: 5 days
  • Freight Forward Detail: 3PL
  • Transport Insurance Type: Included
		Supplier Site Level UDA
		• Single row: Supplier Site Logistics Information
		  • Address Name: LOS ANGELES
		  • Standard Delivery Time Guarantee: 5 days
		  • Freight Forward Detail: 3PL
		  • Transport Insurance Type: Included

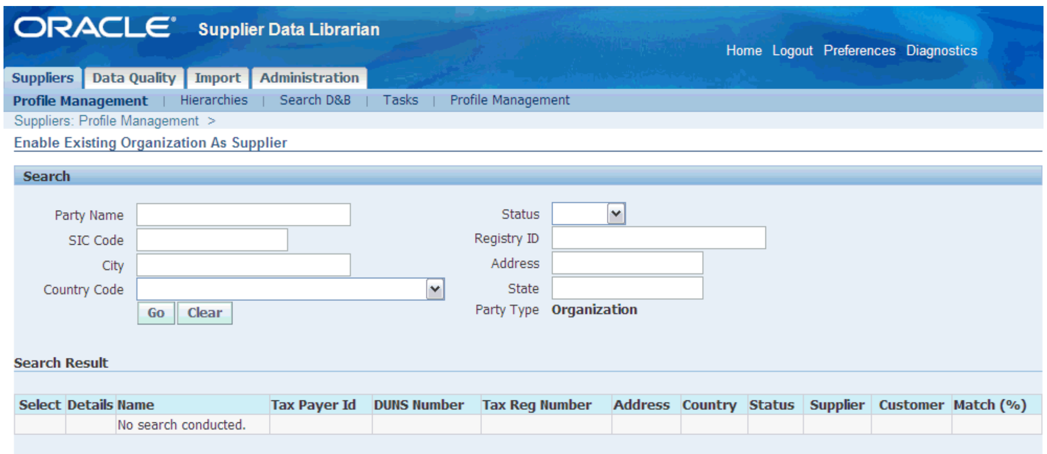
Enabling Existing Party as Supplier

Supplier Management administrator and data librarian super users can enable an existing party record to be used as supplier. The party must be an organization and not an individual. The application enables the existing TCA party organization as supplier organization by setting up the appropriate supplier enablement setups (setup supplier party in iPayee, setup supplier party in EBiz Tax, setup supplier party in Oracle Payables.

Additionally, the application enables all the existing TCA party organization contacts/persons with 'supplier' usages, so that the TCA party organization contacts are available from the Supplier Profile Workbench pages as Supplier Contacts. However, instead of automatically enabling all the existing organization contacts with 'supplier' usage the application displays the 'Enable Supplier Contact' button from the Contact Directory page. This button enables you to add an existing party contacts as supplier contacts. If there are no organization contacts defined for the party, then the application does not display the Enable as Supplier Contact button. In such a case, you can click the Create Contact button and add the contact details for the newly enabled supplier. However, all the addresses associated with the TCA Party (Party Sites) are enabled as Supplier Party sites. Supplier sites are not created by default and they must be created manually by clicking on Manage Sites button against each party site and then selecting the associated operating units.

Use the Supplier tab and Enable as Supplier button to enable an existing organization as supplier.





To enable an existing party as supplier:

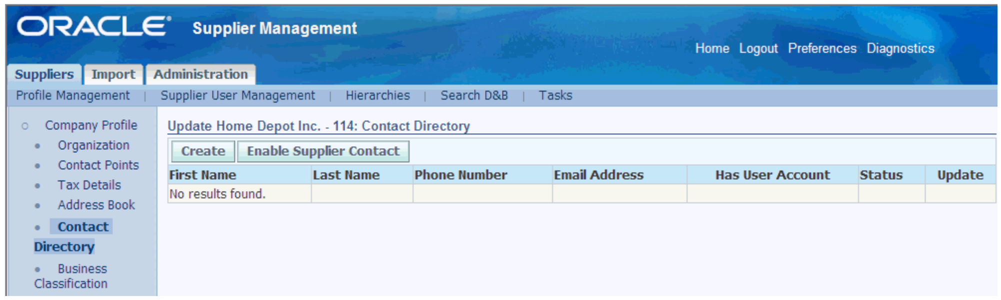
1. Search for an existing organization. If the party is already a supplier, then the selection check box is grayed out. Supplier Hub does not allow associating more than one suppliers with the same TCA party. The search results display explicit supplier and customer columns to indicate if the party is used as a customer or supplier or both in the system.

