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Process Guide

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Procurement Command Center Plus Process Guide.*

Implementers, administrators, users

See Related Information Sources on page viii 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

1 Overview of Oracle Procurement Command Center Plus

This chapter discusses the functional advantages of Oracle Procurement Command Center Plus and the business entities that enable procurement teams, procurement managers, and buyers to plan and process procurement actions.

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This chapter discusses the Document Builder feature in Oracle Procurement Command Center Plus.

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This chapter discusses the Notes feature in Oracle Procurement Command Center Plus.

Related Information Sources

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Purchasing User's Guide

Oracle iSupplier Portal User's Guide

Oracle iSupplier Portal Implementation Guide

Oracle iProcurement User Guide

Oracle iProcurement Implementation and Administration Guide

Oracle Project Procurement Command Center Plus Process Guide

Oracle Payables Implementation Guide

Oracle Payables User's Guide

Oracle Procurement Contracts Implementation and Administration Guide

Oracle E-Business Suite Information Discovery Integration and System Administration Guide

Oracle Supplier Management Implementation and Administration Guide

Oracle Supplier Management User's Guide

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 of Oracle Procurement Command Center Plus

This chapter discusses the functional advantages of Oracle Procurement Command Center Plus and the business entities that enable procurement teams, procurement managers, and buyers to plan and process procurement actions.

This chapter covers the following topics:

- Overview of Oracle Procurement Command Center Plus
- Oracle Procurement Command Center Plus Business Components

Overview of Oracle Procurement Command Center Plus

Oracle Procurement Command Center Plus enables procurement professionals to develop purchasing strategies while empowering cross-document actions. It is a key component of the Oracle Advanced Procurement suite. Procurement teams across industries must transform from a support function to an assuming value creation function. Oracle Procurement Command Center Plus equips procurement teams, procurement managers, and buyers with tools to support this transformation within their enterprise.

Key Features of Oracle Procurement Command Center Plus

The following are the key features of Oracle Procurement Command Center Plus:

- 360 Degree View into the Procure-to-Pay Process

  To implement a focused approach towards workload management and prioritization, the application provides comprehensive information about procurement documents, their lifecycle, and exceptions. The Procurement Operations Dashboard pulls in data from across the Procure-to-Pay cycle to enable the buyer to make timely decisions on requisitions, negotiations, contracts, purchase orders, change requests, deliverables, invoices, catalogs, suppliers etc. By automating, streamlining and simplifying key operational decisions, procurement teams and buyers can spend more of their day's time working on spend analysis, supplier relationship, and contract optimization rather than getting bogged down with non-value added routine operational decisions. They can utilize their time interacting with their customers and understanding their needs better.

- Metrics and Charts

  Using the power of Endeca, Oracle Procurement Command Center Plus provides procurement teams and buyers with relevant charts, graphs, and metrics that help them to coordinate execution of the procurement processes. For example, with graphs, buyers can visualize agreement utilization status and take action to terminate, renegotiate, or extend documents as needed.

- Insight into Requester and Spend Behavior

  Procurement Command Center's Indirect Procurement helps buyers monitor and understand requester and spend behavior and to ensure catalogs made available in Oracle iProcurement are relevant to the business needs. Requesters can offer feedback for better sources of supply that helps buyers to gain insight into the catalog usage and refine catalog content. The procurement team can review off-contract spend including Oracle iExpense and identify cost saving opportunities.

- Insight into Supplier Performance

  Oracle Procurement Command Center Plus's integration with Oracle Supplier Life Cycle Management enables buyers to make better supplier selection decisions and to monitor performance of suppliers. Supplier Analysis Dashboard displays catalog review ratings from Oracle iProcurement and supplier performance evaluation ratings from Oracle Supplier Lifecycle Management.

- Conduct Effective Negotiations and Deliver Strategic Objectives

  The Strategic Sourcing Dashboard aggregates information from Sourcing negotiations, initiatives, and objectives, and helps buyers and procurement managers to gain improved visibility into the status of all strategic objectives and initiatives.

- Analysis Portals

  The Item Analysis and Supplier Analysis portals bring together traditionally segregated data from both structured and unstructured sources that empower buyers with the insight to ensure that the items and suppliers selected are the best choices to meet the procurement needs of the business. When there are multiple viable alternatives, use the portals to find and compare most appropriate items and suppliers that best fulfill the procurement strategy based on historical and future demand.

- Notes

Notes enable collaboration and help organize the workload within the procurement team. For example, a certain requisition in the pool might require a series of tasks such as estimating overall demand, performing market research, checking price or availability, and evaluating viable alternatives. Buyers may specialize in one of those areas. Notes enable a buyer to assign tasks to others in the procurement team with a target completion date, to create visibility into ownership, and to track tasks to completion. The buyer can track differences between forecasted completion dates and planned completion dates. Any difference between the forecasted and planned dates may constitute a delay, and this information provides an early warning to the buyer about delay in the delivery of the item or service.

- Document Builder

  The Document Builder is a tool that enables procurement team, procurement managers, and buyers to match open demand with available agreements and suppliers, and then determine whether a purchase order with linked agreements should be created, or if a negotiation is to be created.

- Integration with Oracle Advanced Procurement

  Oracle Procurement Command Center Plus integrates with Oracle Purchasing, Oracle Sourcing, Oracle Procurement Contracts, Oracle Supplier Lifecycle Management, Oracle iProcurement Information Discovery Plus, Oracle Payables, and Oracle iExpenses, so that procurements teams and buyers have access to information to gain insights for decision-making and drive key procurement actions directly from the dashboards, without having to access individual applications separately.

Oracle Procurement Command Center Plus Business Components

Oracle Procurement Command Center Plus provides the following dashboards, application pages, and other application components that enable procurement managers and buyers to plan and process procurement actions.

Dashboards

Oracle Procurement Command Center Plus provides the following dashboards:

Procurement Operations Dashboard

The Procurement Operations Dashboard helps buyers gain end-to-end visibility of the status of procurement. For example, a buyer can view the backing requisition for a purchase order line, the agreement line from which the PO line was sourced, the RFX award from which the agreement line was created, and open supplier deliverables.

- Full Procurement Lifecycle

Using this dashboard, buyers can filter and see relationships across all the following documents:

- Requisitions
- Purchase Orders
- Global Blanket Agreements and Contract Agreements
- Negotiations
- Deliverables

By viewing related documents, buyers can quickly assess individual document flows end-to-end as well as evaluate important related documents. The buyer can quickly review all procurement activities pertaining to them, discover issues and resolve them before business is affected. With graphs, buyers can visualize agreement utilization status and take action to terminate, renegotiate, or extend documents as needed.

- Requisition Management

  A critical customer service area is requisition management. Buyers review requisitions and prioritize requisitions based on business needs. Depending on your business needs, buyers can also manage requisitions and other documents using notes.

- Integrated Payables Information

  Procurement Command Center enables buyers to respond quickly to purchase order and agreement performance by monitoring purchasing documents beyond the walls of procurement. Buyers track information on ordered, shipped, received, and invoiced quantities and amounts available through the Procurement Operations dashboard. Buyers are able to identify invoice holds, overdue payments, and procurement contract deliverables.

  See: Analyzing Procurement Operations, page 3-1

Indirect Procurement Dashboard

The Indirect Procurement Dashboard enables buyers to analyze buying behaviors of internal requesters by analyzing requisitions and expense reports. If included on the requisition, buyers are able to view feedback from the requisition, update the purchasing documents, and refine the catalog as needed to meet business needs.

Buyers can:

- Analyze reviews and ratings provided by requester on the catalog items available in Oracle iProcurement, and initiate necessary corrective actions.

- Gain insights into catalog usage and refine catalog content.
- Act on specific feedback coming in from requesters.
- Review off-contract spend behavior (including spend from Oracle Internet Expenses) and identify cost-saving opportunities.

See: Analyzing the Buying Behavior of Requesters, page 4-1

Strategic Sourcing Dashboard

The Strategic Sourcing Dashboard provides Sourcing buyers with end-to-end visibility on all negotiation activities.

- Negotiations, lines, and offers or bids
- Initiatives and tasks
- Objectives

> **Important:** The Strategic Sourcing Dashboard is accessible only to buyers in the application. When non-buyers access this dashboard, the application displays an error message.

See: Using the Strategic Sourcing Dashboard, page 7-1

Application Pages

Oracle Procurement Command Center Plus provides the following application pages:

Item Analysis Page

Buyers can use the Item Analysis page to explore the history of items used in the organization including on-time delivery, quality, and item suitability. Items requested in the requisition can be compared to other item performance measures to ensure the best item fit for the business need.

See: Using the Item Analysis Page, page 6-1

Supplier Analysis Page

The Supplier Analysis page provides supplier history for goods or services used in your organization. Past performance, including on-time delivery, quality, and supplier capabilities can be evaluated or compared to the items requested in the requisition to ensure the best suppliers and agreements are selected.

See: Using the Supplier Analysis Page, page 6-12

Oracle Web ADI Integrator and Layouts

Oracle Procurement Command Center Plus provides an Oracle Web ADI integrator and Web ADI layouts to enable buyers and procurement managers to update data for multiple orders and agreements at a time.

Web ADI Integrator

The predefined Purchasing Documents Dashboard Integrator enables you to import and export orders and agreements data. You can view this integrator using the Desktop Integration Manager, Manage Integrators navigation.

Web ADI Layouts

Oracle Procurement Command Center Pluss delivers the following predefined layouts for the import and export of orders and agreements data:

- Purchasing Documents Order Header Layout
- Purchasing Documents Lines Layout
- Purchasing Documents Agreement Header Layout

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Implementing Oracle Procurement Command Center Plus

The chapter discusses the prerequisite products and the setup steps required to install and use Oracle Procurement Command Center Plus.

This chapter covers the following topics:

Licenses for Oracle Procurement Command Center Plus

Prerequisite Licenses

To use Oracle Procurement Command Center Plus, you must have the following:

- Release 12.2.5 or above of Oracle E-Business Suite
- License for Oracle Purchasing: All purchasing related features (manage orders, agreements, and notes) are available in Procurement Command Center without needing to license any additional product
- Release 12.2 V6 or above of Oracle E-Business Suite Information Discovery

Additional Licenses

Oracle Procurement Command Center Plus integrates and interacts with the other Oracle E-Business Suite products. Licensing and implementing other products is optional; however, other products enable more functionality and provide optimal business information.

Feature	License Required	Comments
Reviews, Ratings, and Feedback analysis and actions Catalog review ratings	Oracle iProcurement Information Discovery Plus	Requesters enter reviews or ratings and submit feedback using Oracle iProcurement Information Discovery Plus, which is a separately licensed product.
iExpense spend analysis and actions	Oracle iExpenses	
iProcurement catalog: manage and refine	Oracle iProcurement	
Negotiations: monitor, analyze, and manage Initiatives, objectives, and tasks	Oracle Sourcing	
Deliverables: track and manage	Oracle Procurement Contracts	
Search suppliers using user-defined attributes (UDAs). Supplier performance evaluation	Oracle Supplier Lifecycle Management and Oracle Supplier Hub	
View invoice and payment information	Oracle Payables	

Oracle Procurement Command Center Plus Predefined Components

Oracle Procurement Command Center Plus provides the following predefined components:

Submenu

The 'Purchasing: SCC: Dashboard Tab' (PO_DASHBOARD_TAB) submenu is delivered as part of the 'Purchasing Home Page for Buyers' (PO_BUYER_HOME_PAGE) main menu.

Description of the 'Purchasing: SCC: Dashboard Tab' submenu:

Prompt	Submenu /Code	Submenu Type	Function/Code	Function Type	Description
Procurement Operations	Purchasing: SCC Operational Dashboard (PO_SCC_OPERATIONAL_SUBTAB)	SUBTAB			Purchasing: Operational Dashboard
	Purchasing: Project Procurement : Plan Tab (PO_PSC_PROC_PLAN_TAB)	TAB			Purchasing: Project Procurement tab
Item Analysis	Purchasing: Dash Board: Item Analysis Subtab (PO_DB_ITEM_ANAL_SUBTAB)	SUBTAB			Purchasing: Dash Board: Item Analysis Subtab
Supplier Analysis	Purchasing: Dashboard: Supplier Analysis Subtab (PO_DB_SUPP_ANAL_SUBTAB)	SUBTAB			Purchasing: Dashboard: Supplier Analysis Subtab

Prompt	Submenu /Code	Submenu Type	Function/Code	Function Type	Description
			Purchasing: Dash Board: Bookmark Page (PO_DASHBOARD_BOOK_MARK_FN)	JSP	
			Purchasing: Indirect Procurement: Bookmark Page (PO_IND_PROC_BOOK_MARK_FN)	JSP	
			Purchasing: Procurement: Bookmark page (PO_PSC_BOOK_MARK_FN)	JSP	
Indirect Procurement	Purchasing: SCC Indirect Procurement SubTab (PO_IND_PROC_SUB_TAB)	SUBTAB			Purchasing: Indirect Procurement SubTab
			Purchasing: Procurement: Supplier Analysis Page (PO_PSC_SUPPLIER_ANALYSIS_FN)	JSP	Purchasing: Procurement: Supplier Analysis Page

Prompt	Submenu /Code	Submenu Type	Function/Code	Function Type	Description
			Strategic Sourcing Dashboard: Endeca page (PON_PCC_STR_SOURCING_ENDECA_FN)	JSP	Strategic Sourcing Dashboard: Endeca page
Strategic Sourcing	Sourcing: Dash Board: Strategic Sourcing Subtab	SUBTAB			Sourcing: Dash Board: Strategic Sourcing Subtab
			PON: Sourcing Bookmark page (PON_SCC_BOOK_MARK_FN)	JSP	

Function

The 'Purchasing: SCC Operational Page' (PO_SCC_OPERATIONAL_FN) function is delivered as part of the Purchasing Buyer Work Center (PO_BUYER_WORK_CENTER) main menu.

