Oracle® Sourcing

Implementation and Administration Guide

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Oracle Sourcing Implementation and Administration Guide, Release 12.2

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Oracle Sourcing Implementation and Administration Guide, Release 12.2

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- Are the examples correct? Do you need more examples?

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Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Sourcing Implementation and Administration Guide.*

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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

Overview

This chapter covers the following topics:

- About Oracle Sourcing

About Oracle Sourcing

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

With Oracle Sourcing you can:

- Source more of your spend.
- Source for lowest total cost.
- Create immediate and long-term savings.

Source More of Your Spend

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

Exploit More Sourcing Opportunities

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

Slash Time with Online Negotiations

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

Make Faster Award Decisions with Online Bid Comparison and Award Rules

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

Source for Lowest Total Cost

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

Improve Sourcing Results with Cross-Functional Collaboration

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

Leverage Best Practices with Sourcing Knowledge Capture

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

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

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

Create Immediate and Long-Term Savings

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

Start Saving Immediately with Rapid Deployment

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

Achieve Rapid ROI through Open Competition

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

Realize Long Term Savings with Consistent Execution and Compliance

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

Unified Sourcing Platform

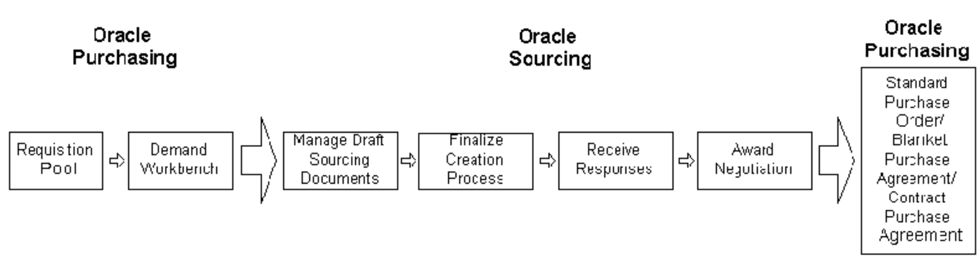
Oracle Sourcing is tightly integrated with the procurement modules of the E-Business Suite. Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more - all from applications that are built on a unified information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

Oracle Sourcing Business Flows

There are three typical business flows that utilize Oracle Sourcing.

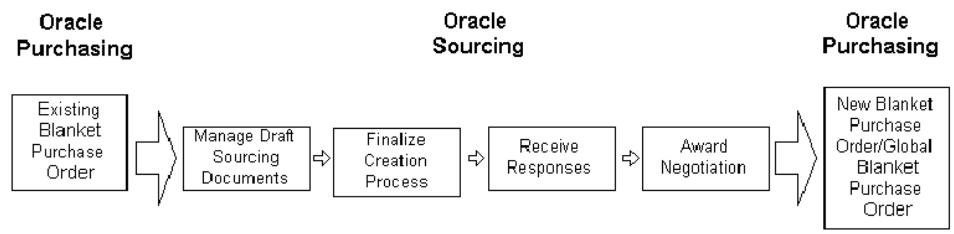
- Sourcing buyers can use the Demand Workbench feature of Oracle Purchasing to select approved requisition lines and aggregate demand into a draft auction or a Sourcing RFQ. Buyers can use the Demand Workbench without leaving Oracle Sourcing. The backing requisition line information is retained throughout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

Creating New Documents Using Demand Workbench



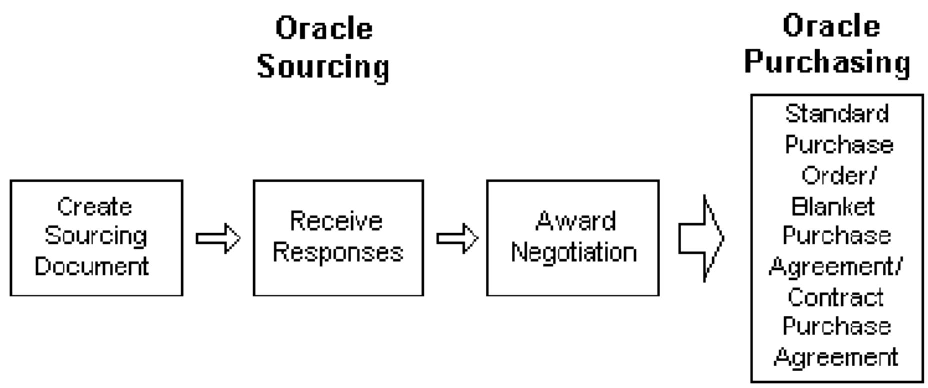
- Oracle Purchasing buyers can select a blanket purchase agreement (BPA) and use it as the basis of a new auction or Sourcing RFQ. The details of the BPA (including header, attachments, price breaks) are copied to the draft negotiation, and the sourcing lines refer to the originating BPA lines.

Creating New Documents from Existing Blanket Purchase Agreements



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

Creating Documents Directly in Oracle Sourcing



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

2

Implementing Oracle Sourcing

This chapter covers the following topics:

- Introduction
- Overview of Oracle Sourcing Implementation
- Upgrading an Existing Oracle Sourcing System
- Prerequisites
- Oracle Sourcing Implementation Steps
- Set the Enterprise Name (Required)
- Define System Profile Options (Required)
- Assign Sourcing Responsibilities (Required)
- Define Buyer Security (Optional)
- Set Up Attribute Groups and Requirement Sections (Optional)
- Set Up Negotiations Configuration (Optional)
- Subscribe to Notifications (Optional)
- Register Suppliers and Supplier Users (Required)
- Define Negotiation Terms and Conditions (Optional)
- Define Reusable Attribute Lists (Optional)
- Define Reusable Requirement Lists (Optional)
- Define Cost Factors and Cost Factor Lists (Optional)
- Define Reusable Invitation Lists (Optional)
- Define Negotiation Styles (Optional)
- Define Purchasing Document Style (Optional)
- Define Negotiation Templates (Optional)
- Create Abstracts and Forms (Optional)

- Set Up Document Print Layouts (Optional)
- Set Up Demand Workbench (Optional)
- Enable Award Approval (Optional)
- Enable Sourcing Optimization (Optional)
- Enable Oracle Procurement Contracts (Optional)
- Enable Oracle Services Procurement (Optional)
- Set Up Inbox for Notifications (Optional)
- Set Up Enhanced Supplier Search Feature (Optional)
- Enable Supplier Site Access (Optional)
- Customize Content (Optional)
- Customize Two-Stage RFQ (Optional)
- Extend Sourcing Business Events (Optional)
- Set Up Additional Information for Negotiations (Optional)
- Set Up Earnest Money Deposit
- Set up Initiatives
- Set up Terms and Conditions

Introduction

New Customers

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

Existing Customers

Additionally, existing customers can use the information contained in this chapter to upgrade an existing Oracle Sourcing system. See Upgrading an Existing System , page 2-7 later in this chapter for instructions on upgrading your existing Oracle Sourcing system.

Implementing Other E-Business Suite Applications

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

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

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

Overview of Oracle Sourcing Implementation

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

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

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

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

New System Implementation Steps

Step Number	Step Name	Required?	Information Source
Prerequisite	Review Information in Appendix A	Yes	Appendix A, Implementing E-Business Suite for Oracle Sourcing
1	Set the Enterprise Name.	Yes	Instructions in this chapter.

Step Number	Step Name	Required?	Information Source
2	Define System Profile Options	Yes	*Oracle E-Business Suite Setup Guide* using the information in this chapter.
3	Assign Sourcing Responsibilities	Yes	*Oracle E-Business Suite Security Guide* using information in this chapter.
4	Define Buyer Security	No	*Oracle Purchasing User's Guide* using information in this chapter.
5	Set Up Attribute Groups and Requirement Sections	No	*Oracle E-Business Suite Developer's Guide* using information in this chapter.
6	Set Up Negotiations Configuration	No	Instructions in this chapter.
7	Subscribe to Notifications	No	Instructions in this chapter and Appendix.
8	Register Suppliers and Supplier Users	Yes	*Oracle iSupplier Portal User's Guide.*
9	Define Negotiation Terms and Conditions	No	Instructions in this chapter.
10	Define Reusable Attribute Lists	No	Instructions in this chapter.
11	Define Reusable Requirement Lists	No	Instructions in this chapter.
12	Define Cost Factors and Cost Factor Lists	No	Instructions in this chapter.

Step Number	Step Name	Required?	Information Source
13	Define Reusable Invitation Lists	No	Instructions in this chapter.
14	Define Negotiation Styles	No	Instructions in this chapter.
15	Define Purchasing Document Styles	No	*Oracle Purchasing User's Guide* using instructions in this chapter.
16	Define Negotiation Templates	No	Instructions in this chapter.
17	Create Abstracts and Forms	No	Instructions in this chapter. *Oracle E-Business Suite Setup Guide* using information in this chapter for creating value sets and values.
18	Set Up Document Print Layouts	No	*Oracle XML Publisher User's Guide*for instructions on creating templates. *Oracle Purchasing User's Guide* for instructions on assigning templates to documents.
19	Set Up Demand Workbench	No	*Oracle E-Business Suite Setup Guide* and *Configuring, Reporting, and System Administration in Oracle HRMS* using information in this chapter.

Step Number	Step Name	Required?	Information Source
20	Enable Award Approval	No	*Oracle Approvals Management Implementation Guide* using Instructions in this chapter.
21	Enable Sourcing Optimization	No	*Oracle E-Business Suite Setup Guide*using instructions in this chapter.
22	Enable Oracle Procurement Contracts	No	*Oracle E-Business Suite Setup Guide* for information on setting profile options and security. *Oracle Purchasing User's Guide* for information on setting document types.
23	Enable Oracle Services Procurement	No	*Oracle E-Business Suite Setup Guide* using information in this chapter.
24	Set Up Inbox for Notifications	No	Information in this chapter.
23	Set Up Enhanced Supplier Search Feature	No	*Oracle iSupplier Portal User's Guide.*
25	Enable Supplier Site Access	No	*Oracle Payables User Guide* using information in this chapter.
26	Enable Supplier Scorecard	No	using instructions in this chapter.

Step Number	Step Name	Required?	Information Source
27	Rename Two-stage RFQ Lookup Codes	No	using instructions in this chapter.
28	Rename Attachment Categories for Two-Stage RFQs	No	using instructions in this chapter.
29	Customize Content	No	Instructions in this chapter.
30	Extend Sourcing Business Events	No	*Oracle Workflow Developer's Guide* using instructions in this chapter.

Upgrading an Existing Oracle Sourcing System

If you are upgrading an existing Oracle Sourcing system, most of the steps identified in the table above have already been performed and do not need to be performed again. Those steps can be omitted when upgrading. The table below lists the setup steps that deal with the new release features.

If there are setups that have been done previously but for which there are new release ramifications, the new information is noted in the **Release Details** column. You may wish to read the information for that step to decide whether to perform the setup again to enable the new functionality. If there is no information in the **Release Details** column, that step concerns a feature that is new for this release. Read the information for that step to decide whether to enable the new feature.

Existing System Implementation Steps

Step Number	Step Name	Required?	Information Source	Release Details
1	Define System Profile Options	Yes	*Oracle E-Business Suite Setup Guide* using the information in this chapter.	The following system profiles are new: • PON: Automatically Default Catalog Attributes • Self-Service Accessibility Features
2	Assign Sourcing Responsibilities	Yes	*Oracle E-Business Suite Security Guide* using information in this chapter.	Job functions have been reallocated among menus to facilitate easier responsibility definition
3	Set Up Attribute Groups and Requirement Sections	No	*Oracle E-Business Suite Developer's Guide* using information in this chapter.	Header attributes are now called Requirements
4	Set Up Negotiations Configuration	No	Instructions in this chapter.	Many negotiations configuration features are new.
5	Subscribe to Notifications	No	Instructions in this chapter and Appendix.	

Step Number	Step Name	Required?	Information Source	Release Details
6	Register Suppliers and Supplier Users	Yes	*Oracle Applications iSupplier Portal User's Guide.*	Supplier Users can be directly registered and/or approved during negotiation creation.
7	Define Reusable Requirement Lists	No	Instructions in this chapter.	In prior releases, Requirements were called Header Attributes.
8	Define Cost Factors and Cost Factor Lists	No	Instructions in this chapter.	Price Factors have been renamed to Cost Factors
9	Define Negotiation Styles	No	Instructions in this chapter.	
10	Define Purchasing Document Styles	No	*Oracle Purchasing User's Guide* using instructions in this chapter.	
11	Enable Award Approval	No	*Oracle Approvals Management Implementation Guide* using Instructions in this chapter.	Approvals can now use position hierarchy as well as employee supervisor models
12	Enable Supplier Scorecard	No	using instructions in this chapter.	

Step Number	Step Name	Required?	Information Source	Release Details
13	Extend Sourcing Business Events	No	*Oracle Workflow Developer's Guide* using instructions in this chapter.	

Prerequisites

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

Oracle Sourcing Implementation Steps

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

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

Using the Administration Tab Functions

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

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

Set the Enterprise Name (Required)

You can specify the Enterprise name that is used by the system. To specify this name, run the following script

$APPL_TOP/pos/12.0.0/patch/120/sql/POSENTUP.sql

This script prompts for an enterprise name and updates the relevant tables with this information. If you do not run this script, "Default enterprise name" will be used by the system as the company name.

Define System Profile Options (Required)

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

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

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

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

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

- **PON: Automatically Default Catalog Attributes** Determines the type of catalog attributes Oracle Sourcing automatically adds to a negotiation line when a shopping category is selected.
    - All - both base and category descriptors are added to the line
    - Base - only base descriptors are added to the line.
    - Category - only category descriptors are added to the line.
    - None - no descriptors are automatically added to the line.

- **PON:External Application Framework Agent** specifies a URL (typically outside your firewall) will be used for the links in notifications sent to suppliers.

- The **POS: External URL** is used to construct the link to supplier registration page as well as the external abstract page.

- Set the **Self-Service Accessibility Features** to None to enable rich-text capabilities when defining Requirements.

- **Sourcing Default Responsibility for External User** specifies the responsibility that will be assigned to any external user whose registration is initiated from Oracle Sourcing.

See *Oracle E-Business Suite Setup Guide* for information on setting system profiles.

Assign Sourcing Responsibilities (Required)

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

See *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide* for instructions on setting up personnel entries in Oracle HRMS.

See *Oracle E-Business Suite Security Guide* for instructions on assigning a responsibility to a user.

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

Controlling Publishing, Unlocking/Unsealing, and Awarding Negotiations

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

Seeded Sourcing Job Functions

Function	Description	Seeded in Super User	Seeded in Buyer	Seeded in Team Member
Award My Negotiations	Users can make award decisions for negotiations they created.	Yes	Yes	No
Unlock Sealed Negotiations	Users can unlock any sealed negotiations.	Yes	Yes	No
Unseal Sealed Negotiations	Users can unseal any sealed negotiations.	Yes	Yes	No

Function	Description	Seeded in Super User	Seeded in Buyer	Seeded in Team Member
Publish Negotiation	Users can publish negotiations.	Yes	Yes	No

The following job functions are assigned to the Sourcing Super User but not to the Sourcing Buyer or Sourcing Team Member. You will need to explicitly grant them to buyers and team members.

Other Negotiations Job Functions

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

See *Oracle E-Business Suite Security Guide* for instructions on creating a customized responsibility.

Granting Collaboration Team Management Capabilities

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

Collaboration Team Management Job Function

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

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

- Grant your buyers the Sourcing Buyer responsibility.
- Grant any users who will participate as Collaboration Team members the Sourcing Team Member responsibility. Note that Collaboration Team members cannot create negotiations. They can only edit draft negotiations created by others.
- Grant any users who will be maintaining the Oracle Sourcing system the Sourcing Super User responsibility.

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

Define Buyer Security (Optional)

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

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

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

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

To set up buyer security:

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

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

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

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

  3. Select the appropriate Operating Unit and click Go. Click Update for the Document Type used in Oracle Sourcing (Sourcing Buyer Auction, Sourcing RFQ, or Sourcing RFI).

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

  5. Click Apply.

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

Set Up Attribute Groups and Requirement Sections (Optional)

Requirements solicit header level information from a supplier when the supplier responds to a negotiation. Requirements can be grouped into Sections. You can then use sections to logically and coherently structure the questions you wish the supplier to answer. A Sourcing Administrator can create sections to which buyers later assign their Requirements when creating a negotiation. Alternatively, buyers can create a new section instead of selecting a predefined section by the administrator during negotiation creation.

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

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

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

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

3. Query for PON%GROUPS in the Type field. This will return two lookups:

Type	Meaning
PON_HEADER_ATTRIBUTE_GROUPS	Sourcing Requirement Sections
PON_LINE_ATTRIBUTES_GROUPS	Sourcing Line Attribute Groups

   The first entry lists the section values available for Requirement sections. The second entry lists the group values available for line attributes. To add Requirements sections, click the first entry. To add line attribute groups click the second entry.

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

   See *Oracle E-Business Suite Developer's Guide* for instructions on adding lookup values.

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

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

Set Up Negotiations Configuration (Optional)

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

- Selecting the default ranking display.
- Specifying visibility in blind auctions or RFQs
- Identifying allowable cost factor types.
- Specifying default price break types.
- Allowing award approval to be required.
- Defining header scoring defaults.
- Defining the default line attribute group.
- Defining the default UOM for amount-based line types.
- Enforcing response levels in multi-round negotiations.
- Listing URLs for supplier discovery.
- Specifying the supplier online window value.
- Specifying concurrent processing values.
- Specifying defaulting values for alternate lines.

Using the Negotiations Configuration page:

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

To access the **Negotiations Configuration** page:

1. On the **Negotiations Home** page, click the Administration tab.
2. On the Administration tab, click " Negotiations Configuration."
3. After you have finished performing any of the following tasks, click Apply to save your updates.

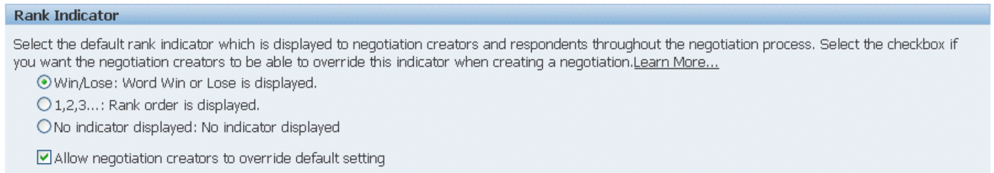
Setting the default ranking display:

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

To choose a ranking indicator:

1. In the Rank Indicator section of the **Negotiations Configuration** page, select a

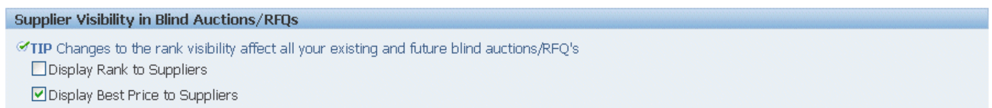
default rank indicator. This indicator is used to identify the method for displaying the rank of responses on a negotiation.



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

Specifying visibility in blind auctions and RFQs:

1. Participants in blind auctions/RFQs are typically restricted from viewing information on other participant's responses. However, you can allow them to see the response rankings by selecting the appropriate checkbox. This will existing and affect future blind auctions and RFQs.



2. If, in addition to allowing participants in blind auctions/RFQs to see competing response ranking, you also wish to allow them to see the actual response price, select the checkbox. Display Best Price to Suppliers.

Identifying allowable cost factor types:

Cost factors identify additional costs that should be included when calculating total cost for a line. There are two types of cost factors.

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

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

You can specify the default type of cost factors buyers can apply to their negotiations. Buyers can override this value when creating a negotiation.

To specify the default types of cost factors:

1. Select the appropriate value from the Cost Factors menu.

Specifying default price break types:

For blanket and/or contract purchase agreement negotiation types, buyers can specify price breaks to negotiation with suppliers. Buyers can require suppliers to respond to their price breaks, or allow suppliers to modify the price break values or respond with their own price breaks. Buyers have three choices when creating their negotiations:

- None - no price breaks are defined.
- Required - suppliers must respond to the price breaks and cannot modify them.
- Optional - supplier must respond to the price breaks but can also modify the buyer's price break values.

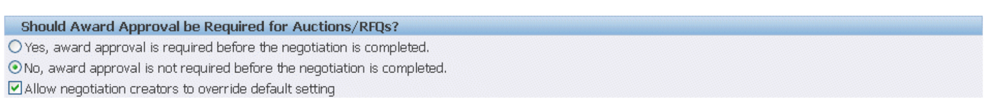
You can define the default price break type. This can be overridden by the buyer as needed.

1. Select the appropriate value from the Price Break menu.

Allowing award approval to be required:

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

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



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

Defining Requirements scoring defaults:

You can define defaults for Requirement scores. You can choose to allow buyers to weight scores when evaluating supplier responses, and you can define a default maximum score value. You can also choose whether to display the scoring criteria to suppliers.

To define Requirements score defaults:

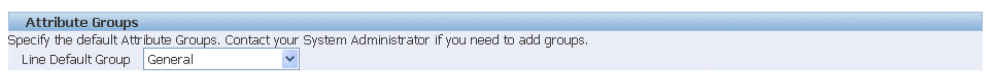
1. On the **Negotiations Configuration** page, select the appropriate check boxes and enter appropriate values.

Defining the default line attribute group:

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

1. On the **Negotiations Configuration** page, select a group from the list of predefined groups.

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



Defining the default UOM for amount-based line types:

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

To define a default unit of measurement:

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

Enforcing response levels in multi-round negotiations:

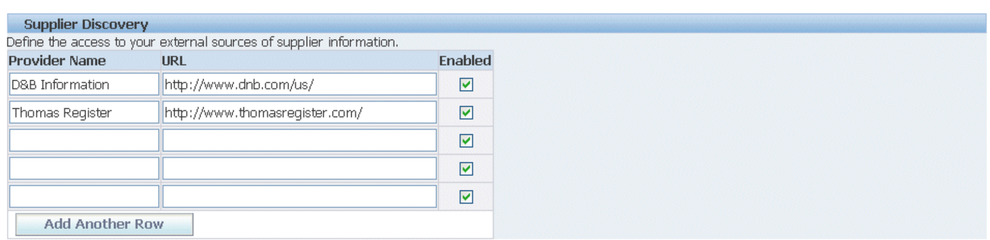
When taking a negotiation to a subsequent round of responding, you can choose to force the suppliers to respond in the new round with a price that is lower than the price they offered in the prior round.

1. To require suppliers to respond in a new round of a negotiation with a lower price, select the checkbox. This checkbox only sets the default for new negotiations. This control appears when creating a new round and can be overridden then.

Listing URLs for supplier discovery:

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

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

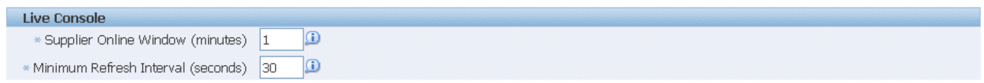


Specifying the supplier online window values:

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

To set the Supplier Online Window Values::

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



Specify the countdown clock polling interval:

When a negotiation has less that twenty fours hours left, the Time Left display becomes a countdown clock, displaying in real time the hours, minutes, and seconds left before the negotiation closes.

Specify concurrent processing values:

Large negotiations can sometimes have hundreds or thousands of lines. Processing such negotiations can be time consuming and resource intensive. You can specify a limit to the number of negotiation lines that are processed online. A negotiation having more than this number of lines is processed asynchronously using a concurrent request. For example, if the threshold is set at 500 and a buyer has defined an RFQ with 600 lines, when the buyer publishes that negotiation, a concurrent request is generated to run in the background. This frees the buyer's terminal. The buyer can monitor the progress of the request online and is sent a notification once it completes.

Note:

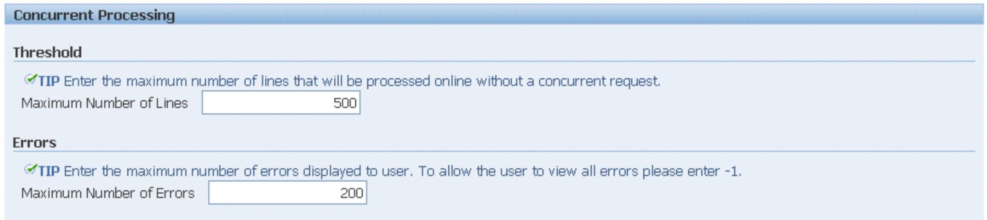
Because of their inherently larger size, the number of lines to be processed online is automatically divided by five when processing XML spreadsheets. For example, if the threshold is set to 500 lines, only 100 lines in an XML spreadsheet will trigger the concurrent request.

For concurrent processing, you set

- The maximum number of lines to be processed online.

- The maximum number of error messages that are contained in a display.

1. To set the processing and error message thresholds, enter values in the appropriate fields.



Specify the defaulting values for alternate lines using the following options:

- Default Uom for Quantity Based Lines: Use this dropdown to specify the default unit of measure for quantity based alternate lines.

- Allow Suppliers to update Uom on Quantity Based Response Lines: Select this checkbox to enable suppliers to update the UOM in alternate lines.

- Default Category: Use this dropdown to specify a default purchasing category for the alternate lines.

- Allow Suppliers to update Category on Response Lines: Select this checkbox to enable suppliers to update the category in alternate lines.

Subscribe to Notifications (Optional)

One of the key elements of the sourcing process is the communication between suppliers and buyers. Oracle Sourcing generates a large number of notifications that appear throughout the sourcing process. However, many of these notifications vary in relevance depending on the sourcing document type or the sourcing business process followed by the buying organization.

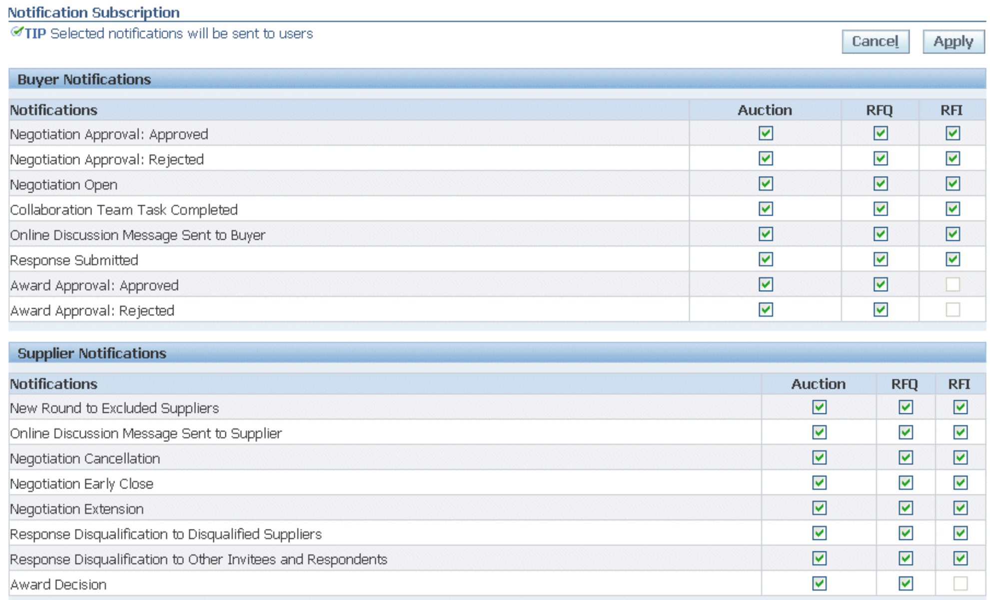
Oracle Sourcing has a notification framework that allows administrators to easily enable or disable notifications system-wide.

To select appropriate notifications:

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

2. On the **Administration** page, click "Notification Subscription."

3. On the **Notification Subscription** page, select which notifications apply to which negotiation types.



Notification Subscription

TIP Selected notifications will be sent to users

Cancel Apply

Buyer Notifications

Notifications	Auction	RFQ	RFI
Negotiation Approval: Approved	☑	☑	☑
Negotiation Approval: Rejected	☑	☑	☑
Negotiation Open	☑	☑	☑
Collaboration Team Task Completed	☑	☑	☑
Online Discussion Message Sent to Buyer	☑	☑	☑
Response Submitted	☑	☑	☑
Award Approval: Approved	☑	☑	☐
Award Approval: Rejected	☑	☑	☐

Supplier Notifications

Notifications	Auction	RFQ	RFI
New Round to Excluded Suppliers	☑	☑	☑
Online Discussion Message Sent to Supplier	☑	☑	☑
Negotiation Cancellation	☑	☑	☑
Negotiation Early Close	☑	☑	☑
Negotiation Extension	☑	☑	☑
Response Disqualification to Disqualified Suppliers	☑	☑	☑
Response Disqualification to Other Invitees and Respondents	☑	☑	☑
Award Decision	☑	☑	☐

4. When you are finished, click Apply.

Register Suppliers and Supplier Users (Required)

Supplier companies and their users must be registered with the system to access Oracle Sourcing and participate in negotiations. There are several methods by which suppliers and supplier users (contacts) can register with the system.

If the company is already registered:

- Buyers can invite a contact at a supplier company to register the system.
- If the buyer knows the email address of a contact, when creating a negotiation, the buyer can add a supplier contact to the list of invited suppliers. When the invitation notification is sent to the contact, the notification includes a link to the registration page where the contact can go to register.

If the company is not registered:

- Buyers can send the URL of the registration page to the contact of the supplier company. The contact can access the page and complete the registration request.
- If the buyer knows contact and company information, the company can be tentatively registered when a negotiation is created. The supplier contact is notified and completes the registration request.

Regardless of how the registration request is submitted, the requests must be authorized by an approver at the buyer company.

The contacts at your supplier companies must also be registered with the system and assigned the Sourcing Supplier responsibility and have any security information defined before they can participate in any Oracle Sourcing negotiations. See the *Internet Supplier Portal User's Guide* for instructions on assigning contacts responsibility and security restrictions.

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

For instructions on registering and approving suppliers and supplier users see the *Oracle ISupplier Portal Implementation* manual..

Define Negotiation Terms and Conditions (Optional)

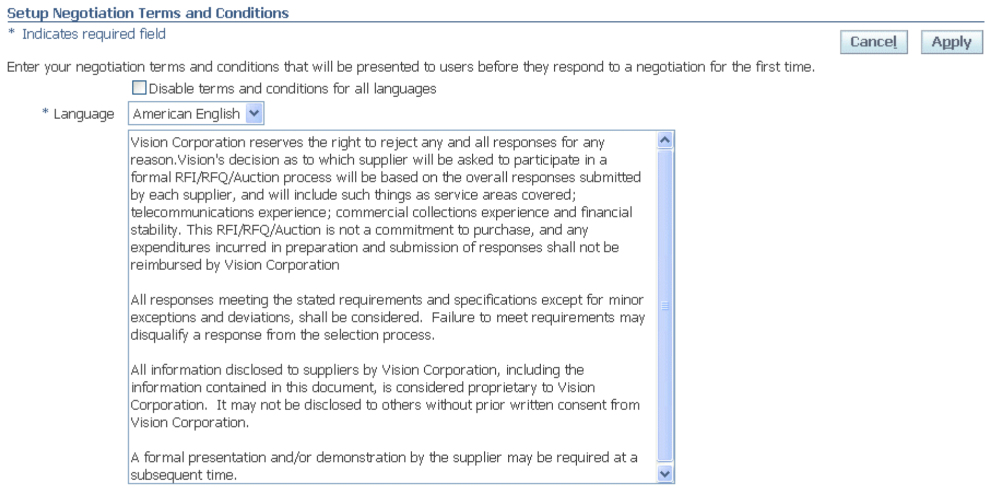
Negotiation terms and conditions are presented to supplier users before they respond to a negotiation for the first time. Supplier users must accept the terms and conditions before they can submit a response. Users are not required to accept terms and conditions when placing a subsequent response in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

To define negotiation terms and conditions:

1. On the Sourcing Home page, click the Administration tab.

2. Click Setup Negotiation Terms and Conditions.

3. On the Negotiation Terms and Conditions page that displays, you can search for a negotiation to view or update its terms and conditions, based on the Scope and Language. If you select Operating Unit as the Scope, then you can search for a specific Operating Unit to view and update negotiations belonging to that operating unit. To create new terms and conditions for a negotiation, click Create Terms and Conditions. This displays the Setup Negotiation Terms and Conditions page.



4. On the Setup Negotiation Terms and Conditions page, to define the terms and conditions that you want to display on negotiations. You can enter the following details:

   - **Select Operating Unit and Display Terms and Conditions Options –** Use this region to enter details of the Operating Unit and options to display terms and conditions to suppliers. You can enter the following details:

     - **Scope**: Select the Scope from the list of values. You can choose between Global and Operating Unit. If you select Operating Unit, then select the specific operating unit for which you want to define the terms and conditions.

     - **Status –** the status for the operating unit displays.

     - **Display Terms and Conditions to the Supplier** - Select the appropriate radio button to choose how the terms and conditions should display to the supplier. You can choose between Before supplier user creates the response, Before supplier user accesses negotiation for the first time, and Never.

       Note: The Accept Terms and Conditions page displays to suppliers depending on the option you chose in this region. For example, if you selected the Before supplier user accesses negotiation for the first time radio button, then supplier users are directed to the Accept Terms and Conditions page each time they access a negotiation for the first time.

   - **Update Terms and Conditions –** Use this region to select a Language, if multiple languages are installed, and to translate the terms and conditions for each language if your suppliers use other languages.

- **Attachments** – use this region to view attachments or to create and upload new attachments for the negotiation. Click Add Attachments to create a new attachment. This displays the Add Attachment page.

5. On the Add Attachment page, choose between Desktop File/Text/URL or From Document Catalog from the Add list of values to select the location of the attachment. In the Attachment Summary Information region, enter the Title and a Description for the attachment. By Default, the category is To Supplier. In the Define Attachment region, select the Type of attachment. If you selected Desktop File/Text/URL in the Add list, then you can choose from File, URL, Short Text, or Long Text. If you selected From Document Catalog in the Add list, then you can search for and select the document catalog to attach. Click Apply to add the attachment.

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

Define Reusable Attribute Lists (Optional)

Attributes identify additional details that a supplier should provide (beyond just response price) when responding to a negotiation line.