2. Select the required organization in the Search results area and click Enable as Supplier. The application displays the Update Organization page.

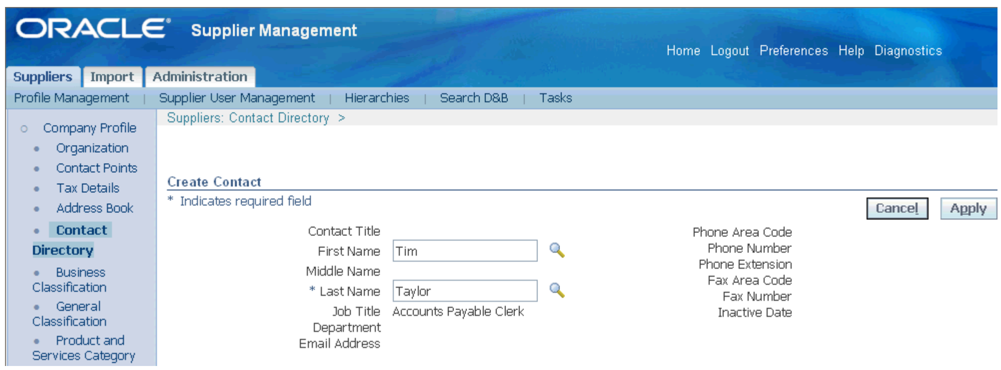
   You need to enable the supplier contact for this organization.

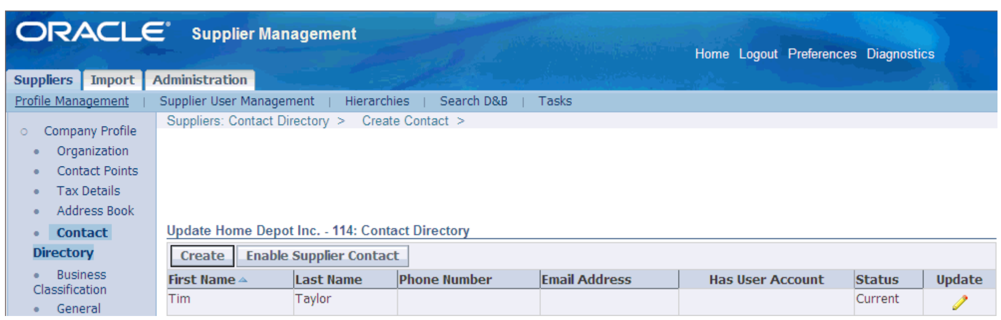
To enable the supplier contact for the existing party:

1. Select Contact Directory link under the Company Profile information.



2. Click Enable Supplier Contact button to add a supplier contact. Enter the contact details in the Create Contact page and click Apply.