- HTML Call:

  OA.jsp?page=/oracle/apps/po/dashboard/webui/PoOperationalDashboardPG&OAHP=PO_BUYER_HOME_PAGE&OASF=PO_SCC_OPERATIONAL_FN&OAPB=PO_BRAND

- Parameters: None

- Icon: fav_dashboard_dials.png

Note: Oracle does not deliver any responsibility to log in to Oracle Procurement Command Center Plus.

Enabling the Oracle Procurement Command Center Plus Menu

To use Oracle Procurement Command Center Plus, the system administrator must provide a prompt to the predefined menu and function. Once the prompt is entered for the predefined menu and function, then the tab for Procurement Command Center is visible on the Purchasing responsibility, Buyer Work Center page. This tab in Buyer Work Center is the starting point for Oracle Procurement Command Center Plus. From this tab, procurement teams and buyers can click any of the following subtabs:

- Procurement Operations
- Indirect Procurement
- Item Analysis
- Supplier Analysis
- Strategic Sourcing

For more information, see: Setting Up Oracle Procurement Command Center Plus, page 2-6.

Setting Up Oracle Procurement Command Center Plus

Prior to performing Oracle Procurement Command Center Plus setup steps, you must ensure that the following are completed:

1. Install Oracle Purchasing R 12.2.5 or above

2. Install Oracle E-Business Suite Information Discovery Release 12.2 V6 or above.

   See the *Installing Oracle E-Business Suite Information Discovery* note for the relevant release on My Oracle Support.

Post-Installation Steps

Complete the following post-installation steps.

Required Steps

1. Add a prompt to the following menu and function to enable the user interface for Oracle Procurement Command Center Plus.

   1. Navigate to the System Administrator responsibility.

   2. Open the **Menus** window.

3. Query the Purchasing Home Page for Buyers (PO_BUYER_HOME_PAGE) main menu.

4. Locate the Purchasing: SCC: Dashboard Tab submenu.

5. Enter a prompt for the submenu, for example, Dashboard.

6. Save your work.

7. Query the Purchasing Buyer Work Center (PO_BUYER_WORK_CENTER) main menu.

8. Locate the Purchasing: SCC Operational Page (PO_SCC_OPERATIONAL_FN) function.

9. Enter a prompt for the function, for example, Dashboard.

10. Save your work.

11. Now, when users log in to the Purchasing responsibility and click Buyer Work Center, they view a function called Dashboard.

    When clicking the Dashboard function, the Buyer Work Center page appears, where they can view the Dashboard tab.

    The Dashboard tab in Buyer Work Center is the starting point for Oracle Procurement Command Center Plus. From this tab, procurement teams and buyers can click any of the following subtabs:

    - **Procurement Operations**
    - **Strategic Sourcing**
    - **Indirect Procurement**
    - **Item Analysis**
    - **Supplier Analysis**

2. Set up access for users as follows:

   For procurement managers and buyers, setup the following role to the Purchasing responsibility:

   Role Name: UMX|PO_SCC_ENDECA_ACCESS_ROLE

   Grant Name: PO_SCC_ENDECA_ACCESS_GRANT

   Permission Set Name: Purchasing SCC Buyer Permission Set

   See: *Oracle E-Business Suite Security Guide* and the "*steps to add product-specific roles to* *responsibilities to provide user access to Endeca-related pages and components in Oracle E-Business Suite*" section in My Oracle Support note 1497685.1.

3. Set up the following profile option for Oracle Procurement Command Center Plus. If you have set this profile option for Oracle Project Procurement Command Center Plus, then review the date to ensure that the date is also applicable to Oracle Procurement Command Center Plus.

   PO: Item and Supplier Analysis Data-load Cut-off – Set an applicable date based on how much data you want to use when evaluating items and suppliers. This profile value determines the historical procurement documents, such as requisitions, purchase orders, agreements, and negotiations that are loaded into the data set that supports the Supplier and Item Analysis pages. The application does not load any data beyond this cut-off and compares this date with the creation date of the document header to determine the document information to load. You must set the value in the canonical date format (example: 2010/01/01).

   Note: If you choose a date that is too far in the past, then the amount of data to be loaded increases, resulting in longer full-load and incremental-load times, and more memory resources demanded by the Endeca Server. If you select too recent a date, then the insights might not be extensive or accurate.

4. Run the Full Load Graph to load applicable data from the Oracle Endeca Server to the Oracle Endeca Integrator ETL. See: Running the Full Load Graph, page 2-10.

5. Set up the scheduler for incremental refresh. See: Setting up the Scheduler for Incremental Refresh, page 2-11.

Optional Steps

1. Add lookup values to the following lookup types for Note Types in the Notes page.

   - PO_BUYER_ACTION_STATUS: Lookup type for the Action Status
   - PO_BUYER_PA_HEADER_ACTIONS: Lookup type for the Agreement Header
   - PO_BUYER_PA_LINE_ACTIONS: Lookup type for the Agreement Line
   - PO_BUYER_PO_HEADER_ACTIONS: Lookup type for the PO Header
   - PO_BUYER_PO_LINE_ACTIONS: Lookup type for the PO Line
   - PO_BUYER_REQ_LINE_ACTIONS: Lookup type for the Requisition Line
   - PO_BUYER_REVIEW_ACTIONS: Lookup type for the Review
   - PO_BUYER_SUGGESTION_ACTIONS: Lookup type for the Suggestions

Each lookup value relates to an independent task that a buyer performs or delegates to another buyer. Each document, such as a requisition Line or a purchase order can have its own set of lookup values, as defined by these lookups. To review the delivered lookup values, see: Using Notes in Oracle Procurement Command Center Plus, page 9-1. After review, add the lookup values based on your business requirements.

Use the **Oracle Purchasing Lookups** window to define lookup codes. See: Defining Lookup Codes, *Oracle Purchasing User's Guide*.

2. Review the Oracle Web Applications Desktop Integrator (ADI) layouts available for Oracle Procurement Command Center Plus.

   If required, you can customize these layouts to suit your business requirements. If you customize these layouts, then you must ensure that you do not remove or hide key columns. Key columns include: Batch Id, Result Format Usage Id, Line Number, Schedule/Pay Item Number, and Distribution Number. For information about the Web ADI integrator and layouts supplied by Oracle Procurement Command Center Plus, see: Oracle Procurement Command Center Plus Predefined Components, page 2-2.

3. Enable descriptive flexfields (DFFs) on Oracle Procurement Command Center Plus dashboards.

   The application allows buyers to filter purchasing documents by descriptive flexfield attributes. You can enable DFFs for the dashboards and for the Web ADI functionality.

   > **Important:** You can use only one DFF at a time for each dashboard.

   The DFFs for the Procurement Command Center dashboards are:

   - Purchasing Documents Order Header Layout: Header DFF for orders
   - Purchasing Documents Lines Layout: Line DFF for orders. This is the default DFF
   - Purchasing Documents Agreement Header Layout: Header DFF for agreements

   DFFs are supported in the following tables in Procurement Command Center:

   - PO Header
   - PO Line
   - PO Shipment
   - PO Distribution

- Requisition Header
- Requisition Line

DFFs can be enabled in the Procurement Operations Dashboard (PoOperationalDashboardPG).

For information about how to enable DFFs, refer to the *Oracle Application Framework Personalization Guide*.

4. If required, implement the document-level security for Oracle Procurement Command Center Plus. See: Document Security in Oracle Procurement Command Center Plus, page 2-14.

   If document-level security is setup, then run the Fill Employee Hierarchy concurrent program for any hierarchy-related changes to take effect.

   Refer to the *Oracle Purchasing User's Guide* for information about the Fill Employee Hierarchy concurrent program.

5. Configure partial search attributes, if required.

   Partial search is enabled for a predefined set of attributes on all the dashboards. For the list of attributes for which partial search is enabled, see:

   - Procurement Operations, page 3-3
   - Strategic Sourcing, page 7-2
   - Indirect Procurement, page 4-2
   - Item Analysis, page 6-2
   - Supplier Analysis, page 6-13

   As an optional step, you can customize the list of attributes identified for partial search. To add additional attributes or remove already configured attributes for partial search, modify the attribute profile value using the Information Discovery Developer responsibility. Follow the configuration steps in the *Oracle E-Business Suite Information Discovery Plus Integration and System Administration Guide.* After the configuration is changed, run the Full Load Graph (FullLoadConfig.grf) for this configuration to take effect.

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery* note for the relevant release on My Oracle Support, attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full Endeca Refresh on the Integrator Server:

1. Log in to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Projects Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select "po-scc" for Procurement Operations dashboard, "po-ind-proc" for Indirect Procurement dashboard, "po-proc-sup" for supplier analysis, and "po-proc-item" for Item Analysis from the Sandbox list one after another. Ensure to run the full load graph for each of these sandboxes.
13. Select as follows from the graph list:
    - po-scc (FullLoadConfig.grf) when you select po-scc sandbox
    - po-ind-proc (FullLoadConfig.grf) when you select po-ind-proc sandbox
    - po-proc-item(Full.grf) when you select po-proc-item sandbox
    - po-proc-sup(Full.grf) when you select po-proc-supp sandbox
    - scc-sourcing(FullLoadConfig.grf) in pon-scc-sourcing sandbox
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V6*, My Oracle Support Document ID 1970071.1, initial data load for Oracle Procurement Command Center Plus is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the Endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the volume of information requiring update.

To set up the scheduler:

1. Log in to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Projects Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select "po-scc" for Procurement Operations dashboard, "po-ind-proc" for Indirect Procurement dashboard, "po-proc-sup" for supplier analysis, and "po-proc-item" for Item Analysis from the Sandbox list one after another. Ensure to run the full load graph for each of these sandboxes.
13. Select as follows from the graph list:
    - po-scc (IncrementalLoadConfig.grf) when you select po-scc sandbox
    - po-ind-proc (IncrementalLoadConfig.grf) when you select po-ind-proc sandbox
    - po-proc-item(Incremental.grf) when you select po-proc-item sandbox
    - po-proc-sup(Incremental.grf) when you select po-proc-sup sandbox
    - pon-scc-sourcing(IncrementalLoadConfig.grf) in pon-scc-sourcing sandbox

14. Click Create to set the scheduler.

Views and Joins to Load Procurement Command Center Data

The following views are used by the Oracle Endeca Integrator ETL to load and display Procurement Command Center Plus, Item Analysis, Supplier Analysis, and Strategic Sourcing dashboards data to the Endeca data store:

- PO_SCC_DASHBOARD_V: View to extract Procurement and related documents data for full load graph - po-scc
- PO_SCC_DASHBOARD_INC_V: View to extract Procurement and related documents data for incremental graph - po-scc
- PO_SCC_PROCPLAN_V: View to extract Procurement Plan related data for full load graph - po-scc.
- PO_SCC_PROCPLAN_INC_V: View to extract Procurement Plan related data for incremental graph - po-scc
- PO_SCC_REVIEWS_V: View to extract the procurement items and supplier reviews data for full load graph – po-scc
- PO_SCC_REVIEWS_INC_V: View to extract the procurement items and supplier reviews data for incremental graph – po-scc
- PO_ENDECA_SCC_IND_PROC_V: View to extract Indirect Procurement and related documents data for full load graph - po-ind-proc
- PO_ENDECA_SCC_IND_PROC_INC_V: View to extract Indirect Procurement and related documents data for incremental graph - po-ind-proc
- PO_ENDECA_ITEMS_PROCUREMENT_V - View to extract item related data for system items for full load graph - po-proc-item
- PO_ENDECA_ITEMS_PROC_INC_V - View to extract item related data for system items for incremental graph - po-proc-item
- PO_ENDECA_ITEMS_ASL_INC_V – View to extract data for approved supplier lists for incremental graph - po-proc-item
- PO_ENDECA_ITEMS_QTY_INC_V - View to extract data for quantity available data for incremental graph- po-proc-item
- PO_ENDECA_SUPPLIER_ANALYSIS_V - View to extract data for supplier data for full load graph- po-proc-sup

- PO_ENDECA_UDA_ATTRS_V - - View to extract data for supplier user defined attributes for incremental graph - po-proc-sup

- PO_ENDECA_SUPP_ANALYSIS_INC_V - View to extract data for supplier data for incremental graph - po-proc-sup

- PON_SCC_SOURCING_ENDECA_V - - View to extract data for sourcing documents, initiatives and objectives for full load graph - pon-scc-sourcing

- PON_SCC_SOURCING_ENDECA_INC_V - - View to extract data for sourcing documents, initiatives and objectives for incremental graph - pon-scc-sourcing

Oracle Procurement Command Center Plus Menu Navigation

Oracle Procurement Command Center Plus enables procurement teams and buyers to access the product using the Purchasing responsibility, Buyer Work Center page, tab for Oracle Procurement Command Center Plus.

The system administrator must provide a prompt for the Purchasing: SCC: Dashboard Tab' (PO_DASHBOARD_TAB) submenu and Purchasing: SCC Operational Page' (PO_SCC_OPERATIONAL_FN) function. Once the prompt is entered for the predefined menu and function, then the tab for Procurement Command Center is visible on the Purchasing responsibility, Buyer Work Center page. This tab in Buyer Work Center is the starting point for Oracle Procurement Command Center Plus. From this tab, procurement teams and buyers can click any of the following subtabs:

- Procurement Operations

- Indirect Procurement

- Item Analysis

- Supplier Analysis

- Strategic Sourcing

For more information, see: Setting Up Oracle Procurement Command Center Plus, page 2-6.

Document Security in Oracle Procurement Command Center Plus

Oracle Procurement Command Center Plus provides the following security features for purchasing documents:

- Multi-Org Access Control (MOAC), page 2-15

- Document Security, page 2-15

Multi-Org Access Control (MOAC)

Oracle Procurement Command Center Plus uses MOAC to control what data is displayed. Each dashboard displays only data for organizations to which the logged-in user has access. The MOAC feature applies to the following dashboards in Procurement Command Center:

- Procurement Operations
- Indirect Procurement
- Item Analysis
- Supplier Analysis

Document Security

Oracle Procurement Command Center Plus provides the same document security available within Oracle Advanced Procurement for purchasing documents such as requisitions, negotiations, agreements, and purchase orders. Oracle Purchasing lets you control which groups of users have access to each document type, and what modification or control actions these users can take. The security rules also affect the calculation of metrics and plotting of charts, which use only the data to which the user has access. For more information about document security, refer to Document Security and Access in *Oracle Purchasing User's Guide*.