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

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

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

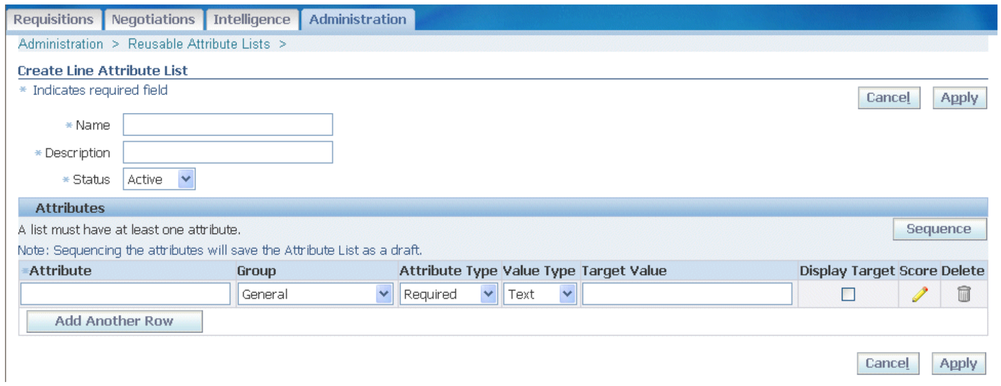
To create line attribute lists:

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

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

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

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



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

- *Attribute: Enter a name for your attribute (for example, Mileage, PPM Defect Rate; Grade).

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

- Attribute Type: If you want all suppliers to enter a value for this attribute when responding, select Required. If you don't want to require suppliers to enter a value for this attribute when responding, select Optional. If you want this attribute to be displayed to the supplier without allowing any response, select Display Only.

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

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

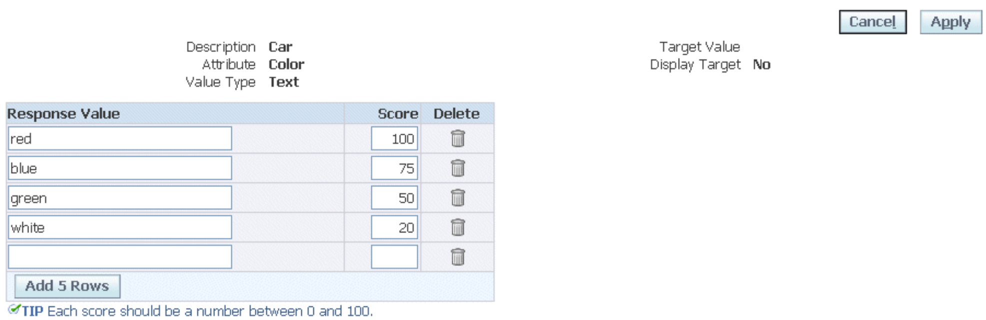
- Display Target: If you want suppliers to see the target value, select this checkbox. If you wish to hide the target value from suppliers, leave the checkbox unchecked .

5. If this attribute is required and you wish to assign values to allowable entries and scores, click the Score icon.

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

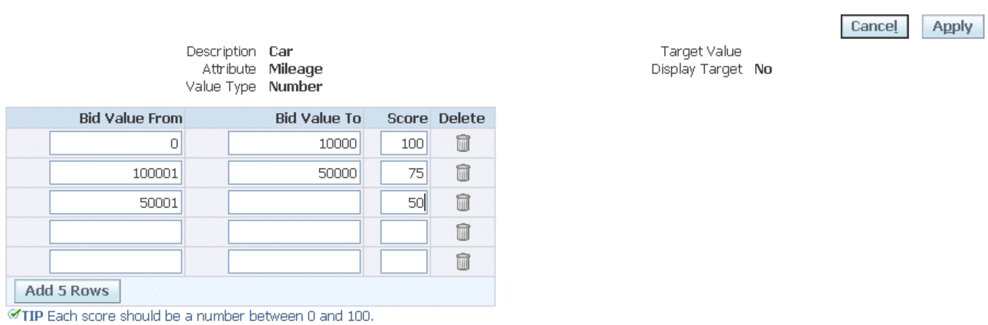
   On the **Enter Scoring Criteria** page, you must specify the values you will accept for this attribute and assign a score to each value.

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



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

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



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

If you need to add and score more than five values, click Add 5 Rows to display five more entry rows.

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

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

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

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

Sequencing line attributes:

The line attributes appear in the order you define them. However you can alter the order if needed.

To define the order of line attributes:

1. Click Sequence.

2. On the **Sequence Attributes** page, the line attributes appear in the order in which you defined them and are given a number.

3. Modify the attribute numbers to reflect the new sequence.

4. When finished, click Apply. You are returned to the **Create Line Attribute List** page with the attribute sequence modified accordingly.

Define Reusable Requirement Lists (Optional)

You define Requirements to solicit high-level information about the suppliers who have responded to your negotiation. This information can come from the suppliers themselves or internal evaluators. You typically define Requirements in the form of questions.

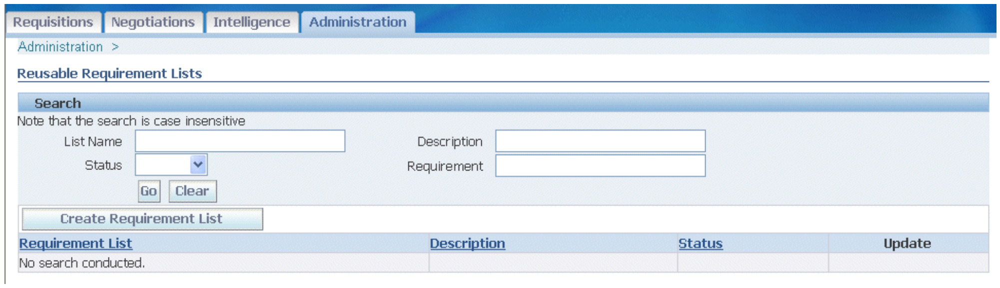
Once you have defined your Requirements, you can combine them into reusable lists, similar to reusable attribute lists. First, you create your list, and then you defined the Requirements for that list.

Defining your Requirement List

To define your Requirement list:

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

2. Click "Reusable Requirement Lists."



3. On the **Create Requirement List** page,

    1. Enter a name for your Requirement List

    2. Enter a descriptions for your list.

    3. Select a status for your list (Inactive lists cannot be used).

Once you have created your list, you can begin defining Requirements to it.

Defining Requirements

You create collections of Requirements called Sections. You are provided with a default section called Requirements. To begin defining your Requirements:

1. In the Requirements area of the **Create Requirement List** page, select the entry for the default section called Requirements.

2. Click Add Section

3. To add a new section, accept the default, New Section, in the Add drop down menu.

4. Enter a name for your new section.

5. If you are ready to begin adding individual Requirements for this section, click Apply and Add Requirement. If you need to create a section after this section, click Apply and Add Section. You cannot create a section within a section.

6. On the **Create Requirement List: Add Requirement** page, enter your Requirement question in the text box provided

7. Once you have defined your Requirement text, set the Properties for this Requirement as necessary:

    - **Type** Type describes how the Requirement is used within the negotiation. Values can be:

        - **Display Only** The Requirement is displayed to the supplier, but the supplier cannot enter a response to it. If the type is display-only, Display Target is set to Yes and Scoring Method is automatically set to None. Display only Requirements merely notify suppliers of additional aspects in which buyers are interested.

- **Internal** Internal Requirement can only be seen by buyers. If an internal Requirement is weighted, the total weight value seen by the supplier will not add up to 100. For example, if a Requirement is internal and has a weight of 10, the supplier sees no information on the internal Requirement and sees the sum of all weighted Requirements as 90. If unweighted, new internal Requirements can be added while the negotiation is in progress. If weighted, new internal Requirements can be added if they are given a weight of zero or if their weight amount is subtracted from another internal Requirements. Internal Requirements have Display Target set to No.
- **Optional** Suppliers do not have to respond to this Requirement.
- **Required** Suppliers must respond to this Requirement.

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

  Note: Text is the most flexible value type. If you select Text, suppliers can enter letters as well as digits. If you select Number, participants can only enter digits; if you select Date, suppliers can only enter dates in date format.

- **Target** Enter a target value for the Requirement (for example: 30 or more years in business) .
- **Display to Supplier** Indicate whether you want suppliers to see your Target value.
- **Scoring Method** Select the method by which you wish to score responses to this Requirement.
  - **None** - Responses can not be scored.
  - **Automatic** - The system will assign a score based on scoring information you define. If you choose Automatic, you must define the allowable values

(or value ranges) and the score for each.

- **Manual** - evaluators will enter scores for a particular response manually when scoring a participant's response.

Note that the scoring method chosen applies only to a particular Requirement. You can have a combination of both automatically and manually scored Requirements within the same negotiation.

If you choose to enable scoring for this Requirement, you can also set the following fields:

- **Maximum Score (Manual scoring method only)**

  You can set a maximum score allowable for this Requirement. The Sourcing Administrator may have set a default value for this property, but you can override it if necessary.

- **Knockout Score**

  You can specify a threshold value that applies to supplier responses. If the score for a supplier's response does not meet this threshold, that response will be removed from the shortlist once the buyer applies the knockout result.

- **Weight (Automatic and Manual scoring methods only)**

  If you choose to use weighting, enter the weight of this Requirement. The value you assign should reflect the importance of this Requirement relative to all other Requirements for this negotiation. The higher the value, the more important the Requirement.The total of all Requirement weights must be 100.

8. You can define which response values (or range of values) are acceptable for this Requirement. If you define acceptable response values for text type Requirements, those values are displayed to the responder, who must select a value from the predefined list of values

   Note that if you chose the Manual scoring method, these fields do not appear. Also note that if you chose the Automatic scoring method, you must define both the acceptable values and their scores. To define acceptable values:

   1. Click the Add 5 Rows button under Acceptable Values.

   2. Enter values for the following fields:

      - **Response Value**

        Enter an acceptable value for this Requirement. You may enter as many separate values as is necessary to identify all possible acceptable responses.

The values you enter should reflect the Value Type (text, number, date) you specified for this Requirement.

- **Value From/Value To (number and date type Requirements only)**

  If your Requirement has a value type of number or date , you can enter specific numbers/dates or you can define ranges of numbers/dates. If you wish to define a single value, enter the number in both the From and the To fields. Otherwise, to define a range, enter the beginning value in the From field and the ending value in the To field.

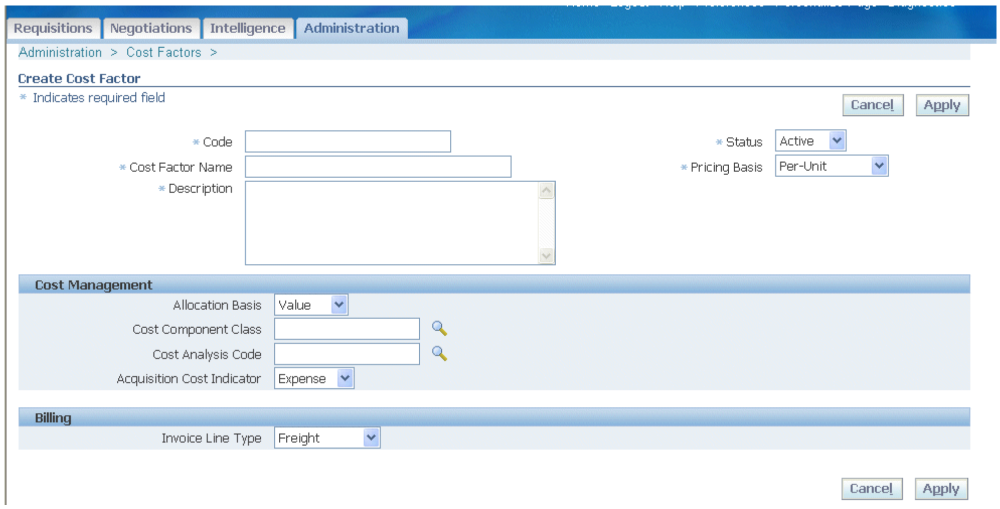
Define Cost Factors and Cost Factor Lists (Optional)

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

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

To define a cost factor:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Cost Factors."
3. On the **Cost Factors** page, click Create.
4. On the **Create Cost Factor** page, enter the following information:



- A unique code .
- The name of the new price factor.
- A short text description for the price factor.
- A pricing basis value to determine how this price factor is calculated. You can define: a fixed amount for the line, a fixed amount for each unit of the line, or a percentage amount of the line cost.
- The status for this price factor. Active price elements are immediately available for use. Inactive price elements cannot be used.
- Cost Management and Billing values are not used in Sourcing:

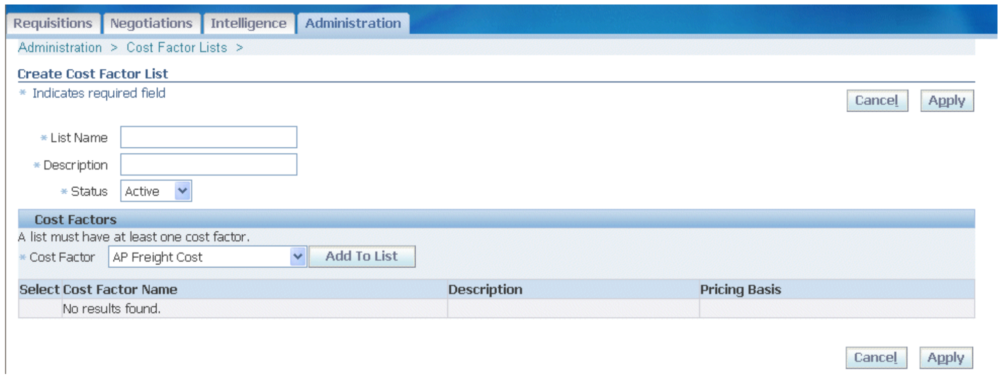
5. Once you have entered your information, click Apply. The information you entered is validated. If your code is not unique, you are prompted to enter a different one.

To define a cost factor list:

1. On the **Negotiations Home** page, click the Administration tab.
2. Click "Reusable Cost Factor Lists."
3. On the **Reusable Cost Factor Lists** page, click "Create Cost Factor List."
4. On the **Create Cost Factor List** page, enter the following information:
   - Name of the new list
   - A short text description of the new list

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

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



6. When you are finished adding cost factors , click Apply.

Define Reusable Invitation Lists (Optional)

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

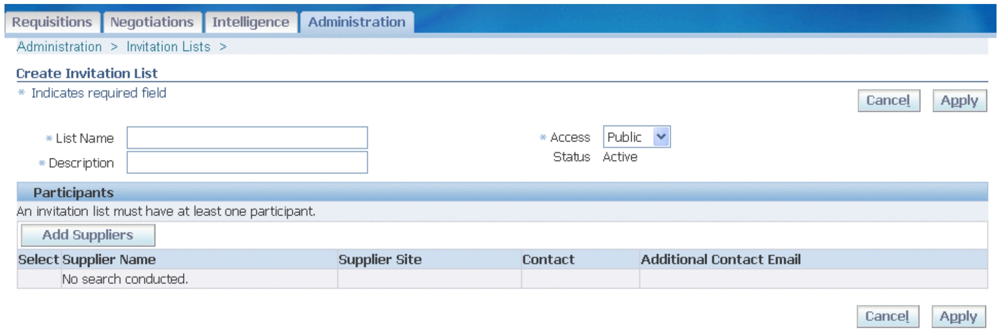
To create a new invitation list:

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

2. Click "Reusable Invitation Lists."

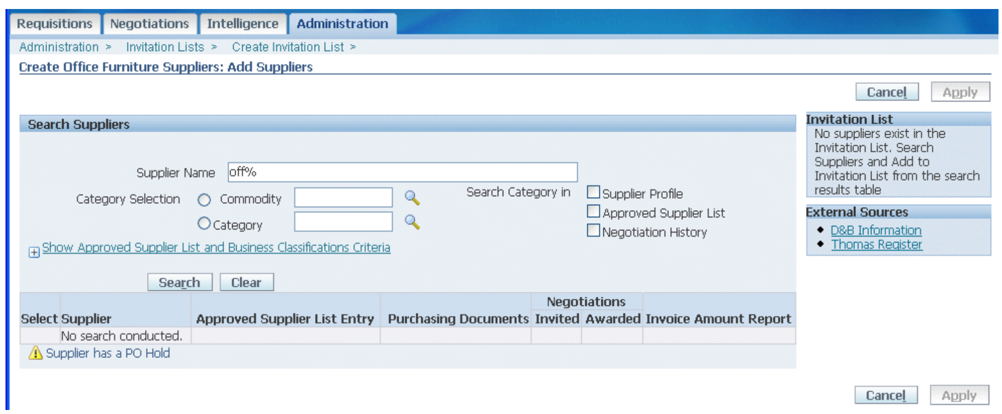
3. On the **Reusable Invitation Lists** page, click Create Invitation List.

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



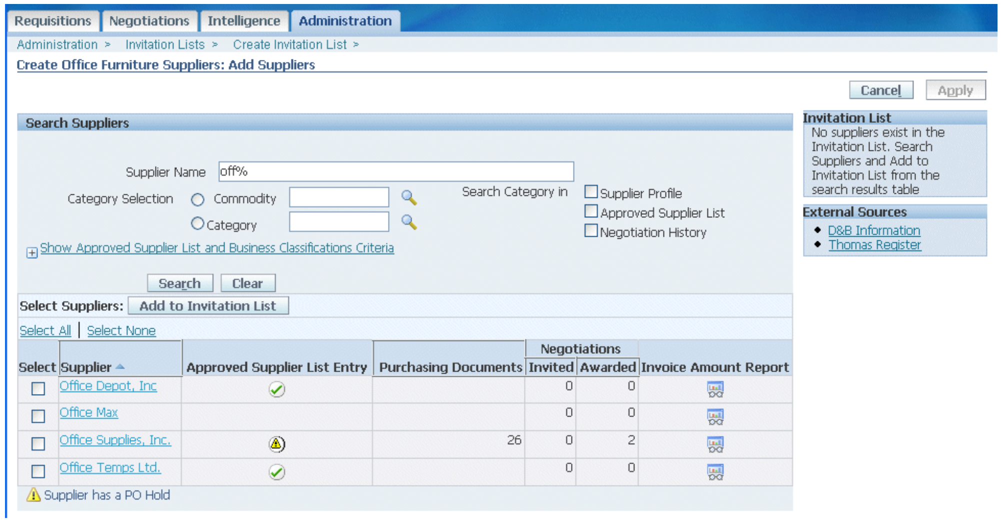
Click Add Suppliers.

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



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

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



7. You see that the suppliers appear in the Invitation List box in the upper right-hand corner of the page. Use the instructions in the previous steps to continue adding suppliers. Click Apply to return to the **Create Invitation List** page.

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

Define Negotiation Styles (Optional)

Oracle Sourcing enables complex electronic sourcing practices. The product's many features provide powerful functionality for users.

Not all of these features are needed for many negotiations, however. Sourcing Administrators can control which features are available by defining negotiation styles. Negotiation styles allow buying organizations to tailor the Oracle Sourcing user interface to match the needs of different sourcing events. Through reusable negotiation styles, buying organizations can expose or hide unneeded Oracle Sourcing features, thereby simplifying the user interface. When a sourcing document is created using a style, disabled features are hidden from users.

To define a Negotiation style:

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

2. Click "Negotiation Styles."

3. On the **Negotiation Styles** page, click "Create Negotiation Style."

4. On the **Create Negotiation Style** page,
   - Give your style a name.
   - Optionally give your style a description.
   - Accept the default status of Active (Inactive status styles are not available for use).
   - Select the features that are available from the style.
   - Identify which document types this style can be used with.
   - When you are finished, click Apply.

Define Purchasing Document Style (Optional)

Oracle Sourcing supports the use of different Purchasing document styles to control which aspects of a negotiation are available to buyers. Purchasing document styles specify allowable purchase bases and line types, whether certain features such as price breaks or price differentials can be used. Purchasing document styles also control the use of complex payment features. For example, a Purchasing document style could be defined that does not allow price breaks to be defined. These Purchasing document styles are recognized by Oracle Sourcing, and a buyer can select different Purchasing document styles when creating negotiations by selecting a style from the Outcome field.

If you plan on creating complex work negotiations, you must use a Purchasing document style that supports complex work features such as advance payments and retainage.

See the *Oracle Purchasing User's Guide* for instructions on defining Purchasing document styles.

Define Negotiation Templates (Optional)

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

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

To create a negotiation template:

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

2. In the Templates column of the Quick Links section, click the link for the type of negotiation template you wish to create.

3. On the **Templates** page, click "Create New Template."

4. On the **Step 1: Create Template Header** page, give your template a name and optionally a description. Be sure to accept the default Access value of Public.

5. Continue by using the instructions in the online help describing how to define templates.

Create Abstracts and Forms (Optional)

Organizations need to publish data concerning their negotiations to:

- Advertise the purchase to increase competition.

- Comply with rules and regulations regarding proper competition.

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

Abstracts

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

Forms

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

Creating Abstracts and Forms

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

General Steps to Using the Abstract Feature:

1. (Super User) Create any new fields or sections (building blocks) desired on the Abstract.
2. (Super User) Modify and activate the existing Abstract definition.
3. (Super User) Set up and customize external website.
4. (Buyer) Add Abstract to negotiation and complete required information.
5. (Buyer) Publish the Abstract for a specific negotiation to an external website.

General Steps to Using the Forms Feature:

1. (Super User) Create fields and sections.
2. (Super User) Create a new form or modify an existing form.
3. (Super User) Add any new fields or sections on the form.
4. (Super User) Activate the form.
5. (Super User) Map to third-party XSD/DTD file
6. (Buyer) Complete the form and generate XML.
7. (Super User) Update form as requirements change

Using Abstracts and Forms:

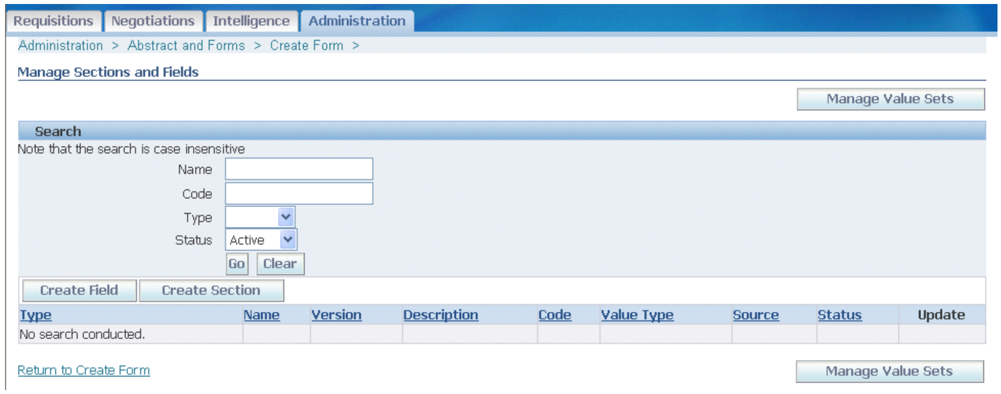
Oracle Sourcing is seeded with a draft abstract and two forms.

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

Creating New Sections/Fields

1. From the **Negotiations Home** page, click the Administration tab.
2. On the **Administration** page, click "Abstract and Forms."
3. The **Abstract and Forms** page displays the abstract and the forms that exist in the system (initially you should see only one abstract and two forms that are seeded with the application).
4. On the **Abstract and Forms** page, click Manage Sections and Fields.
5. On the **Manage Sections and Fields** page, click Create Section to define a new section, or click Create Field to define a new field.

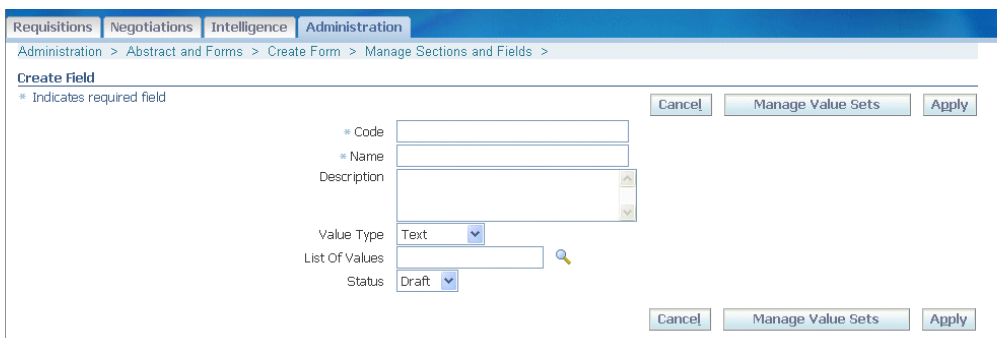
Use the instructions in the sections below to create new fields and sections.



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

Creating New Fields

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



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

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

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

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

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

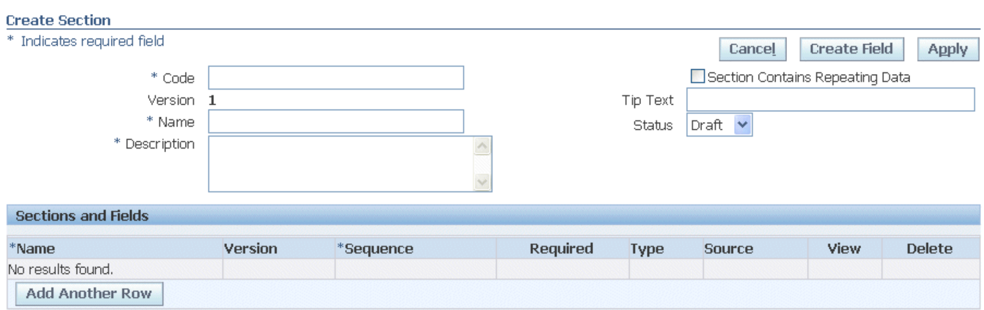
  - Table
  - Independent
  - Translatable independent

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

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

Creating New Sections

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



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

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

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

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

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

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

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

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

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

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

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

3. Click the flashlight icon.

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

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

Updating Existing Fields or Sections

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

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

3. Update the values for the field or section. You can preview the section. When finished, click Apply.

Modify the Existing Abstract Definition

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

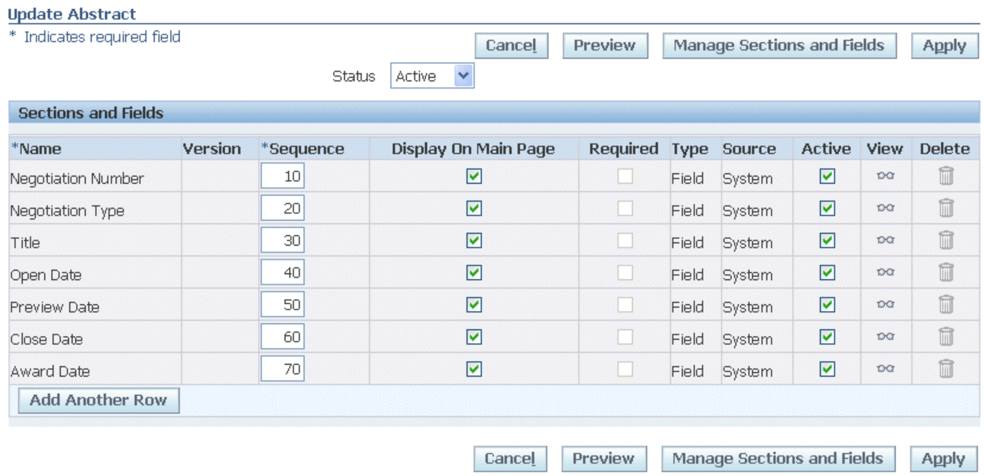
You can modify the seeded Abstract definition by using

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

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

3. Click the Update icon for the Abstract.

4. The **Update Abstract** page displays the current definition for the abstract.



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

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

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

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

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

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

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

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

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

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

- Active. If you check this box, the field is included in the Abstract definition.
- View. Clicking this icon allows you to see the details of the field definition.
- Delete. Click this icon to remove the field or section from the Abstract definition. The definition must be inactivated for this icon to be available.

Adding a New Field to the Abstract

1. Click Add Another Row
2. Click the flashlight icon to access the Search and Select window.
3. Search for the field you wish to add. You can search by:
   - Field Name
   - Code
   - Type (field or section)
   - Description
   - Source
4. Select the field or section you wish to add and specify whether to display the field on the main abstract page. Fields not displayed on the main page are displayed on the detail drill down page.
5. Once you have completed your modifications to the abstract, preview the new Abstract if desired, change the status to active, and click Apply.

Customizing the External Abstract Page

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

Setting the External Page URL

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

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

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

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

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

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

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

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

Changing User Preference Values at Login

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

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

- PON_ORGANIZATION_ID The particular organization for which negotiations should be displayed. Otherwise, by default, negotiations from all organizations across the buyer company are displayed.

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

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

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

http://external.oracle.com:10333/OA_HTML/OA.jsp?OAFunc=PON_ABSTRACT_PAGE&PON_LANGUAGE_CODE=EN&PON_ORGANIZATION_ID=123&PON_NEGOTIATION_STATUS=ACTIVE

See the *Oracle E-Business Suite Security Guide* for information on setting up the GUEST user.

Customizing Your Web Page

You can customize your external web page in two ways

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

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

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

Gif File Size

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

- 460 x 60
- 230 x 60
- 230 x 30

Loading Your Customizations

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

- Create your .gif files. Name them
  - pon_SourcingExternal_Adv.gif (the branding .gif that appears at the top of the page)
  - pon_SourcingExternal_left.htm (the HTML region on the left side of the page)
  - pon_SourcingExternal_right.htm (the HTML region on the right side of the page)
  - pon_SourcingExternal_bottom.htm (the HTML region at the bottom of the page)
- Copy the .gif files and the relevant .htm files to the following directory

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

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

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

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

Linking the Abstract Page to Your Main Web Page:

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

Creating and Using Forms:

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

Planning the form

1. Determine the desired output.

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

2. Create a plan of the form.

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

   - Which, if any, fields are required.
   - Whether there are any repeating sections.
   - Do certain fields only allow predefined values.
   - Can certain fields obtain their values from the system.

3. Model the form in Oracle Sourcing.

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

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

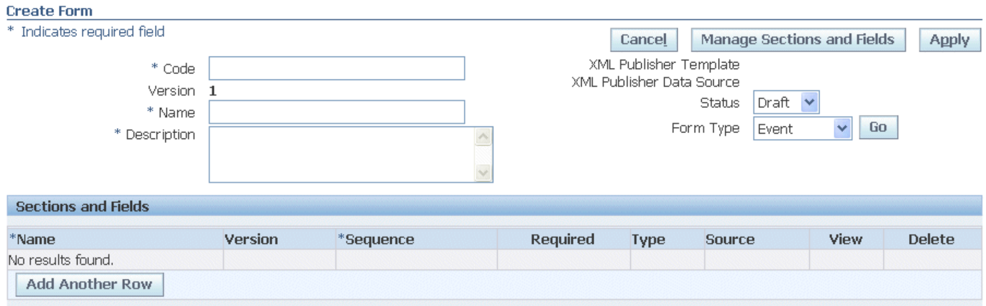
   Since you build your form by combining fields and sections, you should define the form in Oracle Sourcing starting at the lowest level and working up.

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

Creating the form definition

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

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



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

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

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

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

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

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

- Status. Values are either Active or Draft.

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

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

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

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

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

7. Once you have completed your form definition, preview the form if you wish, and click Apply.

Activating the form

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

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

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

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

Mapping a form to a third party XSD/DTD file

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

Download the XSD data source file

1. From the Sourcing **Administration** page, click Abstracts and Forms

2. On the Abstracts and Forms page, click the Data Source File icon for the form whose source file you wish to download.

3. Save the file to an appropriate location.

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

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

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

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

5. Save your mapping file.

Load the XSL file

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

6. Log into Oracle Applications and select the XML Publisher responsibility.
7. Access the **Templates** page.
8. Click Create Template and enter the following information
   - Name. Enter any name to identify the template. This name appears on the **Form** page within Oracle Sourcing. This field is required.
   - Code. Provide a unique code for the template. This field is required.
   - Application. Enter "Sourcing."
   - Data Definition. Search the List of Values for the application "Sourcing" and select the data definition file that was created by the system when you activated your form.
   - Type. Select XSL-XML.
   - Start Date. The date on which you want to activate the template. You should use the default date.
   - End Date. The date on which you want to inactivate the template. You can leave this blank.
   - Description. Enter text to describe this template.
   - File. select the XSL file you have created from your mapping tool.
   - Language. Your default language.
   - Territory. Your default territory.
9. Click Apply.
10. Log out of the XML Publisher responsibility and into Oracle Sourcing Super User responsibility.
11. Access your form definition. If it is active, deactivate it.

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

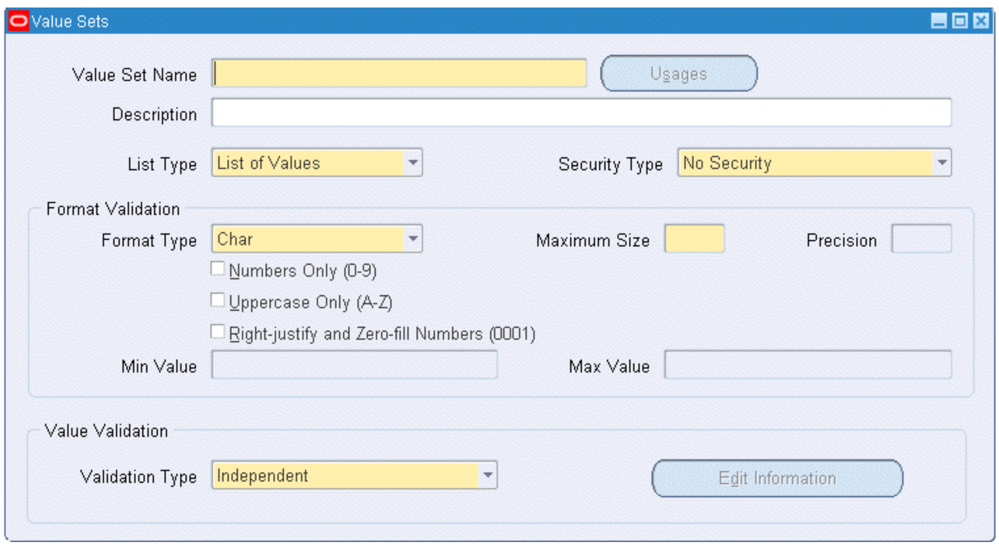
13. Click Apply.