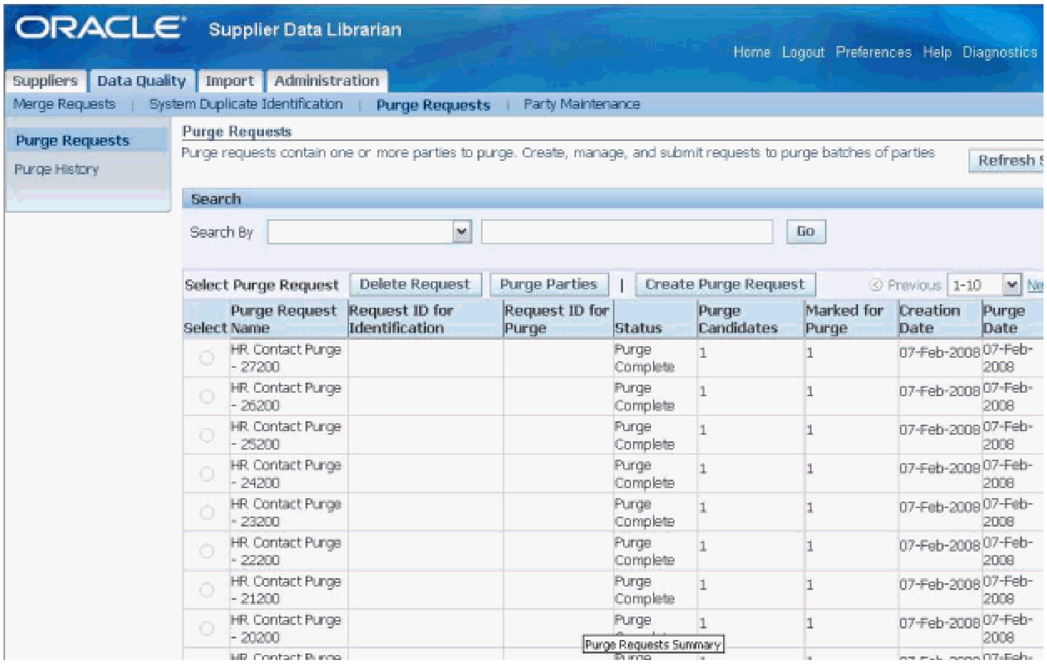
3. Click Address Book to view all the addresses associated with the supplier. All TCA addresses have been enabled as Supplier party sites. If required, create supplier sites by clicking on the Manage Sites button next to an address and selecting one or more operating units.

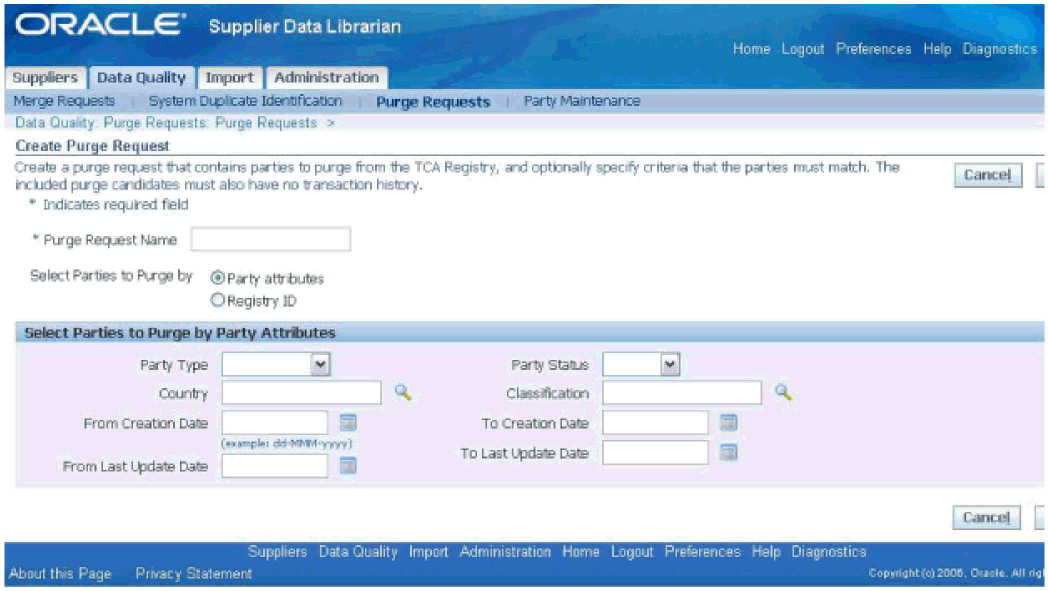
Purging Suppliers

Party purge lets you permanently purge parties from the TCA Registry, for example duplicate or mistakenly entered parties. A party is available for purge only if it has no associated transactions, or if the party record has no references from other database tables. You cannot restore a party after you purge it. The purge functionality includes:

- Purge requests: Purge batches of parties.
- Purge history: View parties that were successfully purged.

Click the Purge Requests subtab to open the Purge Requests page. See Party Purge in *Oracle Customer Data Librarian User Guide*.