Important: Document Security Implementation Considerations

Document security affects metrics and charts. The calculation of metrics and the plotting of charts use only the data that is visible to the user. When implementing Oracle Procurement Command Center Plus, buyer administrators must consider the security structure and ensure that if a buyer has access to purchase orders, then the buyer also has access to associated documents such as agreements and negotiations. If there are inconsistencies in the security setup, such as having different document security settings on the agreement than on the associated negotiation and on the purchase orders that reference the agreement, then the buyers will not get the correct insights to make better and more informed decisions. These inconsistencies will impact the ability of the procurement team to maximize savings and improve responsiveness. Excessive and complicated document-level security will lead to incorrect analysis and insights and can lead to incorrect decision making. Therefore, it is important to keep document security simple and to use it only when it is essential for the business. Inconsistent document security rules will severely undermine the value of the insights available through Oracle Procurement Command Center Plus.

The document security applies to the Procurement Operations dashboard and the Indirect Procurement dashboard only. The document security does not apply to the Item Analysis dashboard and the Supplier Analysis dashboard. Buyer administrators can restrict document access based on security level options for each document type.

Buyer administrators can specify a security access level that controls which modifications and control actions buyers can take on a particular document type.

The following sections explain how the document security works for purchasing documents in Oracle Procurement Command Center Plus.

Purchase Orders

1. If MOAC is enabled, then buyers can view only documents that belong to the operating units that they have access to. Therefore, users who need access to the Procurement Operations dashboard and the Indirect Procurement dashboard must be set up as buyers.

2. If MOAC is enabled, then buyers can view only documents that belong to the operating units that they have access to. Therefore, users who need access to the Procurement Operations dashboard and the Indirect Procurement dashboard must be set up as buyers.

   - Purchasing: Only the document owner, subsequent approvers, and buyers can access the document.

   - Public: All system users can access the document.

   - Private: Only the document owner and subsequent approvers can access the document.

   - Hierarchy: Only the document owner, subsequent approvers, and users included in the security hierarchy can access the document. Security Hierarchy is a position hierarchy, which is specified in the Purchasing Options.

3. If the profile option PO: Enforce Project Security is set to Yes, then the buyer can access a purchase order only if the purchase order is associated with a project to which the buyer has access. Access to projects is based on the projects setup.

4. Purchase order security overrides all other document security. For example, when a purchase order refers to an agreement or a negotiation, and the document-level security for purchase orders is different from that of the referenced document, then the application ignores the document security of the referenced document.

Requisitions

1. If a requisition is placed on a purchase order or negotiation, then the security from the final document in the business flow applies to the requisition.

2. If a requisition is in a pool, then MOAC security and project security is applied. The document-level security on the requisitions is not applied, which is the behavior of Demand Workbench in Oracle Purchasing.

3. For requisitions in a pool, the profile option PO: Allow Buyer Override in Autocreate Find is applied. If this profile is set to yes, then the user can view unassigned requisitions and requisitions assigned to other buyers as well. If this is set to No, then only requisitions assigned to that user as a buyer are visible.

Negotiations

1. If a negotiation is referenced on a purchase order, then only the purchase order security applies.

2. If a negotiation is placed on an agreement and not referenced on a purchase order, then only the agreement security applies.

3. For negotiations that are not placed on a purchase order or on a global blanket purchase agreement, the security level set at the Negotiation Document type and for the collaboration team will take effect.

   - For Purchasing and Public: All buyers have access.

   - For Private: The buyer who owns the negotiation and all members of the collaboration team have access to the negotiation. Note that the dashboards are accessible only to buyers.

Agreements

1. If an agreement is referenced on a purchase order and a buyer has access to that purchase order as per the rules described in the Purchase Orders section, then the agreement data is accessible to the buyer. See: Purchase Orders, page 2-16

2. For agreements not used on a purchase order, MOAC security and Document Type security will apply as described in points 1 and 2 of the Purchase Orders section. See: Purchase Orders, page 2-16

3

Monitoring Procurement Operations

This chapter discusses how to use the Procurement Operations dashboard and actions available from this dashboard.

This chapter covers the following topics:

- Analyzing Procurement Operations
- Using Oracle Web ADI in Oracle Procurement Command Center Plus
- Performing Bulk Update of Purchasing Data Using Oracle Web ADI
- Overview of Procurement Manager Actions
- Performing Actions for Requisitions
- Performing Actions for Orders
- Performing Actions for Agreements
- Performing Actions for Negotiations
- Performing Actions for Deliverables
- Performing Actions for Notes

Analyzing Procurement Operations

The **Procurement Operations Dashboard** helps buyers gain end-to-end visibility of the status of procurement. For example, a buyer can view the backing requisition for a purchase order line, the agreement line from which the PO line was sourced, the RFX award from which the agreement line was created, and open supplier deliverables.

Full Procurement Lifecycle

Using this dashboard, buyers can filter and see relationships across all the following domains:

- Requisitions

- Purchase Orders
- Global Blanket Agreements and Contract Agreements
- Negotiations
- Deliverables

By viewing related documents, buyers can assess individual document flows end-to-end as well as evaluate important related documents. The buyer can review all procurement activities pertaining to them, discover issues and resolve them before business is affected.

With graphs, buyers can visualize agreement utilization status and take action to terminate, renegotiate, or extend documents as needed.

Requisition Management

Buyers can review requisitions and prioritize requisitions based on business needs. Buyers can also manage requisition and other document workload using notes.

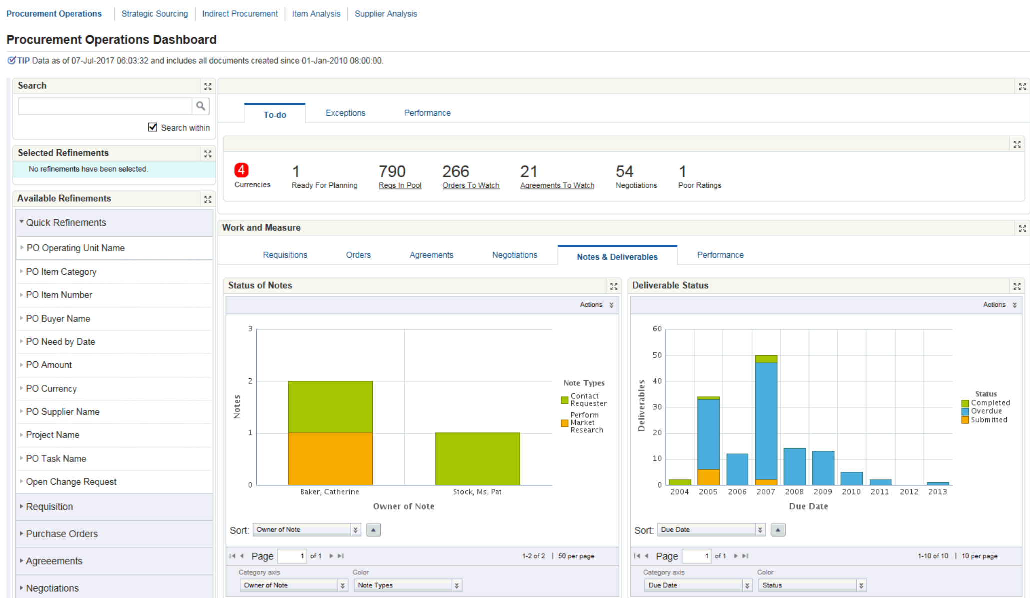
Integrated Payables Information

Procurement Command Center enables buyers to respond quickly to purchase order and agreement performance by monitoring purchasing documents beyond the walls of procurement. Buyers track information on ordered, shipped, received, and invoiced quantities and amounts available through the **Procurement Operations Dashboard**. Buyers are able to identify invoice holds, overdue payments, and procurement contract deliverables.

Procurement Operations Dashboard Details

Using the different regions in this dashboard, procurement teams and procurements managers can:

- Prioritize work, discover and resolve problems as the dashboard offers a 360 degree view of procurement activities.
- Take corrective action on exceptions before business is affected.
- Search across documents and update multiple documents with one click.
- View catalog review ratings from Oracle iProcurement.
- View supplier performance evaluation ratings from Oracle Supplier Lifecycle Management.



Header Region

This region displays the date and time stamp of the last ETL update.

Search Region

The **Search** component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Partial record search is enabled for specific attributes. Attributes for partial record search include:

- PO Item Description
- PO Description
- Requisition Item Description
- Requisition Description
- Agreement Description
- Agreement Item Description
- PO Supplier

- Agreement Supplier
- Note type
- Note Description
- PO Number
- Requisition Number
- Agreement Number
- Deliverable Name
- Negotiation Item Description

Selected Refinements

The **Selected Refinements** component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Bookmarks

The **Bookmarks** component allows you to save a given navigation and component state and return to it at a later time.

Available Refinements

The **Available Refinements** component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Metrics

Metrics are displayed in the following tabs:

- **To-Do**
- **Exceptions**
- **Performance**

To-Do

The **To-Do** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

Metric Display Title	Description
Ready for Planning	Number of Project Procurement Plan lines in the Ready for Planning status. Click to navigate to Oracle Project Procurement Command Center Plus. This metric is displayed only if Oracle Project Procurement Command Center Plus is installed and procurement plan lines exist in the application.
Reqs in Pool	Number of approved requisition lines in the buyer's pool
Negotiations	Number of negotiations that are not completed or cancelled
Orders to Watch	Number of purchase orders with open action items or in any of the following statuses: Incomplete, In-process, Pre-approved, or Pending Change Request
Agreements to Watch	Number of purchase orders with open action items or in any of the following statuses: Draft, In-process, Pre-approved, Pending change-requests, Approaching Amount Limit, Approaching End Date, Amount Limit reached, or End-date Reached
Poor Ratings	Number of poor ratings (two stars or below). Click to navigate to the Indirect Procurement dashboard and filter down to review comments.
Feedback Lines	Number of feedback items that are currently open. Click to navigate to the Indirect Procurement dashboard and filter down to view the feedback items with the Not Closed status.
Open Initiatives	Number of Sourcing Initiatives that are currently open. Click to navigate to the Strategic Sourcing Dashboard.

Exceptions

The **Exceptions** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

Metric Display Title	Description
Urgent Requisitions	Number of requisition lines in the pool that are marked Urgent. Requisition lines must be in the pool.
Overdue Shipments	Number of purchase order lines with open quantity on shipments and a need-by-date in the past
Rejected Shipments	Number of purchase order lines on which quality rejections have been reported during receiving
Overdue Deliverables	Number of open deliverables with a due date in the past
Invoices On Hold	Number of purchase order lines which are referenced by an Accounts Payable (AP) Invoice with a payment hold
Overdue Notes	Number of open notes on which a delay is marked
Change Requests	Number of purchase orders or agreements with open change requests

Performance

The **Performance** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

<table>
<tr><th>Metric Display Title</th><th>Description</th></tr>
<tr><td>Currency</td><td>Select a currency to view currency-specific information. Some of the elements on this dashboard are dependent on currency.</td></tr>
<tr><td>Suppliers</td><td>Number of different suppliers in the current view.</td></tr>
<tr><td>On-Time Delivery</td><td>On-Time Delivery

The following default color key indicates the percentage of shipments received on-time:
Green: More than 95%
Yellow: Between 85% and 95%
Red: Fewer than 85%</td></tr>
<tr><td>Quality</td><td>The percentage of shipments with no quality rejections

The following default color key indicates the percentage of shipments with no quality rejections:
Green: More than 95%
Yellow: Between 85% and 95%
Red: Fewer than 85%</td></tr>
<tr><td>Price Compliance</td><td>The ratio of the price demanded on the invoice and the agreed-upon price agreed on the agreement or order, expressed as a percentage

The following default color key indicates the price compliance percentage:
Green: More than 95%
Yellow: Between 85% and 95%
Red: Fewer than 85%</td></tr>
</table>

Metric Display Title	Description
Procurement Cycle Time	The average time taken from Requisition Approval to Purchase Order Approval. The following default color key indicates the average time taken: • Green: Fewer than 10 days • Yellow: Between 10 and 30 days • Yellow: Between 10 and 30 days
Savings Achieved	The ratio of savings negotiated and savings targeted, expressed as a percentage. The percentage of negotiated savings is calculated as: Average Offer Price - Start Price)/ Targeted Savings (Target Price - Start Price) - Weighted by Negotiation Amount) The following default color key indicates the savings achieved in percentage: • Green: More than 90% • Yellow: Between 70% and 90% • Red: Less than 70%

Work and Measure Region

The **Work and Measure** region displays the following charts and graphs:

Wherever the chart shows amount or price, the chart will render only when there is only one currency in the current view.

Tab	Chart Title	Details
Requisitions	**Requisition Status**	This stacked bar chart shows the number of requisitions in each status. The Category axis values are Need By Date (month, drill down to date – default), Approved Date (month, drill down to date), approval date, Buyer Name (drill down to month / date), Next Action Owner, and Next Action Type. The Value Axis shows the Number of Requisition Lines and Requisition Amount. Each requisition line status is represented by a different color, which shows the following (evaluated top-down, if one condition is satisfied, then that condition is considered): • If the requisition line is linked to a negotiation, then the status can be "In Negotiation". • If the requisition is in the pool, then it can be either Urgent - if the urgent flag is checked or Potentially late - if either need-by-date is in the past, or if need-by-date falls below the lead-time on the linked agreement. Note that the chart does not consider requisition lines which are in incomplete, in-process, cancelled or returned status.