Create value sets for abstracts and forms

When creating Abstracts or Forms, you can choose to allow buyers to enter field values, or you can require buyers to select a value from a predefined list. To define a list of values for a field, you must first create a Value Set. Once you have created the Value Set, you can define the values that it contains.

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

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



See *Oracle E-Business Suite Security Guide* for instructions on defining Value Sets.

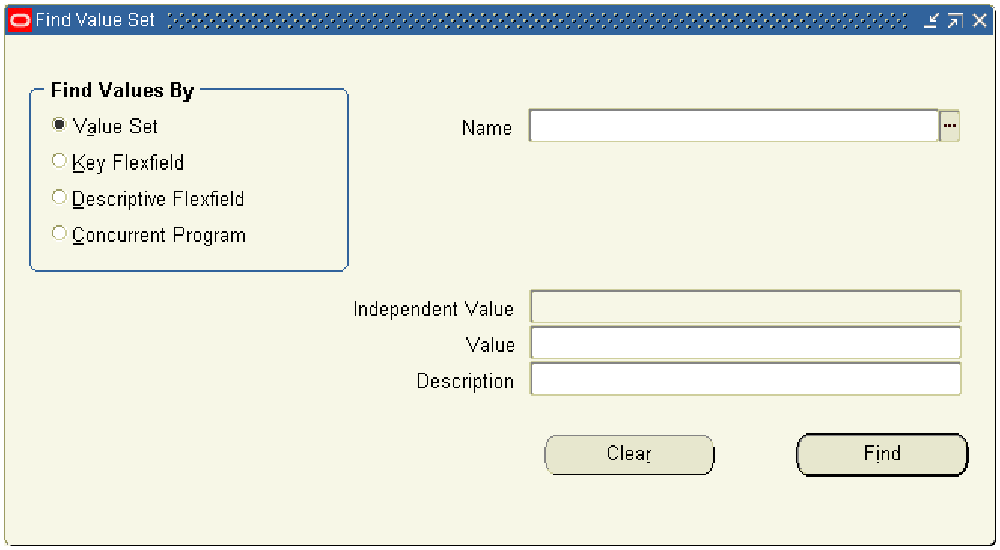
Create values for abstracts and forms and abstracts

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

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

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

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



4. On the Segment Values form, enter the allowable values for your field. See *Oracle E-Business Suite Security Guide* for instructions on defining values for value sets.

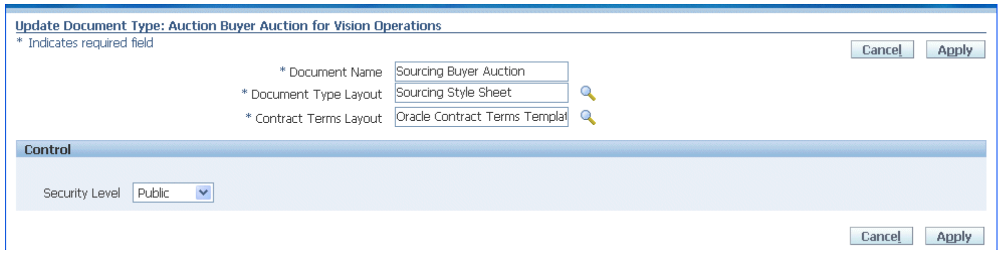
Set Up Document Print Layouts (Optional)

The print facilities make use of the capabilities of Oracle XML Published when printing negotiations or responses.

You can assign a separate layout to use when printing different sourcing document types. Also, you can create a temporary directory for processing large files when printing PDF copies of large negotiations. See the *XML Publisher User's Guide* for instructions on creating layout templates and creating directories.

To Assign Layout Templates:

1. Log into Oracle Purchasing as a Purchasing Super User.
2. Navigate to the Document Types page. Set Up > Purchasing > Document Types.
3. Select the Operating Unit to which this assignment applies. Click Go.l
4. Click Update for any Sourcing document type (Buyer Auction, RFQ, RFI).
5. For each document type, select a Document Type Layout.. (If you have Oracle Procurement Contracts licensed and installed, also select a Contract Terms layout.)



To Create a Temporary Directory:

1. Navigate to the XML Publisher Configuration page.

   (N) XML Publisher Administration > Administration > Configuration > General > Temporary directory.

2. Enter the path to the temporary directory. It is strongly recommended that you specify a temporary directory to avoid "Out of memory" errors when processing large files.

Set Up Demand Workbench (Optional)

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

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

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

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

3. Set the **PO: Document Builder Default Document Type** system profile option. (values: Blanket Auction, Blanket RFQ, Standard Auction, Standard RFQ). This specifies the default target document type when creating a new negotiation (this can be changed when the negotiation is initially created in Demand Workbench by selecting one of the other three values from a drop down menu).

4. Set the **PON: Use Negotiation line number in outcome document** profile option. Set to**Yes** to retain the negotiation line numbers in the outcome document. You can set the profile option at the site, application, responsibility, and user levels. The default value for this profile option is **No**.

5. Set the **PON: Use Requisition Line Numbers on Autocreated Negotiation Lines** profile option. Set to **Yes** to retain the requisition line numbers on an autocreated negotiation lines. You can set the profile option at the site, application, responsibility, and user levels. The default value for this profile option is **No**.

Enable Award Approval (Optional)

You can enable award approval in Oracle Sourcing by implementing the approval routing mechanism in Oracle Approvals Management. You can use both the employee-supervisor hierarchy and the position hierarchy. Employee-Supervisor hierarchy uses the organizational management structure defined in Oracle HR to process award approval. Position-based hierarchies allow organizations the flexibility to create reporting structures that remain stable regardless of organizational changes.

To enable award approval:

1. Define the employee and supervisor hierarchies or the positions and their hierarchies in Oracle Human Resources.

2. Set up the Sourcing Award transaction type within Oracle Approval Management. Set up the transaction type with the following attributes:

   - DOCUMENT_TYPE - identifies the sourcing document to which this rule applies (BUYER_AUCTION or RFQ)

   - TRANSACTION_AMOUNT - identifies the award amount above which this rule is triggered.

   - LINE_CATEGORY - allows buyers to set up rules based on the awarded line categories. If any awarded line within the negotiation has this particular line category set up in Approval Management, the rule associated with that line category is triggered.

See *Oracle Approvals Management Implementation Guide* for instructions.

Enable Sourcing Optimization (Optional)

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

There are other optimization profile options that can adjust the precision of the optimization engine and the amount of time it takes to process the requests.

- **PON: Optimal Tolerance for Award Optimization**

  Defines how close a solution needs to be to the ideal solution, such that the optimizer considers it to be the best solution. Acceptable values: 0.0 to 1.0. Default: 0.0001

- **PON: Integer Tolerance for Award Optimization**

  Defines the tolerance within which the optimizer considers a value as an integer value. Acceptable values: 0.000000001 to 1.0. Default: 0.00001

- **PON: MIP Emphasis for Award Optimization**

  Defines what the optimizer emphasizes to find a solution. Acceptable values: 0-Balance feasibility and optimality, 1-Feasibility, 2-Optimality, 3-Moving best bound. Default: 1

- **PON: Timeout for Award Optimization**

  Defines the processing timeout threshold (in seconds) for online processing. The default value is 60.

Enable Oracle Procurement Contracts (Optional)

If you have Oracle Procurement Contracts licensed and implemented:

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

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

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

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

   - Associate the contract templates with sourcing document types.

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

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

   See the *Oracle Purchasing User's Guide* for instructions on using the Document Types window.

Enable Oracle Services Procurement (Optional)

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

- Fixed Price Services
- Fixed Price Temp Labor
- Rate Based Temp Labor

If you enable Services Procurement, you can also create Purchasing document styles that support the controls for complex work negotiations.

Set Up Inbox for Notifications (Optional)

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

Set Up Enhanced Supplier Search Feature (Optional)

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

Refer to the *Oracle iSupplier Portal User's Guide* for instructions on entering supplier business and commodity classification information.

Enable Supplier Site Access (Optional)

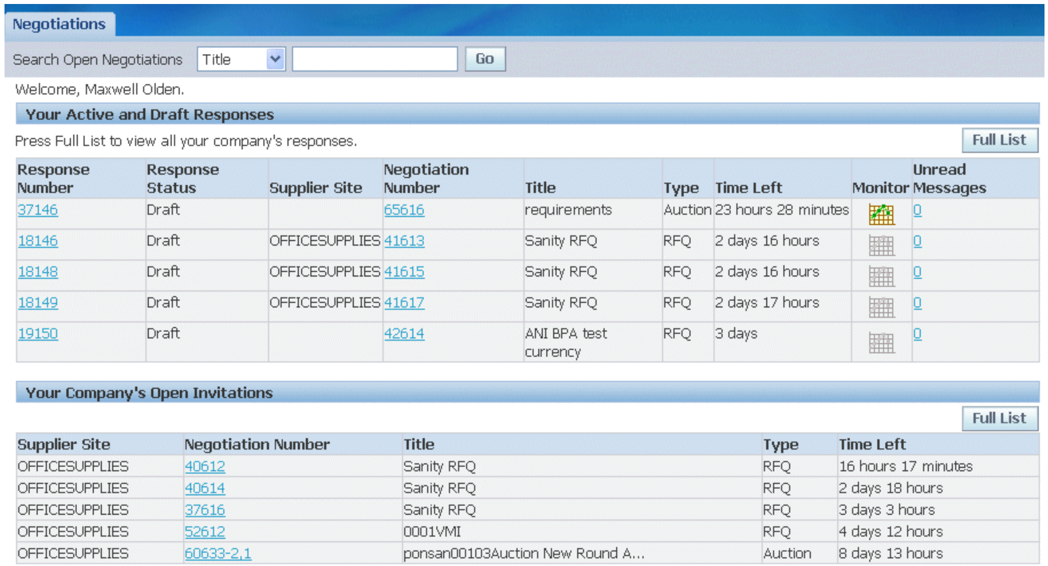
For buyers to see and send information to a supplier site, the site must be defined as a Purchasing and/or RFQ Only site.

See the *Oracle iSupplier Portal Implementation Guide* for instructions on defining supplier sites.

Customize Content (Optional)

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

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



To customize the text on the home page:

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

2. To modify the text displayed to buyers, edit the content of the pon_SourcingBuying.htm file. This file is located in $<template-path>/pon/custom/marketing/SRC_BUYING/<language-directory> directory where <template-path> is a system property specified in the ssp_init.txt file of the iAS properties file. Modify the file and save the new version to the same directory.

3. To modify the text displayed to suppliers, edit the content of the pon_SourcingSelling.htm file. This file is located in $<template-path>/pon/custom/marketing/SRC_SELLING/<language-directory> directory where <template-path> is a system property specified in the ssp_init.txt file of the iAS properties file. Modify and save the new version of the file to the same directory.

Customize Two-Stage RFQ (Optional)

Quotes submitted to two-stage RFQs are evaluated in phases. The first stage evaluates the technical merits of the quote, and the second stage analysis the commercial terms of the proposal. By default, the two evaulation stages are labeled "technical" and "commercial," but you can change the labels if you wish. You can also change the labels used for attachments to the two stages.

To change the stage names:

1. Sign on with a userid having access to teh Application Developer responsibility.
2. Application Developer > Application > Lookups > Object Application Library
3. Query for the lookup with the Meaning of **PON: Two Stage Name**
4. Use the instructions in the *Oracle Application Developer's Guide* to change the value.

To change the possible attachment labels:

1. Sign on with a userid having access to the Application Developer responsibility.
2. Application Developer > Attachments > Document Categories
3. Use the instructions in the *Oracle Application Developer's Guide* to change the attachment categories **From Supplier: Commercial** and **From Supplier: Technical**

In order for a Two-Stage RFQ checkbox to appear on the Abstract, the field **Two-Stage RFQ** must be added to the Abstract definition.

Extend Sourcing Business Events (Optional)

Customers planning to extend Oracle Sourcing will be able to leverage the new workflow business events embedded in the application. Oracle Sourcing Release 12 includes a set of workflow business events that can be raised at different event points during the negotiation process. Customers can create custom "subscribing" processes for these business events to perform desired processing when the corresponding business event is raised. The following list of events is supported:

- Sourcing Negotiation Published Event
- Sourcing Response Published Event
- Sourcing Response Disqualified Event
- Sourcing Negotiation Submitted for Award Approval Event
- Sourcing Negotiation Award Completed Event
- Sourcing PO Creation Initiated Event

See the section on Managing Business Events in the *Oracle Workflow Developer's Guide*.

Set Up Additional Information for Negotiations (Optional)

When a buyer creates a negotiation header (RFI, RFQ or Auction), the buyer can:

- Specify the business owner of the negotiation using the Requester field.
- Provide additional header attributes:
  - For buyers in the Additional Header Attribute (Buyer Only) region.
  - For both buyers and suppliers in the Additional Header Attributes (Buyer & Supplier) region.

The following components are hidden by default:

- Requester field
- Additional Header Attribute (Buyer Only) and Additional Header Attributes (Buyer & Supplier) regions

To enable buyers to select the requester and provide additional header attributes, you can display these components using Oracle Application Framework personalization. The following sections explain how you can display these components.

Enable Personalization:

To make changes to the OA Framework pages used in Oracle Sourcing, you must enable Personalization Framework functionality using the Personalize Self-Service Defn profile option. Set the Personalize Self-Service Defn profile option at the appropriate level so that you can access Personalization Framework.

For more information, refer to the *Oracle Application Framework Personalization Guide*

1. Using the System Administrator responsibility, navigate to the System Profile Values window (N) Profile > System.
2. You can define the profile option at any of the levels: Site, Application, Responsibility or User. Select the appropriate level at which you want to define the profile option.
3. In the Profile field, search for the Personalize Self-Service Defn profile option.
4. Select Yes at the appropriate level.
5. Save your work and exit the System Profile Values window.

Define the PON Auction Headers (External) and PON Auction Headers (Internal) Descriptive Flexfields (DFF):

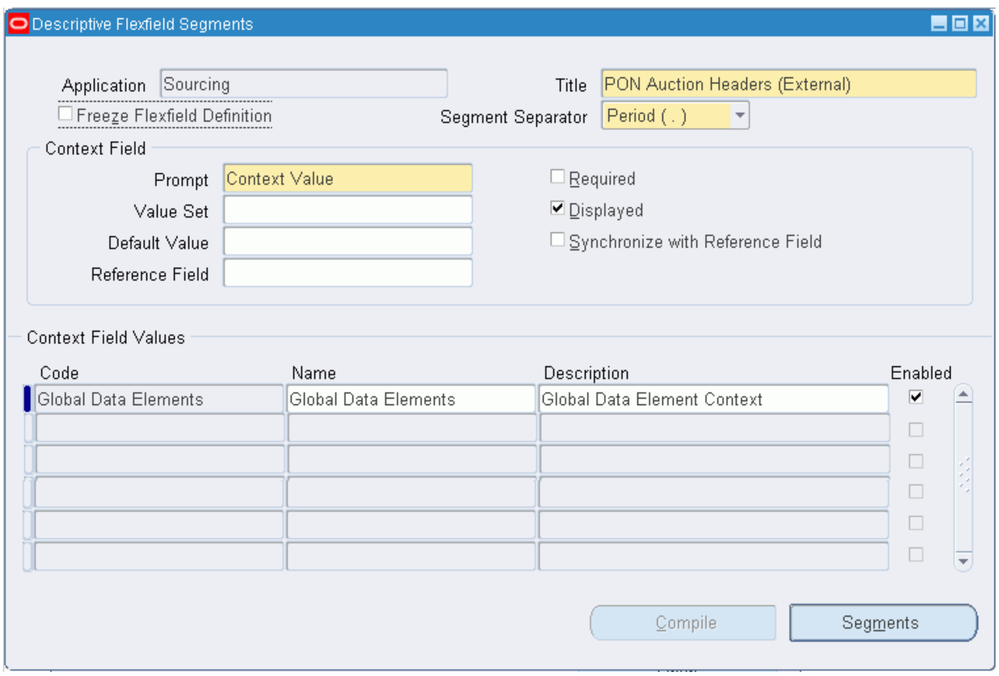
The PON Auction Headers (Internal) DFF is displayed as the Additional Header Attribute (Buyer Only) region in the negotiation header and this region is visible only to the buyers who can access the negotiation. The PON Auction Headers (External) DFF is displayed as the Additional Header Attributes (Buyer & Supplier) region in the negotiation header and this region is available to both buyers and suppliers. To display fields in these regions, define DFF segments based on your business requirements. For the PON Auction Headers (Internal) DFF, you can create segments, for example, to record internal negotiation details such as total budget sanctioned and final project approver. The segments that you create for the PON Auction Headers (External) DFF are visible to both the buyers who have access to the negotiation and the suppliers accessing the negotiation. You can create segments to record additional supplier details such as contact address and contact number.

To define the PON Auction Headers (Internal) DFF segments:

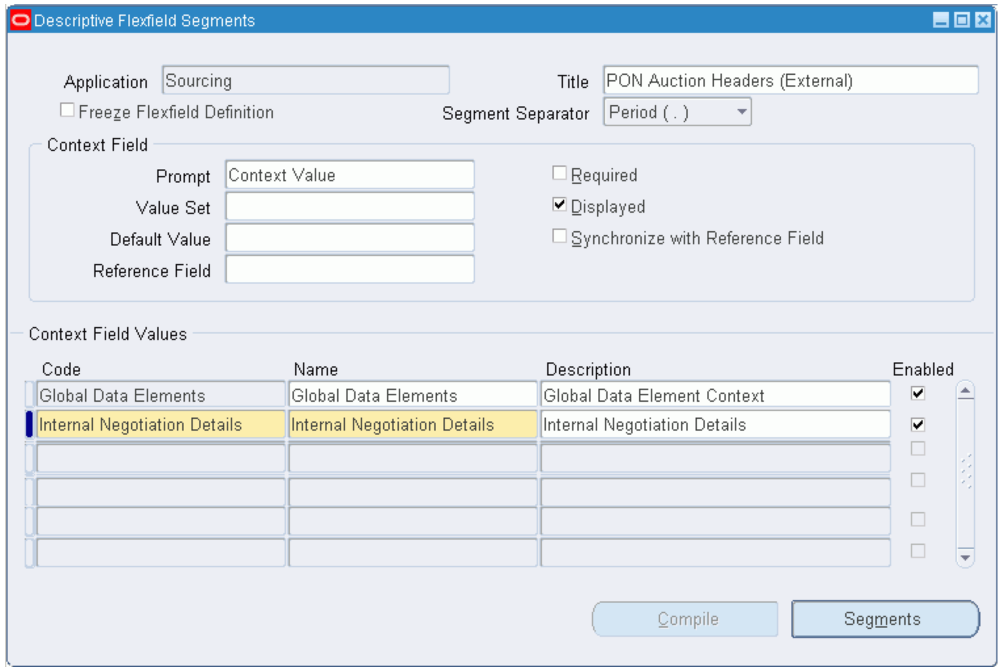
1. Using the System Administrator responsibility, navigate to the Descriptive Flexfield Segments window (N) Application > Flexfield > Descriptive > Segments.

2. Search for the PON Auction Headers (Internal) flexfield.

3. Unselect the Freeze Flexfield Definition checkbox. A Caution popup appears: Unfreezing this flexfield and making changes to the segment definitions could affect the validity of the data already existing for this flexfield. Click Ok to continue.

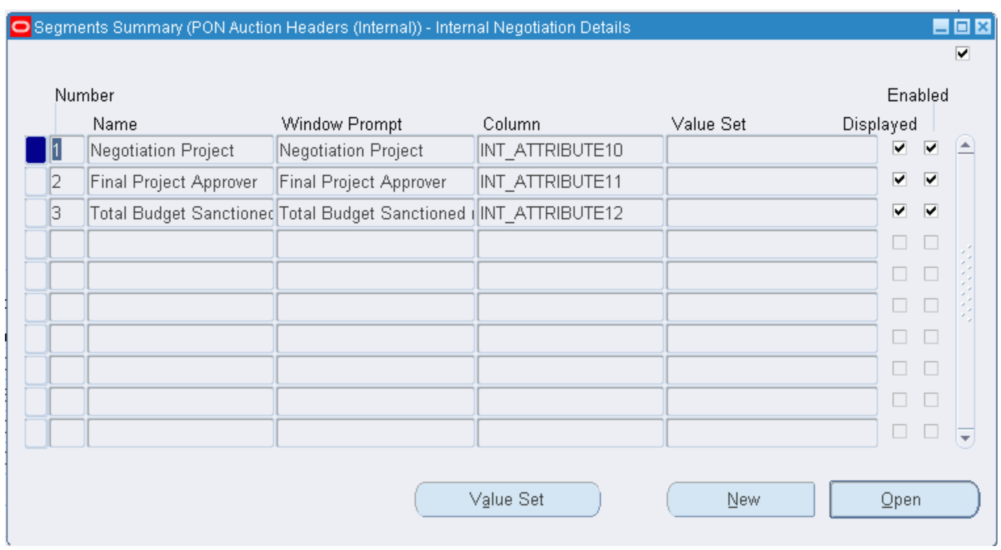


4. In the Context Field Values region, enter the code, name, and description as required.



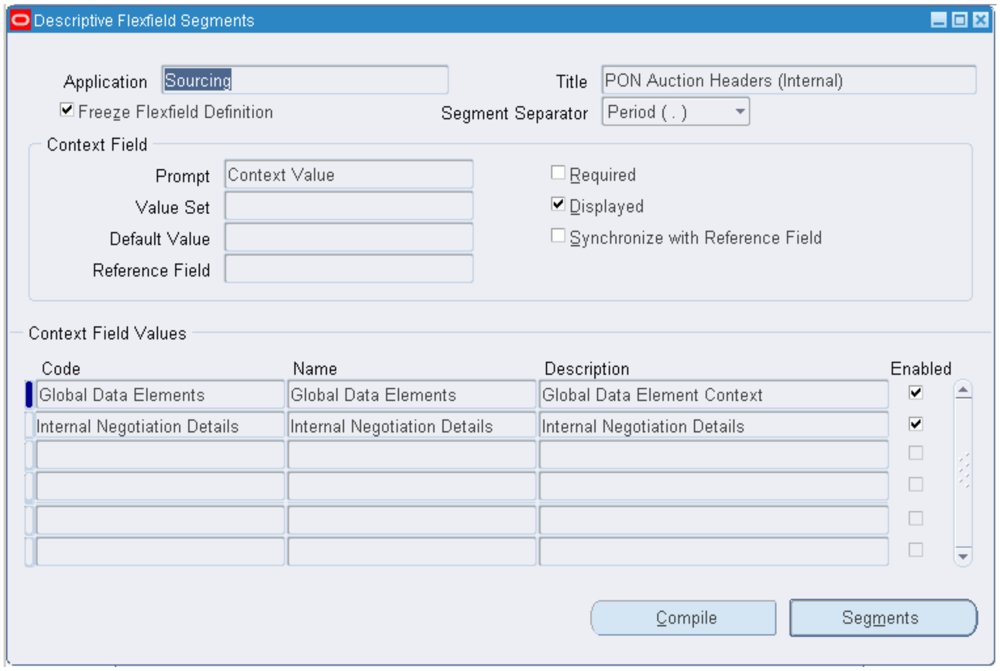
5. Select the code and click Segments.

6. In the Segments Summary window, create segments as required and save your work.



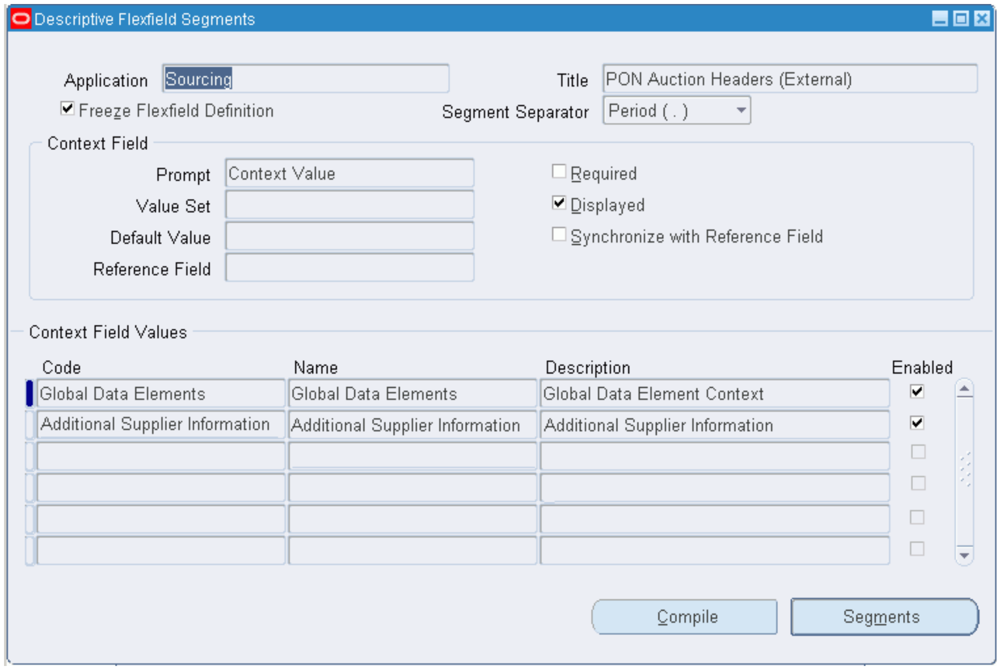
7. Close the Segments Summary window.

8. Freeze the flexfield definition and compile the flexfield to save your work.



To define the PON Auction Headers (External) DFF segments:

1. Search for the PON Auction Headers (External) flexfield. Unselect the Freeze Flexfield Definition check box and create segments as required. Freeze the flexfield definition and compile the flexfield to save your work.



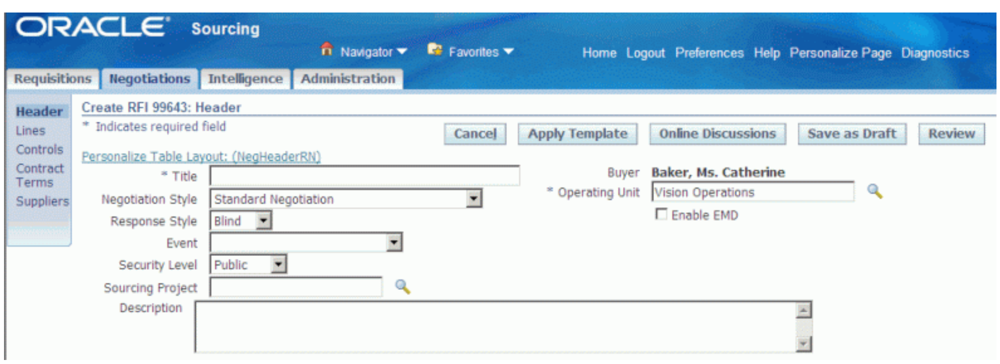
For more information on defining flexfields, refer to the *Oracle E-Business Suite Flexfields Guide.*

Display the Requester Field Using Oracle Framework Personalization:

1. Using the Sourcing Super User responsibility, navigate to the **Negotiations Home** page.

2. Click the Negotiations tab.

3. In the Create column of the Quick Links section, click RFI, RFQ or Auction. The Create Header page appears.



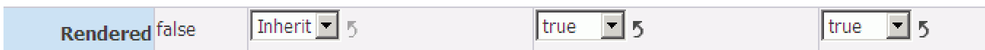
4. Click the Personalize Page link on the Create Header page (ponDefineHdrPG).

5. On the Personalize Page: Create Negotiation, click the Complete View option.

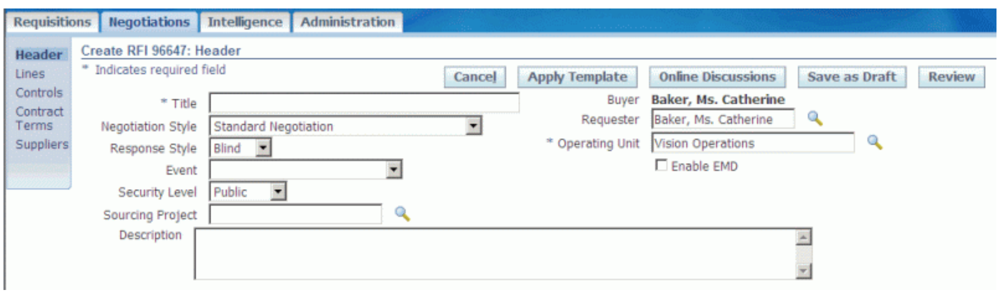
6. Search for the Message Lov Input: Requester item.

7. Click the Personalize icon. The Personalize Message Lov Input : Requester page appears.

8. Navigate to the Rendered property. By default, the Rendered property value is **false**. To display the Requester field at the appropriate level, for example, Responsibility: Sourcing Super User, select true in the Responsibility column.



9. Click Apply to save your work. The Requester field appears on the page.



10. Repeat the steps to display the Requester field on the:

- Negotiation Review page (ponNegReviewPG)
- Negotiation Summary page (ponNegSumPG)

Display the Additional Header Attribute (Buyer Only) and Additional Header Attributes (Buyer & Supplier) Regions Using Oracle Framework Personalization:

To display the Additional Header Attribute (Buyer Only) region:

1. Using the Sourcing Super User responsibility, navigate to the **Negotiations Home** page.

2. Click the Negotiations tab.

3. In the Create column of the Quick Links section, click RFI, RFQ or Auction. The Create Header page appears.

4. Click the Personalize Page link on the Create Header page (ponDefineHdrPG).

5. On the Personalize Page: Create Negotiation, click the Complete View option.

6. Search for the Header: Additional Header Attributes (Buyer Only) page element.

7. Click the Personalize icon. The Personalize Header : Additional Header Attributes (Buyer Only) page appears.

8. Navigate to the Rendered property. By default, the Rendered property value is **false**. To display the Requester field at the appropriate level, for example, Responsibility: Sourcing Super User, select true in the Responsibility column.

9. Click Apply to save your work. The Additional Header Attribute (Buyer Only) region appears.

10. Repeat the steps to display the region on the:

    - Negotiation Review page (ponNegReviewPG)

    - Negotiation Summary page (ponNegSumPG)

To display the Additional Header Attributes (Buyer & Supplier) region:

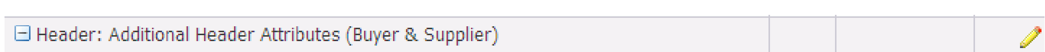
Display the region on the following pages:

- Create Header page (ponDefineHdrPG)

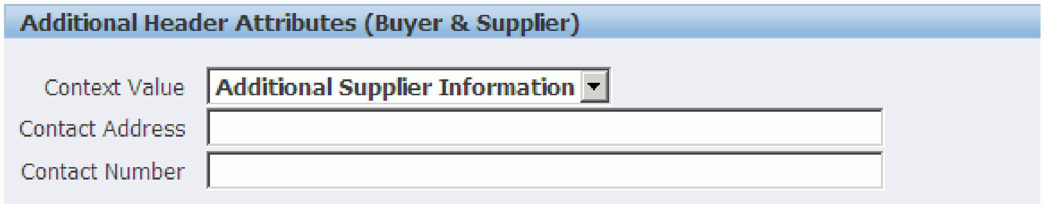
- Negotiation Review page (ponNegReviewPG)

- Negotiation Summary page (ponNegSumPG)

Repeat the steps described in the previous section and set the Rendered property to true for the Header: Additional Header Attributes (Buyer & Supplier) page element.



After Personalization, the Additional Header Attributes (Buyer & Supplier) region appears.



What's Next

See the Oracle Sourcing online help for instructions on using the Requester and additional header attribute fields.

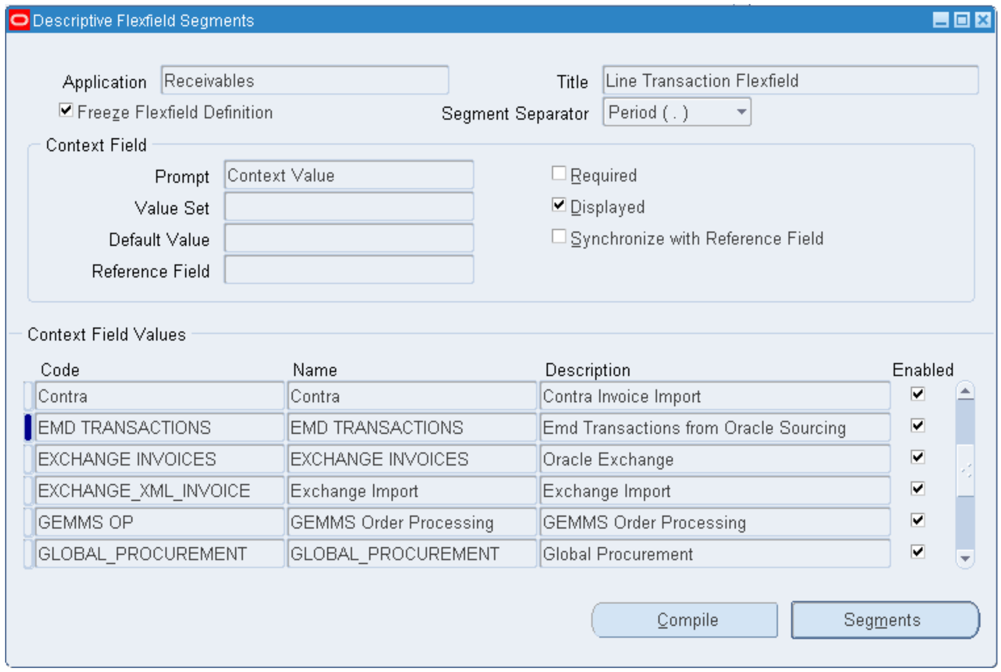
Set Up Earnest Money Deposit

In order to integrate with Accounts Receivables and Accounts Payables, set up the following in Oracle Financials.

Using the System Administrator responsibility set the value of the profile option AR: Deposit Offset Account Source as Transaction Type at the site and responsibility level.

Flexfield Segments

1. Using the Receivables responsibility, navigate to (N) Setup >Financials > Flexfields > Descriptive > Segments. Click the Find icon to search for and display the Receivables Line Transaction Flexfield. The Context Field Values region will display EMD Transactions in the Code column.



2. Unselect the Freeze Flexfield Definition checkbox. A Caution popup appears: Unfreezing this flexfield and making changes to the segment definitions could affect the validity of the data already existing for this flexfield. Click Ok to continue.