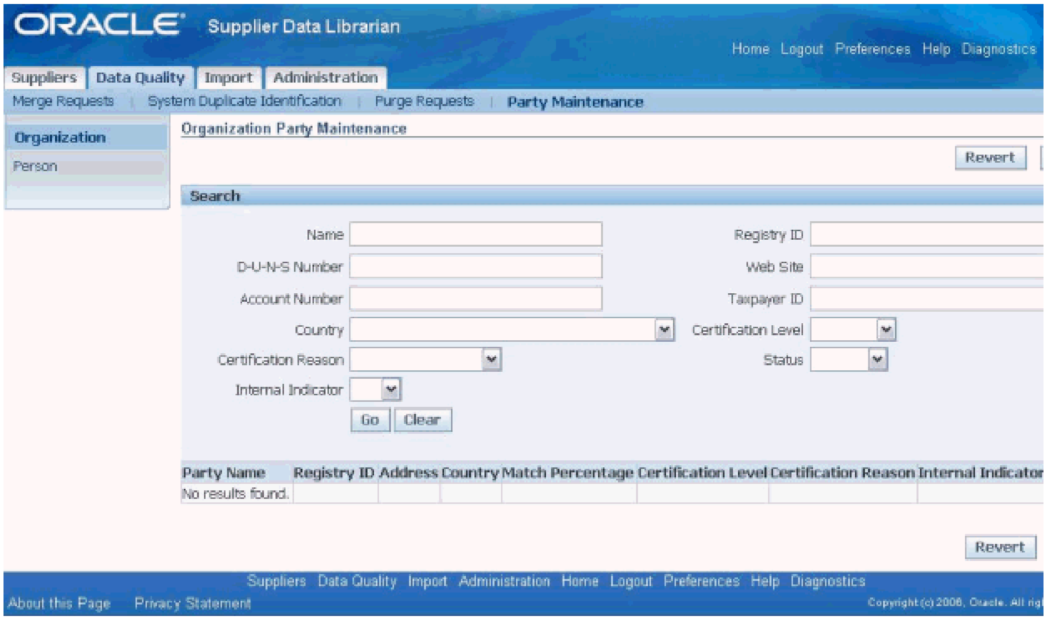
You can also purge invoices, purchase orders and other supplier related records such as invoice payments, supplier schedules, and purchase receipts. See Resource Management in *Oracle Payables User's Guide*.

Maintaining Parties

Party maintenance lets you:

- Assign a certification level and reason to the party.
- Indicate if the party is internal to your organization.
- Activate or inactivate the party.

Click the Party Maintenance subtab to open the Organization Party Maintenance page. Use this page to search for parties by organization. See Party Maintenance in *Oracle Customer Data Librarian User Guide*.


ORACLE Supplier Data Librarian
Home Logout Preferences Help Diagnostics
Suppliers Data Quality Import Administration
Merge Requests System Duplicate Identification Purge Requests Party Maintenance
Organization
Person
Organization Party Maintenance
Revert
Search
Name
Registry ID
D-U-N-S Number
Web Site
Account Number
Taxpayer ID
Country
Certification Level
Certification Reason
Status
Internal Indicator
Go Clear
Party Name Registry ID Address Country Match Percentage Certification Level Certification Reason Internal Indicator
No results found.
Revert
Suppliers Data Quality Import Administration Home Logout Preferences Help Diagnostics
About this Page Privacy Statement

13

Managing Supplier D&B Enrichment

This chapter covers the following topics:

- Overview of Supplier D&B Enrichment
- Searching for Suppliers in D&B
- Enriching New and Approved Suppliers