Tab	Chart Title	Details
Requisitions	**Requisition Analysis**	This pie chart shows requisition amount by buyer, category, requisition number, and ship-to.
Orders	**Order Lifecycle Tracker**	This comparative bar chart shows how much has been ordered, received and invoiced, in terms of amounts. The Category axis values are PO need-by-year, drill-down to month, drill-down to date. The Value axis is shown as the Total Amount (that is the sum of PO amounts for all POs - exclude cancelled quantities / amounts) Each bar represents the following: Ordered Amount, Received Amount, and Invoiced Amount.

Tab	Chart Title	Details

Orders	**Order Status**	This bar chart provides a summary of order status.
		
		The Value axis values are Orders (number of orders) and PO Amount (excluding cancelled amounts).
		
		The Category axis values are Promised Date, Creation Date, Group Status, Buyer Name, Approved Date, Next Action Type, and Sub Status.
		
		Each purchase order sub status is represented by a different color. View an enhanced PO Status / Sub-status structure that describes the current status of the PO.
		
		The chart uses the following structure:
		
		• Authoring
		    • Incomplete
		    • Requires Re-Approval
		    • Delay Anticipated (if either of the above status, and the need-by-date is earlier than the lead-time on the linked agreement)
		• Awaiting Approval
		    Pending Approval
		• Awaiting Fulfillment
		    • Delay Anticipated: Approved PO on

Tab	Chart Title	Details
		which need-by-date - PO Approved date is less than the lead-time on the linked agreement • Pending Supplier Acknowledgments • Pending Change Orders • Pending Work Confirmations • Has overdue shipments (has at least one shipments that is overdue) • Any of the above statuses can be appended with the earliest open action, if one exists on the order header • Closed • Closed for Receiving • Closed for Invoicing • Finally Closed

Tab	Chart Title	Details
Agreements	**Agreement Utilization**	This balloon chart shows how well the agreement is being utilized over the lifecycle. The X-axis value is Lifecycle Time, which is expressed as a percentage of time consumed or the overall duration of the agreement. Time Consumed = sysdate – agreement start date Overall duration = Agreement end-date – Agreement start date The Y-axis value is the Utilization Gap%, calculated as planned utilization – actual utilization. Planned utilization = (sysdate – agreement start date)/(agreement end date – agreement start date) Actual utilization = Amount released / agreed amount The bubble size represents the Amount Agreed – one bubble per agreement

Tab	Chart Title	Details

Agreements	**Agreement Status**	This bar chart provides a summary of agreement status.
		
		The Category axis values are Agreement Approved Month / Year, Last changed month / year, Buyer, Status (default).
		
		The Value axis shows the Agreements (number of orders) and Agreement Amount. Each agreement sub-status is represented by a different color. View an enhanced agreement Status or Sub status structure that describes the current status of the agreement.
		
		The chart uses the following structure:
		
		• Authoring
		    • Incomplete
		    • Requires Re-Approval
		• Awaiting
		    Approval Pending Approval
		• Awaiting Fulfillment
		    • Pending Supplier Acknowledgments
		    • Pending Change Orders
		    • Approaching End-Date

Tab	Chart Title	Details
		- Approaching Amount Limit - Any of the above statuses can be appended with the earliest open action, if one exists on the order header • Closed - Closed for Receiving - Closed for Invoicing - Finally Closed

Tab	Chart Title	Details
Negotiations	**Savings Analysis**	This bubble chart helps compare projected savings on each negotiation with the actual savings achieved on that negotiation. The X-axis values is Projected Savings shown as: • Quantity-based lines: (Current Price – target price)*quantity and then sum it up to negotiation level • Amount based lines: Current price – target price The Y-axis value is Negotiated Savings shown as: • Quantity based lines: (Current Price - avg (Winning-bid-price)) *quantity and then summed up to the negotiation level. • Amount based lines: Current price – Winning bid amount The bubble size represents the Negotiation Amount, which is calculated as Current Price * Quantity. The chart displays one balloon per negotiation.

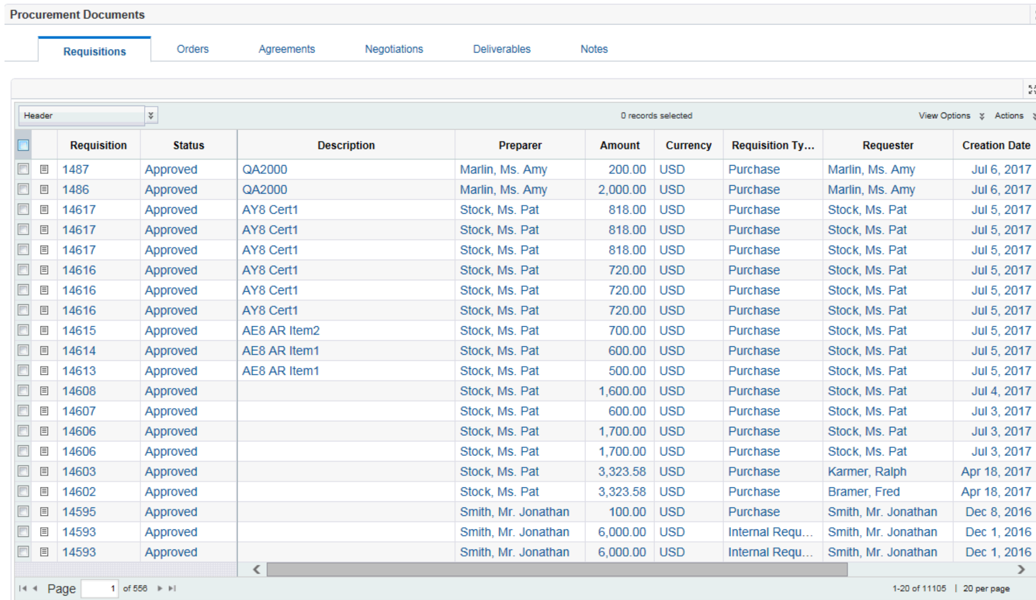
Tab	Chart Title	Details
Negotiations	**Negotiations Status**	This bar chart shows a summary of negotiation statuses. The Category axis values are Negotiation Published Year / or Month (default), Negotiation Buyer, and Negotiation Status. The Value axis shows the Negotiations (count of negotiations) and Negotiation Amount Each negotiation status is represented by a different color.
Notes & Deliverables	**Status of Notes**	This stacked bar chart shows the status of a note and the action to be taken. The Category axis values are Owner of Note (default - drill down to note entities), Note Entity Type (drill down to assignee), and Note Target Date. The Value axis shows the number of open notes. Each Note Type and Note Status is represented by a different color.

Tab	Chart Title	Details
Notes & Deliverables	**Deliverable Status**	This stacked bar chart provides details on the status of the deliverables. The Category axis values are Delivery due month (default) – drill down to date, Owner, Document Type, and Responsible Party. The Value axis value shows the number of deliverables (deliverable count). This stacked bar chart provides details on the status of the deliverables. The Category axis values are Delivery due month (default) – drill down to date, Owner, Document Type, and Responsible Party. The Value axis value shows the number of deliverables (deliverable count).

Tab	Chart Title	Details
Performance	**Supplier Performance**	This bubble chart is similar to the bubble chart in the Supplier Analysis page. The X-axis values are Delivery Rating (default), Quality Rating, and Price Compliance. The application uses the following calculation: • Delivery Rating: No. of shipments received on time / total number of shipments received, expressed as a percentage. • Quality rating: sum (Quantity rejected) / sum (quantity ordered). This does not work for amount based lines. • Price compliance rating: The difference between the invoice-price and PO / Agreement price, expressed as a percentage. The Y-axis values are Delivery Rating (default), Quality Rating, and Price Compliance. The bubble size represents the purchase order amount of that supplier. The chart does not display data when there are multiple functional currencies.

Tab	Chart Title	Details
Performance	**Procurement Cycle-Time**	The bubble size represents the purchase order amount of that supplier. The chart does not display data when there are multiple functional currencies. The chart displays the Performance Evaluation Score, which is calculated by averaging out the score for all purchase orders and agreements in the visible data set. The X-axis value is Time. The Y-axis values are Category, Buyer, and Ship-to. Different colors indicate the following cycle times: • Time in Pool: PO / Negotiation Creation Date – Requisition Approved Date • Time in Sourcing: Outcome Document Creation Date – Negotiation Creation Date • Time in Order Drafting: PO Approved Date – PO Creation Date

Procurement Documents Region



Requisition	Status	Description	Preparer	Amount	Currency	Requisition Ty...	Requester	Creation Date
1487	Approved	QA2000	Marlin, Ms. Amy	200.00	USD	Purchase	Marlin, Ms. Amy	Jul 6, 2017
1486	Approved	QA2000	Marlin, Ms. Amy	2,000.00	USD	Purchase	Marlin, Ms. Amy	Jul 6, 2017
14617	Approved	AY8 Cert1	Stock, Ms. Pat	818.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14617	Approved	AY8 Cert1	Stock, Ms. Pat	818.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14617	Approved	AY8 Cert1	Stock, Ms. Pat	818.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14616	Approved	AY8 Cert1	Stock, Ms. Pat	720.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14616	Approved	AY8 Cert1	Stock, Ms. Pat	720.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14616	Approved	AY8 Cert1	Stock, Ms. Pat	720.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14615	Approved	AE8 AR Item2	Stock, Ms. Pat	700.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14614	Approved	AE8 AR Item1	Stock, Ms. Pat	600.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14613	Approved	AE8 AR Item1	Stock, Ms. Pat	500.00	USD	Purchase	Stock, Ms. Pat	Jul 5, 2017
14608	Approved		Stock, Ms. Pat	1,600.00	USD	Purchase	Stock, Ms. Pat	Jul 4, 2017
14607	Approved		Stock, Ms. Pat	600.00	USD	Purchase	Stock, Ms. Pat	Jul 3, 2017
14606	Approved		Stock, Ms. Pat	1,700.00	USD	Purchase	Stock, Ms. Pat	Jul 3, 2017
14606	Approved		Stock, Ms. Pat	1,700.00	USD	Purchase	Stock, Ms. Pat	Jul 3, 2017
14603	Approved		Stock, Ms. Pat	3,323.58	USD	Purchase	Karmer, Ralph	Apr 18, 2017
14602	Approved		Stock, Ms. Pat	3,323.58	USD	Purchase	Bramer, Fred	Apr 18, 2017
14595	Approved		Smith, Mr. Jonathan	100.00	USD	Purchase	Smith, Mr. Jonathan	Dec 8, 2016
14593	Approved		Smith, Mr. Jonathan	6,000.00	USD	Internal Requ...	Smith, Mr. Jonathan	Dec 1, 2016
14593	Approved		Smith, Mr. Jonathan	6,000.00	USD	Internal Requ...	Smith, Mr. Jonathan	Dec 1, 2016

The **Procurement Documents** region displays a summary of the item within the following tabs:

Requisitions tab

The **Requisitions** tab displays the following options:

- The Header option displays relevant details such as the requisition number, the status, the description, the requester, the requisition type, and the amount.

- The Lines option displays the requisition line number, type, the item number, the revision information, and the unit price.

- The Additional Details option displays the tax information, the requisition task name, the deliver to location, and the destination type.

- The Action option enables you to perform certain actions for requisitions. For more information, see: Performing Actions for Requisitions, page 3-33.

You can perform the following actions using the **Actions** list on the right side of the tab:

- Print

- Export

- Compare

- Add to Document Builder
- Reassign Requisitions

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2
- Performing Actions for Requisitions, page 3-33

Orders tab

The **Orders** tab displays the following options:

- The Header option displays details such as the order number, the status, the supplier, the open change request count, the work confirmation count, and the payment terms.
- The Lines option displays details such as the order line type, the item number, the category, the unit price, the need by date, the promised date, and the line status.
- The Performance Tracker option displays details such as the delivery rating, the quality rating, and the price compliance rating. You can view the subjective performance score, which is an average performance score received by a supplier on all evaluations linked to an order.
- The Line Quantity Tracker option displays details such as the line number and the line quantity(ordered, shipped, received, rejected, invoiced, and cancelled) quantity. You can also view if the shipment is overdue.
- The Line Amount Tracker option displays details such as the line number, the unit price, and the amount (ordered, shipped, received, rejected, and invoiced).
- The Distribution option displays details such as the destination type, the destination subinventory, the charge account, the project name, the task name, the expenditure type and item date, the distribution requester, and the ship to location.
- The Actions option. For more information, see: Performing Actions for Orders, page 3-34.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

- Place On Hold
- Remove Hold
- Freeze
- Unfreeze
- Acknowledge
- Cancel Order
- Cancel Shipment
- Bulk Update Headers
- Bulk Update Lines
- View Bulk Update Status

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2
- Performing Actions for Orders, page 3-34
- Using Oracle Web ADI in Oracle Procurement Command Center Plus, page 3-26

Agreements tab

The **Agreements** tab displays the following options:

- The Header option displays details such as the agreement number, the status, the style, the buyer, the supplier, the revision, and the currency, payment term. You can view if a change request exists for an agreement.
- The Lines option displays details such as the agreement line number, the line type, the lead time, the supplier item number, the price break count, and the next action date.
- The Actions option. For more information, see: Performing Actions for Agreements, page 3-36.
- The Header Amount Tracker option displays details such as the agreement line number agreement amount (released, shipped, received, invoiced) and the currency.

- The Performance Tracker option displays details such as the delivery rating, quality rating, and price compliance rating. The price compliance rating is the summary of all orders referencing the agreement.

- The Line Amount Tracker option displays details such as the agreement line number, the currency, and the amount (released, shipped, received, invoiced).

- The Line Quantity Tracker option displays details such as the agreement line number, the unit price, and the quantity (released, shipped, received, rejected, and invoiced).

- The Line Performance Tracker option displays details such as the line number, the delivery rating, and the quality rating.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare
- Place On Hold
- Remove Hold
- Cancel Agreement
- Freeze
- Unfreeze
- Acknowledge
- Bulk Update Headers
- View Bulk Update Status

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2
- Performing Actions for Agreements, page 3-36
- Using Oracle Web ADI in Oracle Procurement Command Center Plus, page 3-26

Negotiations tab

The **Negotiations** tab displays the following options:

- The Header option displays details such as the negotiation number, the title, the status, the type, the style, the invited supplier count, and the active offers count offers count.