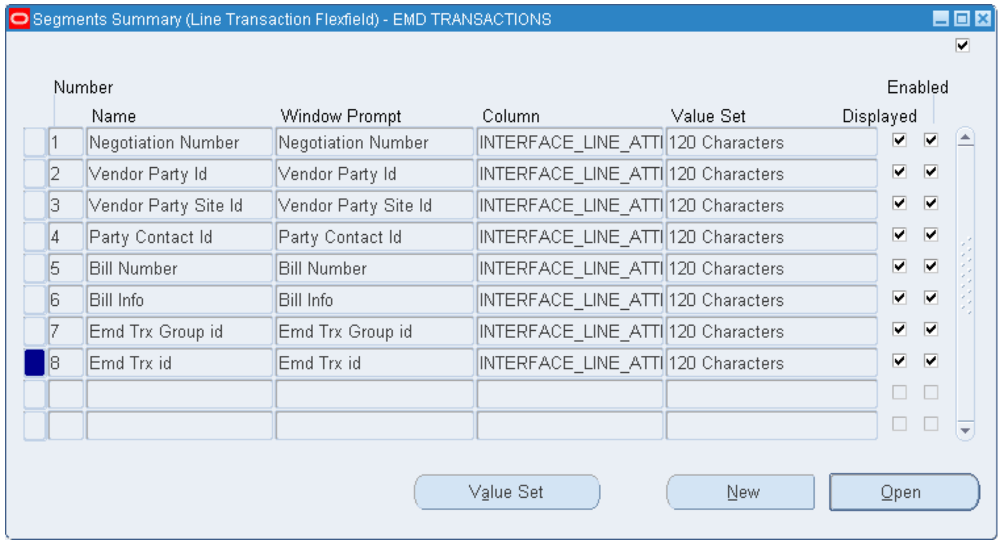
   Note: These segments may already be seeded in your instance, please check for them before you enter any user-defined segments.

3. Click Segments and enter the segments for the EMD Transactions. Enter the following in the Segments window:

Name	Window Prompt	Column	Value Set	Displayed checkbox	Enabled checkbox
Negotiation Number	Negotiation Number	INTERFACE_LINE_ATTRIBUTE1	120 characters	Checked	Checked
Vendor Party Id	Vendor Party Id	INTERFACE_LINE_ATTRIBUTE2	120 characters	Checked	Checked

Name	Window Prompt	Column	Value Set	Displayed checkbox	Enabled checkbox
Vendor Party Site Id	Vendor Party Site Id	INTERFACE_LINE_ATTRIBUTE3	120 characters	Checked	Checked
Party Contact Id	Party Contact Id	INTERFACE_LINE_ATTRIBUTE4	120 characters	Checked	Checked
Bill Number	Bill Number	INTERFACE_LINE_ATTRIBUTE5	120 characters	Checked	Checked
Bill Info	Bill Info	INTERFACE_LINE_ATTRIBUTE6	120 characters	Checked	Checked
Emd Group ID	Emd Group ID	INTERFACE_LINE_ATTRIBUTE7	120 characters	Checked	Checked
Emd Transaction ID	Emd Transaction ID	INTERFACE_LINE_ATTRIBUTE8	120 characters	Checked	Checked

Your Segment window should appear as follows:



4. Save your work and close the Segments window. Exit from the Descriptive Flexfields Segments window.

Transaction Types

1. Using the Receivables responsibility, navigate to Receivables > Setup > Transactions > Transaction Types.

2. Enter information to setup the following transaction types: EMD Deposit, EMD Credit Memo and EMD Invoice.

3. For EMD Deposit setup, enter the following information in the Transaction Types window:

   - Name: EMD Deposit
   - Class: Deposit
   - Transaction Status: Open
   - Invoice Type: EMD Invoice
   - Start Date: any start date
   - Description: Deposit Transaction Type for EMD from Oracle Sourcing
   - Creation Sign: Positive Sign
   - Printing Option: Print

- Credit Memo Type: EMD Credit Memo

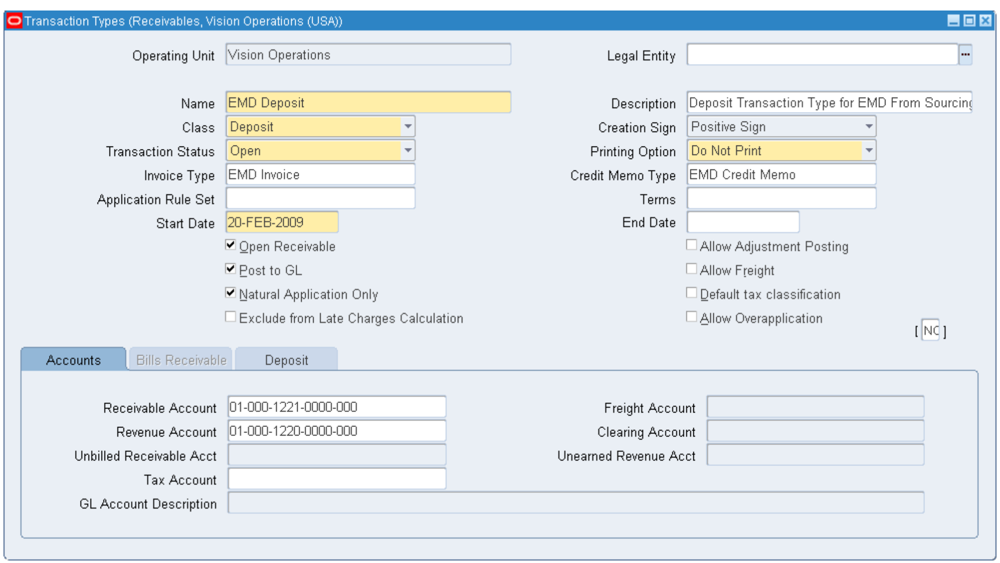
4. Select the following checkboxes:
   - Open Receivable
   - Post to GL
   - Natural Application Only

5. Click the Accounts tab and enter the following account information:
   - Receivable Account: enter the appropriate account code
   - Revenue Account: enter the appropriate account code

6. Click the Deposit tab and enter the following account information:
   - Receivable Account: enter the appropriate account code
   - Offset Account: enter the appropriate account code

7. Save your work.

   The Transaction Types window appears as follows for the EMD Deposit Transaction Type:

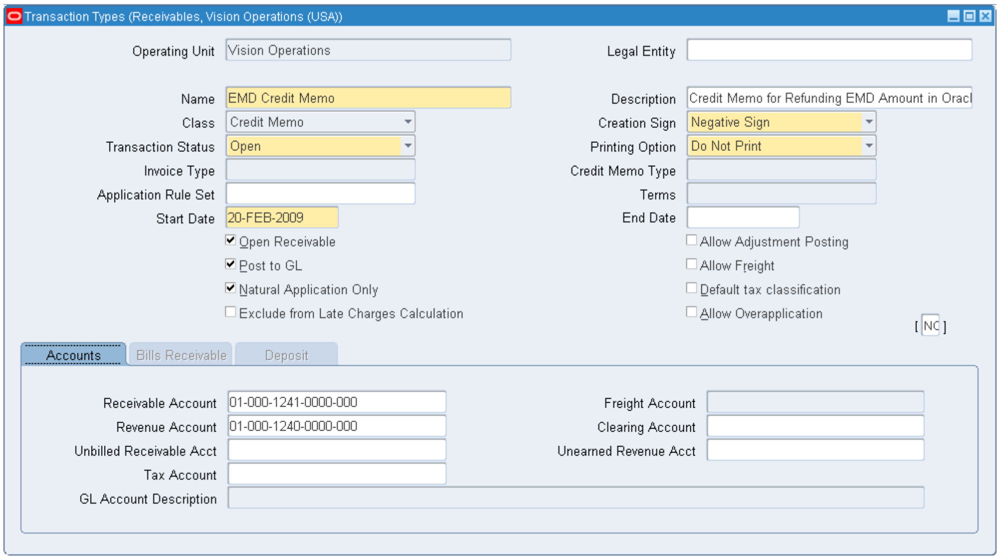


8. For EMD Credit Memo setup, enter the following information in the Transaction Types window:
   - Name: EMD Credit Memo

- Class: Credit Memo
- Transaction Status: Open
- Start Date: any start date
- Description: Credit Memo for refunding EMD amount in Oracle Sourcing
- Creation Sign: Negative Sign
- Printing Option: Print

9. Select the following checkboxes:
   - Open Receivable
   - Post to GL
   - Natural Application Only
10. Click the Accounts tab and enter the following account information:
    - Receivable Account: enter the appropriate account code
    - Revenue Account: enter the appropriate account code
11. Save your work.

    The Transaction Types window appears as follows for the EMD Credit Memo Transaction Type:



12. For EMD Invoice setup, enter the following information in the Transaction Types window:

    - Name: EMD Invoice
    - Class: Invoice
    - Transaction Status: Open
    - Start Date: any start date
    - Description: Regular Invoice
    - Creation Sign: Positive Sign
    - Printing Option: Print

13. Select the following checkboxes:

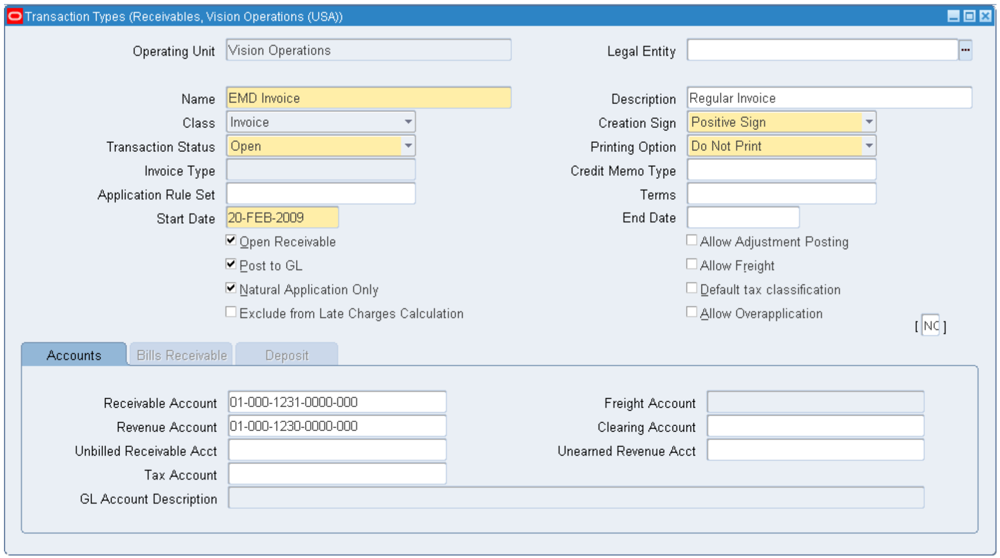
    - Open Receivable
    - Post to GL
    - Natural Application Only

14. Click the Accounts tab and enter the following account information:

    - Receivable Account: enter the appropriate account code
    - Revenue Account: enter the appropriate account code

15. Save your work.

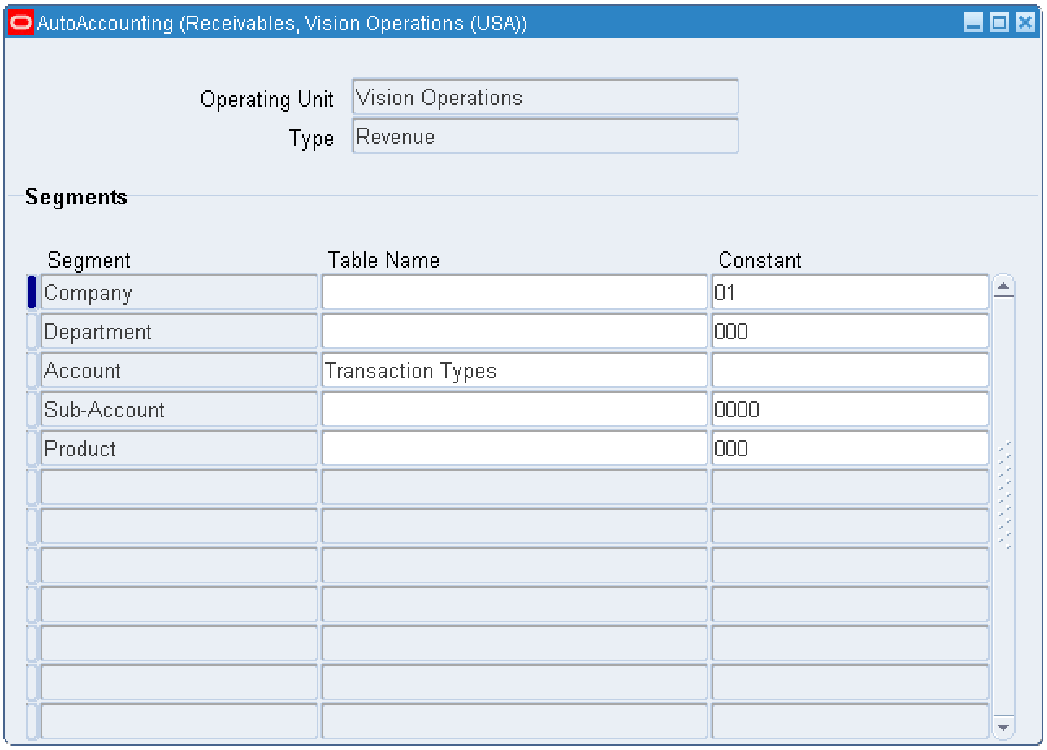
The Transaction Types window appears as follows for the EMD Invoice Transaction Type:



16. Close the Transaction Types window.

AutoAccounting

Navigate to Receivables > Setup > Transactions > AutoAccounting and select the operating unit. Search for the Type with a value of Revenue. In the Segment column, the Accounts row should have a value in the Table Name column.

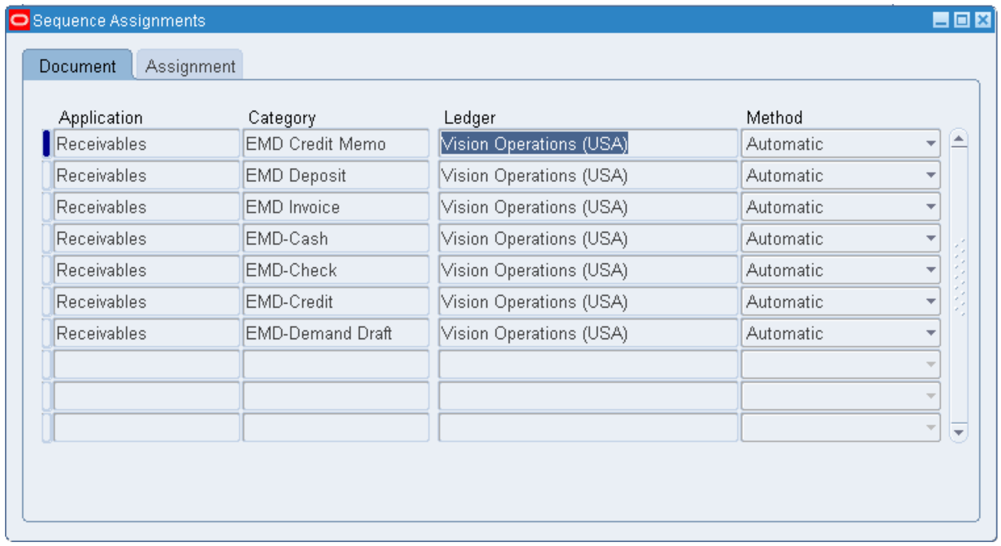


Assigning Sequential Numbering to the following EMD entities

1. Using the System Administrator responsibility, navigate to Application > Sequential Numbering > Assign > (T) Document.
2. Enter the following in the Document tab using the table information below

Application	Category	Ledger	Method
Receivables	EMD Credit Memo	Your Ledger	Automatic
Receivables	EMD Deposit	Your Ledger	Automatic
Receivables	EMD Invoice	Your Ledger	Automatic
Receivables	EMD-Cash	Your Ledger	Automatic
Receivables	EMD-Check	Your Ledger	Automatic
Receivables	EMD-Demand Draft	Your Ledger	Automatic

3. Save your work. The window appears as follows:



4. Click the Assignment tab to enter document sequences for each of the EMD categories.

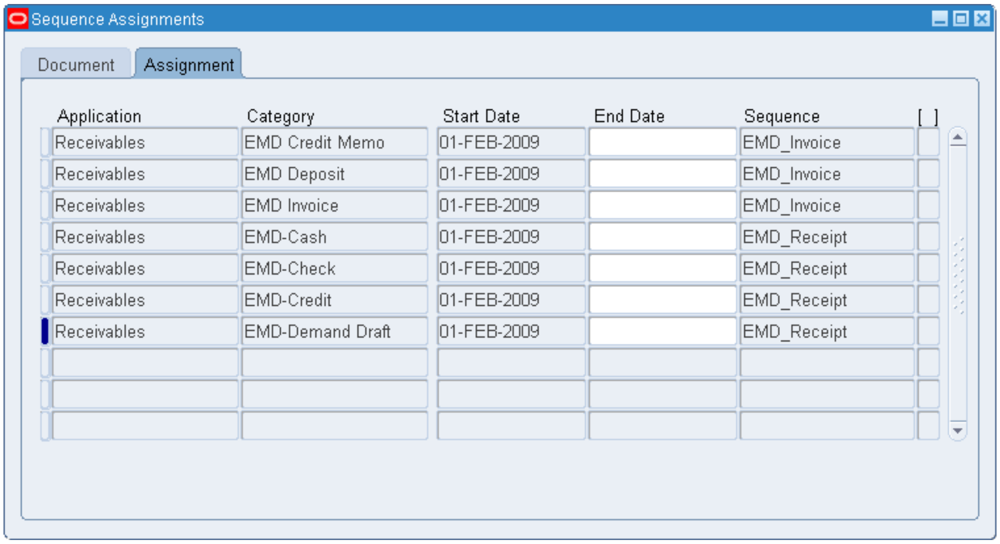
5. Enter the EMD_Invoice sequence for the following categories:

   - EMD Credit Memo
   - EMD Deposit
   - EMD Invoice

6. Enter the EMD_Receipt sequence for the following categories:

   - EMD-Cash
   - EMD-Check
   - EMD-Credit
   - EMD-Demand Draft

7. Save your work. The Assignment window appears as follows:



8. Close the Sequence Assignments window.

Batch Source

1. Using the Receivables responsibility, navigate to Setup > Transactions > Sources > (T) Batch Source to set up a batch source. Enter the following in the Batch Source window:

   - Operating Unit: the default operating unit
   - Name: EMD Transaction Source
   - Type: Manual
   - Description: EMD transaction sources for transactions from Oracle Sourcing

2. Select the following checkboxes:

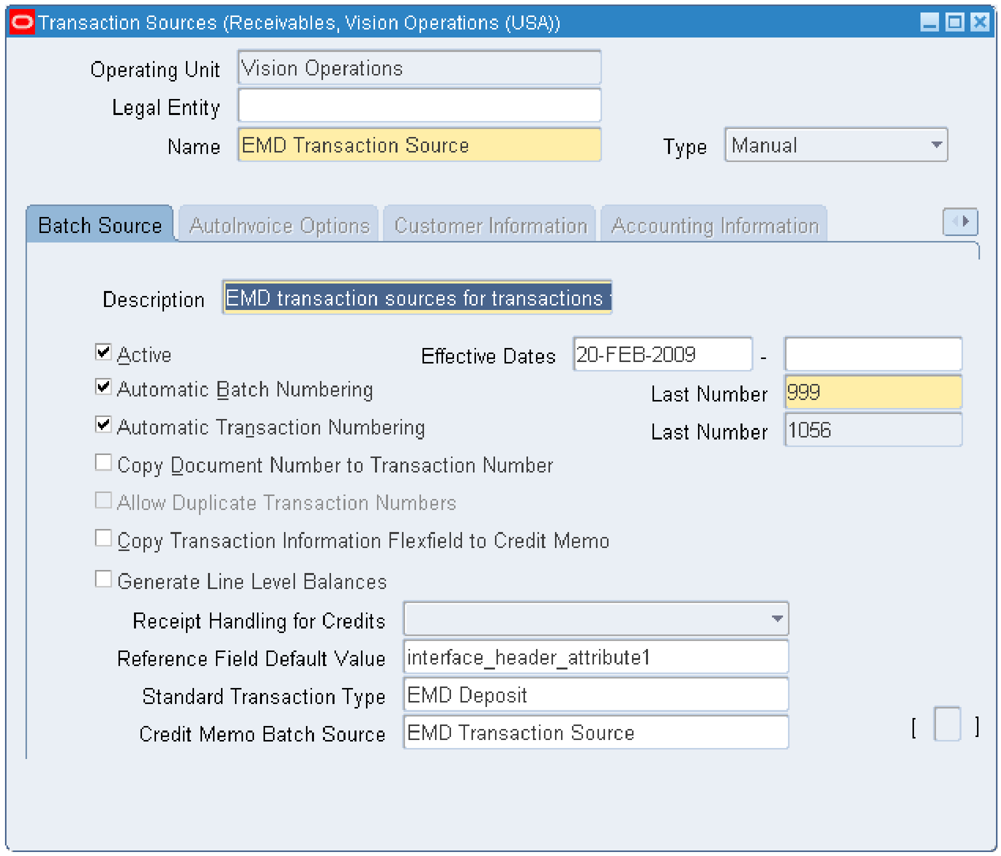
   - Active
   - Automatic Batch Numbering
   - Automatic Transaction Numbering

3. Enter the remaining information in the Batch Source tab:

   - Last Number: 999
   - Reference Field Default Value: interface_header_attribute1

- Standard Transaction Type: EMD Deposit
- Credit Memo Batch Source: EMD Transaction Source

4. Save your work. The window appears as follows:



5. Enter the following information for the next batch source - EMD Import Invoice Batch Source:
   - Operating Unit: the default operating unit
   - Name: EMD Import Invoice Batch Source
   - Type: Imported
   - Description: EMD Import Invoice Batch Source

6. Select the following checkboxes:
   - Active

- Automatic Batch Numbering
- Automatic Transaction Numbering

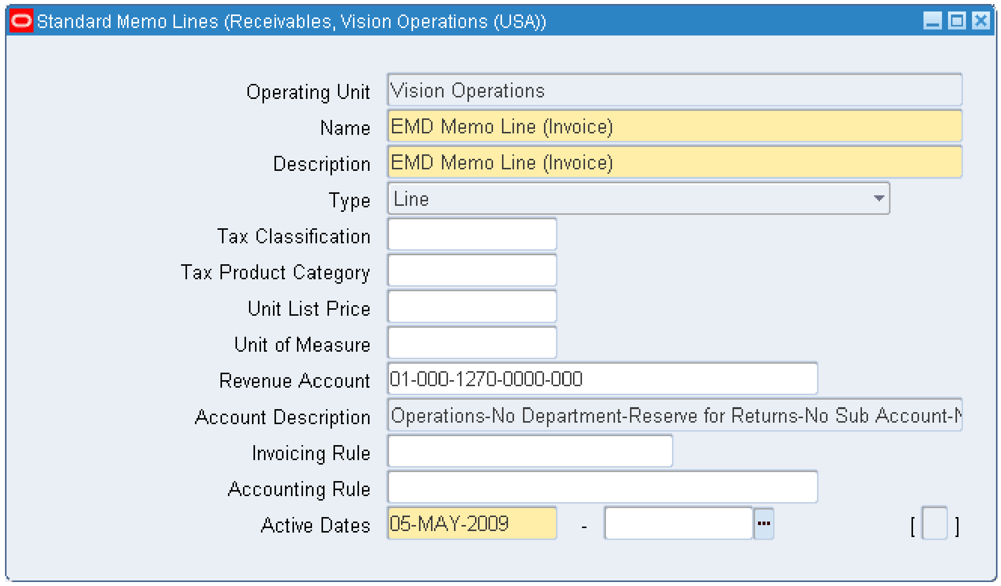
7. Enter the remaining information in the Batch Source tab:
   - Last Number: 999
   - Reference Field Default Value: interface_header_attribute1
   - Standard Transaction Type: EMD Invoice
   - Credit Memo Batch Source: null

8. Save your work and close the Batch Sources window.

9. Using the same responsibility, create memo lines by navigating to: (N) Receivables > Setup > Transactions > Memo Lines.

10. Enter the following information:
    - Operating Unit: the default operating unit
    - Name: EMD Memo Line (Invoice)
    - Description: EMD Memo Line (Invoice)
    - Type: Line
    - Revenue Account: enter the appropriate account code
    - Account Description: Operations-No Department-Reserve for Returns-No Sub Account-No Product
    - Active Dates: 1-NOV-2008

11. Save your work, your window appears as follows:

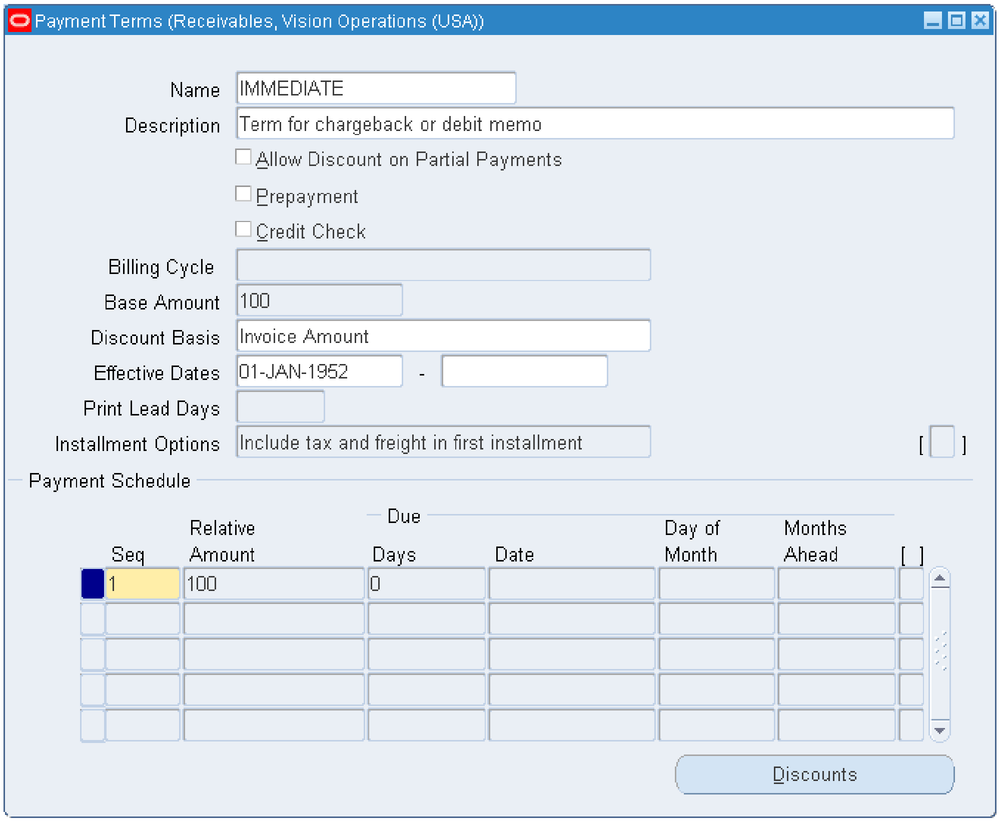


12. Close the Standard Memo Lines window.

Payment Terms

1. Using the same responsibility, enter / confirm the Payment Terms. Navigate to (N) Receivables > Setup > Transactions > Payment Terms. Enter the following information for creating a new payment term:
   - Name: IMMEDIATE
   - Description: Term for chargeback or debit memo
   - Base Amount: 100
   - Discount Basis: Invoice Amount
   - Effective Dates: 01-JAN-1966
   - Installment Options: Include tax and freight in first installment
2. In the Payment Schedule region, enter the following:
   - Seq: 1
   - Relative Amount: 100
   - Due Days: 0
3. Save your work and close the Payment Terms window. The window appears as

follows:



Receipt Class

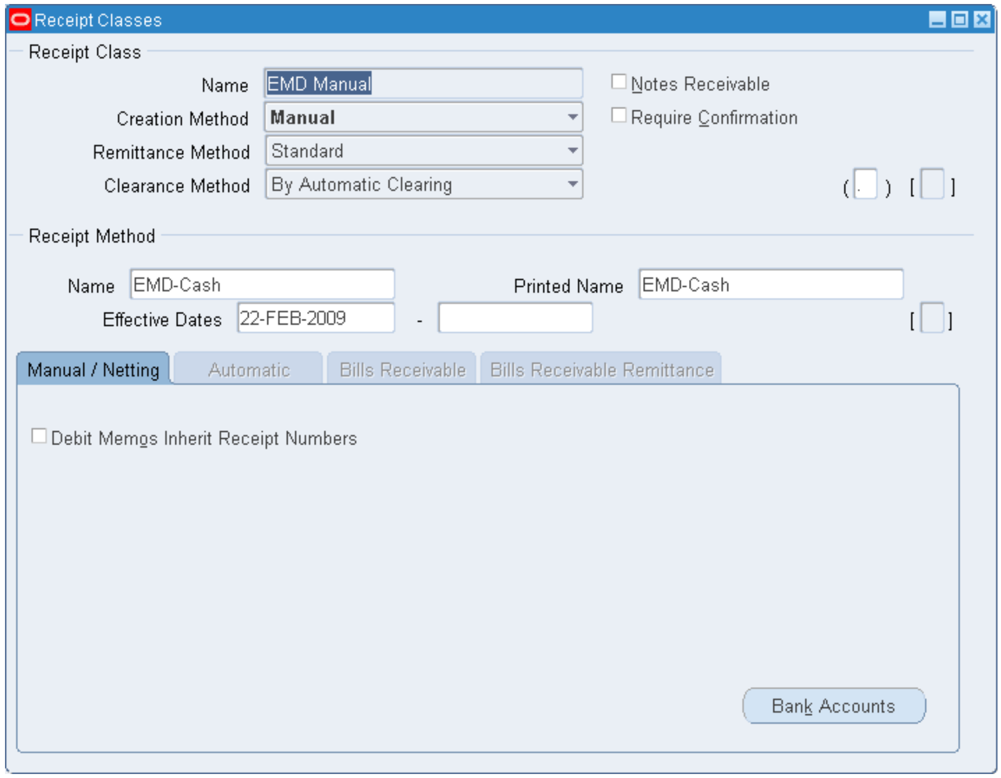
1. Using the Receivables responsibility, enter the Receipt Class. Navigate to (N) Receivables > Receipts > Receipts Classes.

2. In the Receipt Class region, enter the following:
   - Name: EMD Manual
   - Creation Method: Manual
   - Remittance Method: Standard
   - Clearance Method: By Automatic Clearing

3. In the Receipt Method region, enter the following:
   - Name: EMD-Cash
   - Printed Name: EMD-Cash

- Effective Dates: 01-NOV-2008

4. Save your work, the Receipt Classes window appears as below:

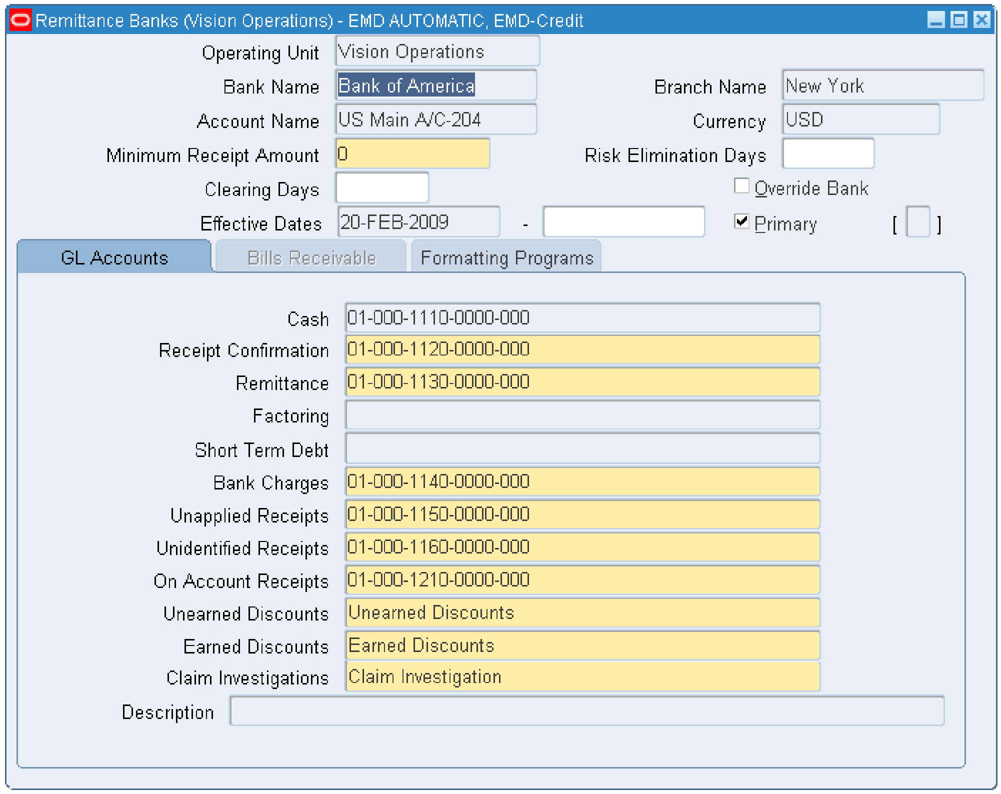


5. Click Bank Accounts to enter the Remittance Bank information:
   - Operating Unit: the selected operating unit
   - Bank Name: enter a bank
   - Branch Name: enter a branch
   - Currency: USD
   - Account Name: enter an account name
   - Minimum Receipt Amount: 0
   - Effective Dates: enter effective dates
6. Select the Primary check box.
7. Enter the following in the GL Accounts tab:

Cash: enter the appropriate account code

- Receipt Confirmation: enter the appropriate account code
- Remittance: enter the appropriate account code
- Bank Charges: enter the appropriate account code
- Unapplied Receipts: enter the appropriate account code
- Unidentified Receipts: enter the appropriate account code
- On Account Receipts: enter the appropriate account code
- Unearned Discount: Unearned Discounts
- Earned Discounts: Earned Discounts
- Claim Investigations: Claim Investigation

8. Save your work and close the Remittance Bank window.



9. **EMD-Check Receipt Class**

10. Enter the Receipt Class details in the Receipt Class region:

    - Name: EMD Manual
    - Creation Method: Manual
    - Remittance Method: Standard
    - Clearance Method: By Automatic Clearing

11. Enter the following in the Receipt Method region:

    - Name: EMD-Check
    - Printed Name: EMD-Check
    - Effective Dates: a date

12. Click Bank Accounts to enter the Remittance Bank information:

    - Operating Unit: your selected operating unit

- Bank Name: enter a bank
- Branch Name: enter a branch
- Currency: USD
- Account Name: enter an account name
- Minimum Receipt Amount: 0
- Effective Dates: a date

13. Select the Primary check box.
14. Enter the following in the GL Accounts tab:
    - Cash: enter the appropriate account code
    - Receipt Confirmation: enter the appropriate account code
    - Remittance: enter the appropriate account code
    - Bank Charges: enter the appropriate account code
    - Unapplied Receipts: enter the appropriate account code
    - Unidentified Receipts: enter the appropriate account code
    - On Account Receipts: enter the appropriate account code
    - Unearned Discount: Unearned Discounts
    - Earned Discounts: Earned Discounts
    - Claim Investigations: Claim Investigation
15. Save your work.