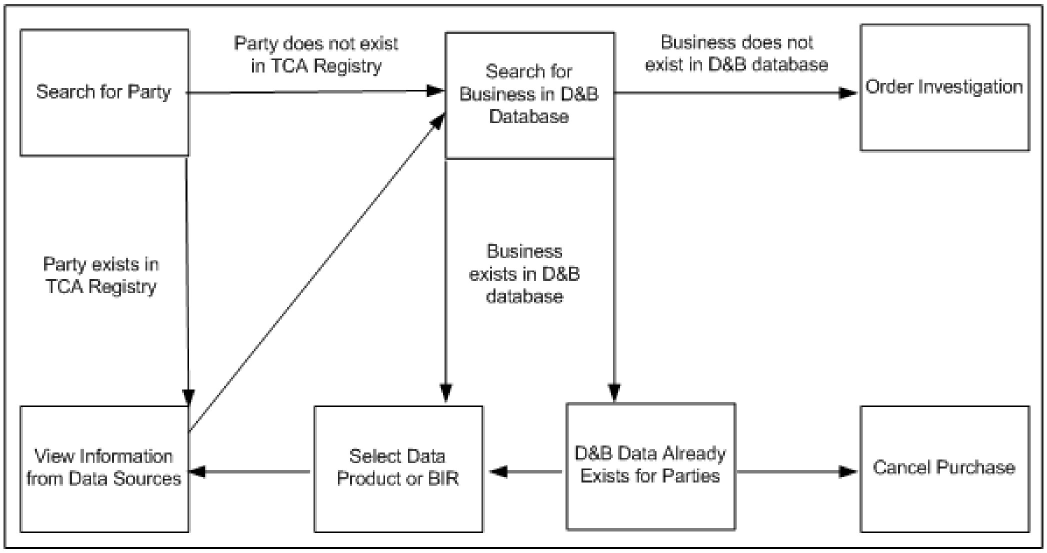
Overview of Supplier D&B Enrichment

Oracle Supplier Management enables administrators to review, enrich, and update the supplier master data with data from Dun and Bradstreet (D&B). D&B maintains a growing global database of more than 70 million businesses worldwide. This database provides key information such as D&B's unique identifier, the D-U-N-S Number, and executive contacts, as well as demographic, financial, and credit risk data. D&B provides information in the form of data products and Business Information Reports that contain a variety of data elements.

D&B information is integrated with the party records to maintain accurate information that you can use to evaluate credit risks. The D&B information coexists with user-entered data. You can view and use information from different data sources, such as user entered and D&B.

Supplier Management leverages Third Party Integration features provided by Oracle Trading Community Architecture to purchase information from D&B. For information about purchasing data from D&B, see Third Party Data Integration in *Oracle Trading Community Architecture User Guide*. The diagram describes the process flow for purchasing D&B information online.

You must have a valid Supplier Hub license for using third party integration. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*. Also, See Setting Up Third Party Data Integration in *Oracle Trading Community Architecture Administration Guide*.



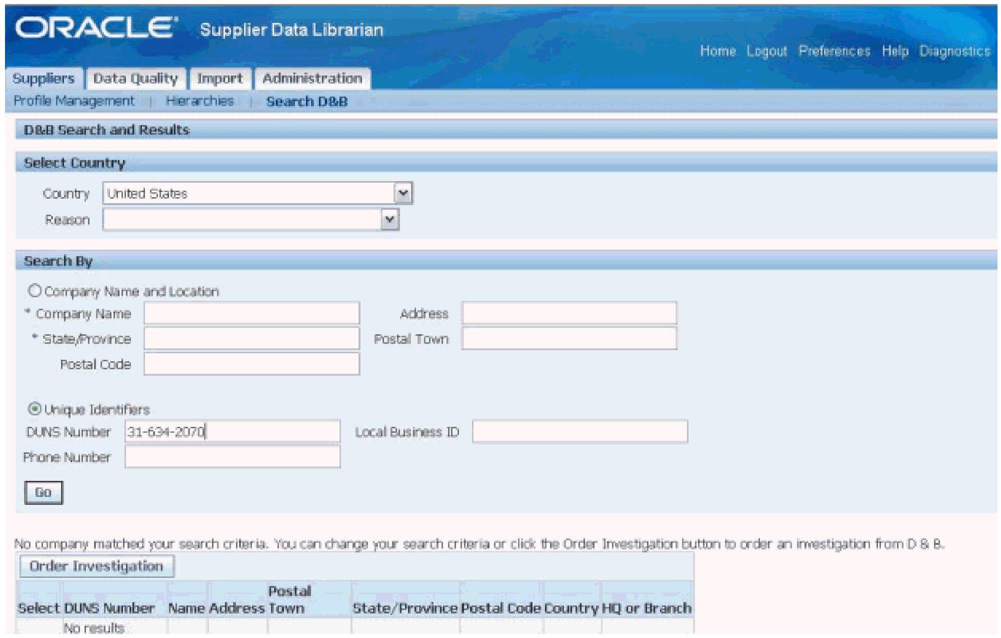
Searching for Suppliers in D&B

Prior to searching and purchasing data from D&B, ensure that you have requisite privileges to access D&B data and completed the required setup. See Setting up Supplier Data Enrichment in *Oracle Supplier Management Implementation and Administration Guide*.