- The Lines option displays details such as the item number, the item revision, the need by date, the negotiation currency, the negotiation quantity, and the number of responses.

- The Actions option. For more information, see: Performing Actions for Negotiations, page 3-37.

- The Responses option displays details such as the response received date, the supplier, the supplier site, and the response value.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Deliverables tab

You can perform the following actions using the **Actions** list on the right side of the tab:

- Print

- Export

- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Notes tab

The **Notes** tab displays information such as the note type, the status, the entity type (the type of purchasing document), and the assignee for each note. You can click the **View/Update** link for the corresponding note to perform further action.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2
- Using Notes in Oracle Procurement Command Center Plus, page 9-1

Using Oracle Web ADI in Oracle Procurement Command Center Plus

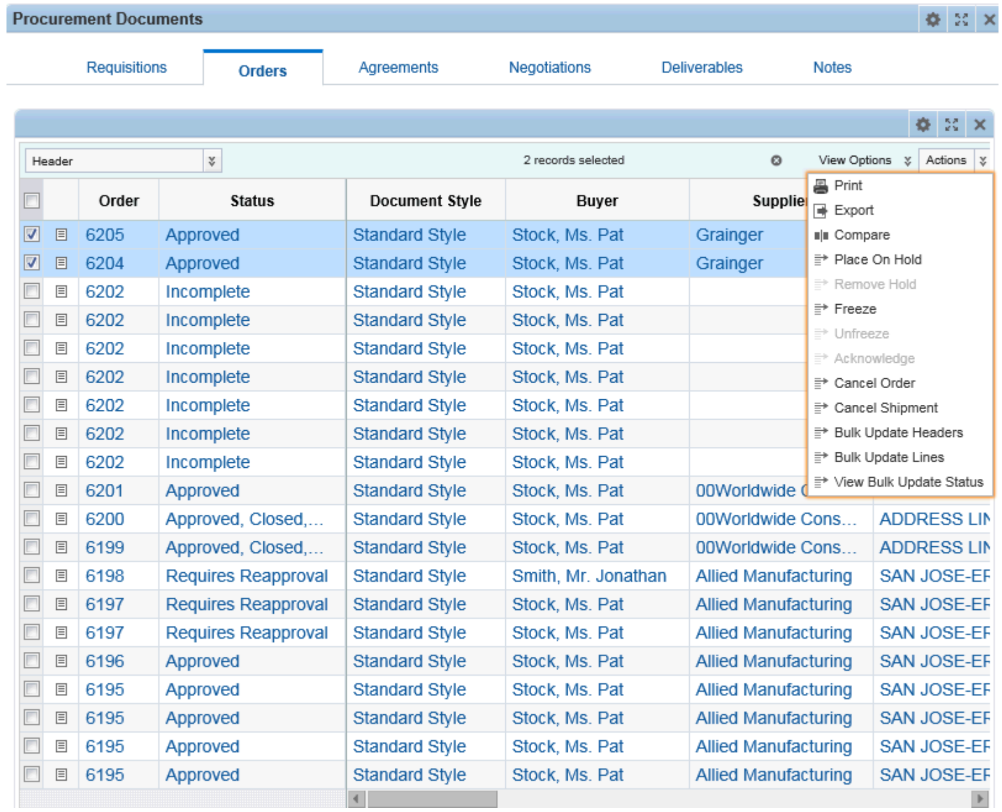
The Oracle Web Applications Desktop Integrator (Web ADI) integration with Microsoft Excel in Oracle Procurement Command Center Plus enables buyers and procurement managers to update data for multiple purchasing documents at a time. Buyers and procurement managers can select headers, lines, or shipments from multiple purchase orders, make changes in bulk using a spreadsheet interface, and upload the modified data to Oracle Procurement Command Center Plus. Oracle Purchasing automatically submits approval workflows and notifies suppliers of approved changes simultaneously for all modified purchasing documents.

For information about how Oracle Web ADI works, refer to *Oracle Web Applications Desktop Integrator Implementation and Administration Guide*.

Features

To enable you to add or modify existing purchase order data using Web ADI, Oracle Procurement Command Center Plus delivers the following components in the Procurement Operations dashboard:

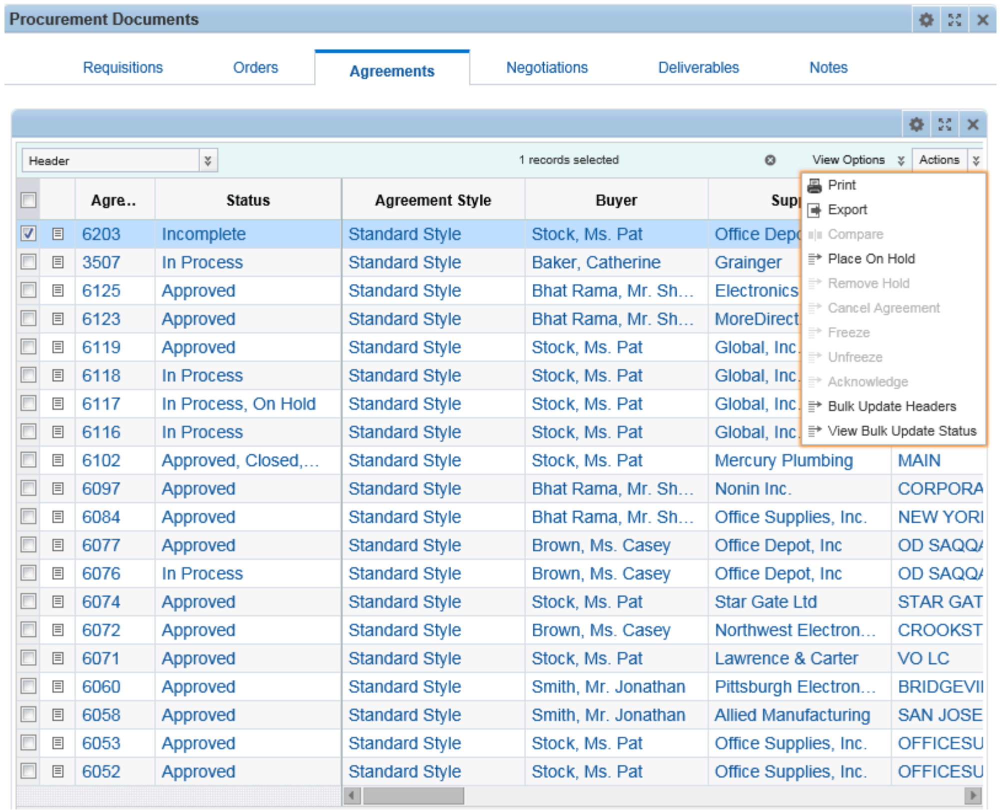
- Orders



The following actions are available on the Orders tab:

- Bulk Update Headers
- Bulk Update Lines
- View Bulk Update Status

- Agreements



The following actions are available on the Agreements tab:

- Bulk Update Headers
- View Bulk Update Status

View Bulk Update Status

After performing bulk update actions for orders and agreements, you can view the status of your updates using the View Bulk Update Status action. This action is available in the Actions list on the Orders tab and on the Agreements tab, Orders tab, Actions list.

When you click the View Bulk Update Status action, the View Bulk Update Requests page appears. Use this page to view the status of the bulk update.

For more information, see: Performing Bulk Update of Purchase Order Data Using Oracle Web ADI, page 3-28

Performing Bulk Update of Purchasing Data Using Oracle Web ADI

This topic explains how to update data of multiple purchase orders at a time using

Oracle Procurement Command Center Plus.

Prerequisite: Before you modify orders or agreements using Oracle Web Applications Desktop Integrator (Web ADI), you must complete the following setup steps based on the versions of Microsoft Excel and Microsoft Internet Explorer versions that you use.

1. Open Microsoft Excel.
   - Select Options and then Trust Center.
   - Select Trust Settings and then Macro Settings.
   - Select Developer Macro Setting.
   - Select Developer Macro Setting.
2. Select the macro security settings to enable the macros used by Oracle Web ADI.
3. Select the Microsoft Internet Explorer settings so that you can download the spreadsheets created by Oracle Web ADI to your desktop.

For more information about how to complete the prerequisite steps, refer to *Oracle Web Applications Desktop Integrator Implementation and Administration Guide*.

Performing Bulk Update of Purchase Order Data

> **Important:** When you select multiple orders or agreements for update, they must belong to the same operating unit. If you select orders or agreements that belong to different operating units, then the application displays an error.

As a buyer:

1. Navigate to one of the following tabs in the Procurement Operations Dashboard:
   - Orders tab
   - Agreements tab
2. Select multiple orders or agreements and then select any of the following actions in the Actions list:
   - Orders tab
     - Bulk Update Headers
     - Bulk Update Lines

- Agreements tab
    - Bulk Update Headers

The application invokes the Web ADI function.

3. Select the integrator viewer. For example, select Excel 2007.
4. Ensure that the Reporting check box is not selected.
5. Download the Microsoft Excel spreadsheet.
6. Enter or modify records in the spreadsheet. The following tables provide information about the fields that you can modify in the spreadsheet for order and agreement headers:

Order Header Fields

Column	Description
Document Style	Read-only
Operating Unit	Read-only
Order Number	Read-only
Supplier	Read-only
Supplier Site	Read-only
Buyer	Editable list
Total	Read-only
Description	Editable, free text
Bill to Location	Editable list
Payment Terms	Editable list
Default Ship To	Editable list
Ship Vid	Editable list

Column	Description
Freight Terms	Editable list
Note to Supplier	Editable, free text
Note to Receiver	Editable, free text
Descriptive Flexfields (DFFs)	If your system administrator has configured DFFs, then the DFFs are available.

Agreement Header Fields

Column	Description
Document Style	Read-only
Operating Unit	Read-only
Order Number	Read-only
Supplier	Read-only
Supplier Site	Read-only
Buyer	Editable list
Amount Agreed	Editable number field. The application validates this information.
Effective From	Editable date. The application validates this information.
Effective To	Editable date. The application validates this information.
Description	Editable, free text
Bill to Location	Editable list

Column	Description
Payment Terms	Editable list
Amount Limit	Editable number. The application validates this information.
Default Ship To	Editable list
Ship Vid	Editable list
Freight Terms	Editable list
Note to Supplier	Editable, free text
Note to Receiver	Editable, free text
Descriptive Flexfields (DFFs)	If your system administrator has configured DFFs, then the DFFs are available.

7. Select Upload in the Oracle menu to upload records to the database.

   If there are errors during the upload, then the error details can be seen in the Microsoft Excel spreadsheet. Oracle Web Applications Desktop Integrator returns messages to the spreadsheet identifying all rows that contain invalid values. By default, if the data in any row is invalid, then Oracle Web Applications Desktop Integrator does not upload any of the data in the spreadsheet. You must correct all errors to successfully upload the spreadsheet. However, if the integrator provides the Commit Rows upload parameter and you chose the Each Row option, then Oracle Web Applications Desktop Integrator does upload the valid rows. You can correct the errors in any invalid rows and retry the upload for those rows. During the upload process, the Purchase Orders Spreadsheet Import program automatically runs in the background to validate the orders or agreements data that is being imported. The import validation errors can be viewed using the View Bulk Update Status action.

8. Use the View Bulk Update Status action to track the status of the upload and to view any import errors.

Overview of Procurement Manager Actions

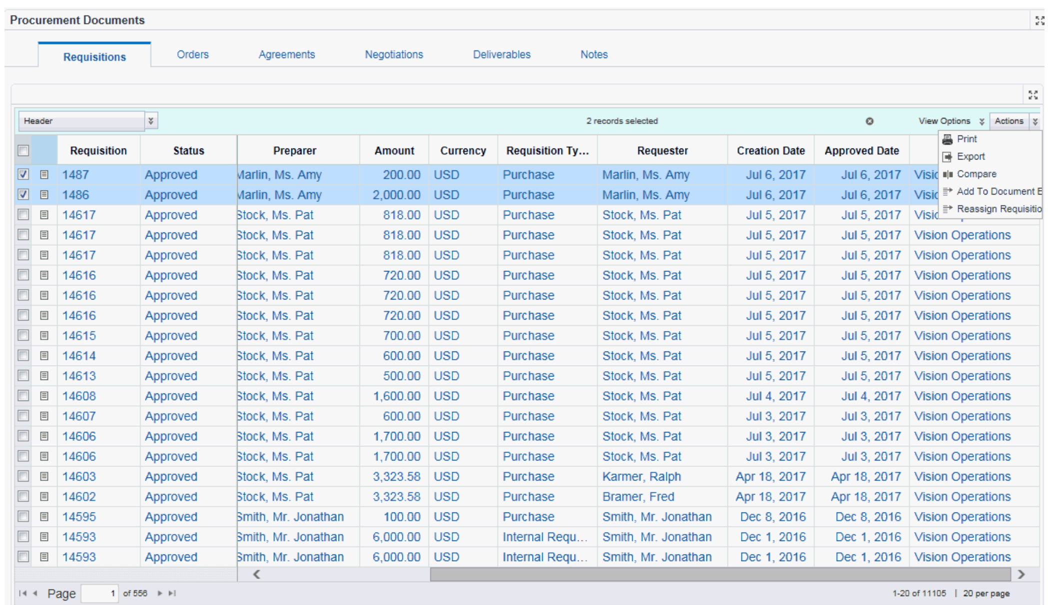
Procurement teams and procurement managers can perform actions from the tabs in the Procurement Documents region:

For more information, see:

- Performing Actions for Requisitions, page 3-33
- Performing Actions for Orders, page 3-34
- Performing Actions for Agreements, page 3-36
- Performing Actions for Negotiations, page 3-37
- Performing Actions for Deliverables, page 3-38
- Performing Actions for Notes, page 3-39
- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Requisitions

From the Procurement Operations dashboard, Procurement Documents region, the procurement team and procurement managers can perform actions for requisitions.