    EMD-Demand Draft Receipt Class
16. In the Receipt Class region, enter:
    - Name: EMD Manual
    - Creation Method: Manual
    - Remittance Method: Standard

- Clearance Method: By Automatic Clearing

17. In the Receipt Method region, enter the following:
    - Name: EMD-Demand Draft
    - Printed Name: EMD-Demand Draft
    - Bank Name: enter a bank
    - Branch Name: enter a branch
    - Currency: USD
    - Account Name: enter an account name
    - Minimum Receipt Amount: 0
    - Effective Dates: a date
18. Select the Primary check box.
19. Enter the following in the GL Accounts tab:
    - Cash: enter the appropriate account code
    - Receipt Confirmation: enter the appropriate account code
    - Remittance: enter the appropriate account code
    - Bank Charges: enter the appropriate account code
    - Unapplied Receipts: enter the appropriate account code
    - Unidentified Receipts: enter the appropriate account code
    - On Account Receipts: enter the appropriate account code
    - Unearned Discount: Unearned Discounts
    - Earned Discounts: Earned Discounts
    - Claim Investigations: Claim Investigation
20. Save your work and close the windows.

Receivable Activity

1. Using the Receivables responsibility, navigate to (N) Receivables > Setup > Receipts > Receivable Activities. Enter the Receivable Activity information as below.

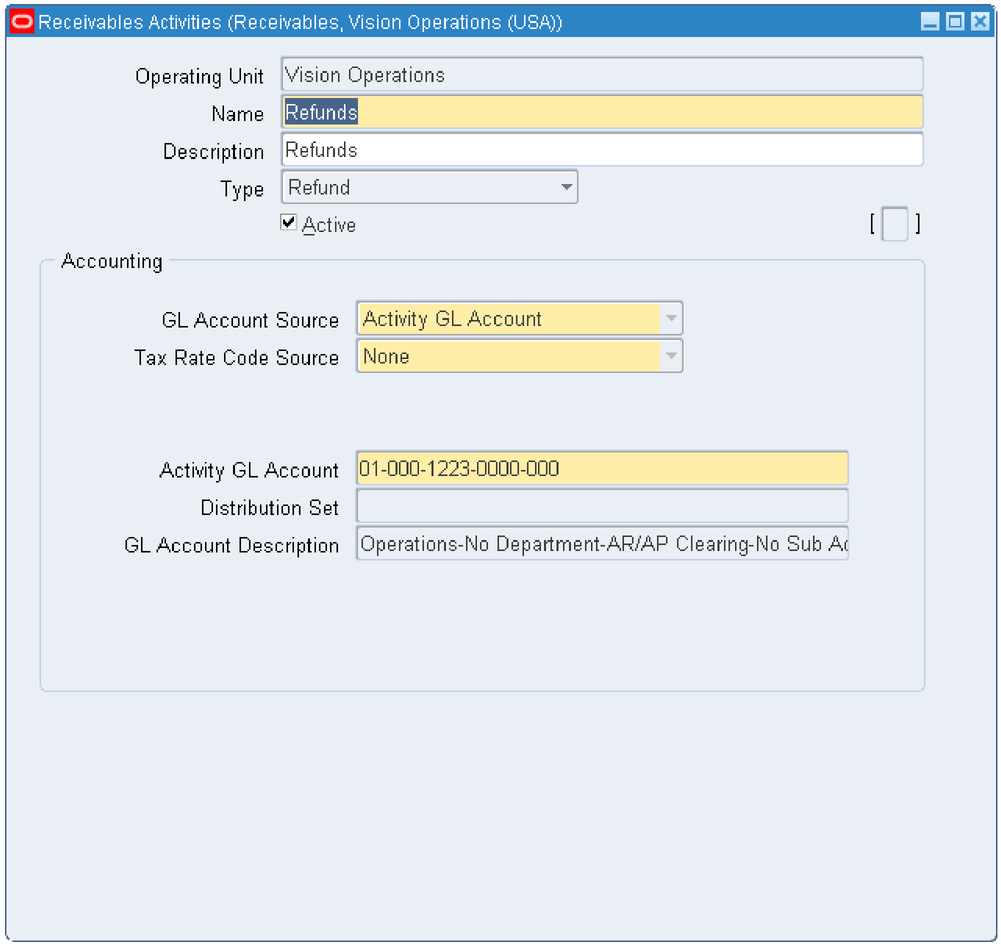
   - Operating Unit: the default operating unit
   - Name: Refunds
   - Description: Refunds
   - Type: Refund

2. Select the Active check box.

3. In the Accounting region, enter the following:

   - GL Account Source: Activity GL Account
   - Tax Rate Code Source: None
   - Activity GL Account: enter the appropriate account code
   - GL Account Description: Operations – No Department – AR/AP Clearing – No sub Account

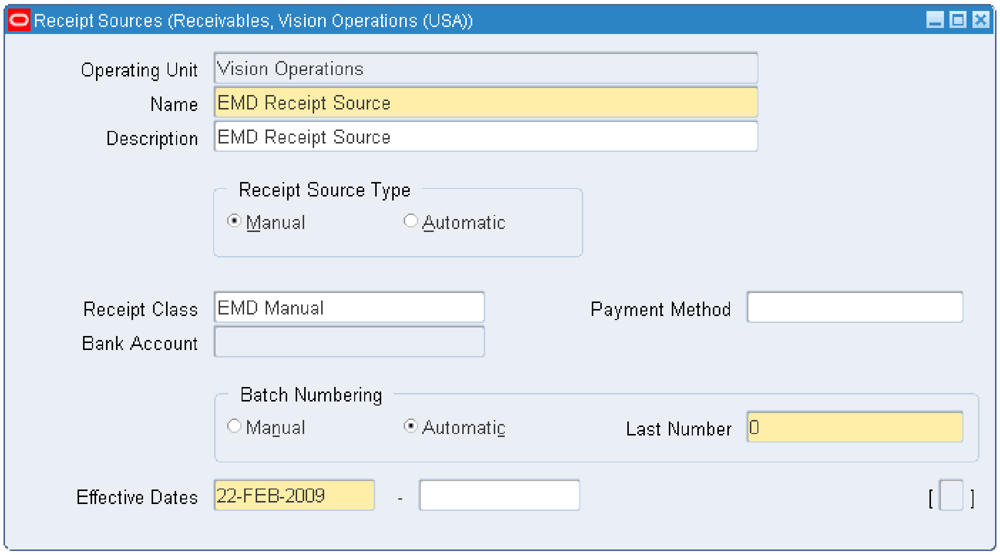
4. Save your work, the window appears as follows:



Receipt Sources

1. Using the Receivables responsibility, enter the Receipt Sources. Navigate to Receivables > Setup > Receipts > Receipt Sources and enter the following information:
   - Operating Unit: the default operating unit
   - Name: EMD Receipt Source
   - Description: EMD Receipt Source
2. In the Receipt Source Type region, select the Manual radio button.
   - Receipt Class: EMD Manual
   - In the Batch Numbering region, select the Automatic radio button
   - Last Number: 102

- Enter the Effective Dates

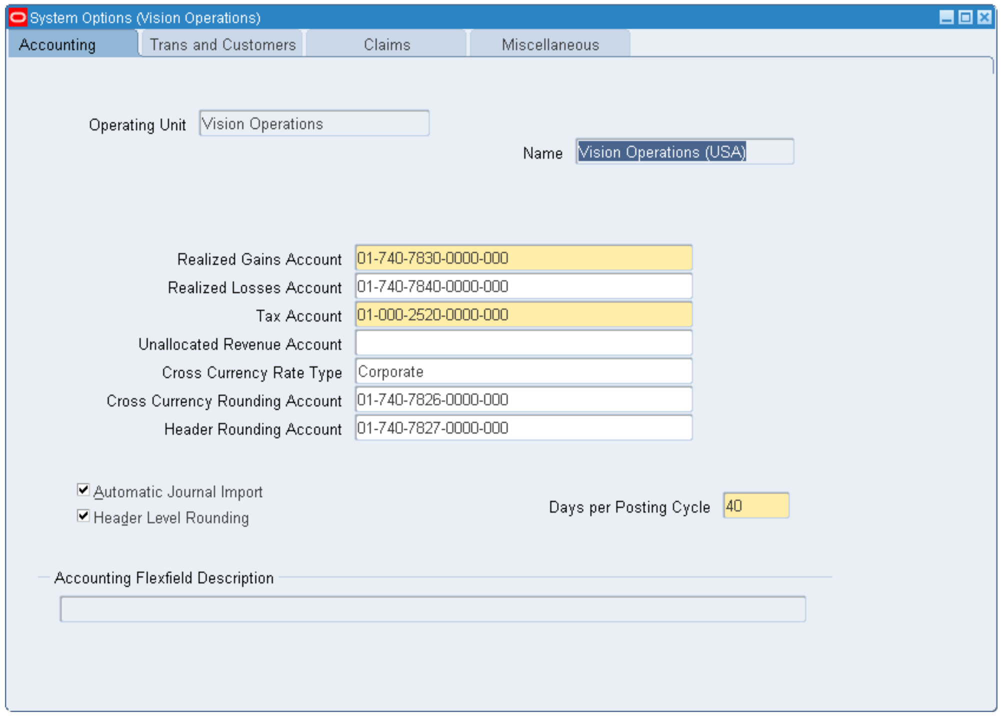


Receivables System Options

1. Navigate to Receivables > Setup >System > System Options. Enter the following Receivables System Options as below:

   In the Accounting tab enter:

   - Operating Unit: the default operating unit
   - Name: the default operating unit
   - Realized Gains Account: enter the appropriate account code
   - Realized Losses Account: enter the appropriate account code
   - Tax Account: enter the appropriate account code
   - Cross Currency Rate Type: Corporate
   - Cross Currency Rounding Account: enter the appropriate account code
   - Header Rounding Account: enter the appropriate account code
   - Select Automatic Journal Import check box
   - Select Header Level Rounding check box
   - Days per Posting Cycle: 40



2. Save your work and close the window.

If you are not using Financial Integration - Setup Steps

If the user is not integrating the EMD functionality with Oracle Financials, navigate to the Administration page and specify an operating unit that will not be used with Financials. Also please ensure that the Enable Integration with Oracle Financials checkbox is not selected. However the user needs to enter the Receivables Payment Type region. Currently the Payment Types of Cash, Check and Demand Draft are supported.

Enter Receivables Payment Type Information

Payment Type	Description	Receipt Method	Refund Payment Method	Enabled
Cash	Cash	EMD-Cash	Check	☑
Check	Check	EMD-Check	Check	☑
Demand Draft	Demand Draft	EMD-Demand Draft	Check	☑

Set up Initiatives

The following setup steps help you to implement Initiatives.

Function Security

The function, Initiative buyer access, when assigned to a responsibility, enables the assigned user to create and manage initiatives.

Ensure that this function is assigned only to buyers and procurement managers in your organization.

Function Name	Responsibility: Sourcing Super User	Responsibility: Sourcing Buyer	Responsibility: Sourcing Team Member
Initiative buyer access	Yes	Yes	No

This function is part of the standard Sourcing Super User responsibility. (As specified in the above table, it is not part of the Sourcing Team Member responsibility)

Workflow Notifications

The following FYI workflow notifications come seeded with Initiatives.

Event	Recipient	Purpose
Initiative Active	Task Owners	Informs the task owner that the initiative is active.
Initiative on Hold	Task Owners and Sponsors (optional)	Informs the recipient that the initiative has been placed on hold,
Initiatives Cancelled	Task Owners and Sponsors (optional)	Informs the recipients that the initiative has been canceled.
Request Updated	Task Owners	Requests the task owners to update the task progress.
Task placed on hold	Task Owner	Informs task owners that the task is on hold.
Task Canceled	Task Owners	Informs task owners that the task is cancelled.

Concurrent Program

Navigate to Sourcing Super User > Sourcing Home page >Administration (Tab) > Concurrent Program.

Schedule the Run Task Overdue concurrent program to run at an interval you require. The concurrent program sends task overdue notifications to the task owner.

Enter a value for the Notification interval parameter. This parameter determines the number of days after which the next notification is sent. By default it is 7 days, if no interval value is entered.

Descriptive Flexfields (DFFs)

Enabling DFFs at Initiative Header level

This is an optional step. You can enable the DFF region at the Initiative header page:

1. Use the Functional Administrator responsibility.
2. Click the Personalization tab.
3. In the document path, enter '/oracle/apps/pon/initiative/creation/webui/ponInitiativeHeaderPG' and click Go.
4. Click the Personalize Page pencil icon.
5. Select defaults and click Apply.
6. Search for Header: Additional Attributes and click the Personalize icon.
7. Set the Rendered property to true at all levels and click Apply.

Enabling Task Level Attributes

1. Use the Functional Administrator responsibility.
2. Click the Personalization tab.
3. In the document path enter '/oracle/apps/pon/initiative/creation/webui/ponTaskHeaderPG' and click Go.
4. Click the Personalize Page pencil icon.
5. Select defaults and click Apply.
6. Search for Task: Additional Attributes and click the Personalize icon.
7. Set the Rendered property to true at all levels and click Apply.

Profile Options

The table indicates whether users of the system can view or update the profile option, and at which levels (either user, responsibility, application, or site) the profile options can be updated. These levels are included in the table as Site, Application, Responsibility, and User.

For the User Access column, Yes indicates that you can update the profile, View Only indicates that you can view the profile but you cannot update it, and No indicates that you can neither view nor update the profile. A Required profile option requires you to provide a value. Otherwise, the profile option already provides a default value, so you only need to change it if you do not want to accept the default. For details of profile options applicable to all Oracle Applications, see: Profile Options in Oracle Applications Object Library.

The following profile options need to be set in order to send notifications. If the value of the profile option is No, notifications are not sent. If the value of the profile option is Yes, notifications are sent.

Profile Option Name	User Access	Site	Application	Responsibility	User
PON: Task Assigned	Yes	Update	Update	Update	Update
PON: Task Placed on-hold	Yes	Update	Update	Update	Update
PON: Task Cancelled	Yes	Update	Update	Update	Update
PON: Initiative placed on-hold	Yes	Update	Update	Update	Update
PON: Initiative Canceled	Yes	Update	Update	Update	Update

Objective API

This API is available for customers who wish to use automation to manage the current value of objectives from a custom program that fetches / calculates the current value from third-party systems, or from any data available in Oracle eBusiness Suite. The details of the API are as follows:

- **Package Name:** PON_INIT_UTIL_PKG
- **Procedure Name:** UPDATE_OBJ_CURR_VALUE

Procedure signature:

Parameter Name	IN/OUT	Datatype	Comments
x_result	OUT	VARCHAR2	Returns S/E/U which has following meaning S -> Success E -> Error U -> Unexpected Error
x_error_code	OUT	VARCHAR2	Returns SQL error code
x_error_message	OUT	VARCHAR2	Returns error message
p_objective_id	IN	NUMBER	d of the objective which needs to be updated. We can fetch objective_id using the following SQL statement: Select objective_id from pon_objectives where name = 'OBJECTIVE_NAME';
p_curr_value	IN	NUMBER	Current value of the objective which needs to be updated

Sample code for executing the API:

```
DECLARE
l_result VARCHAR2(1);
l_error_code VARCHAR2(100);

l_error_message VARCHAR2(2000);
l_objective_id NUMBER;
l_current_value NUMBER;

BEGIN

/* Initializing IN variables */
l_objective_id:= 181;
l_current_value:=2000;

/* Calling private API for updating current value */

PON_INIT_UTIL_PKG.UPDATE_OBJ_CURR_VALUE(x_result =>  l_result,
                                        x_error_code => l_error_code,
                                        x_error_message =>
l_error_message,
                                        p_objective_id =>
l_objective_id,
                                        p_curr_value =>
l_current_value);



Dbms_Output.put_line('l_result => '|| l_result);
Dbms_Output.put_line('l_error_code => '|| l_error_code);
Dbms_Output.put_line('l_error_message => '|| l_error_message);



END;
```

Set up Terms and Conditions

Use the Administration tab > Setup Negotiation Terms and Conditions to create or search for existing terms and conditions in a specific language.

The Setup Terms and Conditions page has the following options for the administrator:

Require Acceptance of Terms and Conditions from Suppliers:

- Before supplier user creates the response
- Before supplier user accesses negotiation for the first time
- Never
- Allow user to participate without accepting terms and conditions

3

Maintaining and Administering Oracle Sourcing

This chapter covers the following topics:

- Introduction
- Supplier Registration and Profile Maintenance
- Deactivating Supplier Contacts
- Deactivating a Supplier Site
- Suppliers on Purchase Order Hold Status
- Canceling or Deleting a Negotiation
- Using Sourcing Events
- Unlocking Draft Negotiations
- Using the Concurrent Manager to Administer Large Negotiations
- Mass Update of Sourcing Documents
- Notification Reminder for Negotiation Response
- Applications Setup

Introduction

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

Supplier Registration and Profile Maintenance

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

Also, if supplier administrators update their profile information, updates must be approved before they can be promoted into the system.

See the iSupplier Portal online help for instructions on registering and approving supplier users and maintaining supplier profiles.

Deactivating Supplier Contacts

There may be times when you or a Purchasing Manager need to deactivate a supplier contact. See the *Oracle iSupplier Portal Implementation Guide* for instructions on deactivating a supplier contact. Inactivating a supplier contact has the following impact:

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

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

Deactivating a Supplier Site

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

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

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

Suppliers on Purchase Order Hold Status

There may be occasions when a supplier is put on Purchase Order Hold. You can accomplish this by assigning the supplier a status of Purchase Order Hold. See the

Oracle Purchasing User's Guide for instructions on performing this task.

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

Canceling or Deleting a Negotiation

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

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

To cancel a negotiation in progress:

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

To delete a negotiation:

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

Using Sourcing Events

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

Both Sourcing Buyers and the Sourcing Super User can create events. Events are always public. Negotiations cannot be added to an event after the inactive date

When you create a new negotiation, you can associate the negotiation with an existing event. You can also monitor your sourcing events from the **Manage Events** page.

Sourcing events can be in one of three statuses:

- Active - an event is active as soon as it is created
- Inactive - an event becomes inactive once it reaches the inactive date specified by the buyer who created the event.
- Canceled - an event can be canceled by the Sourcing Super User or a Sourcing Buyer with a responsibility containing the Cancel Events function

To create a sourcing event:

1. Click "Event" under the Create column of the Quick Links section of the **Negotiations Home** page
2. On the **Create Event** page, enter a title, description, and an inactive date/time. No negotiations can be associated with this sourcing event after its inactive date and time has passed.
3. Click Apply.

To cancel a sourcing event:

1. Click "Events" under the Manage column of the Quick Links section of the Buyer **Home** page.
2. On the **Manage Events** page, search for and select the event you wish to cancel.
3. Click Cancel Event.
4. On the **Cancel Event** page, you can choose to cancel all the negotiations associated with this event, or just cancel the event itself.
5. If you chose to cancel both the event and its associated negotiations in the previous step, you can supply an explanation of why the event is being cancelled. This explanation is sent to all invitees and anyone else who may have responded to one

of the negotiations in the event.

6. Click Apply.

Unlocking Draft Negotiations

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

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

To unlock a draft:

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

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

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

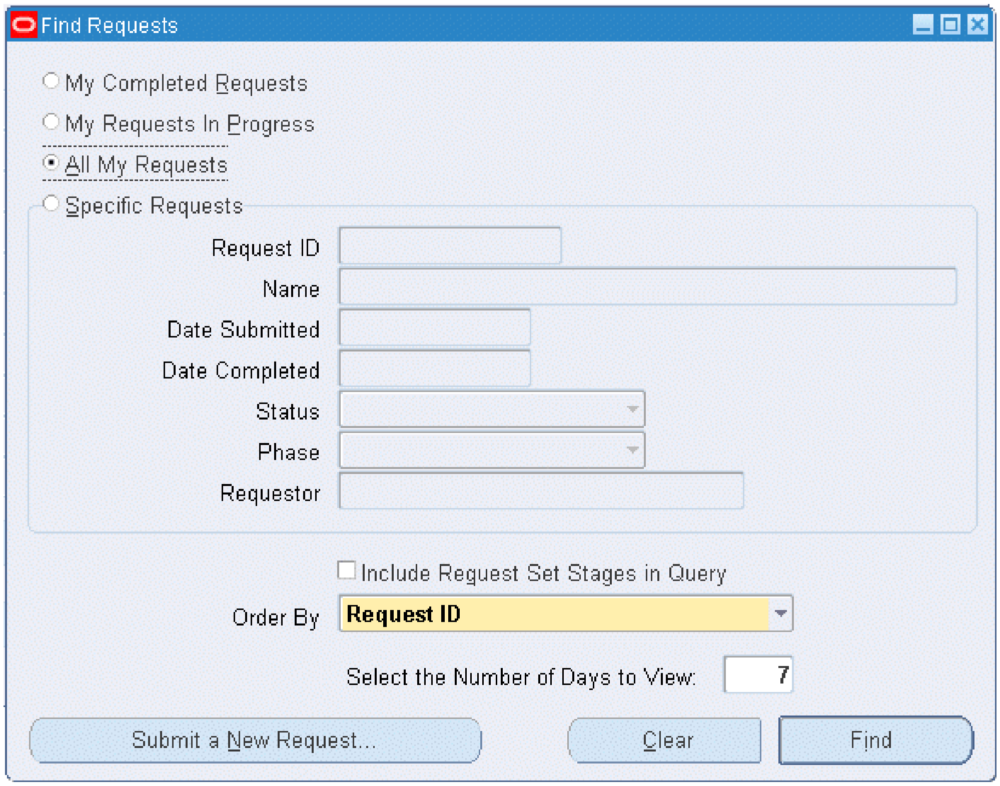
Using the Concurrent Manager to Administer Large Negotiations

Large negotiations are negotiations that process several hundreds of lines. Since these negotiations would take time if processed online, you can tell the system to process a negotiation offline by flagging it as a large negotiation. You do this by specifying a threshold number of lines (see Set Up Negotiations Configuration for instructions on setting this threshold). Any negotiation that has more lines than this threshold is considered by the system to be "large" and is processed using concurrent requests. Since large negotiations generate concurrent requests to perform many tasks, there may be times when you need to monitor and administer the operation of these requests.

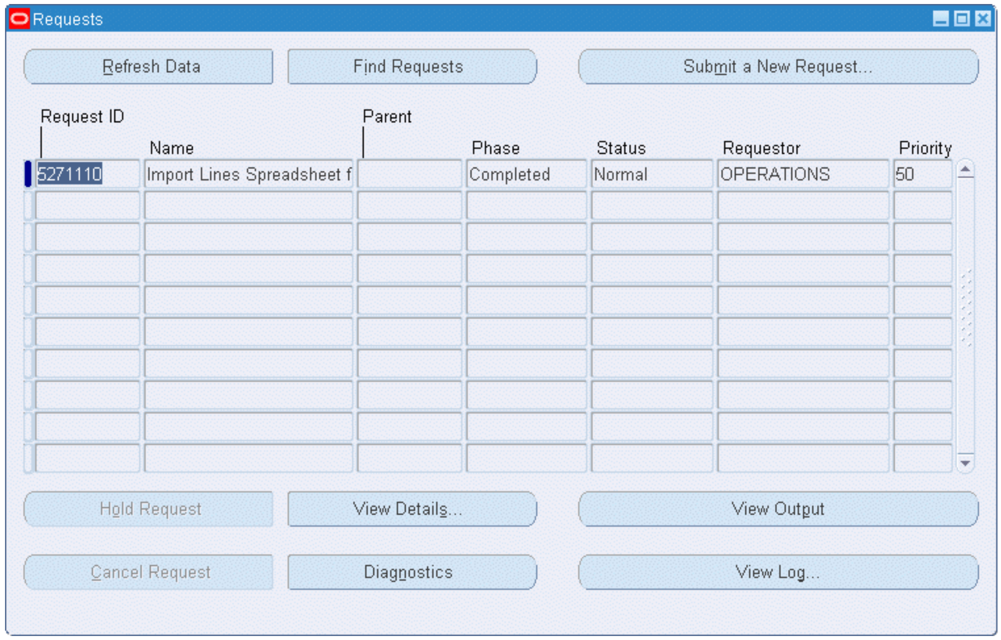
When a concurrent request is generated by a large negotiation, it is given a request ID. You can use this ID to monitor the request and, if necessary, intervene during its operations.

To monitor a concurrent request:

1. From the **Administration** page, click Concurrent Requests. You are taken to the System Administration feature of Oracle e-Business Suite and placed on the **Find Requests** form.



2. By default, the All My Requests radio button in checked. If you have only one request running, simply click Find. If you have multiple requests running and you know the ID of the request you wish to view, select Specific Request, and enter the number in the Request ID field and click Find.



3. On the Requests page, if the request is still active, you can cancel the request or put the request on hold. Once the request is completed, you can view the details, the output, the log file for the execution. See the *Oracle E-Business Suite System Administration Guide* for details on the actions you can take on this page.

Mass Update of Sourcing Documents

Use the Submit Requests window to run the Mass Update of Sourcing Documents. You do this to update the trading partner contacts for negotiations which are not Cancelled, Deleted, or Paused. The bid headers, contract deliverables are also updated. If the new user is already present in the collaboration team, then the application updates the user as owner and gives the user full access. Otherwise the application inserts a new record and provides the user the creator role and full access to the negotiation. The old user still present in the collaboration team can perform all the activities a team member can do (if they are still active members). If the old person is an approver (negotiation approval or award approval) the application forwards the notification of the old person to the new person. Also, the application updates the workflow attributes so the new person receives the approval notifications.

To mass update sourcing document:

1. In the Submit Requests window, enter Mass Update of Sourcing Documents in the Name field.

2. In the Parameters window, enter the following details:

- Old Person - The name of the buyer to be replaced.
- New Person - The name of the new buyer. The person entered here should a valid buyer with Create Negotiation (function PON_CREATE_NEW_NEG) privileges.
- Document number From - The starting document number (inclusive).
- Document Number To - The ending document number (inclusive).
- Date From - The from creation date.
- Date To - The to creation date.
- Commit Interval - Enter the number to indicate after how many records the program should write the data to the database. If this is null, the program writes the data to the db at the end of the program.
- Simulate - Use this as a dry run of the program. If this flag is yes while running the concurrent program, then no records are updated. But the report displays the negotiations selected for update with the filter conditions specified. It is advised to run the program with Simulate as Yes first after specifying the other filter paramaters and verify the data selected for update, before the actual run of the program.

3. Click OK and Submit.

Notification Reminder for Negotiation Response

The Notification Reminder for Negotiation Response concurrent program send reminder notification to suppliers who have not responded to a negotiation. The program allows you to specify the timing of the reminder based on key negotiation dates. The parameters are as follows:

- Notification to be sent:
  - After open date: Sends the notification after the negotiation's open date.
  - After preview date: Sends the notification after the negotiation's preview date.
  - Before close date: Sends the notification before the negotiation's close date.
- Enter Days: Enter a comma-separated list of days. The reminder notification is sent to the supplier after or before the specified number of days.

This concurrent program is useful when suppliers within a negotiation have not yet responded. Set these parameters to send the timely reminders to suppliers and encourage supplier participation in the negotiation process.

To run the concurrent request:

1. From the **Negotiations Home** page, click the **Administration** tab.
2. On the **Administration** page, click **Concurrent Requests**. You are taken to the System Administration feature of Oracle e-Business Suite and placed on the **Find Requests** form.
3. Click **Submit a New Request**. The **Submit Request** window opens.
4. In the **Name** field, find and enter the **Negotiation Response Reminder Notification** from the **Reports** window.
5. Select the appropriate parameters.
   - Notification to be sent
     - After open date
     - After preview date
     - Before close date
   - Enter days
6. Click **OK**.

Applications Setup

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

- Update any exchange rates you might have set
- Review your negotiation invitation lists to reflect the changes in your business
- Check or update your negotiation Requirement lists, attributes lists, cost factors, and cost factor lists to streamline the negotiation creation process
- Update your negotiation abstract document and/or create any new forms.
- Update your list of supplier discovery URLs as needed.
- Register new suppliers and supplier users and update their profiles.

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

4

API To Import Negotiations

Over of API to Import Negotiations

This API enables creating or importing negotiations into Oracle Sourcing from backend. The negotiation created will be in draft status.

The user can create negotiation with all the header details including header requirements, scoring, collaboration team, controls and invited suppliers. At line level all the line level details along with attributes, cost factors, price breaks and price tiers, can be created. UDA data creation at header level and line level is also supported when solicitations are created for federal customer.

Invoking API

Creating Negotiation

The procedure that should be called for creating negotiation is PON_OPEN_INTERFACE_PUB.CREATE_NEGOTIATIONS.

The input parameters for the above procedure are: p_group_batch_id: This is the value of the interface_group_id that was inserted in pon_auction_headers_interface table. All the negotiations with this interface_group_id in pon_auction_headers_interface table will be picked for processing.

The output parameters are: EFFBUF: This is mandatory output parameter needed for concurrent program. RETCODE: This is another mandatory parameter needed for concurrent program. Value 0 means success and 2 means failure.