Use the Supplier Data Librarian or Supplier Data Librarian Super User responsibility and Search D&B sub tab on the Suppliers tab. Search D&B tab is also visible from the Supplier Management User and Supplier Management Administrator responsibilities, but you must have a valid Supplier Hub license to search D&B. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

To search D&B for supplier data:

1. Specify the search criteria on the D&B Search and Results page, for example the DUNS Number.



2. Click Go. The application searches the D&B database and presents the details in the Search Results region.

3. Review the supplier data from D&B.

Enriching New and Approved Suppliers

You can enrich data for a new supplier during supplier registration. See Managing New Supplier Qualification, page 5-9. This mitigates the risk of approving suppliers going out of business, suppliers on any type of debarment list or involved in fraudulent, bribery or money laundering activities.

For approved suppliers, you can buy D&B information either from the Search D&B page as shown above or directly from the Supplier's profile details page. From the supplier's profile page, click on Enrich button to open the Review: D&B Purchase Data page. This page shows a side-by-side view of user-entered, D&B and Single Source of Truth data. See Single Source of Truth Overview in *Oracle Trading Community Architecture User Guide*.

14

Publishing and Synchronizing Supplier Data

This chapter covers the following topics:

- Overview of Supplier Data Publication and Synchronization
- Business Events
- Exporting Search Results to Excel
- Publishing Supplier Profile
- Tracking Publication History
- Generating Supplier Profile Report

Overview of Supplier Data Publication and Synchronization

Supplier Data Publication provides integration of Supplier Hub with other spoke systems. It has the infrastructure to raise necessary business events. Supplier Hub provides the supplier profile publish event that enables publishing of supplier information. The Hub has the ability to track publish event history and to generate a report of the supplier profile. Additionally, Supplier Hub has APIs that can be used to integrate data from third party systems. Since Supplier Hub uses Oracle Trading Community Architecture as its foundation, various APIs provided by TCA can be used to perform supplier related operations. For TCA product APIs, see *Oracle Trading Community Architecture Technical Implementation Guide*.

Supplier Hub provides various APIs for extracting and publishing supplier information to third party systems. For automated publication, the business event framework, in conjunction with publication services, provides an integration infrastructure for publishing data in the Supplier Hub repository to consuming business process services and subscribing applications.

Publication services are a set of predefined APIs that extract supplier information from Supplier Hub. Synchronization APIs synchronize data in the Supplier Hub from third party systems.

See Using Supplier Hub APIs in *Oracle Supplier Management Implementation and*

Administration Guide.

Business Events

Whenever a supplier, supplier site or contact is created or changed within Supplier Hub, a business event is raised. These business events in Supplier Hub are pre-registered with the Oracle Workflow Event manager. A system registered in the Oracle Workflow Event manager can subscribe to an event, and use the event subscription logic to specify the processes to perform when the triggering event occurs.

A business event passes the primary identifier of the changed record plus the operation performed, such as create, update or delete. The subscriber can call the query services to extract the object definition from Supplier Hub using the entity identifier passed by the business event. The subscriber can specify what information they require about that entity based on the input parameters passed to the query service. The query service then returns the object definition to the subscriber.

See Setting up Business Events in *Oracle Supplier Management Implementation and Administration Guide*.

Exporting Search Results to Excel

Export of supplier profile information into spreadsheet from the Advanced Search results page. Search for the supplier or suppliers who you wish to export. Then click on 'Export All' to export the entire result set to a spreadsheet. Set the display format to export the most relevant information.