The following actions are available for requisitions:

- View Requisition: This is a single-row action, which takes you to the Requisition Details page.
- Analyze Item: This is a single row action, which takes you to the Item Analysis page

from where the item on the requisition line can be replaced with another.

- Analyze Supplier: This is a single row action, which takes you to the Supplier Analysis page from where suppliers or agreements can be selected and the requisition can be completed.

- Manage Notes: Click View/Update for a requisition to navigate to the Notes page for the requisition line. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

- Add to Document Builder: This is a multiple row action that adds selected requisitions to the document builder. When you perform this action, the application displays a confirmation message.

- Reassign Requisitions: This is a multiple row action that reassigns a set of requisition lines from one user to another. When you select this action, the Reassign Requisition Lines page appears.

For more information, see:

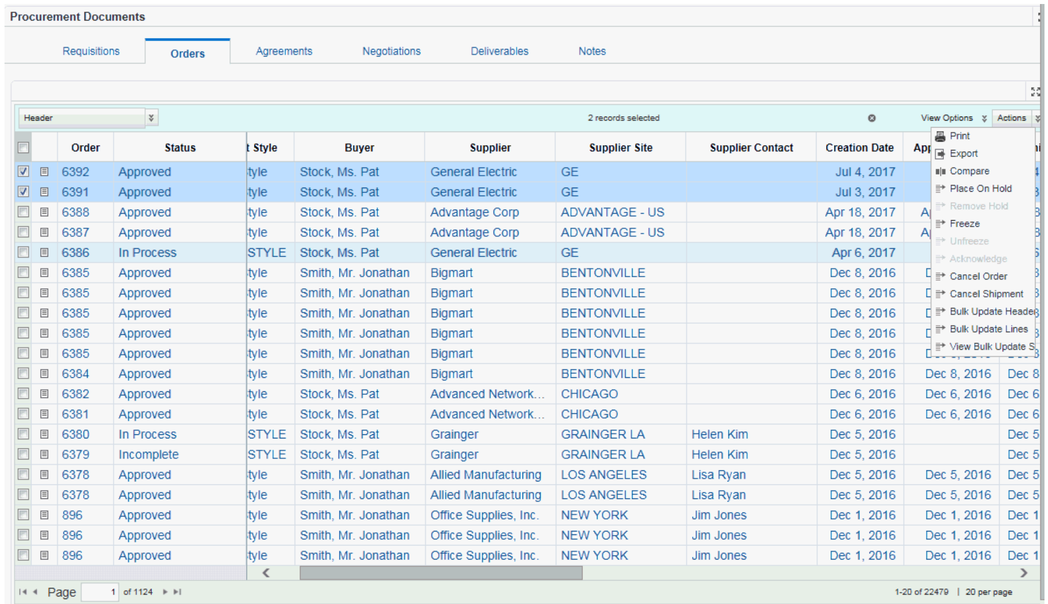
- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

- Overview of Document Builder in Oracle Procurement Command Center Plus, page 8-1

Performing Actions for Orders

From the Procurement Operations dashboard, Procurement Documents region, the procurement team and procurement managers can perform actions for orders.



The following actions are available for requisitions:

- View Order: This is a single row action, which takes you to the Order page in Buyer Work Center.

- Manage Order Notes: This is a single-row action that takes you to the header-level Notes page. From that page you can perform the required action for the purchase order header. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

- Manage Line Notes: This is a single-row action that takes you to the line-level Notes page. From that page you can perform the required action for the purchase order line. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

- Place On Hold: This is a multiple row action that places selected orders or shipments on hold.

- Remove Hold: This is a multiple row action that removes hold on selected orders or shipments.

- Freeze: This is a multiple row action that places a freeze on the selected shipments or orders. When you select this action, the Freeze page appears.

- Unfreeze: This is a multiple row action that removes freeze on orders or shipments.

- Acknowledge: This is a multiple row action that enables you to enter surrogate acknowledgement on behalf of the supplier.

- Cancel Order: This is a multiple row action that cancels multiple orders of the selected shipments. When you select this action, the Cancel page for order or orders appears.

- Cancel Shipment: This is a multiple row action that cancels selected shipments. When you select this action, the Cancel page for order or orders appears.

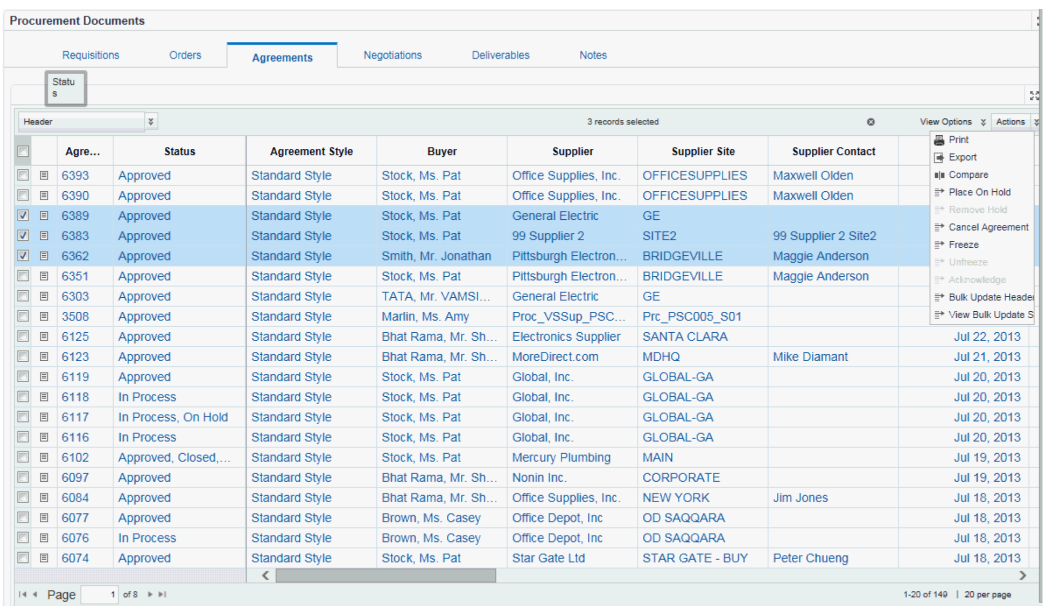
For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Agreements

From the Procurement Operations dashboard, Procurement Documents region, the procurement team and procurement managers can perform actions for agreements.



The following actions are available for requisitions:

- View Agreement: This is a single row action, which takes you to the Agreement page in Buyer Work Center.

- Manage Order Notes: This is a single-row action that takes you to the header-level

Notes page. From that page you can perform the required action for the purchase order header. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

- Manage Line Notes: This is a single-row action that takes you to the line-level Notes page. From that page you can perform the required action for the purchase order line. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

You can perform the following actions using the Actions list on the right side of the tab:

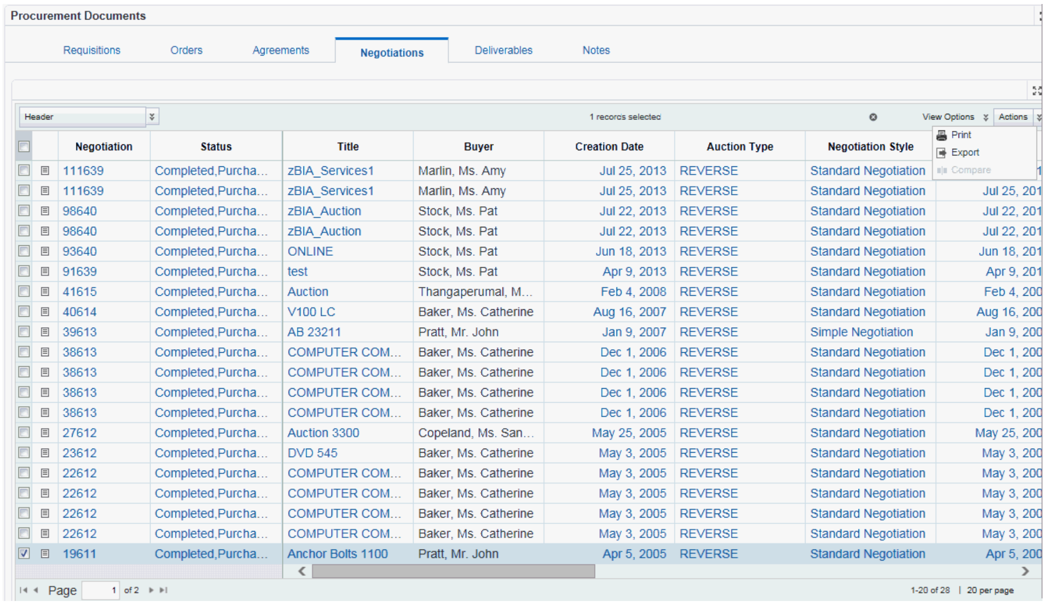
- Print
- Export
- Compare
- Place On Hold: This is a multiple row action that places selected agreements on hold.
- Remove Hold: This is a multiple row action that removes hold on selected agreements.
- Cancel Agreement: This is a multiple row action that cancels selected agreements. When you select this action, the Cancel page for agreement or agreements appears.
- Freeze: This is a multiple row action that places a freeze on the selected agreements. When you select this action, the Freeze page appears.
- Unfreeze: This is a multiple row action that removes freeze on orders or shipments.
- Acknowledge: This is a multiple row action that enables you to enter surrogate acknowledgement on behalf of the supplier.

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Negotiations

From the Procurement Operations dashboard, Procurement Documents region, the procurement team and procurement managers can perform actions for negotiations.



The following actions are available for requisitions:

- View Negotiation: This is a single-row action, which takes you to the Negotiation page in Buyer Work Center.

You can perform the following actions using the Actions list on the right side of the tab:

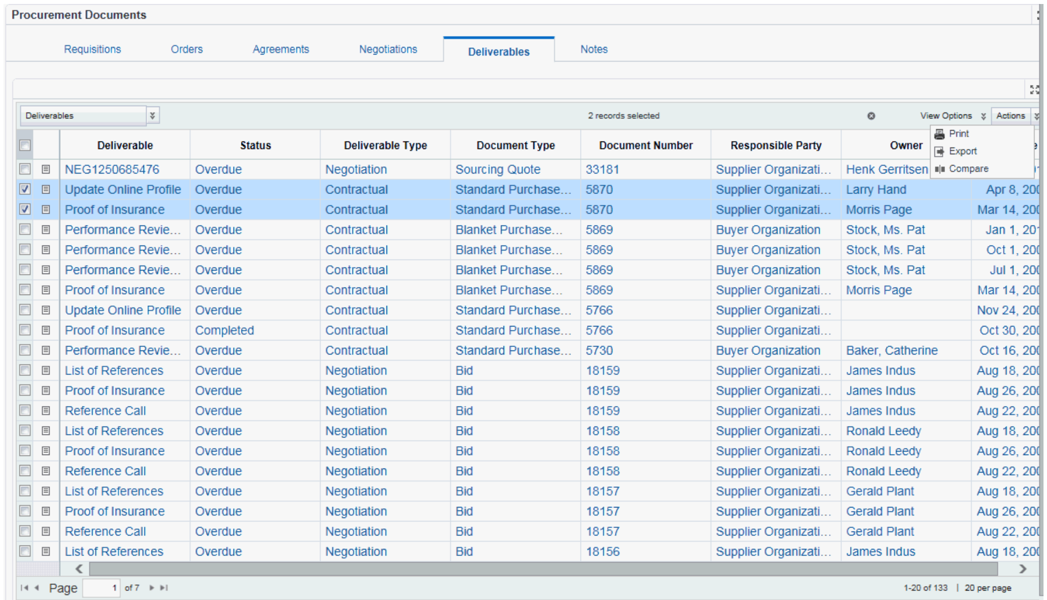
- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Deliverables

From the Procurement Operations dashboard, Procurement Documents region, the procurement team and procurement managers can perform actions for deliverables.



The following actions are available for deliverables:

View: This is a single-row action, which takes you to the View or Update deliverable page in Buyer Work Center.

You can perform the following actions using the Actions list on the right side of the tab:

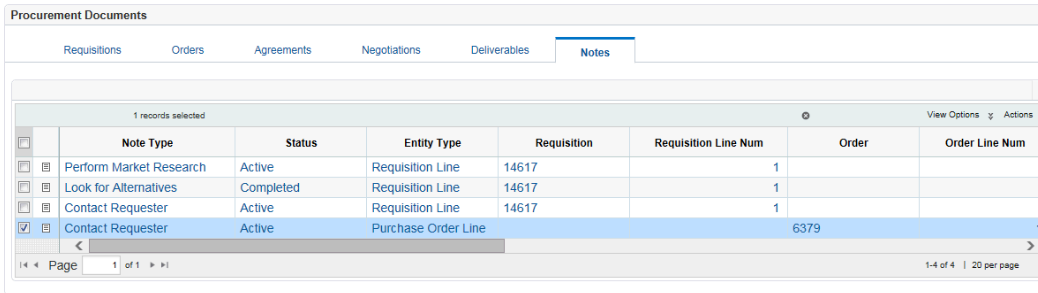
- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Notes

From the Procurement Operations dashboard, Procurement Documents region, the procurement team and procurement managers can perform actions for notes.



The following actions are available for notes:

View/Update: This single-row action takes you to the Notes page for the purchasing document. From that page you can view or update the document. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

4

Using the Indirect Procurement Dashboard

This chapter discusses how to use the Indirect Procurement dashboard and performing actions from this dashboard.

This chapter covers the following topics:

- Analyzing the Buying Behavior of Requesters
- Performing Actions for Reviews
- Performing Actions for Feedback
- Performing Actions for Catalog Items
- Performing Actions for iExpenses
- Performing Actions for PO Spend

Analyzing the Buying Behavior of Requesters

The **Indirect Procurement** dashboard enables buyers to analyze buying behaviors of requesters within the organization from both requisitions and expense reports. Reviewing requester feedback helps buyers update purchasing documents and refine the available catalog to better meet business needs.