Sample data insertion:

```
 INSERT
   INTO pon_auction_headers_interface
  (
    interface_group_id ,
    INTERFACE_header_id                ,
    AUCTION_TITLE              ,
    ORG_ID                     ,
    --OPEN_BIDDING_DATE          ,
    CLOSE_BIDDING_DATE         ,
    OPEN_AUCTION_NOW_FLAG      ,
    DOCTYPE_ID                 ,
    STYLE_ID                   ,
    PO_STYLE_name                ,
    CREATION_DATE              ,
    CREATED_BY                 ,
    LAST_UPDATE_DATE           ,
    LAST_UPDATED_BY            ,
    PROCESSING_STATUS_CODE     ,
    PF_TYPE_ALLOWED            ,
    PRICE_BREAK_RESPONSE       ,
    PRICE_TIERS_INDICATOR      ,
    GLOBAL_AGREEMENT_FLAG      ,
    trading_partner_contact_name
  )
  VALUES
  (
    123,
    1234                 ,
    'solicitation api ',
    204                  ,
    --NULL                 ,
    SYSDATE + 3          ,
    'Y'                  ,
    5                    ,
    1                    ,
    'Blanket Purchase Agreement'                  ,
    sysdate              ,
    -1                   ,
    sysdate              ,
    -1                   ,
    'PENDING'            ,
    'BOTH'               ,
    'OPTIONAL'           ,
    'PRICE_BREAKS'     ,
    'Y'                ,
    'OPERATIONS'
  );
------------------------------------------------------------------------
----------------------------------------
--  Line details
 INSERT
   INTO pon_item_prices_interface
  (
    INTERFACE_header_id           ,
    auction_header_id,
    INTERFACE_LINE_ID  ,
    --INTERFACE_TYPE     ,
    ITEM_DESCRIPTION   ,
    CATEGORY_NAME,
    QUANTITY             ,
    PRICE                ,
    LINE_TYPE,
    job_id,
    GROUP_TYPE             ,
    price_break_type ,
```

```
price_break_neg_flag
  )
  --ALLOW_ITEM_DESC_UPDATE_FLAG,
  --PRICE_AND_QUANTITY_APPLY)
  VALUES
  (
    1234      ,--pon_item_prices_interface_s.currval,--
pon_item_prices_interface_s.NEXTVAL, -- batch_id
    1234, -- dummy value for auctioN_header_id
    1           ,--line_number,
    --'ITEMUPLOAD',
    'item'      ,
    'MISC.MISC',
    --CATEGORY_ID,
    15         ,
    --UOM_CODE,
    25        ,
    'Goods'    ,
    17,
    'LINE'     ,
    'Non-Cumulative' ,
    'Optional'
  );

 INSERT
   INTO pon_auc_price_breaks_interface
  (
    INTERFACE_header_id                    ,
    INTERFACE_LINE_ID           ,
   SHIPMENT_NUMBER             ,
    has_price_differentials_flag,
    --DIFFERENTIAL_RESPONSE_TYPE,
    MAX_QUANTITY,
    EFFECTIVE_END_DATE,
    EFFECTIVE_START_DATE,
    PRICE
  )
  VALUES
  (
    1234            ,
    1               ,
    1  ,
    'N',
    --'OPTIONAL'             ,
    20,
    SYSDATE + 100,
    SYSDATE + 80,
    10
  );

INSERT
   INTO PON_AUC_ATTRIBUTES_INTERFACE
  (
    INTERFACE_header_id          ,
    INTERFACE_LINE_ID  ,
    SEQUENCE_NUMBER    ,
    ATTRIBUTE_NAME     ,
    DATATYPE           ,
    RESPONSE_TYPE      ,
    RESPONSE_TYPE_NAME ,
    MANDATORY_FLAG     ,
    DISPLAY_ONLY_FLAG  ,
    DISPLAY_TARGET_FLAG,
    VALUE              ,
    GROUP_CODE         ,
    GROUP_NAME         ,
```

```
SCORING_TYPE       ,
    ATTR_MAX_SCORE     ,
    WEIGHT             ,
    INTERNAL_ATTR_FLAG ,
    SCORING_METHOD
  )
  VALUES
  (
    1234,
    -1  ,
    10,
    'Years of experience in this domain',
    'DAT'                                ,
    'REQUIRED'                           ,
    NULL                                 ,
    'N'                                  ,
    'N'                                  ,
    'N'                                  ,
    NULL                                 ,
    NULL                                 ,
    NULL                 ,
    NULL                                 ,
    NULL                                 ,
    100                                  ,
    'N'                                  ,
    'AUTOMATIC'
  );
------------------------------------------------------------------------
-------------------------------------------
-- Acceptable values for header

 INSERT
   INTO pon_attribute_scores_interface
  (
    INTERFACE_header_id                ,
    interface_line_id ,
    ATTRIBUTE_SEQUENCE_NUMBER,
    VALUE                    ,
    FROM_RANGE               ,
    TO_RANGE                 ,
    SCORE                    ,
    SEQUENCE_NUMBER          ,
    ACTION                   ,
    CREATION_DATE            ,
    CREATED_BY               ,
    LAST_UPDATE_DATE         ,
    LAST_UPDATED_BY
  )
  VALUES
  (
    1234,
    -1,
    10,
    NULL         ,
    '01-12-2009',
    '10-12-2009',
    30,1,
    NULL   ,
    SYSDATE,
    -1     ,
    SYSDATE,
    -1
  );

 INSERT
   INTO pon_attribute_scores_interface
```

```
(
    INTERFACE_header_id                 ,
    interface_line_id,
    ATTRIBUTE_SEQUENCE_NUMBER,
    VALUE                     ,
    FROM_RANGE                ,
    TO_RANGE                  ,
    SCORE                     ,
    SEQUENCE_NUMBER           ,
    ACTION                    ,
    CREATION_DATE             ,
    CREATED_BY                ,
    LAST_UPDATE_DATE          ,
    LAST_UPDATED_BY
  )
  VALUES
  (
    1234,
    -1,
    10,
    NULL         ,
    '11-12-2009',
    '20-12-2009',
    50,1,
    NULL   ,
    SYSDATE,
    -1     ,
    SYSDATE,
    -1
  );

   INSERT
   INTO PON_AUC_PRICE_ELEMENTS_INT
  (
    INTERFACE_header_id               ,
    INTERFACE_LINE_ID      ,
    AUCTION_HEADER_ID      ,
    SEQUENCE_NUMBER        ,
    PRICE_ELEMENT_TYPE_NAME,
    PRICING_BASIS_name     ,
    VALUE                  ,
    PF_TYPE,
    DISPLAY_TO_SUPPLIERS_FLAG
  )
  VALUES
  (
    '1234'    ,
    1         ,--line_number,
    1234    , -- dummy value for auctioN_header_id
    10        ,--SEQUENCE_NUMBER,
    'FREIGHT' ,--(SELECT name FROM pon_price_element_types_tl WHERE
PRICE_ELEMENT_TYPE_ID = ppe.PRICE_ELEMENT_TYPE_ID AND ROWNUM =1),
    'Per-Unit',--(SELECT meaning FROM fnd_lookups WHERE lookup_type =
'PON_PRICING_BASIS' AND lookup_code = ppe.pricing_basis aND ROWNUM =1) ,
    10        ,
    'SUPPLIER',--PF_TYPE,
    'Y'
  );

commit;

/*
DECLARE
EFFBUF VARCHAR2(1000);
retcode VARCHAR2(1);
```

```
BEGIN
  pon_open_interface_pub.create_negotiations(EFFBUF,retcode,123);
  Dbms_Output.put_line( retcode );
END;

SELECT * FROM pon.pon_interface_errors;
select * from pon_auction_headers_interface;

truncate table pon.pon_auction_headers_interface;
truncate table pon.pon_bid_parties_interface;
truncate table pon.pon_neg_team_interface;
truncate table pon.pon_auc_price_breaks_interface;
truncate table pon.pon_item_prices_interface;
truncate table pon.PON_AUC_ATTRIBUTES_INTERFACE;
truncate table pon.pon_attribute_scores_interface;
truncate table pon.PON_AUC_PRICE_ELEMENTS_INT;
TRUNCATE TABLE pon.pon_auc_price_differ_int;

TRUNCATE TABLE pon.pon_interface_errors;


*/
```

Sample use of this procedure:

```
DECLARE
EFFBUF VARCHAR2(1000);
retcode VARCHAR2(1);
BEGIN
pon_open_interface_pub.create_negotiations(EFFBUF,retcode,123);
END;
```

Concurrent Program

Concurrent program 'Import Negotiations' is seeded to invoke this API. This is a PL/SQL based program. It takes the input parameter 'p_group_batch_id' which should be the value of interface_group_id given in pon_auction_headers_interface table. If any there is error in any negotiation, then return status of the concurrent program will be error. The module in which the error occurred will be displayed in concurrent program log. For further details, user should check pon_auction_headers_interface and pon_interface_errors tables.

Batch processing and error handling

The negotiation API can be called to create a group of negotiations. All these negotiations should have the same interface_group_id in pon_auction_headers_interface table and the value of PROCESSING_STATUS_CODE column in pon_auction_headers_interface table should be 'PENDING'. When the procedure to create negotiations is called with this interface_group_id passed as input parameter, the API will process the negotiations one by one.

When one negotiation data is successfully processed and negotiation is created in the application, the data gets committed for this negotiation and value 'PROCESSED' is stamped in PROCESSING_STATUS_CODE column of pon_auction_Headers_interface table for that negotiation and then next negotiation will be taken for processing. But if there is any failure in the interface data for a particular negotiation, then the value of 'FAILED' is stamped in PROCESSING_STATUS_CODE column of pon_auction_headers_interface table for that negotiation and then next negotiation will be taken for processing.

Validation errors will be logged in PON_INTERFACE_ERRORS table for the particular batch_id. Errors logged in this table can be checked and then data can be corrected. Again PROCESSING_STATUS_CODE should be updated with 'PENDING' status for these records to be picked again for processing.

Interface tables

Following are the list of interface tables that need to be populated

PON_AUCTION_HEADERS_INTERFACE

Header level information needs to be inserted in this interface. This will include the controls information also. Interface_group_id column should have the same value for all the records to be processed in a particular run of the API. Individual records should have unique interface_header_id value for each negotiation.

PON_ITEM_PRICES_INTERFACE

This table will have line details. Interface_header_id value should correspond with that in pon_auction_headers_interface table. Individual lines should have interface_line_id populated.

PON_AUC_ATTRIBUTES_INTERFACE

This table is for both header requirements and line attributes.Inteface_header_id column in this table should be same as that given in pon_auction_Headers_interface table. For line level attributes value of interface_line_Id should be same as that given in pon_item_prices_interface table for that line.

PON_ATTRIBUTE_SCORES_INTERFACE

This table will have values for automatic scoring and the scores for those values. Interface_header_id and interface_line_id should match with values in pon_auction_headers_interface and pon_item_prices_interface tables.

PON_BID_PARTIES_INTERFACE

This table has list of invited suppliers. Interface_header_id value should match with the value in pon_auction_headers_interface table for that negotiation.

PON_NEG_TEAM_INTERFACE

This table will have members to be added in the collobaration team for a particular negotiation. Interface_header_id value should match with pon_auction_headers_interface table.

PON_AUC_PRICE_ELEMENTS_INT

This table will have cost factor details of a particular line in a negotiation. Interface_header_id and interface_line_id should be matching with the values in pon_item_prices_interface table.

PON_AUC_PAYMENTS_INTERFACE

This table will have list of pay items for negotiations supporting complex outcomes. Interface_header_id and interface_line_id should be matching with the values in pon_item_prices_interface table.

PON_AUC_PRICE_BREAKS_INTERFACE

This table will store price break information that needs to be imported into the application. Key fields for this interface are interface_header_id, interface_Line_id and shipment_number.

PON_AUC_PRICE_DIFFER_INT

This table will store price differential information for temp labor lines that need to be imported into the application. Key fields for this interface are interface_header_id, Interface_line_id and sequence_number. If the price differential is associated to price break then auction_shipment_number column should be populated with the corresponding shipment number.

PO_UDA_INTERFACE

Both header level and line level UDA data needs to be inserted in this table. ATTR_GROUP_TYPE column will tell whether it is line level UDA or header level UDA. INTERFACE_REFERENCE_ID will have unique value for each negotiation and should match with interface_header_id of pon_auction_headers_interface table. For line level UDA information, interface_line_id column should have the value that matches with pon_item_prices_interface table.

Populating Data in Interface Tables

Negotiation Header Interface Table Description

The following table describes PON_AUCTION_HEADERS_INTERFACE table.

Column Name	Type	Required	Comment
INTERFACE_GROUP_ID	Number	Yes	-
INTERFACE_HEADER_ID	Number	Yes	-
PROCESSING_STATUS_CODE	Varchar2	Yes	-
AUCTION_TITLE	Varchar2	Yes	-
DESCRIPTION	Varchar2	-	-
ORG_ID	Number	Yes	Organization_id from hr_operating_units table
DOCTYPE_ID	Number	Yes	Doctype_id from pon_auc_doctypes table.
STYLE_ID	Number	Yes	Style_id from pon_negotiation_styles_tl
PO_STYLE_ID	Number	Either po_style_id or po_style_name is required	-
PO_STYLE_NAME	Varchar2	Either po_style_id or po_style_name is required	Eg: Standard Purchase Order
CONTRACT_TYPE	Varchar2	-	Derived based on PO style

Column Name	Type	Required	Comment
EVENT_ID	Number	-	pon_auction_events table
EVENT_TITLE	Varchar2	-	-
SECURITY_LEVEL_CODE	Varchar2	-	Value will be defaulted from settings if not given by the user
PO_AGREED_AMOUNT	Number	-	-
PO_MIN_REL_AMOUNT	Number	-	-
GLOBAL_AGREEMENT_FLAG	Varchar2	-	-
PO_START_DATE	Date	-	-
PO_END_DATE	Date	-	-
SHIP_TO_LOCATION_CODE	Varchar2	-	-
SHIP_TO_LOCATION_ID	Number	-	-
BILL_TO_LOCATION_CODE	Varchar2	-	-
BILL_TO_LOCATION_ID	Number	-	-
PAYMENT_TERMS_ID	Number	-	-
FREIGHT_TERMS_CODE	Varchar2	-	-
FOB_CODE	Varchar2	-	-

Column Name	Type	Required	Comment
CARRIER_CODE	Varchar2	-	-
CURRENCY_CODE	Varchar2	-	-
RATE_TYPE	Varchar2	-	-
RATE_DATE	Date	-	-
PUBLISH_RATES_TO_BIDDERS_FLAG	Varchar2	-	-
OPEN_BIDDING_DATE	Date	Value shouldBe given ifOpen_auction_now_flagis 'Y'	-
CLOSE_BIDDING_DATE	Date	-	-
VIEW_BY_DATE	Date	-	-
AWARD_BY_DATE	Date	-	-
OPEN_AUCTION_NOW_FLAG	Varchar2	-	-
NOTE_TO_BIDDERS	Varchar2	-	-
SHOW_BIDDER_NOTES	Varchar2	-	-
BID_VISIBILITY_CODE	Varchar2	-	Defaulted
BID_SCOPE_CODE	Varchar2	-	Defaulted
BID_LIST_TYPE	Varchar2	-	Defaulted
BID_FREQUENCY_CODE	Varchar2	-	Defaulted
BID_RANKING	Varchar2		Defaulted

Column Name	Type	Required	Comment
RANK_INDICATOR	Varchar2	-	Defaulted
FULL_QUANTITY_BID_CODE	Varchar2	-	Defaulted
MULTIPLE_ROUNDS_FLAG	Varchar2	-	Defaulted
MANUAL_CLOSE_FLAG	Varchar2	-	Defaulted
MANUAL_EXTEND_FLAG	Varchar2	-	Defaulted
AWARD_APPROVAL_FLAG	Varchar2	-	Defaulted
AUCTION_ORIGINATION_CODE	-	-	-
ADVANCE_NEGOTIABLE_FLAG	Varchar2	-	-
RECOUPMENT_NEGOTIABLE_FLAG	Varchar2	-	-
PROGRESS_PAYMENT_NEGOTIABLE_FLAG	Varchar2	-	-
RETAINAGE_NEGOTIABLE_FLAG	Varchar2	-	-
MAX_RETAINAGE_NEGOTIABLE_FLAG	Varchar2	-	-
SUPPLIER_ENTERABLE_PYMT_FLAG	Varchar2	-	-
TWO_PART_FLAG	Varchar2	-	-
PROJECT_ID	Number	-	-

Column Name	Type	Required	Comment
PF_TYPE_ALLOWED	Varchar2	-	Defaulted
PRICE_BREAK_RESPONSE	Varchar2	Conditional	Defaulted
PRICE_TIERS_INDICATOR	Varchar2	-	-
CREATION_DATE	Date	-	Defaulted
CREATED_BY	Number	-	Defaulted
LAST_UPDATE_DATE	Date	-	Defaulted
LAST_UPDATE_BY	Number	-	Defaulted
INT_ATTRIBUTE_CATEGORY	Varchar2	-	
INT_ATTRIBUTE1	Varchar2	-	-
INT_ATTRIBUTE2	Varchar2	-	-
INT_ATTRIBUTE3	Varchar2	-	-
INT_ATTRIBUTE4	Varchar2	-	-
INT_ATTRIBUTE5	Varchar2	-	-
INT_ATTRIBUTE6	Varchar2	-	-
INT_ATTRIBUTE7	Varchar2	-	-
INT_ATTRIBUTE8	Varchar2	-	-
INT_ATTRIBUTE9	Varchar2	-	-
INT_ATTRIBUTE10	Varchar2	-	-

Column Name	Type	Required	Comment
INT_ATTRIBUTE11	Varchar2	-	-
INT_ATTRIBUTE12	Varchar2	-	-
INT_ATTRIBUTE13	Varchar2	-	-
INT_ATTRIBUTE14	Varchar2	-	-
INT_ATTRIBUTE15	Varchar2	-	-
EXT_ATTRIBUTE_CATEGORY	Varchar2	-	-
EXT_ATTRIBUTE1	Varchar2	-	-
EXT_ATTRIBUTE2	Varchar2	-	-
EXT_ATTRIBUTE3	Varchar2	-	-
EXT_ATTRIBUTE4	Varchar2	-	-
EXT_ATTRIBUTE5	Varchar2	-	-
EXT_ATTRIBUTE6	Varchar2	-	-
EXT_ATTRIBUTE7	Varchar2	-	-
EXT_ATTRIBUTE8	Varchar2	-	-
EXT_ATTRIBUTE9	Varchar2	-	-
EXT_ATTRIBUTE10	Varchar2	-	-
EXT_ATTRIBUTE11	Varchar2	-	-
EXT_ATTRIBUTE12	Varchar2	-	-
EXT_ATTRIBUTE13	Varchar2	-	-
EXT_ATTRIBUTE14	Varchar2	-	-

Column Name	Type	Required	Comment
EXT_ATTRIBUTE15	Varchar2	-	-
SIGNED_DATE	Date	-	-
SOLICITATION_TYPE	Varchar2	-	-
UDA_TEMPLATE_ID	Number	-	Derived
UDA_TEMPLATE_DATE	Date	-	Derived
NO_OF_COPIES	Number	-	-
STANDARD_FORM	Varchar2	-	Derived
DOCUMENT_FORMAT	Varchar2	-	Derived
AUTO_EXTEND_MIN_TRIGGER_RANK	Number	-	-
ENFORCE_PREVRND_BID_PRICE_FLAG	Varchar2	-	-
STAGGERED_CLOSING_INTERVAL	Number	-	-
FIRST_LINE_CLOSE_DATE	Date	-	-
DISPLAY_BEST_PRICE_BLIND_FLAG	Varchar2	-	-
BID_DECREMENT_METHOD	Varchar2	-	-
SUPPLIER_VIEW_TYPE	Varchar2	-	-

Column Name	Type	Required	Comment
ABSTRACT_DETAILS	Varchar2	-	-
HDR_ATTR_DISPLAY_SCORE	Varchar2	-	-
PROGRESS_PAYMENT_TYPE	Varchar2	-	Derived
LINE_MAS_ENABLED_FLAG	Varchar2	-	Derived
HDR_ATTR_ENABLED_WEIGHTS	Varchar2	-	Derived
AUTO_EXTEND_FLAG	Varchar2	-	-
AUTO_EXTEND_NUMBER	Number	-	-
MIN_BID_DECREMENT	Number	-	-
MIN_BID_CHANGE_TYPE	Varchar2	-	-
PRICE_DRIVEN_AUCTION_FLAG	Varchar2	-	-
AUTO_EXTEND_ALL_LINES_FLAG	Varchar2	-	-
ALLOW_OTHER_BID_CURRENCY_FLAG	Varchar2	-	-
AUTO_EXTEND_DURATION	Number	-	-
SEALED_AUCTION_STATUS	Varchar2	-	-

Column Name	Type	Required	Comment
AUTO_EXTEND_TYPE_FLAG	Varchar2	-	-
SHOW_BIDDER_SCORES	Varchar2	-	-

Negotiation Lines interface Table Description

Following is the description of the PON_ITEM_PRICES_INTERFACE table.

Column Name	Type	Required	Derived and/orDefaulted
INTERFACE_HEADER_ID	Number	Yes	
INTERFACE_LINE_ID	Number	Yes	
AUCTION_HEADER_ID	Number	Yes	Dummy value
ITEM_DESCRIPTION	Varchar2	Yes	-
CATEGORY_ID	Number	-	-
CATEGORY_NAME	Varchar2	-	-
UNIT_OF_MEASURE	Varchar2	-	-
CURRENCY_CODE	Varchar2	-	-
QUANTITY	Number	Conditionally	-
UOM_CODE	Varchar2	-	Derived
PRICE	Number	Conditionally	-
PROMISED_DATE	Date	-	-

Column Name	Type	Required	Derived and/orDefaulted
NEED_BY_DATE	Date	Conditionally	-
TARGET_PRICE	Number	-	-
THRESHOLD_PRICE	Number	-	-
BID_START_PRICE	Number	-	-
NOTE_TO_BIDDERS	Varchar2	-	-
NOTE_TO_AUCTION_OWNER	Varchar2	-	-
SHIP_TO_LOCATION	Varchar2	-	-
SHIP_TO_LOCATION_ID	Number	-	-
CURRENT_PRICE	Number	-	-
RESERVE_PRICE	Number	-	-
DISPLAY_TARGET_FLAG	Varchar2	-	-
INTERFACE_ITEM_TYPE	Varchar2	-	-
INTERFACE_LOT_LINE_ID	Number	-	-
PO_MIN_REL_AMOUNT	Number	-	-
PO_RCPT_TOLERANCE_PCT	Number	-	-
NUM_DAYS_EARLY	Number	-	-

Column Name	Type	Required	Derived and/orDefaulted
NUM_DAYS_LATE	Number	-	-
DISPLAY_TARGET_PRICE_FLAG	Varchar2	-	-
BID_CURRENCY_LIMIT_PRICE	Number	-	-
PROXY_BID_LIMIT_PRICE	Number	-	-
BID_CURRENCY_PRICE	Number	-	-
ATTACHMENT_URL	Varchar2	-	-
ATTACHMENT_DESC	Varchar2	-	-
NEED_BY_START_DATE	-	-	-
LINE_TYPE	Varchar2	Required	-
LINE_TYPE_ID	Number	-	Derived
LINE_ORIGINATION_CODE	Varchar2	-	-
ORDER_TYPE_LOOKUP_CODE	Varchar2	-	Derived
ITEM_NUMBER	Varchar2	Conditionally	-
ITEM_REVISION	Varchar2	-	-
ITEM_ID	Number	-	-

Column Name	Type	Required	Derived and/orDefaulted
ALLOW_ITEM_ DESC_UPDATE_FLA G	Varchar2	-	-
PRICE_AND_QUAN TITY_APPLY	Varchar2	-	-
DISP_LINE_NUMBE R	Number	-	-
ADDITIONAL_JOB_ DETAILS	Varchar2	-	-
PO_AGREED_AMO UNT	Number	-	-
DIFFERENTIAL_RES PONSE_TYPE	Varchar2	-	-
PURCHASE_BASIS	Varchar2	-	Derived
JOB_ID	Number	Conditionally	-
GROUP_TYPE	Varchar2	Required	-
PARENT_LINE_NU MBER	Number	-	-
DOCUMENT_DISP_ LINE_NUMBER	Varchar2	Required	-
UNIT_TARGET_PRI CE	Number	-	-
UNIT_DISPLAY_TA RGET_FLAG	Varchar2	-	-
ADVANCE_AMOUN T	Number	-	-

Column Name	Type	Required	Derived and/orDefaulted
RECOUPMENT_RATE_PERCENT	Number	-	-
PROGRESS_PYMT_RATE_PERCENT	Number	-	-
RETAINAGE_RATE_PERCENT	Number	-	-
MAX_RETAINAGE_AMOUNT	Number	-	-
WORK_APPROVER_USER_NAME	Varchar2	-	-
WORK_APPROVER_USER_ID	Number	-	-
PROJECT_NUMBER	Varchar2	-	-
PROJECT_ID	Number	-	-
PROJECT_TASK_NUMBER	Varchar2	-	-
PROJECT_AWARD_NUMBER	Varchar2	-	-
PROJECT_AWARD_ID	Number	-	-
PROJECT_EXPENDITURE_TYPE	Varchar2	-	-
PROJECT_EXP_ORGANIZATION_NAME	Varchar2	-	-
PROJECT_EXP_ORGANIZATION_ID	Number	-	-

Column Name	Type	Required	Derived and/orDefaulted
PROJECT_EXPENDITURE_ITEM_DATE	Date	-	-
IP_CATEGORY_NAME	Varchar2	-	-
IP_CATEGORY_ID	Number	-	-
OUTSIDE_OPERATION_FLAG	Varchar2	-	-
SUB_LINE_SEQUENCE_NUMBER	Number	-	-
LINE_NUM_DISPLAY	Varchar2	-	-
GROUP_LINE_ID	Number	-	-
CLM_INFO_FLAG	Varchar2	-	-
CLM_OPTION_INDICATOR	Varchar2	-	-
CLM_BASE_LINE_NUM	Number	-	-
CLM_OPTION_NUM	Number	-	-
CLM_OPTION_FROM_DATE	Date	-	-
CLM_OPTION_TO_DATE	Date	-	-
CLM_FUNDED_FLAG	Varchar2	-	-
CLM_NEED_BY_DATE	Date	Conditionally	-

Column Name	Type	Required	Derived and/orDefaulted
CLM_CONTRACT_TYPE	Varchar2	-	-
CLM_COST_CONSTRAINT	Varchar2	-	-
CLM_IDC_TYPE	Varchar2	-	-

Negotiation Requirements Interface Table Description

Following table describes PON_AUC_ATTRIBUTES_INTERFACE table:

Column Name	Type	Required	Derived and/or Defaulted
INTERFACE_HEADER_ID	NUMBER	-	-
INTERFACE_LINE_ID	NUMBER	Yes	-
SEQUENCE_NUMBER	NUMBER	Yes	-
SCORING_METHOD	VARCHAR2	-	-
KNOCKOUT_SCORE	VARCHAR2	-	Defaulted
ATTR_GROUP_SEQ_NUMBER	NUMBER	-	Defaulted
ATTR_DISP_SEQ_NUMBER	NUMBER	-	Derived
SUB_LINE_SEQUENCE_NUMBER	NUMBER	-	-
IP_CATEGORY_ID	NUMBER	-	-

Column Name	Type	Required	Derived and/or Defaulted
IP_DESCRIPTOR_ID	NUMBER	-	-
ATTR_MAX_SCORE	NUMBER	-	-
INTERNAL_ATTR_FLAG	VARCHAR2	-	-
WEIGHT	NUMBER	-	-
BATCH_ID	NUMBER	-	-
AUCTION_HEADER_ID	NUMBER	-	-
AUCTION_LINE_NUMBER	NUMBER	-	-
ATTRIBUTE_NAME	VARCHAR2	Yes	-
DATATYPE	VARCHAR2	Yes	-
RESPONSE_TYPE_NAME	VARCHAR2	Yes	-
RESPONSE_TYPE	VARCHAR2	-	Derived
MANDATORY_FLAG	VARCHAR2	-	Derived
DISPLAY_ONLY_FLAG	VARCHAR2	-	Derived
DISPLAY_TARGET_FLAG	VARCHAR2	-	Derived
VALUE	VARCHAR2	-	-
GROUP_CODE	VARCHAR2	-	Defaulted
GROUP_NAME	VARCHAR2	-	Defaulted

Column Name	Type	Required	Derived and/or Defaulted
SCORING_TYPE	VARCHAR2	-	Defaulted

Negotiation Scores Interface Table

Following is the description of the PON_ATTRIBUTE_SCORES_INTERFACE table.

Column Name	Type	Required	Derived and/or defaulted
INTERFACE_HEADER_ID	NUMBER	Yes	-
INTERFACE_LINE_ID	NUMBER	Yes	-
AUCTION_HEADER_ID	NUMBER	-	-
LINE_NUMBER	NUMBER	-	-
ATTRIBUTE_SEQUENCE_NUMBER	NUMBER	Yes	-
VALUE	VARCHAR2	Conditionally	-
FROM_RANGE	VARCHAR2	Conditionally	-
TO_RANGE	VARCHAR2	Conditionally	-
SCORE	NUMBER	-	-
SEQUENCE_NUMBER	NUMBER	-	-
ACTION	VARCHAR2	-	-
CREATION_DATE	DATE	-	-

Column Name	Type	Required	Derived and/or defaulted
CREATED_BY	NUMBER	-	-
LAST_UPDATE_DATE	DATE	-	-
LAST_UPDATED_BY	NUMBER	-	-

Negotiation Collaboration Team Interface Table

Following is the description of the PON_NEG_TEAM_INTERFACE table.

Column Name	Type	Required	Derived and/or defaulted
INTERFACE_HEADER_ID	NUMBER	Yes	-
AUCTION_HEADER_ID	NUMBER	-	-
USER_NAME	VARCHAR2	Yes	-
APPROVER_FLAG	VARCHAR2	-	-
TASK_NAME	VARCHAR2	-	-
TARGET_DATE	DATE	-	-
ACCESS_VALUE	VARCHAR2	-	-
ACTION	VARCHAR2	-	-
CREATION_DATE	DATE	-	-
CREATED_BY	NUMBER	-	-
LAST_UPDATE_DATE	DATE	-	-

Column Name	Type	Required	Derived and/or defaulted
LAST_UPDATED_BY	NUMBER	-	-

Negotiation Invited Suppliers Interface Table

Following is the description of PON_BID_PARTIES_INTERFACE table.

Column Name	Type	Required	Defaulted and /or derived
INTERFACE_HEADER_ID	NUMBER	Yes	-
AUCTION_HEADER_ID	NUMBER	-	-
SEQUENCE_NUMBER	NUMBER	-	-
VENDOR_NAME	VARCHAR2	Either vendor name or vendor id should be given	-
VENDOR_ID	NUMBER	-	-
VENDOR_SITE_ID	NUMBER	-	-
VENDOR_SITE_CODE	VARCHAR2	-	-
TRADING_PARTNER_CONTACT_NAME	VARCHAR2	-	-
TRADING_PARTNER_CONTACT_ID	NUMBER	Either trading partner contact id or additional contact email should be given	-

Column Name	Type	Required	Defaulted and /or derived
ADDITIONAL_CONTACT_EMAIL	VARCHAR2	-	-
CREATION_DATE	DATE	-	-
CREATED_BY	NUMBER	-	-
LAST_UPDATE_DATE	DATE	-	-
LAST_UPDATED_BY	NUMBER	-	-

Negotiation Cost Factors Interface Table

Following is the description of PON_AUC_PRICE_ELEMENTS_INT table.

Column Name	Type	Required	Derived and/or defaulted
INTERFACE_HEADER_ID	NUMBER	Required	-
INTERFACE_LINE_ID	NUMBER	Required	-
AUCTION_HEADER_ID	NUMBER	-	-
PF_TYPE	VARCHAR2	Required	-
DISPLAY_TO_SUPPLIERS_FLAG	VARCHAR2	-	-
AUCTION_HEADER_ID	NUMBER	-	-
AUCTION_LINE_NUMBER	NUMBER	-	-

Column Name	Type	Required	Derived and/or defaulted
SEQUENCE_NUMBER	NUMBER	Required	-
PRICE_ELEMENT_TYPE_NAME	VARCHAR2	Required	-
PRICE_ELEMENT_TYPE_ID	NUMBER	-	Derived
DESCRIPTION	VARCHAR2	-	-
PRICING_BASIS_NAME	VARCHAR2	-	-
PRICING_BASIS	VARCHAR2	-	-
VALUE	NUMBER	Conditionally	-
PRECISION	NUMBER	-	-
DISPLAY_TARGET_FLAG	VARCHAR2	-	-

Negotiation Price Breaks Interface Table

Following is the description of PON_AUC_PRICE_BREAKS_INTERFACE table.

Column Name	Type	Required	Derived and/or defaulted
INTERFACE_HEADER_ID	NUMBER	Required	-
INTERFACE_LINE_ID	NUMBER	Required	-
AUCTION_LINE_NUMBER	NUMBER	-	-

Column Name	Type	Required	Derived and/or defaulted
SHIPMENT_NUMBER	NUMBER	Required	-
SHIPMENT_TYPE	VARCHAR2	-	Derived
QUANTITY	NUMBER	Conditionally	-
PRICE	NUMBER	-	-
ORG_ID	NUMBER		Derived
SHIP_TO_ORGANIZATION_ID	NUMBER	-	-
SHIP_TO_LOCATION_ID	NUMBER	-	-
EFFECTIVE_START_DATE	DATE	-	-
EFFECTIVE_END_DATE	DATE	-	-
MAX_QUANTITY	NUMBER	-	-
DIFFERENTIAL_RESPONSE_TYPE	VARCHAR2	-	-
HAS_PRICE_DIFFERENTIALS_FLAG	VARCHAR2	-	Defaulted
LAST_UPDATE_LOGIN	NUMBER	-	-
LAST_UPDATED_BY	NUMBER	-	-
LAST_UPDATE_DATE	DATE	-	-
CREATED_BY	NUMBER	-	-

Column Name	Type	Required	Derived and/or defaulted
CREATION_DATE	DATE	-	-
SHIP_TO_ORGANIZATION	VARCHAR2	-	-
SHIP_TO_LOCATION	VARCHAR2	-	-
ORG_NAME	VARCHAR2	-	-

Negotiation Price Differentials Interface Table

Following is the description of PON_AUC_PRICE_DIFFER_INT table.

Column name	Type	Required	Derived and/or defaulted
INTERFACE_HEADER_ID	NUMBER	Required	-
INTERFACE_LINE_ID	NUMBER	Required	-
AUCTION_SHIPMENT_NUMBER	NUMBER	-	-
AUCTION_HEADER_ID	NUMBER	-	Derived
AUCTION_LINE_NUMBER	NUMBER	-	Derived
SEQUENCE_NUMBER	NUMBER	Required	-
PRICE_TYPE	VARCHAR2	-	-
PRICE_TYPE_NAME	VARCHAR2	-	-

Column name	Type	Required	Derived and/or defaulted
PRICE_TYPE_DESC	VARCHAR2	-	-
MULTIPLIER	NUMBER	-	-
CREATION_DATE	DATE	-	-
CREATED_BY	NUMBER	-	-
LAST_UPDATE_DATE	DATE	-	-
LAST_UPDATED_BY	NUMBER	-	-
LAST_UPDATE_LOGIN	NUMBER	-	-

Negotiation Complex Pay Items Interface Table

Following is the description of PON_AUC_PAYMENTS_INTERFACE table.

Column Name	Type	Required	Derived and/or defaulted
INTERFACE_HEADER_ID	NUMBER	Yes	-
INTERFACE_LINE_ID	NUMBER	Yes	-
AUCTION_HEADER_ID	NUMBER	-	Derived
DOCUMENT_DISP_LINE_NUMBER	VARCHAR2	Yes	-
PAYMENT_DISPLAY_NUMBER	NUMBER	Yes	-

Column Name	Type	Required	Derived and/or defaulted
PAYMENT_DESCRIPTION	VARCHAR2	Yes	-
CREATION_DATE	DATE	-	-
CREATED_BY	NUMBER	-	-
LAST_UPDATE_DATE	DATE	-	-
LAST_UPDATED_BY	NUMBER	-	-
LAST_UPDATE_LOGIN	NUMBER	-	-
PAYMENT_TYPE	VARCHAR2	Yes	-
QUANTITY	NUMBER	Conditionally	-
UNIT_OF_MEASURE	VARCHAR2	-	-
TARGET_PRICE	NUMBER	-	-
NEED_BY_DATE	DATE	-	-
SHIP_TO_LOCATION_CODE	VARCHAR2	-	-
WORK_APPROVER_USER_NAME	VARCHAR2	-	-
NOTE_TO_BIDDERS	VARCHAR2	-	-
PROJECT_NUMBER	VARCHAR2	-	-
PROJECT_TASK_NUMBER	VARCHAR2	-	-
PROJECT_AWARD_NUMBER	VARCHAR2	-	-

Column Name	Type	Required	Derived and/or defaulted
PROJECT_EXPENDITURE_TYPE	VARCHAR2	-	-
PROJECT_EXP_ORGANIZATION_NAME	VARCHAR2	-	-
PROJECT_EXPENDITURE_ITEM_DATE	DATE	-	-
ATTACHMENT_DESC	VARCHAR2	-	-
ATTACHMENT_URL	VARCHAR2	-	-

Negotiation UDA interface Table

Following is the description of PO_UDA_INTERFACE table

Column Name	Type	Required	Derived and/or defaulted
INTERFACE_REFERENCE_ID	NUMBER	Yes	-
INTERFACE_LINE_ID	NUMBER	Yes	-
ATTR_NAME	VARCHAR2	Yes	-
ATTR_VALUE_STR	VARCHAR2	Conditionally	-
ATTR_VALUE_NUM	NUMBER	-	-
ATTR_VALUE_DATE	DATE	-	-
ATTR_DISP_VALUE	VARCHAR2	-	-

Column Name	Type	Required	Derived and/or defaulted
ATTR_UNIT_OF_MEASURE	VARCHAR2	-	-
USER_ROW_IDENTIFIER	NUMBER	Yes	-
PK1_VALUE	NUMBER	-	Derived
PK2_VALUE	NUMBER	-	Derived
PK3_VALUE	NUMBER	-	-
PK4_VALUE	NUMBER	-	-
PK5_VALUE	NUMBER	-	-
UDA_TEMPLATE_ID	NUMBER	Yes	-
PROCESS_STATUS	NUMBER	Yes	-
PROCESS_PHASE	VARCHAR2	-	Derived
REQUEST_ID	NUMBER	-	-
PROGRAM_ID	NUMBER	-	-
PROGRAM_APPLICATION_ID	NUMBER	-	-
PROGRAM_UPDATE_DATE	DATE	-	-
LAST_UPDATE_DATE	DATE	-	-
CREATION_DATE	DATE	Yes	-
LAST_UPDATE_LOGIN	NUMBER	-	-

Column Name	Type	Required	Derived and/or defaulted
CREATED_BY	NUMBER	Yes	-
LAST_UPDATED_BY	NUMBER	-	-
CREATED_BY_NAME	VARCHAR2	Yes	-
LAST_UPDATED_BY_NAME	VARCHAR2	-	-
INTERFACE_SOURCE_CODE	VARCHAR2	-	-
INTERFACE_SOURCE_LINE_ID	NUMBER	-	-
TRANSACTION_ID	NUMBER	Yes	-
ROW_IDENTIFIER	NUMBER	Yes	-
ATTR_GROUP_ID	NUMBER	Yes	-
ATTR_GROUP_APP_ID	NUMBER	Yes	-
ATTR_GROUP_TYPE	VARCHAR2	Yes	-
ATTR_GROUP_NAME	VARCHAR2	Yes	-
DATA_LEVEL_1	VARCHAR2	Conditionally	-
DATA_LEVEL_2	VARCHAR2	-	-
DATA_LEVEL_3	VARCHAR2	-	-
TRANSACTION_TYPE	VARCHAR2	Yes	-

5

Glossary

Glossary

A

Abstract

An Abstract is a form which summarizes negotiation details. Abstracts are published to external web sites and can be viewed by suppliers without having to log into the system.