Publishing Supplier Profile

Supplier management data librarians can publish supplier profile from the supplier search results. Supplier Hub enables data librarians to publish:

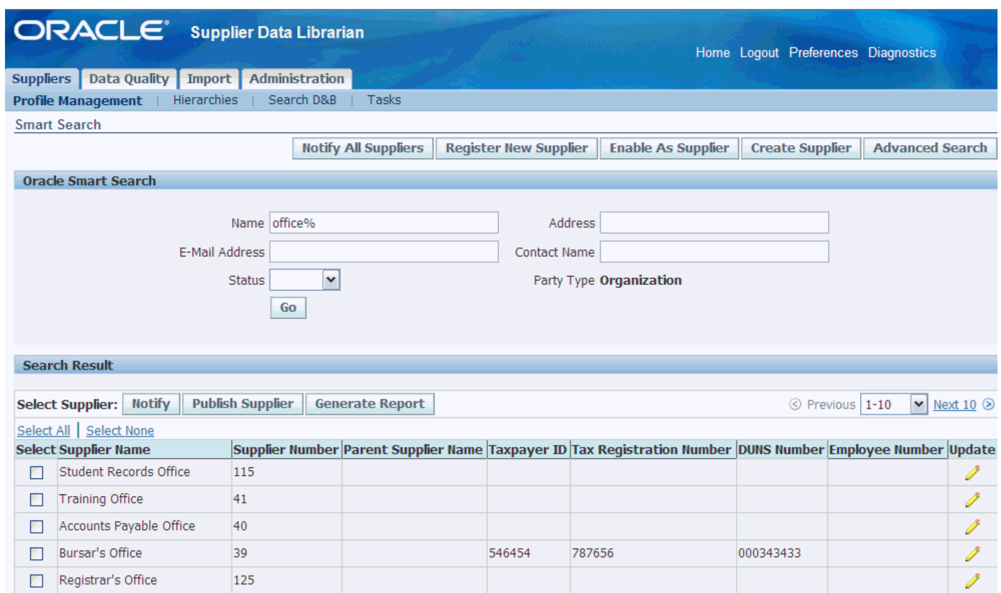
- Single or multiple supplier records from the Smart Search, Basic Search, and Advanced Search pages.
- Updated supplier records.
- Supplier UDA information.
- Using the Publish button on the search and organization details pages.
- Using the POS Supplier Publish Job concurrent program from the Schedule Request page. Data librarians can run this program when they need to publish large quantities of supplier data. This program publishes the whole supplier business object for all suppliers identified for publication. The program identifies suppliers for publication based on input parameters. Data librarians can run this program

based on from and to dates, for specific hours, or schedule the program to run at specific date/time/frequency. If the data librarian has not specified any specific parameter, then the program runs from the last run date till the current date.

When you click the Publish button or run the concurrent program, the application raises the Publish Supplier business event. It also inserts data into the pos_supp_pub_history table. This table has the entire data of the supplier in xml format. This is a workflow business event and the spoke system must subscribe to the Publish Supplier business event. See, the relevant topic in the workflow guide to subscribe to the business event. On subscription to the business event, the spoke systems can get the publication event ID as a mail or an alert, based on how they have subscribed. The spoke systems can then use the event ID mentioned in their mail or alert to access the xml data in the table and update their systems.

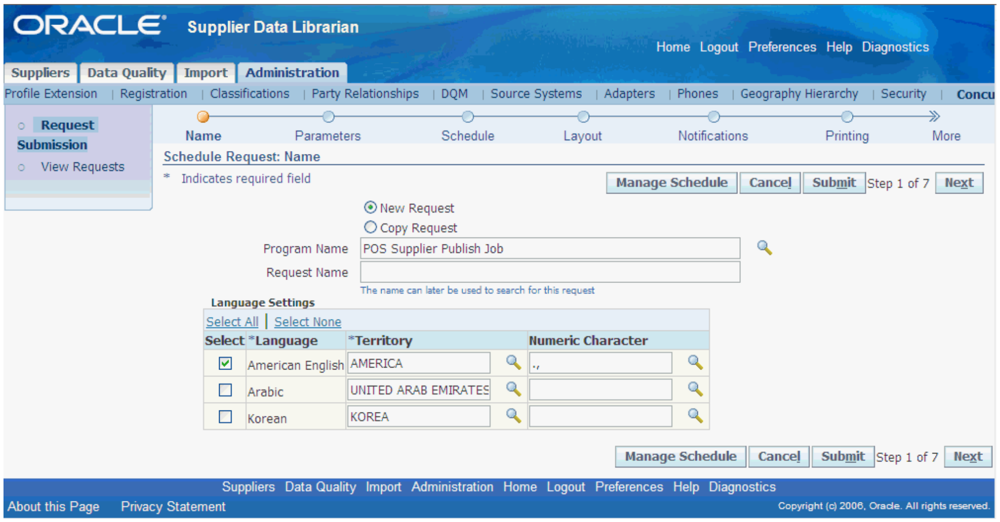
To publish supplier information using the Publish button:

1. Search for the supplier.
2. Select the applicable supplier or multiple suppliers.
3. Click the Publish button.



To publish supplier information using the concurrent program:

1. Navigate to the Schedule Request page using the Concurrent Requests subtab on the Administration tab.



2. Enter POS Supplier Publish Job as the concurrent program name.

3. Select the applicable parameters.

   Note: If the data librarian has not specified any specific parameter, then the program runs from the last run date till the current date.

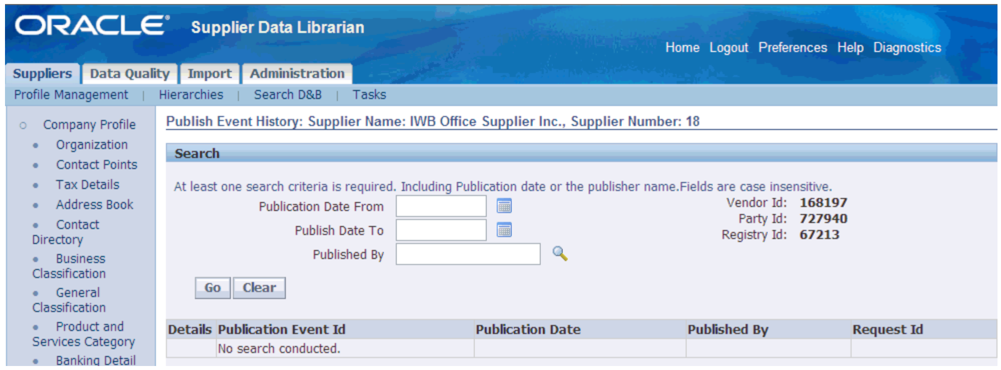
Tracking Publication History

Supplier Hub enables data librarians to track the publication history for information purposes. Use the Supplier Management Data Librarian Super User (get the name correct from the application) responsibility and the Publish Event History left pane navigation link on the supplier details page.

To track publication history:

1. Search Supplier, click on Update Pen icon and Go to Publish Event History side navigation link.

2. Enter search criteria based on Publication Date From and Publication Date To and click on Go button or enter published by and click Go.



Generating Supplier Profile Report

Supplier Hub enables you to generate supplier profile reports using Oracle BI Publisher. Oracle BI Publisher is a template-based publishing solution delivered with the Oracle E-Business Suite. It provides a new approach to report design and publishing by integrating familiar desktop word processing tools with existing E-Business Suite data reporting. BI Publisher leverages standard, well-known technologies and tools, so you can rapidly develop and maintain custom report formats. You can design and control how the report outputs are presented in separate template files. At runtime, BI Publisher merges your designed template files with the report data to create PDF, RTF, HTML, or EXCEL output to meet a variety of business needs.

To generate the supplier profile report using BI Publisher:

> **Note:** Ensure to set up applicable values for the POS: SM: Supplier Report Template and POS: SM: Supplier Report Output Type profile options. See: Setting up Supplier Profile Report in the *Oracle Supplier Management Implementation and Administration Guide*.

1. Search Supplier and click Update icon.

2. Click the Generate Report button.


ORACLE Supplier Data Librarian
Home Logout Preferences Diagnostics
Suppliers Data Quality Import Administration
Profile Management | Hierarchies | Search D&B | Tasks
Smart Search
Notify All Suppliers Register New Supplier Enable As Supplier Create Supplier Advanced Search
Oracle Smart Search
Name office%
Address
E-Mail Address
Contact Name
Status
Party Type Organization
Go
Search Result
Select Supplier: Notify Publish Supplier Generate Report
Previous 1-10 Next 10
Select All | Select None
Select Supplier Name Supplier Number Parent Supplier Name Taxpayer ID Tax Registration Number DUNS Number Employee Number Update
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