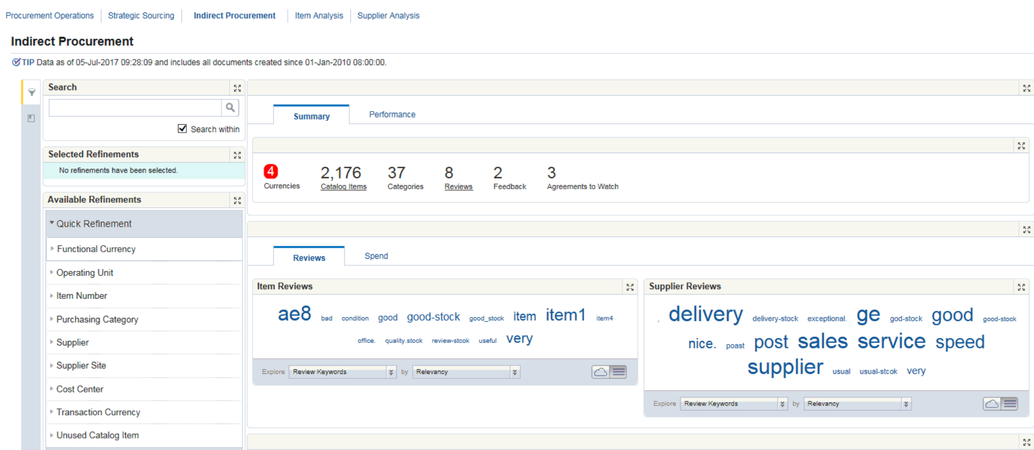
Buyers can also:

- Analyze reviews and ratings provided by requester on the catalog items available in iProcurement, and initiate necessary corrective actions.
- Act on specific feedback coming in from requesters.
- Gain insights into catalog usage and refine catalog content.
- Use tag clouds to gain insight into catalog reviews.
- View catalog review ratings from Oracle iProcurement.

- View supplier performance evaluation ratings from Oracle Supplier Lifecycle Management.

- Review off-contract spend behavior (including spend from Oracle iExpenses) and identify cost-saving opportunities.

Note: The content that is visible in this page for the logged in user is secured by Multi-Org Access Control (MOAC). If the logged in user has access to only one OU, then the user can see information related to that operating unit that the user has access to. If the logged in user has access to multiple operating units, then the user can view information to all the operating units that the user has access to.



Header Region

The **Header** region displays the date and time stamp of the last ETL update.

Search Region

The **Search** component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Partial record search is enabled for specific attributes. Attributes for partial record search include:

- Review Title

- Review Description

- Feedback Title

- Feedback Description

- Catalog Item Description
- Catalog Item Number
- Catalog Agreement Number
- Catalog Supplier Name
- Invoice Justification
- PO Line Description
- PO Number

Selected Refinements

The **Selected Refinements** component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Bookmarks

The **Bookmarks** component allows you to save a given navigation and component state and return to it at a later time.

Available Refinements

The **Available Refinements** component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Metrics

Metrics are displayed in the following tabs:

- **Summary**
- **Performance**

Summary

The **Summary** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

Metric Display Title	Description
Currency	Select a currency to view currency-specific information. Some of the elements on this dashboard are dependent on currency.
Catalog Items	Total number of distinct active items in the current view of the catalog
Categories	Total number of unique categories in the current view of the catalog
Reviews	Number of reviews in the Open status
Feedback	Number of feedback items in the Open status
Overdue Notes	Number of notes that are marked overdue. Click this link to navigate to the Procurement Operations Dashboard.
Agreements to Watch	Number of blanket or contract purchase agreements with open action items in any of the following statuses: Draft, In-process, Pre-approved, Pending change-requests, Approaching Amount Limit, Approaching End Date, Amount Limit Reached, or End-date Reached. Click this link to navigate to the Procurement Operations Dashboard.

Performance

The **Performance** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

Metric Display Title	Description
Item Rating	Average review rating for items in the current view The following default color key indicates the item rating: • Green: Above 4 • Yellow: Between 3 and 4 • Red: Below 4
Supplier Rating	Average review rating for suppliers in the current view The following default color key indicates the supplier rating: • Green: Above 4 • Yellow: Between 3 and 4 • Red: Below 4
Unused Items	Total number of catalog items not ordered in the last 6 months, in the current view
Off-Contract	Total Purchase Order spend not linked to an agreement, expressed as a percentage of total procurement spend The following default color key indicates the percentage of total procurement spend: • Green: Less than 30% • Yellow: Between 30% and 50% • Red: More than 50%

Metric Display Title	Description
iExpense Spend Ratio	Ratio of iExpense spend to the total procurement spend in the current view, expressed as a percentage. The following default color key indicates the iExpense spend ratio: • Green: Less than 10% • Yellow: Between 10% and 30% • Yellow: Between 10% and 30%

Tag Clouds

The following tag clouds are available in the Indirect Procurement dashboard.

Reviews

The **Reviews** tab contains the following tag clouds:

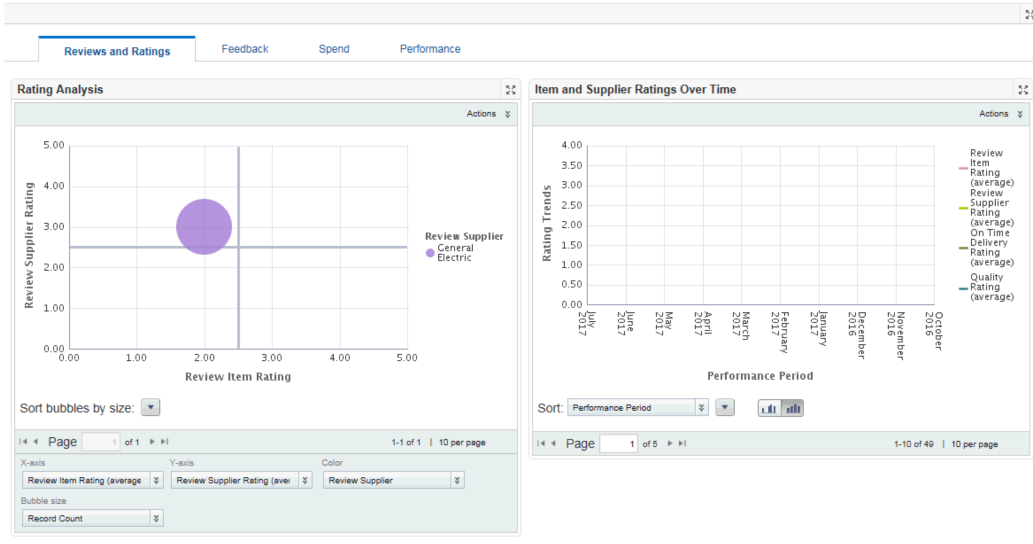
- **Items Reviews**: This tag cloud displays the top ten tags for item reviews. The explore options are Review Keyword, Review Title, and Review Comments.
- **Supplier Reviews**: This tag cloud displays the top ten tags for supplier reviews. The explore options are Review Keyword, Review Title, Review Comments, and Review Supplier.

Spend

The **Spend** tab contains the following tag clouds:

- **iExpense Spend**: This tag cloud displays the top ten tags for either the invoice description or the justification with the largest iExpense spend. The tag cloud renders only when the data set has one functional currency.
- **Off-Contract Spend**: This tag cloud displays the top ten tags for the item description of PO Lines not linked to an agreement, with the largest PO line amount. The tag cloud renders only when the data set has one functional currency. The words in the item description are split, and then filtered through a standard blacklist to arrive at the final set.

Charts Region



The **Charts** region displays the following charts and graphs:

Wherever the chart shows amount or price, the chart will render only when there is only one currency in the current view.

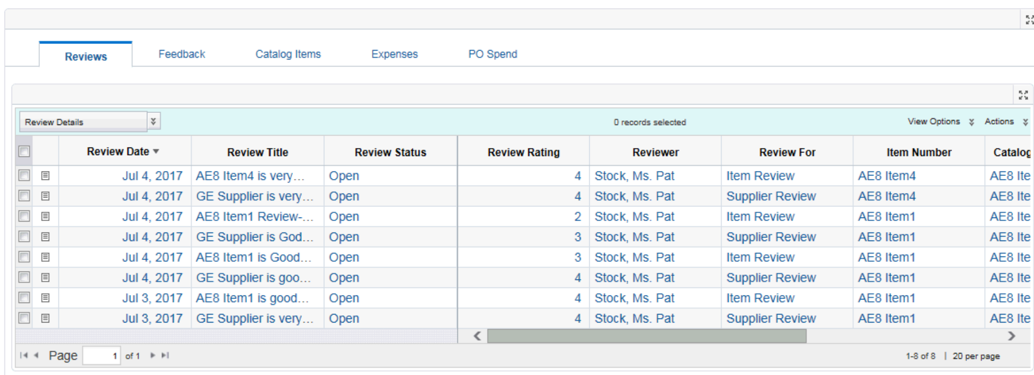
Tab	Chart Title	Details
Reviews and Ratings	**Rating Analysis**	This bubble chart shows item and supplier ratings coming from the reviews data set. The X-axis values are Review Item Rating (default), Price Compliance Rating, Quality Rating, and Delivery Rating. The Y-axis values are Review Item Rating (default), Price Compliance Rating, Quality Rating, and Delivery Rating. From a bubble, you can drill-down to Supplier, Item Number, Reviewer, and Supplier The Bubble size shows the Record Count or the number of reviews. This chart picks only those items, categories, suppliers that have at least one item rating and one supplier rating.
Reviews and Ratings	**Item and Supplier Ratings Over Time**	This is line chart shows the item and supplier ratings over time. The X-axis value is the Timeline (review date). The Y-axis value is the Rating earned on that date. Lines: Two lines, one showing average item rating and another line showing average supplier rating The Default sort is Time.

Tab	Chart Title	Details
Feedback	**Open Feedback**	This stacked bar chart shows open feedback items by type (status of feedback should be open). The X-axis value is Time, which is calculated as (Feedback date) - grouped by date, month, year. The Y-axis value is the Feedback item Each feedback type is represented by a different color. The Default sort is Time.
Spend	**Off-contract spend & iExpense spend**	This is a stacked bar chart. The X-axis value is Top Categories, calculated as combination of purchasing category + iExpense invoice description. The Y-axis value is Spend amount (off-contract spend or iExpense spend). The Color axis value shows the Spend type (Off-contract / iExpense). The Default sort is Total spend descending.

Tab	Chart Title	Details
Spend	**iExpense Percentage vs Off-Contract Percentage**	This bubble chart shows off-contract spend percentage versus iExpense spend percentage for each cost center. This chart will render only if one agreement currency is picked. The X-axis value is the Off-contract Spend% calculated as PO line amount without agreement / Total PO Line amount%. The Y-axis value is the iExpense Spend% calculated as Total iExpense spend / Total PO Line Amount%. The bubble represents the Cost Center. The bubble size represents the Total PO Line Amount. If there is no off-contract spend or no iExpense spend, then the value is taken as zero and the bubble renders on the axis. If the total spend is zero, then the bubble does not appear.
Performance	**Aging Catalog Items**	This bar chart shows number of catalog items that have not been used for a long time. The X-axis value is the Time grouped by years / months (time last purchased). The Y-axis value is the number of catalog items. The Default sort is Time.

Tab	Chart Title	Details
Performance	**Open Notes**	This stacked bar chart shows the number of open notes. The X-axis values are Owner of Note (default - drill down to note entities), Note Target Date, and Note Entity Type (drill down to assignee). The Y-axis value is the number of open notes. Each note type and each note status is represented by a different color.

Results Region



The **Results** region displays a summary of the item within the following tabs:

Reviews tab

The **Reviews** tab displays the following options:

- The Review Details option displays details such as the review date and title, the review status, the item number, the item description, the supplier, the rating, and comments.
- The Additional Information option displays such as the supplier part number, the supplier category, the purchasing category, the agreement effective end date, the response count, the response summary and whether the review is useful or not.
- The Actions option. For more information, see: Performing Actions for Reviews,

page 4-14 .

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare
- Close Reviews

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2
- Performing Actions for Reviews, page 4-14

Feedback tab

The **Feedback** tab displays the following options:

- The Feedback Details option such as the feedback date, feedback title, feedback status, feedback from , and comments.
- The Actions option. For more information, see: Performing Actions for Feedback, page 4-16.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare
- Close Feedback

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2
- Performing Actions for Feedback, page 4-16

Catalog Items tab

The **Catalog Items** tab displays the following options:

- The Item Details option displays information such as the OU, source type, the item number, the description, the catalog currency, the lead time, the supplier, and the supplier site.
- The Consumption option displays information such as the average item rating, the average supplier rating, the agreement utilization rate, the amount agreed and consumed, the line amount agreed and consumed and the last ordered date.
- The Actions option. For more information, see: Performing Actions for Catalog Items, page 4-17.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

iExpenses tab

There are no action options available in this tab.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

PO Spend tab

The **PO Spend** tab displays the following options:

- The Item Details option displays information such as the order number, the item number, and the item description, the purchasing category, the transaction, and the functional currency.

- The Spend Details option displays details such as the quantity ordered, the line type, the transaction currency, the need by date, the ship to location cost center, the agreement number, and the off contract information.

- The Actions option. For more information, see: Performing Actions for PO Spend, page 4-20

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Reviews

From the Indirect Procurement dashboard, the Reviews tab, the procurement team and procurement managers can perform actions for reviews.

Buyers can:

- Analyze reviews and ratings submitted by requesters on Indirect Procurement Dashboard.

- Perform bulk update of status on a review. If the review is open, then the buyer can work on the review.

- Navigate to the Item details page to view all reviews or update status.

Once the investigation is complete, buyer can submit a response to the review, which is visible to everyone who have access to the item.

If Oracle iProcurement Information Discovery Plus is licensed and implemented, then requesters can perform the following tasks using iProcurement Information Discovery Plus.

- Enter reviews and ratings for items or suppliers either when viewing the catalog, or after performing self-service receiving for a requisition.