Agreement Terms(Blanket or Contract Purchase Agreement only)

Agreement terms are optional, and apply only when you have selected "blanket purchase agreement" as the auction outcome, page 5-9.

- **Agreement Amount** - Specifies the currency amount over the course of a blanket purchase agreement. It is the maximum amount that can be issued against a blanket purchase agreement as long as the Amount Limit on the blanket purchase agreement is not increased beyond the Total Agreement Amount. Total Agreement Amount applies only to RFQs or auctions with blanket purchase agreement outcomes, page 5-9.

Approved Supplier List (ASL)

All procurement organizations maintain lists that associate the items and services they buy with the companies who supply them, either formally or informally. Data stored in a controlled, global repository containing relevant details about each ship-from/ship-to/item relationship, is known as an Approved Supplier List (ASL). This repository includes information about all suppliers with business statuses including Approved, Debarred, or New.

Attachments (Attachment URL)

Attachments contain additional descriptive information about items, such as technical specifications or engineering drawings.

Attachments can be an attached file, a URL address of a file, a short or long text message, or an existing document from the system document catalog. For each attachment negotiation creators select, they identify the class of accessor by assigning the attachment a category value. Depending on the category value assigned, only the appropriate users can view the attachment.

The file size limit for attachments is 10 MB. For attachment files larger than 10 MB, use an attachment URL. Post the attachment file to an Internet site, and enter the full URL (for example: http://www.mysite.com/filename.doc) at which the attachment can be accessed.

B

Best Price (Best Quote/Bid Price)

The best price quote/bid is the quote/bid that includes the lowest price for an RFQ/Auction item.

Bid/Quote Price

The total per-unit price offered by the supplier after all cost factors have been included. The bid/quote price represents the actual per-unit cost. Bid/quote price is calculated as follows:

((((line price * any percentage of line cost factor(s)) + any per-unit cost factor(s)) * bid/quote quantity) + any fixed amount cost factor(s)) / bid quote quantity.

Bid Ranking

See Quote/Bid Ranking, page 5-8

Bid Start Price

See Quote/Bid Start Price, page 5-8

Billing Address (Bill-To Address)

The address to which bills for purchased items is sent. You can enter multiple billing addresses.

Blanket Purchase Agreement

See RFQ/Auction Outcome, page 5-9.

Blind (Negotiation Style)

See Negotiation Style, page 5-6.

Buyer's Auction

An auction to purchase items or services that are clearly defined such as office furniture or memory chips. Buyers can tailor each auction to control who can see bids during the auction, whether multiple rounds of bidding are possible, and whether partial bids are allowed. Also called a reverse auction.

C

Collaboration Team

A group of buyers from the same purchasing organization who can collaborate on the creation and management of a sourcing document. Collaboration team members can be any user within the same organization to which the creator belongs. Members can be restricted to read only access meaning they can view but not update any information. Other members can be assigned specific tasks and given deadlines by which these tasks must be completed. Finally, some members can be designated approvers. Approvers must OK the document content before it can be published.

Cost Factor

Cost factors allow a buyer to identify additional costs associated with a particular negotiation item. Such costs could include services such as training or consulting, or discrete costs such as shipping fees. Buyers can specify when they create the RFQ or auction how much they are willing to pay for these additional costs. These costs can then be negotiated between a buyer and supplier just like the line price.

Cost Factor List

See Reusable Cost Factor Lists, page 5-8.

Current Price

The current price represents the assessed value, relative value, or regular "list" price of a negotiation item. The current price can be used to analyze negotiation performance. Suppliers cannot view the current price.

D

E

Estimated Quantity(blanket and contract purchase agreements only)

The organization's best estimate of demand for the item over the life of the blanket agreement. Note that this field is optional for blanket purchase agreements and cannot be scored.

The rate used to convert values between currencies.

Exchange Rate Date

The date on which the currency exchange rate is taken from the operating unit's currency exchange rate table.

Exchange Rate Type

When creating a multi-currency negotiation the buyer selects the exchange rate type:

- **System exchange rates** - Exchange rates that have been bulk loaded into the system's exchange rate table for a particular date. There can be many different system exchange rates defined.

- **User-Defined Rates** - Exchange rates the buyer enters when defining response currencies for a negotiation.

F

G

Global Agreements

Global agreements are a type of blanket or contract purchase agreement. Global agreements can be used by multiple organizations within a company. The agreement is owned and maintained by the creator's organization, but the agreement can be accessed by any of the authorized organizations. When an organization processes a release against the global agreement, the terms and conditions (for example, the ship-to address and billing information) that are applicable to that organization are used even though they may be different from the terms and conditions of the owning organization. Releases against a global agreement are processed as standard purchase orders.

H

I

J

K

L

Ledger Currency (Negotiation Currency)

The currency in which an operating unit conducts business on the system. For example, if an operating unit's currency is USD, then USD is the default currency that appears whenever a user from that operating unit creates a new sourcing document.

Line Types

A negotiation line item's line type determines whether the line item refers to goods or services (other line types can also be defined).

Lots

Collections of lines giving a hierarchical structure to the sourcing document. Lines may be organized into lots to obtain the most competitive bid. Suppliers are required to evaluate the entire lot and place a bid at the lot level. They may optionally provide lot line-level bids as well./

M

Minimum Bid Decrement

The minimum amount by which bids must decrease This is set in the auction's response controls, *Oracle Sourcing User Guide*. You can enter either a straight amount or a percentage by which bids must improve.

Note: A bid decrement amount will always be applied to a bidder's **current** bid price. If you specify your bid decrement amount as a percentage, the decrement percentage will be calculated based on a bidder's **original** bid price, but will be applied to the bidder's **current** bid price. For example:

Auction #1234; bid decrement = $100 Bidder A's original bid = $1,000 Bidder A's second bid = $900 Bidder A's third bid = $800 **Auction #2234; bid decrement = 20%** Bidder B's original bid = $1,000 Bidder B's second bid = $800 Bidder B's third bid = $600

Minimum Release Amount

Specifies the smallest currency amount for any single release of goods during the life of a blanket or contract purchase agreement. It is the minimum amount that can be issued against a blanket purchase agreement header or blanket purchase agreement line or both.

Minimum release amount applies only to RFQs or auctions with blanket purchase agreement outcomes, page 5-9.

N

Negotiation Dates

Depending on the type of negotiation, buyers set four dates for each negotiation (*indicates a required field):

- **Preview Date (RFXs, auctions)** - During the preview period, all eligible suppliers may view the RFx/auction but not submit responses.
- ***Open Date** - The date and time the negotiation opens.
- ***Close Date** - The date and time the negotiation closes. Once closed, no further responses may be accepted.
- **Award Date (RFQs and auctions)** - The date and time by which RFQ/auction will be awarded. While buyers are encouraged to honor their award dates, the system does not enforce these dates.

Negotiation Style

The style determines who will be able to see the quotes/bids and when. The three styles are:

- **Open(RFIs and auctions only)** - All suppliers can see the quotes/bids, though the responding supplier's identity is concealed.
- **Blind** - Only the buyer can see the quotes/bids.
- **Sealed** - The buyer can see the responses when the negotiation is unlocked. Both the buyer and suppliers can see the responses when they are unsealed.

O

P

Percentage (with AutoIncrease)

See Minimum Bid Decrement., page 5-5

Power Quote/Bid

Power Quote/Bid allows you to expedite your rebidding when you have bid on several items in the same auction. When you use power bid, all of your bids (losing and winning) in an auction are improved by the percentage you enter in the Power Bid field. Power bidding cannot be used if any of the auction items contain cost factors, *Oracle Sourcing User Guide*.

Price Breaks

See

Price Tiering., page 5-7

Price Differential

A multiplier applied under certain circumstances to a rate-based labor cost, for example, vacation or overtime pay rates

Price Precision

The number of decimal places allowed for per-unit prices entered in the RFx/Auction currency. The precision you set doesn't apply to per-unit prices entered in a currency other than the RFx/Auction currency no does it apply to currency amounts such as Bid Total or the bid value of Fixed-Amount price elements. While you can set the precision for unit-prices entered in a non-RFx/Auction currency when you define your currency list,, *Oracle Sourcing User Guide* the precision for amounts is automatically governed by the standards defined by the ISO (International Organization for Standardization). The ISO standards are used automatically by Sourcing.

Price Tiering

Price tiering allows buyers and suppliers to negotiate multiple prices for the same item. Price tiering can be based on Quantity, Ship-To address, and Effective Date. The type of tiering available depends on the document outcome. Standard purchase orders can only use tiering on the quantity. Blanket and contract purchase orders can use tiering on location, quantity and effective date.

Price to Total Score Ratio

In an RFQ or auction using Multi-Attribute Weighted Scoring, the price to total score ratio is determined by dividing the Quote/Bid price for an item by the total score, page 5-10 for that item. The price to total score ratio is then used to rank competing quotes/bids. For more information see, Basing Award Decisions on Line Attributes, *Oracle Sourcing User Guide*

Pricing Basis

The method used when using a cost factor to calculate the Quote/Bid price:

- **Per-Unit** - The value is added to the item price.
- **Fixed Amount** - The value is divided by the quantity of units Quote/Bidd and added to the item price.
- **% of Item Price** - The value is divided by 100, then multiplied by the item price, and the result added to the item price.

Proxy Bid

By activating proxy bid in an auction, you allow the system to automatically rebid on your behalf whenever a competing bid price beats your bid price. See Using Proxy Bidding, *Oracle Sourcing User Guide*.

Proxy BidDecrement

The exact amount by which you want each of your proxy rebids to decrease . The proxy bid decrement amount applies to all items on which you submit proxy bids in a single auction.

You cannot change your decrement amount after you submit it.

Proxy Bid Minimum Bid

The lowest price you are willing to proxy bid for any auction item. Whenever your bid price is higher than a competing bid price, the system will continue to automatically rebid (by the proxy bid increment/decrement, page 5-8 amount you specify) until your proxy minimum bid price is met.

After you have submitted your proxy minimum bid amount, you cannot change this amount unless the minimum amount is met in the auction bidding.

Q

Quote/Bid Ranking

Quote/Bid Ranking method determines how bids and quotes are ranked. When creating a sourcing document, the buyer can choose between two methods, Price Only or Multi-Attribute Weighted Scoring. In a Price Only negotiation the lowest price Quote/Bid receives the best rank. In a Multi-Attribute Weighted Scoring negotiation, the buyer can select attributes other than price to be included in the best rank calculation. The bids and quotes are ranked with the lowest price to total score ratio receiving the best rank. The buyer can choose to display the scoring criteria to the suppliers.

Quote/Bid Start Price

The price at which Quoting/Bidding for an item must begin. A Start Price is not required, but if the buyer specifies one, all quotes/bids in an RFQ or auction must be equal to or below the Start Price.

R

Rank Indicator

The rank indicator specifies how response rankings are displayed. If allowed by the system administrator, you can choose from three different indicators. Win/Lose displays "Win" for the best ranked Quote/Bid and "Lose" for all others. "1,2,3..." displays "1" for the best Quote/Bid and sequentially numbers the remaining bids in order of rank. "None" displays no ranking indicator.

Response Currency

If a buyer allows responses in currencies other than the negotiation currency (the currency of the buyer who created the negotiation), the buyer must define the currencies in which responses are accepted.

Reusable Cost Factor Lists

Reusable Cost Factor Lists allow you to group several cost factors which are related or are typically used together. Once you have created a cost factor list, you can apply that cost factor list to any negotiations (RFQs or auctions) containing items to which those cost factors are applicable.

RFI (Request for Information)

RFI's are used to qualify suppliers and their goods and services for subsequent procurement activities. RFIs are used more for gathering information on goods and service provided by a supplier than to lock in particular price information. Therefore, one unique feature of an RFI is that buyers can choose to define negotiation line items without price and quantity and specify lists of criteria to which suppliers must respond. RFIs can be taken to multiple rounds until the buyer has enough information to identify supplier(s) with which to deal. At the conclusion of the RFI cycle, the information contained in the RFI can be copied into an RFQ or buyer's auction.

RFQ (Request for quotes)

RFQs enable buyers to collect quotes from suppliers for complex and hard-to-define items or services such as made-to-order manufacturing or construction projects. Once suppliers have submitted an initial round of quotes, the buyer has the power to fine-tune the RFQ and initiate detailed negotiations as necessary. The process may go through multiple rounds of negotiations and quote before completion.

RFQ/Auction Outcome

The outcome of an auction or an RFQ can be:

- **Standard Purchase Order** - A one-time purchase, after which the buyer is not committed to any future purchases.

- **Blanket Purchase Agreement** - The buyer commits to a contract for future purchases and can enter agreement terms, page 5-2.

S

Score

(In Multi-Attribute Weighted Scoring, *Oracle Sourcing User Guide* only). A number between 0 and 100 assigned to each acceptable Quote/Bid response. The score is multiplied by the weight, page 5-11 assigned to the attribute to calculate the weighted score for the attribute. The sum of all weighted scores is the bid or quote's total score which is used to determine the rank of the response.

Security Level

You can create a sourcing document having a security level of Public, Private, or Hierarchy. Each level of security restricts access to the document.

- **Public -** Any user in the company has access to public sourcing documents. The actions users can perform is determined by their functional security. Buyers can define an additional collaboration team for a public document, but access is not restricted only to members of the team. Actions collaboration team members can perform is determined on their functional security and whether they are identified as view-only.

- **Private** Only the document owner and the members of the collaboration team can access the document. The actions the collaboration team members can perform is determined by their functional security and their view-only status values.

- **Hierarchy -** Only the document owner, the members of the collaboration team (if any), and individuals who are higher in the security hierarchy than the document owner can access the document. Any subsequent approvers can also access the document.

Standard Purchase Order

See Auction Outcome., page 5-9

Supplier Master

A repository of information about suppliers from whom you purchase goods and services. Set up in Oracle Purchasing using the Suppliers window. For each supplier there may be multiple supplier sites.

T

Tab-Delimited Text File

In tab-delimited text (.txt) files, fields are separated by the tab character, but without any special formatting characters. Spreadsheet applications are recommended to open tab-delimited text files.

Target Price

The price a buyer hopes to pay for one unit of an auction item

Time Zone

You can select the time zone in which you will conduct your system transactions. Click "Edit Personal Information" from the Sourcing **Welcome** page to set your time zone preference.

Total Agreement Amount

Total Score

(Multi-Attribute Weighted Scoring) The score calculated for a bid or quote based on a supplier's responses to an item's weighted attributes. For more information, see Basing Award Decisions on Line Attributes, *Oracle Sourcing User Guide*

U

V

Value Type

The type of value that suppliers should enter for item attributes:

- **Characters** - (letters/words)

- **Numbers** - (digits)

- **Dates** - (numbers in date format)
- **URL** - (using the format http://www.oracle.com)

Text is the most flexible value type. If you select Text, buyers can enter letters as well as digits. If you select Numbers, buyers can only enter digits; if you select Dates, buyers can only enter digits in date format.

W

Weight

(Multi-Attribute Weighted Scoring , *Oracle Sourcing User Guide* only) On a scale on 1 to 100, the weight of a scored, page 5-9 attribute as compared to other attributes. Weights for scored attributes must total 100 and each scored attribute must have a weight of at least 1.

Winning Quote/Bid

The winning quote/bid is the response which most correctly meets the requirements of the negotiation. A response's acceptability is generally based on price, however, the quantity available, availability date, may also be important. The winning response is selected by the buyer.

X

Y

Z

A

Implementing E-Business Suite for Oracle Sourcing

This appendix covers the following topics:

- Introduction

Introduction

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

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

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

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

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

E-Business Suite Implementation Steps Required by Oracle Sourcing

Step Number	Step Name	Information Source
1	Set up System Administrator	*Oracle E-Business Suite Setup Guide*
2	Set up Accounting Key Flexfield	*Oracle E-Business Suite Flexfields Guide*
3	Set Up Calendars, Currencies, and Set of Books	*Oracle General Ledger User's Guide*
4	Define Human Resources Key Flexfield	*Oracle E-Business Suite Flexfields Guide*
5	Define Locations	*Oracle Purchasing User's Guide*
6	Define Organizations and Organization Relationships	*Oracle HRMS Enterprise and Workforce Management Guide*
7	Convert to Multi-Org	*Multiple Organizations in Oracle Applications*
8	Define Inventory Key Flexfield	*Oracle E-Business Suite Flexfields Guide*
9	Define Units of Measure	*Oracle Inventory User's Guide*
10	Define Categories	*Oracle Inventory User's Guide*
11	Set Up Personnel	*Oracle HRMS Enterprise and Workforce Management Guide* *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
12	Open Inventory and Purchasing Accounting Periods	*Oracle Inventory User's Guide* *Oracle Purchasing User's Guide*

Step Number	Step Name	Information Source
13	Define Purchasing Options	*Oracle Purchasing User's Guide*
14	Define Buyers	*Oracle Purchasing User's Guide*
15	Define Financial Options	*Oracle Payables User's Guide*
16	Define Receiving Options	*Oracle Purchasing User's Guide*
17	Perform Additional System Administration Setup	*Oracle E-Business Suite Setup Guide*

Optional E-Business Suite Implementation Steps

Step Number	Step Name	Information Source
1	Set Up Oracle Workflow	*Oracle Workflow Administrator's Guide*
2	Define Freight Carriers	*Oracle Order Management Implementation Manual* using the information below
3	Define Payment Terms	*Oracle Payables User's Guide* using the information below
4	Define Lookup Codes	*Oracle Purchasing User's Guide* using the information below

Oracle Sourcing-related Details for Optional Steps

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

Step 1: Set Up Oracle Workflow

Step 2: Define Freight Carriers

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

Step 3: Define Payment Terms

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

Step 4: Define Lookup Codes

Use this step to define the approved FOB terms and freight terms.

B

Oracle Sourcing Responsibilities and Functions

This appendix covers the following topics:

- Oracle Sourcing Responsibilities
- Responsibility/Menu/Function Cross-Reference

Oracle Sourcing Responsibilities

The following responsibilities come installed with Oracle Sourcing:

Responsibilities Installed With Oracle Sourcing

Responsibility Name	Description
Sourcing Buyer	Allows users to create and award buyer's negotiations.
Sourcing Team Member	Allows users to collaborate on sourcing events, from document creation and, response scoring through award.
Sourcing Super User	Allows users to perform negotiations administration, create and award negotiations.
Sourcing Supplier	Allows users to view and respond to buyer's negotiations. Sourcing suppliers should only have the Sourcing Supplier responsibility or a customized responsibility containing only functions from the Sourcing Supplier responsibility.

Responsibility Name	Description
Sourcing Collaborator	Allows users to perform all tasks as a Sourcing buyer, except that Sourcing Collaborators cannot create new negotiations (RFI, RFQ, or Auction): either from scratch, or by copying an existing negotiation. Oracle Sourcing, or Oracle Procurement Contracts should be licensed, and ready to use. The Sourcing Collaborator responsibility enables users to work with the Sourcing team to contribute to negotiation creation, quote review, and awarding.

Responsibility/Menu/Function Cross-Reference

The following tables show which menus/job functions are initially defined to the Oracle Sourcing Super User/Buyer/Team Member responsibilities and which are defined to the Oracle Sourcing Supplier. Note, however, that since users with the System Administration responsibility can customize a responsibility, the exact responsibility definitions you see may be different. Use these tables when planning any customized responsibilities you wish to define.

Note that Sourcing Collaborators cannot create new negotiations (RFI, RFQ, or Auction): either from scratch, or by copying an existing negotiation. Other than that, they can perform the same tasks as a Sourcing Buyer.

Oracle Super User Menu/Function Hierarchy

Root	Level Two	Level Three	Level Four	Description
Sourcing Super User Main Root Menu				Main menu associated with the Sourcing Super User responsibility.
	Sourcing Buyer Submenu			Sourcing buyer submenu that contains prompts displayed in the navigator.

	Sourcing Super User Homepage			Sourcing Super User menu that contains the tabs displayed on the Home page.
	Sourcing Super User Functional Areas			Functional areas associated with the Sourcing Super User.
		Additional Super User Functions		Functions that allow super users to perform miscellaneous tasks.
			Award Other's Negotiations	User can make award decisions for negotiations created by other users.
			Manage Collaboration Team	Users can manage collaboration teams for negotiations that they can access.
			Unlock Draft Sourcing Documents	Users can unlock any draft sourcing document.
		Negotiation Analysis		Functions that allow users to analyze negotiation responses.
		Negotiation Award		Functions that allow users to make award decisions.

	Negotiation Creation		Functions that allow users to create negotiations
	Negotiation Edit/Update		Functions that allow users to edit negotiation documents.
		Apply lists to creation pages	Functions that allow users to apply reusable lists to negotiations during editing.
		Manage draft negotiations	Functions that allow users to manage draft negotiations.
		Negotiation Abstract and forms	Functions that allow users to access abstract and forms pages.
		Negotiation Approval	Functions that allow users to access negotiation approval pages.
		Negotiation Creation Pages	Functions that allow users to access main pages of the negotiation creation process.
		Negotiation Creation Through Spreadsheet	Functions that allow users to create negotiations using spreadsheet.

		Negotiation Review Pages	Functions that allow users to access negotiation review pages.
		Sourcing Concurrent Requests	Functions that allow users to access Sourcing concurrent requests
	Negotiation Events		Functions that allow users to access negotiation events.
	Negotiation Management		Functions that allow users to manage negotiations (for example, unlock/unseal, close early, extend)
	Negotiation Tools		Functions that allow users to access negotiation tools (for example, create invitation/requirement/attribute lists)
	PO Agreement Tab		Functions that allow users to access pages in the Professional Buyer's Work Center Create/Update Agreement Tab.

	PO Document Creation	Functions that allow users to create purchase order documents.
	PO Order Tab	Functions that allow users to access pages in the Professional Buyer's Work Center Create/Update Order tab.
	Project Manager Role Menu	Functions that allow users to perform project manager-related tasks.
	Project Workbench Tab Structure	Functions that allow users to view tabs displayed for project pages.
	Sourcing Administration	Functions that allow users to perform administrative tasks (for example, setting up Oracle Sourcing, creating forms)
	Sourcing Buyer Registration Menu	Functions that allow users to register and approve suppliers.

		Sourcing Contract Terms and Deliverables		Functions that allow users to view and modify contract clauses and deliverables associated with Sourcing documents.
		Sourcing Discussions		Functions that allow users to access online discussions.
		Sourcing Inquiries		Functions that allow users to access inquiry pages.
		iProcurement: Homepage Menu		Functions that allow users to create negotiation lines from iProcurement during negotiation creation.

Oracle Buyer Menu/Function Hierarchy

Root	**Level Two**	**Level Three**	**Level Four**	**Description**
Sourcing Buyer Main Root Menu				Main menu associated with the Sourcing Buyer responsibility.
	Sourcing Buyer Submenu			Sourcing Super User menu containing the tabs displayed in the navigator

	Sourcing Super User Homepage			Sourcing Super User menu containing the tabs displayed on the Sourcing home page.
	Sourcing Buyer Functional Areas			Functional areas associated with the Sourcing Buyer.
		Negotiation Analysis		Functions that allow users to analyze negotiation responses.
		Negotiation Award		Functions that allow users to make award decisions.
		Negotiation Creation		Functions that allow users to create negotiations
		Negotiation Edit/Update		Functions that allow users to edit negotiation documents.
			Apply lists to creation pages	Functions that allow users to apply reusable lists to negotiations during editing.
			Manage draft negotiations	Functions that allow users to manage draft negotiations.

		Negotiation Abstract and forms	Functions that allow users to access abstract and forms pages.
		Negotiation Approval	Functions that allow users to access negotiation approval pages.
		Negotiation Creation Pages	Functions that allow users to access main pages of the negotiation creation process.
		Negotiation Creation Through Spreadsheet	Functions that allow users to create negotiations using spreadsheet.
		Negotiation Review Pages	Functions that allow users to access negotiation review pages.
		Sourcing Concurrent Requests	Functions that allow users to access Sourcing concurrent requests
	Negotiation Events		Functions that allow users to access negotiation events.

	Negotiation Management	Functions that allow users to manage negotiations (for example, unlock/unseal, close early, extend)
	Negotiation Tools	Functions that allow users to access negotiation tools (for example, create invitation/requirement/attribute lists)
	PO Agreement Tab	Functions that allow users to access pages in the Professional Buyer's Work Center Create/Update Agreement Tab.
	PO Document Creation	Functions that allow users to create purchase order documents.
	PO Order Tab	Functions that allow users to access pages in the Professional Buyer's Work Center Create/Update Order tab.

	Project Manager Role Menu	Functions that allow users to perform project manager-related tasks.
	Project Workbench Tab Structure	Functions that allow users to view tabs displayed for project pages.
	Sourcing Buyer Registration Menu	Functions that allow users to register and approve suppliers.
	Sourcing Contract Terms and Deliverables	Functions that allow users to view and modify contract clauses and deliverables associated with Sourcing documents.
	Sourcing Discussions	Functions that allow users to access online discussions.
	Sourcing Inquiries	Functions that allow users to access inquiry pages.
	Sourcing Surrogate Responding Menu	Functions that allow users to create surrogate responses.

		iProcurement Homepage Menu		Functions that allow users to create negotiation lines from iProcurement during negotiation creation.

Oracle Team Member Menu/Function Hierarchy

Root	Level Two	Level Three	Level Four	Description
Sourcing Team Member Main Root Menu				Sourcing team member root menu associated with the Sourcing Team Member responsibility.
	Sourcing Buyer Submenu			Sourcing buyer submenu containing the prompts displayed in the navigator.
	Sourcing Super User Homepage			Sourcing super user menu containing the tabs displayed on the Sourcing home page
	Sourcing Team Member Functional Areas			Functional areas associated with collaboration team members

	Apply Lists to Creation Pages	Functions that allow users to apply reusable lists to negotiations during editing.
	Manage Negotiation Requirements	Functions that allow users to manage Requirements
	Manage Draft Negotiations	Functions that allow users to manage draft negotiations.
	Negotiation Abstracts and Forms	Functions that allow users to access abstract and forms pages.
	Negotiation Analysis	Functions that allow users to analyze negotiation responses.
	Negotiation Creation Pages	Functions that allow users to create negotiations.
	Negotiation Creation Through Spreadsheet	Functions that allow users to create negotiations through spreadsheets.
	Negotiation Review Pages	Functions that allow users to access negotiation review pages.

	Project Manager Role Menu	Functions that allow users to perform project manager-related tasks.
	Project Workbench Tab Structure	Functions that allow users to view tabs displayed for project pages.
	Sourcing Contract Terms and Deliverables	Functions that allow users to view and modify contract clauses and deliverables associated with sourcing documents.
	Sourcing Discussions	Functions that allow users to access online discussions.
	Sourcing Inquiries	Functions that allow users to access inquiry pages.
	Sourcing Surrogate Responding Menu	Functions that allow users to create surrogate responses.
	Sourcing Concurrent Requests	Functions that allow users to access Sourcing concurrent requests.

Oracle Sourcing Supplier Job Functions

User Function Name	Description
Accept Terms & Conditions Page	Users can accept terms and conditions.
Acknowledge Amendments Page	Users can acknowledge amendments.
Acknowledge Participation	Users can acknowledge negotiation participation.
Advanced Workflow Worklist	Users can access the advanced worklist to view notifications.
Amendment History Seller Page	Users can view supplier amendment history.
Auction Monitor	Users can view auction monitor.
Award By Line page in Award Flow	Users can view all lines to be analyzed/awarded.
Award By Quote page in Award Flow	Users can view all responses to be analyzed/awarded.
Award Line page in Award Flow	Users can analyze/award on the line level.
Award Quote page in Award Flow	Users can analyze/award on the response level.
Bid By Spreadsheet Page	Users can submit responses by spreadsheets.
Bid Price Break Differentials Page	Users can respond to price break differentials.
Cancel Proxy Bidding Page	Users can cancel proxy bidding.
Compare Requirements	Users can compare Requirements.
Concurrent Errors Page	Users can view concurrent errors for large negotiation requests.
Create Response Page	Users can create responses.
Discussion Summary	Users can access online discussions.

User Function Name	Description
Download Requests Page	Users can view and download large negotiations requests.
Edit Personal Information	Users can edit personal information.
Enter Response Item Details Page	Users can enter response line details.
Forms JRAD Container Page	Users can access abstract and forms details.
Manage Draft Bids or quotes	Users can edit, delete, and publish draft bids/quotes.
Manage Draft Responses Page	Users can access draft responses.
Monitor Bid	Users can monitor their own responses with a page that automatically refreshed at user-specified time intervals.
Monitor Event	Users can monitor events.
My Disqualified Bids Page	Users can view their disqualified responses.
My Lost Bids Page	Users can view their rejected responses.
My Won Bids Page	Users can view their awarded responses.
Negotiation Line Details Page	Users can view negotiation line details.
Negotiation Summary Page	Users can view the Negotiation Summary page.
Negotiation Summary View Price Break Differentials Page	Users can view price break differentials in negotiation summary.
Negotiation Summary View Requirement Page	Users can view Requirements in negotiation summary view.
New Message	Users can send new messages.
New Round Summary OA Page	Users can view new round summary.

User Function Name	Description
Open Invitation Page	Users can view open invitations.
Review Response Download Contracts	Users can download contracts response on review response page.
Print Discussion	Users can print online discussions.
Reply Message	Users can reply to messages.
Respond To Auctions Page	Users can search negotiations to respond to.
Review Group Details	Users can review line group details.
Review Response Download Contracts	User can download contracts response on review response page.
Review Response Page	Users can review responses.
Show Ship To Page	Users can view ship to addresses for price breaks.
Sourcing	Text for the branding logo.
Sourcing Notification Link Redirect Page	Used to redirect access to destination pages routed from links inside Sourcing notification message body.
Sourcing Supplier Home Page	Users can access supplier negotiations home page.
Submit Bid to Buyer's Negotiations	Users can submit responses to negotiations.
Unlock Draft Response	Users can unlock other users' draft bids/quotes.
Update Response Deliverables	Users can update response deliverables during response creation.
View Active Bids Page	Users can view active responses.
View Bid	Users can view responses.

User Function Name	Description
View Bid History	Users can view response history.
View Bid Price Break Differentials Page	Users can view price break differentials of responses.
View Contact Details	Users can view contact details.
View Group Details	Users can view line group details.
View Message Details	Users can view message details.
View Net Changes Page	Users can view net changes of amendments and multi-rounds.
View Pay Item Details	Users can view pay item details.
Enable Supplier Edit of Contract Terms	Function that allows contract terms to be edited by supplier when creating a response/bid/quote
OKC_CONTRACT_TERMS_USER menu is added to the supplier user to enable terms editing.	Added to supplier user menu PON_SOURCING_SUPPLIER

C

Oracle Sourcing Notifications

This appendix covers the following topics:

- Introduction
- Notifications Content
- RFx/Auction Collaboration Team Member Assignment
- RFx/Auction Collaboration Team Task Completion
- RFx/Auction Requires Your Approval
- RFx/Auction Requires Your Approval - Reminder
- RFx/Auction Has Been Approved
- RFx/Auction Has Been Rejected
- RFx/Auction Creation Confirmation
- RFx/Auction Invitation - Supplier Contact
- RFx/Auction Invitation - Supplier Additional Contact
- RFx/Auction Invitation - Prospective Supplier Contact
- RFx/Auction Acknowledgement Reminder - Participants
- RFx/Auction Bid/Quote/Response Submitted
- RFx/Auction Extend
- RFx/Auction Bid/Quote/Response Disqualification - All Invitees and Respondents
- RFx/Auction Bid/Quote/Response Disqualification - Respondent with Bid/Quote/Response Disqualified
- RFx/Auction Online Discussion Message Sent
- RFx/Auction Early Close
- RFx/Auction Additional Round Invitation - Uninvited Participants
- RFx/Auction Amendment Acknowledgement

- RFx/Auction Canceled
- RFx/Auction Constraint Cost Calculation Successful
- RFx/Auction Constraint Cost Calculation Unsuccessful
- RFQ/Auction Award Approval Required
- RFQ/Auction Award Approval Reminder
- RFQ/Auction Award Approval Approved
- RFQ/Auction Award Approval Rejected
- RFQ/Auction Award
- RFQ/Auction Allocation Failed
- RFQ/Auction Purchase Order Creation Status
- RFx/Auction Copy Successful (Large Negotiation)
- RFx/Auction New Round Creation Successful (Large Negotiation)
- RFx/Auction Publish Successful (Large Negotiation)
- RFx/Auction Export to Spreadsheet Successful (Large Negotiation)
- RFx/Auction PDF Generation Successful (Large Negotiation)
- RFQ/Auction Award Spreadsheet Import Successful (Large Negotiation)
- RFx/Auction Response Spreadsheet Import Successful (Large Negotiation)
- RFx/Auction Lines Spreadsheet Import Successful (Large Negotiation)
- RFx/Auction Amendment Creation Successful (Large Negotiation)
- RFx/Auction Negotiation Approval Started (Large Negotiation)
- RFQ/Auction Award Optimization Successful (Large Negotiation)
- RFx/Auction Publish Response Successful (Large Negotiation)
- RFx/Auction Response Validation Successful (Large Negotiation)
- RFQ/Auction AutoAward Export to Spreadsheet Successful (Large Negotiation)
- RFQ/Auction Renegotiate Blanket Successful (Large Negotiation)
- RFQ/Auction Accept Award Optimization Scenario Successful (Large Negotiations)
- RFx/Auction Publish Negotiation Failed (Large Negotiation)
- RFQ/Auction Renegotiate Blanket Failed (Large Negotiation)
- RFQ/Auction Award Spreadsheet Import Failed (Large Negotiation)
- RFx/Auction Response Spreadsheet Import Failed (Large Negotiation)
- RFx/Auction Amendment Creation Failed (Large Negotiation)
- New Round Creation Failed (Large Negotiation)

- RFx/Auction Negotiation Copy Failed (Large Negotiation)
- RFx/Auction Negotiation Approval Request Failed (Large Negotiation)
- RFx/Auction Response Validation Failed (Large Negotiation)
- RFQ/Auction AutoAward Export to Spreadsheet Failed (Large Negotiation)
- RFx/Auction Export to Spreadsheet Failed (Large Negotiation)
- RFx/Auction PDF Generation Failed (Large Negotiation)
- RFx/Auction Publish Response Failed (Large Negotiation)
- RFQ/Auction Award Optimization Failed (Large Negotiation)
- RFx/Auction Lines Spreadsheet Import Failed (Large Negotiation)
- RFQ/Auction Accept Award Optimization Scenario Failed (Large Negotiation)
- Two Part RFQ Evaluation Complete: Quote Not Shortlisted
- Two Part RFQ Evaluation Complete: Quote Shortlisted
- Reminder Notifications
- Timing of Reminder Notifications

Introduction

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

For each notification, the following details are covered:

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

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

Notifications Content

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

- Title: The title of the notification
- From: The person whose action initiated the notification.
- To: The person to whom the notification is sent.
- Sent: Date and time the notification was sent
- ID: System generated number for this notification
- Company: The buyer company conducting the negotiation
- Title: The title of the negotiation
- Number: The negotiation number
- Negotiation Preview (when appropriate): The date and time the negotiation opens for preview (if specified)
- Negotiation Open (when appropriate): The date and time the negotiation opens for responding
- Negotiation Close (when appropriate): The date and time the negotiation is to be closed as of the time the notification was generated (the negotiation may have been closed early or extended after the negotiation was sent).

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

Summary of Negotiation Notifications

Title	Event	Recipient	Action
RFx/Auction Collaboration Team Member Assignment	Buyer notifies selected team members.	The collaboration team members selected for notification	Review all assigned tasks
RFx/Auction Collaboration Team Task Completion	Collaboration team member completes task	Negotiation Creator	None

Title	Event	Recipient	Action
RFx/Auction Requires Your Approval	Buyer submits the document for approval (document approval, not award approval)	All approvers on the collaboration team	Review the negotiation and either approve or reject
RFx/Auction Requires Your Approval - Reminder	Generated automatically halfway between the time the first notification was sent and either the preview date (if specified), the open date (if specified), or the close date (if the open date is immediate) (document approval, not award approval)	Any approver on the collaboration team who has not yet approved or rejected the sourcing document	View the negotiation and approve or reject
RFx/Auction Has Been Approved	Whenever the last negotiation approver on the collaboration team approves the negotiation	Buyer who submitted the negotiation for approval	For information
RFx/Auction Has Been Rejected	Whenever an approver on the collaboration team rejects the negotiation	Buyer who submitted negotiation for approval	View rejection reason, modify the negotiation and resubmit for approval
RFx/Auction Creation Confirmation	When the negotiation is opened for preview or responding	Negotiation creator	For information
RFx/Auction Invitation - Supplier Contact	When the negotiation is published	Invited supplier contacts	Acknowledge intent (online or via e-mail), and enter Oracle Sourcing to participate

Title	Event	Recipient	Action
RFx/Auction Invitation - Supplier Additional Contact	When the negotiation is published	Any additional supplier contacts	Register if necessary, acknowledge intent, and enter Oracle Sourcing to participate
RFx/Auction Invitation - Prospective Supplier Contact	When the negotiation is published	Prospective supplier contacts	Await registration request approval
RFx/Auction Acknowledgement Reminder - Participants	See section on Reminder Notifications for information	All supplier contacts who have not yet acknowledged	Acknowledge intent (online or via e-mail) and enter Oracle Sourcing to participate
RFz/Auction Bib/Quote/Response Submitted	When a bid/quote/response is submitted by a supplier	Buyer who created the negotiation	Review bid/quote/response details.
RFx/Auction Extend	When the negotiation is extended	All invitees and respondents	For information
RFx/Auction/RFI Bid/Quote/Response Disqualification - All Invitees and Respondents	When a bid/quote/response is disqualified	All invitees and respondents	For information
RFx/Auction/RFI Bid/Quote/Response Disqualification - Respondent with Bid/Quote Disqualified	When a bid/quote/response is disqualified	Respondent with disqualified bid/quote/response	View reason for disqualification and resubmit a new response
RFx/Auction Online Discussion Message is Sent	When an online discussion message is sent	Recipient of the online discussion message	View the online discussion message and reply if necessary
RFx/Auction Early Close	When a negotiation is closed early	All invitees and respondents	For information

Title	Event	Recipient	Action
RFx/Auction Additional Round Invitation - Uninvited Participants	When a negotiation is published for an additional round of responding	Previous invitees and respondents who are not invited to the additional round	For information
RFx/Auction Amendment Acknowledgement	When an amendment is plublished	All invitees and respondents	View details of amendment, acknowledge amendment, and resubmit responses
RFx/Auction Canceled	When a negotiation is canceled	All invitees and respondents	For information
RFQ/Auction Award Approval Required	When award decision is submitted for approval	All award approvers	View award decision and approve or reject
RFQ/Auction Award Approval Required - Reminder	24 hours after the first approval notification is sent	Any approver who has not approved or rejected the award	View award decision and approve or reject
RFQ/Auction Award Approved	Whenever the last award approver approves the award	Buyer who submitted the award for approval	Once all approvers have approved the award recommendation, continue award process
RFQ/Auction Award Rejected	Whenever an approver rejects the award	Buyer who submitted the award for approval	View details of rejection, modify award recommendation as necessary, and resubmit for approval
RFx/Auction Award	When an award decision is shared with suppliers	All respondents	For information

Title	Event	Recipient	Action
RFQ/Auction Allocation Failed	If the requisition allocation fails	Buyer who submitted the purchase order creation process	Review the requisition allocation and resubmit the purchase order creation process
RFQ/Auction Purchase Order Creation Status	When the purchase order is/is not successfully created	Buyer who submitted the purchase order creation process	If any PO creation fails, the buyer can resubmit the purchase order creation process
RFx/Auction Copy Successful (Large Negotiation)	When the concurrent program completes	Buyer who submitted the copy request.	For information
RFx/Auction New Round Creation Successful (Large Negotiation)	When the concurrent program completes	Buyer who created the new round.	For information
RFx/Auction Publish Successful (Large Negotiation)	When the concurrent program completes	Buyer who submitted the negotiation for publication.	For information
RFz/Auction Export to Spreadsheet Successful	When the concurrent program completes	Supplier who submitted the export request.	For information
RFx/Auction PDF Generation Successful (Large Negotiation)	When the concurrent program completes	Buyer or supplier who submitted download request.	For information
RFQ/Auction Award Spreadsheet Import Successful (Large Negotiation)	When the concurrent program completes	Buyer who imported the award spreadsheet.	Continue with award process
RFx/Auction Response Spreadsheet Import Successful (Large Negotiation)	When the concurrent program completes	Supplier who uploaded the spreadsheet	Continue with response process

Title	Event	Recipient	Action
RFx/Auction Lines Spreadsheet Import Successful (Large Negotiation)	When the concurrent program completes	Buyer who uploaded the spreadsheet	Continue with creation process
RFx/Auction Amendment Creation Successful (Large Negotiation)	When the concurrent program completes	Buyer who created the amendment	Reopen negotiation for responding
RFx/Auction Negotiation Approval Started (Large Negotiation)	When the concurrent program completes	Buyer who submitted the negotiation for approval	For information
RFQ/Auction Award Optimization Successful (Large Negotiation)	When the concurrent program completes	Buyer who optimized the award scenario	Continue with the award process
RFx/Auction Publish Response Successful (Large Negotiation)	When the concurrent program completes	Supplier who submitted the response	For information
RFx/Auction Response Validation Successful (Large Negotiation)	When the concurrent program completes	Supplier who validated the response	For information
RFQ/Auction AutoAward Export to Spreadsheet Successful (Large Negotiation)	When the concurrent program completes	Buyer who exported the AutoAward	Continue with award process
RFQ/Auction Renegotiate Blanket Successful (Large Negotiation)	When the concurrent program completes	Buyer who submitted the blanket agreement for renegotiation	For information
RFQ/Auction Accept Award Optimization Scenario Successful	When the concurrent program completes	Buyer who accepted the award optimization spreadsheet	Continue with award process

Title	Event	Recipient	Action
RFx/Auction Publish Negotiation Failed (Large Negotiation)	When the concurrent program completes	Buyer who submitted the negotiation for publication	Review errors and resubmit
RFQ/Auction Renegotiate Blanket Failed (Large Negotiation)	When the concurrent program completes	Buyer who submitted the blanket for renegotiation	Review errors and resubmit
RFQ/Auction Award Spreadsheet Import Failed (Large Negotiation)	When the concurrent program completes	Buyer who imported award spreadsheet	Review errors and resubmit
RFx/Auction Response Spreadsheet Import Failed (Large Negotiation)	When the concurrent program completes	Supplier who imported the response spreadsheet	Review errors and resubmit
RFx/Auction Amendment Creation Failed (Large Negotiation)	When the concurrent program completes	Buyer who created the amendment.	Review errors and resubmit
RFx/Auction New Round Creation Failed (Large Negotiation)	When the concurrent program completes	Buyer who created the new round	Review errors and resubmit
RFx/Auction Negotiation Copy Failed (Large Negotiation)	When the concurrent program completes	Buyer who copied the negotiation	Review errors and resubmit
RFx/Auction Negotiation Approval Failed (Large Negotiation)	When the concurrent program completes	Buyer who submitted the negotiation for approval	Review errors and resubmit
RFx/Auction Response Validation Failed (Large Negotiation)	When the concurrent program completes	Supplier who validated the response	Review errors and resubmit

Title	Event	Recipient	Action
RFQ/Auction AutoAward Export to Spreadsheet Failed (Large Negotiation)	When the concurrent program completes	Buyer who exported the AutoAward	Review errors and resubmit
RFx/Auction Export to Spreadsheet Failed	When the concurrent program completes	Buyer who exportedhe negotiation	Review errors and resubmit
RFx/Auction PDF Generation Failed (Large Negotiation)	When the concurrent program completes	Buyer or supplier who generated the PDF	Review errors and resubmit
RFx.Auction Publish Response Failed (Large Negotiation)	When the concurrent program completes	Supplier who published the response	Review errors and resubmit
RFQ/Auction Award Optimization Failed (Large Negotiation)	When the concurrent program completes	Buyer who optimized the award scenario	Review errors and resubmit
RFx/Auction Lines Spreadsheet Import Failed	When the concurrent program completes	Buyer who imported the lines spreadsheet	Review errors and resubmit
RFQ/Auction Accept Award Optimization Scenario Failed	When the concurrent program completes	Buyer who accepted the award optimization spreadsheet	Review errors and resubmit

RFx/Auction Collaboration Team Member Assignment

Summary of e-mail notification

- Recipient: selected collaboration team members who the buyer chooses to notify
- When: buyer clicks Notify button.
- Possible Action: review any assigned tasks
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **10-December-2006 10:15:30**	Number **192619**
ID **1043745**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **December 31, 2006 03:18 pm Chicago Central Standard Time**

Task **Submit Status Report**

Target Date **December 15, 2006**

RFx/Auction Collaboration Team Task Completion

Summary of e-mail notification

- Recipient: negotiation creator
- When: collaboration team member completes task
- Possible Action: none
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Chris Webb**	Title **Bridge Construction Project**
Sent **15-December-2006 10:15:30**	Number **192619**
ID **1043765**	

Negotiation Preview **Not specified**

Negotiation Open **December 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **December 31, 2006 03:18 pm Chicago Central Standard Time**

Task **Submit Status Report**

Target Date **December 15, 2006**

RFx/Auction Requires Your Approval

Summary of e-mail notification

- Recipient: all approvers on the collaboration team
- When: buyer submits negotiation for approval
- Possible Action: review negotiation and either approve or reject
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **10-MAY-2006 10:15:30**	Number **192619**
ID **1043765**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Note to Approvers

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

Please go to Negotiation Review page if you want to view the document before approving or rejecting it.

RFx/Auction Requires Your Approval - Reminder

Summary of e-mail notification

- Recipient: any approver on the collaboration team who has not either approved or rejected the negotiation
- When: notification is automatically triggered halfway between when the first approval notification was sent and either the preview date (if specified), open date (if specified), or close date (if negotiation is defined as open immediately)
- Possible Action: view negotiation and approve or reject

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **13-MAY-2006 10:15:30**	Number **192619**
ID **10473701**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Note to Approvers

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

Please go to Negotiation Review page if you want to view the document before approving or rejecting it.

RFx/Auction Has Been Approved

Summary of e-mail notification

- Recipient: buyer who submits the negotiation for approval
- When: whenever the last approver on the collaboration team has approved the negotiation
- Possible Action: none (information only)
- Next Steps: publish the negotiation

Sample e-mail text

From **Black, Mr. Chris**	Company **Vision Enterprise**
To **Tanaka, Jane**	Title **Bridge Construction Project**
Sent **15-MAY-2006 15:20:30**	Number **192619**
ID **1074122**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Approval Date **May 15, 2006 3:20 pm Chicago Central Standard Time**

The negotiation has been approved but not published. Please go to Negotiation Review page to view and then publish the document.

RFx/Auction Has Been Rejected

Summary of e-mail notification

- Recipient: buyer who submitted the negotiation for approval
- When: whenever one of the approvers of the collaboration team rejects the negotiation
- Possible Action: view rejection reason, modify the negotiation and resubmit for approval
- Next Steps: none

Sample e-mail text

From **Smith, Mr. John**	Company **Vision Enterprise**
To **Tanaks, Jane**	Title **Bridge Construction Project**
Sent **14-MAY-2006 08:16:30**	Number **192619**
ID **1063734**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Rejection Date **May 14, 2006 8:16 am Chicago Central Standard Time**

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

Please go to Negotiation Review page to view the document.

RFx/Auction Creation Confirmation

Summary of e-mail notification

- Recipient: buyer who submitted the negotiation for publication
- When: when the negotiation is opened for preview or open for responding (if no preview date is specified)
- Possible Action: none, (information only)
- Next Steps: none

Sample e-mail text

From **Tanaka, Jane**	Company **Vision Enterprise**
To **Tanaka, Jane**	Title **Bridge Construction Project**
Sent **14-MAY-2006 08:16:30**	Number **192619**
ID **1063734**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Please go to Negotiation Details page to view the document.

RFx/Auction Invitation - Supplier Contact

Summary of e-mail notification

- Recipient: invited suppliers
- When: when the negotiation is published
- Possible Action: acknowledge intent, and enter Oracle Sourcing to participate
- Next steps: preview or submit responses within Oracle Sourcing for the specified negotiation if preview/open time is immediate or past. Otherwise, wait until the negotiation is open for preview/responding.

Sample e-mail text

From **Tanaka, Jane**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **12-May-2006 13:21:00**	Number **192619**
ID **1073683**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:20 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **AcmeWidgets**

Supplier Site **HEADQUARTERS**

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

Please go to Negotiation Review page to view the document before acknowledging intent to participate and/or place a response..

RFx/Auction Invitation - Supplier Additional Contact

Summary of e-mail notification

- Recipient: any additional supplier contacts
- When: when the negotiation is published
- Possible Action: Enter Oracle Sourcing to acknowledge intent and to participate
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **dan.winter@acme.com**	Title **BridgeConstruction Project**
Sent **20-MAY-2006 10:45:30**	Number **192619**
ID **1074599**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Please go to the Acknowledge Participation page to acknowledge your intent to participate.

Please go to Negotiation Review page to view the document before acknowledging intent to participate and/or entering a response

If you are using this system for the first time, please go to Respond to Invitation page to submit a request to us to create a user for you.

RFx/Auction Invitation - Prospective Supplier Contact

Summary of e-mail notification

- Recipient: prospective supplier contact
- When: when the negotiation is published
- Possible Action: await registration request approval
- Next steps: preview negotiation document. Otherwise, wait until the negotiation is open for preview/responding.

Sample e-mail text

From **Tanaka, Jane**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **12-May-2006 13:21:00**	Number **192619**
ID **1073683**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:20 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **AcmeWidgets**

Supplier Site **HEADQUARTERS**

Your new supplier request is currently in progress. Once the request is approved, you will be able to acknowledge, view and submit responses to this document.

Please go to Acknowledge Participation page to acknowledge your intent to participate.

Please go to Negotiation Review page to view the document before acknowledging intent to participate and/or entering a response..

RFx/Auction Acknowledgement Reminder - Participants

Summary of e-mail notification

- Recipient: respondents who have not acknowledged intent to participate
- When: negotiation is in progress and the company has not acknowledged its intent to participate. Refer to Timing of Notifications for details on when this notification is generated. .
- Possible Action: acknowledge online or reply to this notification to acknowledge intent to participate
- Next Steps: none

Sample e-mail text

From **Tanaka, Jane**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **13-MAY-2006 00:49:09**	Number **192619**
ID **1073428**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 13:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:19 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

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

Please go to Negotiation Details page if you want to view the document before acknowledging intent to participate and/or to enter a response.

RFx/Auction Bid/Quote/Response Submitted

Summary of e-mail notification

- Recipient: buyer who created the negotiation

- When: a bid/quote/response has been submitted to the negotiation by a supplier
- Possible Action: review the bid/quote/response details
- Next Steps: none

Sample e-mail text

From **Sue Brown**	Number **91648**
To **Tanaka, Jane**	Title **Bridge Construction Project**
Sent **21-MAY-2006 00:49:09**	
ID **1078932**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 13:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:19 pm Chicago Central Standard Time**

Bid Number **67156**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

To view the bid, please to the Response Details page.

RFx/Auction Extend

Summary of e-mail notification

- Recipient: all invitees and participants
- When: buyer has extended the negotiation
- Possible Action: none (information only)
- Next Steps: respondents may decide to resubmit responses

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **15-MAY-2006 12:20:59**	Number **192619**
ID **1073781**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Extended Close **July 31, 2006 03:18 pm Chicago Central Standard Time**

Please go to Negotiation Details page to view the document.

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

Summary of e-mail notification

- Recipient: all invitees and participants
- When: the buyer has disqualified a response
- Possible Actions: respondents may wish to resubmit new responses
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **18-MAY-2006 12:20:59**	Number **192619**
ID **1073781**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Date Disqualified **May 21, 2006 05:28 pm Chicago Central Standard Time**

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

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

Summary of e-mail notification

- Recipient: respondent whose response has been disqualified
- When: the respondent's response is disqualified
- Possible Action: respondent can view reason for disqualification and resubmit a new response
- Next Steps: none (information only)

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **ALAN BROWN**	Title **BridgeConstruction Project**
Sent **18-MAY-2006 14:45:59**	Number **192619**
ID **1076783**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Date Disqualified **May 21, 2006 5:28 pm Chicago Central Standard Time**

Supplier **Southside Equipment**

Supplier Site **HEADQUARTERS**

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

Please go to Response Details page to view the disqualified bid, from where you can optionally create a fresh bid.

RFx/Auction Online Discussion Message Sent

Summary of e-mail notification

- Recipient: recipient of the online discusion message
- When: the message is sent
- Possible Actions: view the message and respond
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **18-MAY-2006 12:20:59**	Number **192619**
ID **1073781**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Company **Vision Enterprise**

To view the message, please go to the Message page.

RFx/Auction Early Close

Summary of e-mail notification

- Recipient: all invitees and participants
- When: buyer closes the negotiation early
- Possible Action: none (information only)
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **20-MAY-2006 15:20:30**	Number **192619**
ID **1073799**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Early Close **May 20, 2006 03:20 pm Chicago Central Standard Time**

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

RFx/Auction Additional Round Invitation - Uninvited Participants

Summary of e-mail notification

- Recipient: all invitees and participants from previous round who have not been invited to the subsequent round
- When: buyer publishes the negotiation for the subsequent round
- Possible Action: none (information only)
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **ALAN BLAIR**	Title **Bridge Construction Project**
Sent **25-MAY-2006 08:47:30**	Number **192619-2**
ID **1083499**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **Southside Equipment**

Supplier Site **HEADQUARTERS**

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

RFx/Auction Amendment Acknowledgement

Summary of e-mail notification

- Recipient: all invitees and participants
- When: buyer publishes an amendment to the negotiation
- Possible Action: review the details of the amendment and acknowledge it
- Next Steps: resubmit responses

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **BridgeConstruction Project**
Sent **15-MAY-2006 14:23:30**	Number **192619,1**
ID **1073788**	

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close: **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

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

Please go to Review Changes page to review the changes for this amendment.

RFx/Auction Canceled

Summary of e-mail notification

- Recipient: all invitees and participants
- When: a buyer cancels a negotiation
- Possible Actions: none (information only)
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **15-MAY-2006 12:20:59**	Number **192619**
ID **1073781**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Cancel Date **May 28, 2006 10:25 am Chicago Central Standard Time**

Cancellation Reason: **Insufficient number of responses**

RFx/Auction Constraint Cost Calculation Successful

Summary of e-mail notification

- Recipient: Buyer who submitted the job to calculate the constraint
- When: Concurrent request completes
- Possible Actions: None
- Next Steps: None

Sample e-mail text:

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Vision Enterprise**
Sent **19-May-2006 10:34:44**	Number **192619**
ID **1043976**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Your request to calculate cost of constraint has completed successfully. The details are available on the Award Optimization page.

RFx/Auction Constraint Cost Calculation Unsuccessful

Summaryof e-mail text

- Recipient: Buyer who submitted the job to calculate constraint cost
- When: When the concurrent request completes
- Possible Actions: View results, modify the constraint if appropriate and resubmit
- Next Steps: None

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Vision Enterprise**
Sent **19-May-2006 10:34:44**	ID **192619**
ID **1043975**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Your request to calculate cost of constraint has resulted in unexpected errors. Please contact your system administrator.

RFQ/Auction Award Approval Required

Summary of e-mail notification

- Recipient: all award approvers
- When: the buyer submits the award decisions for approval
- Possible Action: view award decisions and approve if appropriate
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **20-MAY-2006 14:00:33**	Number **192619**
ID **1083256**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Intended Award Date

Note to Approvers

Select from the buttons on this page to take appropriate action or please go to Award Summary page to view the award recommendation, from where you can also either Approve or Reject.

RFQ/Auction Award Approval Reminder

Summary of e-mail notification

- Recipient: any award approver who has not approved or rejected the awars
- When: 24 hours after the initial approval notification is sent
- Possible Action: view award decisions and approve if appropriate
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Black, Mr. Chris**	Title **Bridge Construction Project**
Sent **21-MAY-2006 14:00:33**	Number **192619**
ID **1083756**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Intended Award Date

Note to Approvers

Select from the buttons on this page to take appropriate action or please go to Award Summary page to view the award recommendation, from where you can also either Approve or Reject.

RFQ/Auction Award Approval Approved

Summary of e-mail notification

- Recipient: buyer who submitted the negotiation for approval
- When: whenever the last approver approves the award recommendation
- Possible Action: once all approvers have approved the award recommendation, complete the award process
- Next Steps: none

Sample e-mail text

From **Black, Mr. Chris**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **23-MAY-2006 14:00:33**	Number **192619**
ID **1083678**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Approval Date **June 5, 2006 11:08 Chicago Central Standard Time**

Intended Award Date

Please go to the Award Summary page.

RFQ/Auction Award Approval Rejected

Summary of e-mail notification

- Recipient: buyer who submitted the award for approval
- When: whenever an approver rejects the award recommendation
- Possible Action: view the rejection details and modify the award recommendation

- Next Steps: none

Sample e-mail text

From **Black, Mr. Chris**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **22-MAY-2006 14:00:33**	Number **192619**
ID **108478**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Rejection Date **June 2, 2006 04:34 pm**

Intended Award Date

Note to Buyer

Please go to Award Summary page to view the rejected award recommendation, from where you can modify the award.

RFQ/Auction Award

Summary of e-mail notification

- Recipient: all respondents
- When: the buyer shares the award decision
- Possible Action: None (information only)
- Next Steps: None

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Sue Brown**	Title **Bridge Construction Project**
Sent **25-MAY-2006 17:00:33**	Number **192619**
ID **1083481**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Award date **June 5, 2006 5:00 pm Chicago Central Standard Time**

Your Bid Number **151168**

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

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

Note to Supplier:

Please go to Response Details page to view your bid.

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

RFQ/Auction Allocation Failed

Summary of e-mail notification

- Recipient: buyer who submitted the purchase order creation request
- When: requisition allocation fails in Oracle Purchasing
- Possible Action: review allocations and correct
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Negotiation Close **May 31, 2006 03:18 pm Chicago Central Standard Time**

Organization **Vision Operations**

Line Number **Line information is not available at this point**

Item,Rev/Job

Line Description

Requisition Number(s)

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

Your allocations have been saved. If the process failed due to an error other than System Error, please go to Allocation Summary page to modify allocations and restart Standard Purchase Order creation.

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

RFQ/Auction Purchase Order Creation Status

Summary of e-mail notification

- Recipient: buyer who submitted the purchase order for creation
- When: purchase order is/is not created
- Possible Action: the buyer can resubmit the purchase order creation process if purchase order creation fails
- Next Steps: none

Sample e-mail text

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

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2005 10:21 pm Chicago**

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

Organization **Vision Operations**

Number of Standard Purchase Order(s) created **1**

Number of Standard Purchase Order(s) not created **0**

Details of Standard Purchase Order(s) created

Bid Number **175172**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Standard Purchase Order Number **3495**

Buyer **Jane Tanaka**

Details of up to 10 created Standard Purchase Orders will be displayed.

Details of Standard Purchase Order(s) not created

Bid Number

Supplier

Supplier Site

Standard Purchase Order Number Not Created

Buyer

Error

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

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

To view the details of all created Standard Purchase Orders, please go to the Purchase Order Summary page.

RFx/Auction Copy Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who submitted copy request
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to copy a negotiation has completed successfully. The draft negotiation has been saved.

RFx/Auction New Round Creation Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the new round be created
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to create a new round has completed successfully. This new round has been saved as a draft negotiation.

RFx/Auction Publish Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who published the negotiation
- When: concurrent program completes successfully
- Possible Action: none, information only

- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to publish the negotiation has completed successfully.

RFx/Auction Export to Spreadsheet Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who exported the negotiation
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to export spreadsheet has completed successfully. You may download the spreadsheet from the Download Requests screen for this negotiation.

RFx/Auction PDF Generation Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer or supplier who requested the PDF download
- When: concurrent program completes successfully

- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request for a PDF has completed successfully. You may download the PDF from the Download Requests screen for this negotiation. .

RFQ/Auction Award Spreadsheet Import Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the award spreadsheet import
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to import award decisions using a spreadsheet has completed. The award decisions have been saved as part of the negotiation. You may view the decisions on the Award Summary screen.

RFx/Auction Response Spreadsheet Import Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who uploaded response spreadsheet
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: continue with the response process

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to import lines using a spreadsheet has completed successfully. The data is now included in the draft response.

RFx/Auction Lines Spreadsheet Import Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the line spreadsheet upload
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: continue with the creation process

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to import lines using a spreadsheet has completed successfully. The lines are now included in a draft negotiation.

RFx/Auction Amendment Creation Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who created the new amendment
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to amend a negotiation has completed successfully. The amendment has been saved as a draft negotiation.

RFx/Auction Negotiation Approval Started (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who submitted the negotiation for approval
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your draft negotiation has been submitted for approval successfully.

RFQ/Auction Award Optimization Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested award optimization
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to generate results for award optimization has completed successfully. The details are available on the Award Summary screen.

RFx/Auction Publish Response Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who requested the response be published
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to submit a response has completed successfully.

RFx/Auction Response Validation Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who requested the response be validated
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to validate the draft response has completed successfully.

RFQ/Auction AutoAward Export to Spreadsheet Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who exported the AutoAward
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: continue with the award process

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to export AutoAward recommendation to a spreadsheet has completed successfully. You may download the spreadsheet from the Download Requests screen for this negotiation.

RFQ/Auction Renegotiate Blanket Successful (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the blanket be renegotiated
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to renegotiate a blanket has been saved as a draft negotiation.

RFQ/Auction Accept Award Optimization Scenario Successful (Large Negotiations)

Summary of e-mail notification

- Recipient: buyer who accepted the award optimization spreadsheet.
- When: concurrent program completes successfully

- Possible Action: none, information only
- Next Steps: Continue with award process..

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to accept the Award Optimization Scenario has completed successfully. The details are available on the Award Summary screen.

RFx/Auction Publish Negotiation Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who requested the response be published
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to publish the negotiation has errors..

RFQ/Auction Renegotiate Blanket Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the blanket be renegotiated

- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to renegotiate a blanket has errors..

RFQ/Auction Award Spreadsheet Import Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the award be imported
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and correct problem

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to import award using a spreadsheet has resulted in errors. Please correct the errors in the spreadsheet and import the corrected spreadsheet.

RFx/Auction Response Spreadsheet Import Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who imported the response spreadsheet
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to import response using a spreadsheet has resulted in errors. Please correct the errors in the spreadsheet and import the corrected spreadsheet.

RFx/Auction Amendment Creation Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the amendment be created
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to amend a negotiation has errors..

New Round Creation Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested the new round
- When: concurrent program completes successfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to create a new round has errors..

RFx/Auction Negotiation Copy Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: negotiation creator
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to copy a negotiation has errors..

RFx/Auction Negotiation Approval Request Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who requested negotiation be approved
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to submit a negotiation for approval has errors.

RFx/Auction Response Validation Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who requested the response validation
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to validate the response has resulted in errors.

RFQ/Auction AutoAward Export to Spreadsheet Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who attempted the export of the AutoAward to a spreadsheet.
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: Review errors and resubmit

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to export autoaward recommendation to a spreadsheet has resulted in unexpected errors. Please contact your system administrator.

RFx/Auction Export to Spreadsheet Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who attempted the spreadsheet export.
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: Review errors and resubmit.

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to export spreadsheet has resulted in unexpected errors. Please contact your system administrator.

RFx/Auction PDF Generation Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer or supplier who attempted to generate the PDF version..
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: Review errors and resubmit.

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request for PDF has resulted in unexpected errors. Please contact your system administrator.

RFx/Auction Publish Response Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: supplier who attempted to publish a response.
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: Review errors and resubmit.

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to publish the response has resulted in errors.

RFQ/Auction Award Optimization Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who attempted the award optimization.
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: Review errors and resubmit.

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to optimize the award scenario has resulted in unexpected errors. Please contact your system administrator.

RFx/Auction Lines Spreadsheet Import Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who attempted the lines import.
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: Review errors and resubmit.

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to import lines using a spreadsheet has resulted in errors. Please correct the errors in the spreadsheet and import again.

RFQ/Auction Accept Award Optimization Scenario Failed (Large Negotiation)

Summary of e-mail notification

- Recipient: buyer who attempted to accept the award optimization spreadsheet.
- When: concurrent program completes unsuccessfully
- Possible Action: none, information only
- Next Steps: Review errors and resubmit.

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **Jane Tanaka**	Title **Bridge Construction Project**
Sent **19-MAY-2006 11:01:34**	Number **192619**
ID **1043855**	

Your request to accept the Award Optimization Scenario has resulted in unexpected errors. Please contact your system administrator.

Two Part RFQ Evaluation Complete: Quote Not Shortlisted

Summary of e-mail notification

- Recipient: all respondents whose quotes were not short listed
- When: evaluators complete the technical evaluation stage

- Possible Action: none (information only)
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **20-May-2006 18:35:33**	Number **192619**
ID **1093612**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Your quote number 1**51168**

Note to Supplier:

Your **quote 64176** in response to **RFQ 192619** has not been short listed and will no longer be included in further evaluation and awarding phases of this negotiation.

Two Part RFQ Evaluation Complete: Quote Shortlisted

Summary of e-mail notification

- Recipient: all respondents whose bids were shortlisted at the end of the technical evaluation
- When: the evaluators complete the technical evaluation stage
- Possible Action: none (information only)
- Next Steps: none

Sample e-mail text

From **Jane Tanaka**	Company **Vision Enterprise**
To **SUE BROWN**	Title **Bridge Construction Project**
Sent **20-May-2006**	Number **192619**
ID **1083485**	

Negotiation Preview **Not specified**

Negotiation Open **May 12, 2006 10:21 pm Chicago Central Standard Time**

Supplier **Acme Widgets**

Supplier Site **HEADQUARTERS**

Your Quote Number **151168**

Note to Supplier:

Your **quote 64175** in response to **RFQ 192619** has been short listed for the next phase of evaluation (Financial)

Reminder Notifications

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

Buyer Approval Reminder Notifications

There are two types of approvals for buyers - document approval before publication and award approval after award decisions have been made. Depending on the setup of the negotiation, document and award approval may not be required. Document approvers are set up as members of the collaboration team who have been designated as approvers. They review the document and approve or reject it prior to publication. Award approvers are determined by the approval hierarchy which is used. They review the award decisions and approve or reject them before any purchasing documents can be initiated.

Both document approvers and award approvers receive reminder notifications when they have not approved or rejected the document or award decisions within the appropriate timeframe.

Supplier Reminder Notifications

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

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

Timing of Reminder Notifications

Document Approval Reminders

Negotiation document approvers receive a notification halfway between when the first notification was sent and the preview date (if one was specified), the open date (if one was specified), or close date (if the negotiation was defined as open immediately).

Award Approval Reminders

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

Supplier Reminders

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

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

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

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

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