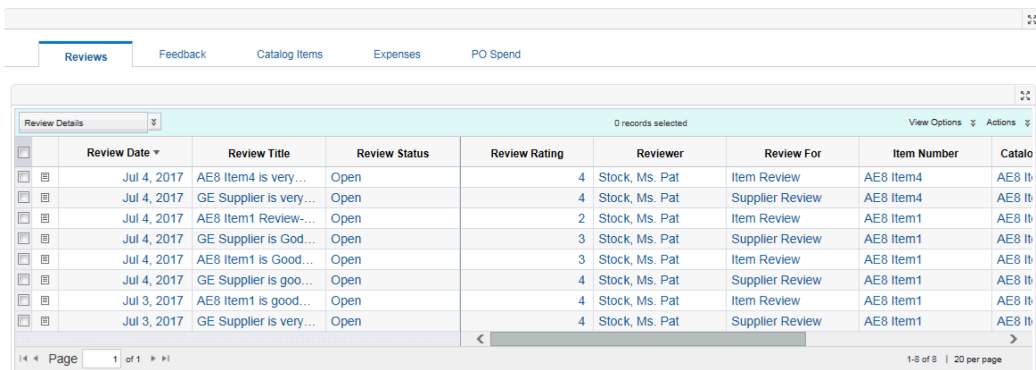
- View ratings or reviews contributed by other requesters, and filter out items with bad reviews or ratings for an informed decision-making.

- View buyer's actions on a review that the buyer has posted, so that the buyer is aware of procurement team response to a review.

- Respond to a review to either ask a question, or to help the reviewer address a challenge pointed out in the review.

Once requesters enter review information in Oracle iProcurement Information Discovery Plus, then buyers can take actions using the Oracle Procurement Command Center Plus, Indirect Procurement Dashboard. For information on Oracle iProcurement Information Discovery Plus, see: *Oracle E-Business Suite Information Discovery Integration and System Administration Guide*.

Actions for Reviews



The following actions are available for reviews:

- Manage Review: This is a single-row action, which takes you to the Reviews page. From that you can perform review related tasks.

- View/Update: This single-row action takes you to the Notes page. From that page you can perform tasks related to the review. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

- View Agreement: This is a single-row action, which takes you to the Agreement page. Use that page to view details of the agreement.

- Re-negotiate Agreement: This is a single-row action, which takes you to the Create RFQ page. From that page you can create a request for quotation (RFQ) to send to a supplier to request pricing and other information for an item or items.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export
- Compare
- Close Reviews: This is a multiple row action that closes the review comments. You view a confirmation message when you close a review. If you try to close a review that is already in the closed status, then the application displays a message that no action is taken.

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Feedback

Feedback items are very similar to reviews. The primary difference is that the correspondence on a feedback is visible only to the requester who submitted the feedback and all buyers linked to the operating unit in which the feedback is made.

From the Indirect Procurement dashboard, the Feedback tab, the procurement team and procurement managers can perform actions for feedback.

Buyers can:

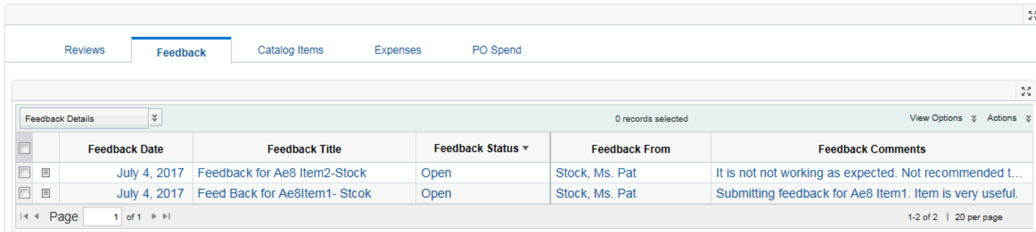
- Analyze feedback items submitted by requesters on the Indirect Procurement Dashboard.
- Perform mass update of status on a feedback. If the status is open, buyer can work on the feedback.

Requesters can:

- Enter a feedback against a catalog item which is initiated from the Item Details page.
- Enter a general feedback, which may be unrelated to the catalog item and select a feedback type.
- View reviews or ratings entered in the past, all in one page, along with the responses, and the action taken by the buyer

Once the investigation is complete, buyer can submit a response to the review, which is visible to everyone who have access to the item.

Actions for Feedback



The following actions are available for feedback:

- Manage Feedback: This is a single-row action, which takes you to the Oracle iProcurement Feedback page. You can enter comments and responses on this page.

- View/Update: This single-row action takes you to the Notes page. From that page you can perform tasks related to the feedback.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

- Close Feedback: This is a multiple row action that closes the feedback record. You view a confirmation message when you close a feedback. If you try to close a feedback that is already in the closed status, then the application displays a message that no action is taken.

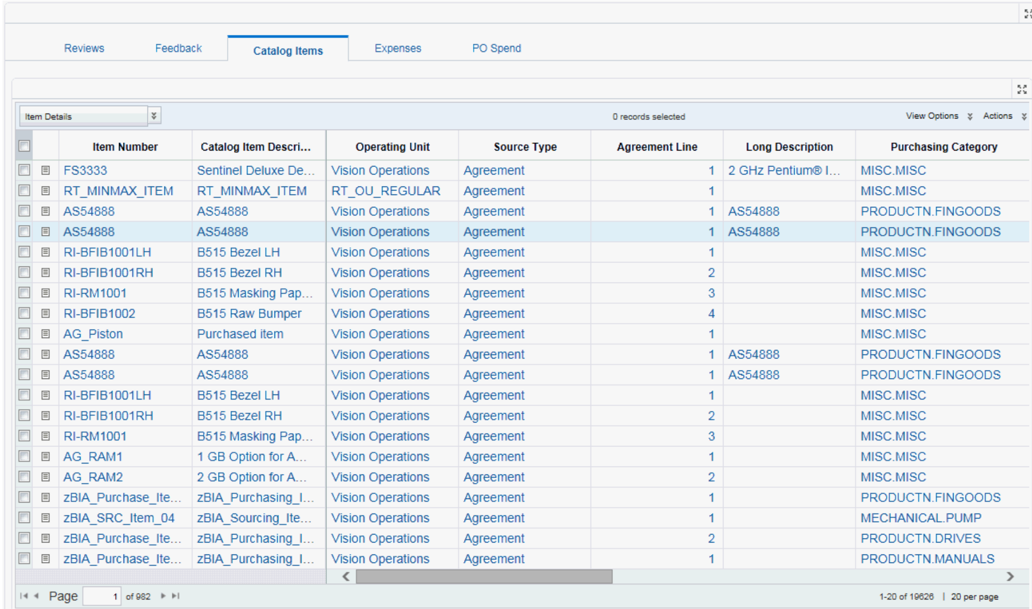
For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for Catalog Items

Catalog items comprise of information from local blankets, global blankets, requisition templates, quotations and item master, all linked to an operating unit which the user has access to.



Item Number	Catalog Item Descri...	Operating Unit	Source Type	Agreement Line	Long Description	Purchasing Category
FS3333	Sentinel Deluxe De...	Vision Operations	Agreement	1	2 GHz Pentium® I...	MISC.MISC
RT_MINMAX_ITEM	RT_MINMAX_ITEM	RT_OU_REGULAR	Agreement	1		MISC.MISC
AS54888	AS54888	Vision Operations	Agreement	1	AS54888	PRODUCTN.FINGOODS
AS54888	AS54888	Vision Operations	Agreement	1	AS54888	PRODUCTN.FINGOODS
RI-BFIB1001LH	B515 Bezel LH	Vision Operations	Agreement	1		MISC.MISC
RI-BFIB1001RH	B515 Bezel RH	Vision Operations	Agreement	2		MISC.MISC
RI-RM1001	B515 Masking Pap...	Vision Operations	Agreement	3		MISC.MISC
RI-BFIB1002	B515 Raw Bumper	Vision Operations	Agreement	4		MISC.MISC
AG_Piston	Purchased item	Vision Operations	Agreement	1		MISC.MISC
AS54888	AS54888	Vision Operations	Agreement	1	AS54888	PRODUCTN.FINGOODS
AS54888	AS54888	Vision Operations	Agreement	1	AS54888	PRODUCTN.FINGOODS
RI-BFIB1001LH	B515 Bezel LH	Vision Operations	Agreement	1		MISC.MISC
RI-BFIB1001RH	B515 Bezel RH	Vision Operations	Agreement	2		MISC.MISC
RI-RM1001	B515 Masking Pap...	Vision Operations	Agreement	3		MISC.MISC
AG_RAM1	1 GB Option for A...	Vision Operations	Agreement	1		MISC.MISC
AG_RAM2	2 GB Option for A...	Vision Operations	Agreement	2		MISC.MISC
zBIA_Purchase_Ite...	zBIA_Purchasing_I...	Vision Operations	Agreement	1		PRODUCTN.FINGOODS
zBIA_SRC_Item_04	zBIA_Sourcing_Ite...	Vision Operations	Agreement	1		MECHANICAL.PUMP
zBIA_Purchase_Ite...	zBIA_Purchasing_I...	Vision Operations	Agreement	2		PRODUCTN.DRIVES
zBIA_Purchase_Ite...	zBIA_Purchasing_I...	Vision Operations	Agreement	1		PRODUCTN.MANUALS

From the Indirect Procurement dashboard, the Catalog Items tab, the procurement team and procurement managers can perform actions for catalog items.

The following actions are available for catalog items:

- Update Catalog Item: This is a single row action that takes you to the Agreement page in the update mode.

- Manage Order Notes: This is a single-row action that takes you to the header-level Notes page. From that page you can perform the required action for the purchase order header.

- Manage Line Notes: This is a single-row action that takes you to the line-level Notes page. From that page you can perform the required action for the purchase order line.

- Re-negotiate Agreement: This is a single-row action, which takes you to the Create RFQ page. From that page you can create a request for quotation (RFQ) to send to a supplier to request pricing and other information for an item or items.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

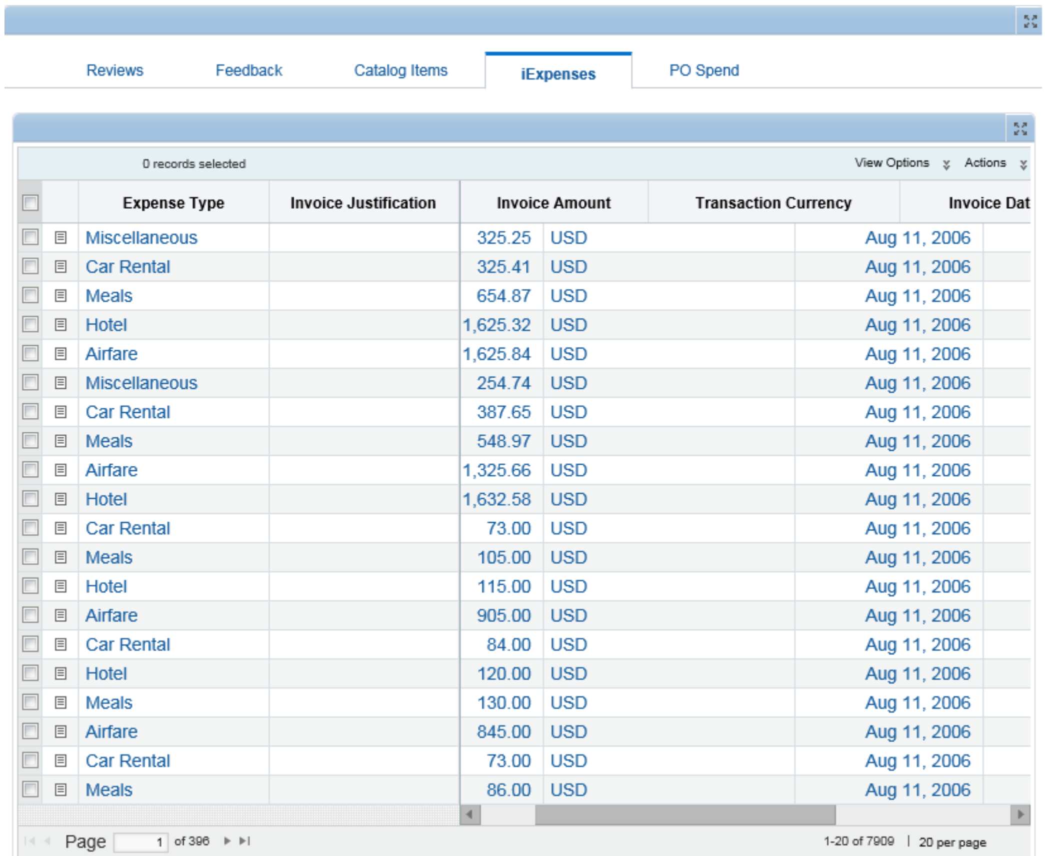
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for iExpenses

All iExpense lines extracted are from invoice information.



Expense Type	Invoice Justification	Invoice Amount	Transaction Currency	Invoice Dat
Miscellaneous		325.25	USD	Aug 11, 2006
Car Rental		325.41	USD	Aug 11, 2006
Meals		654.87	USD	Aug 11, 2006
Hotel		1,625.32	USD	Aug 11, 2006
Airfare		1,625.84	USD	Aug 11, 2006
Miscellaneous		254.74	USD	Aug 11, 2006
Car Rental		387.65	USD	Aug 11, 2006
Meals		548.97	USD	Aug 11, 2006
Airfare		1,325.66	USD	Aug 11, 2006
Hotel		1,632.58	USD	Aug 11, 2006
Car Rental		73.00	USD	Aug 11, 2006
Meals		105.00	USD	Aug 11, 2006
Hotel		115.00	USD	Aug 11, 2006
Airfare		905.00	USD	Aug 11, 2006
Car Rental		84.00	USD	Aug 11, 2006
Hotel		120.00	USD	Aug 11, 2006
Meals		130.00	USD	Aug 11, 2006
Airfare		845.00	USD	Aug 11, 2006
Car Rental		73.00	USD	Aug 11, 2006
Meals		86.00	USD	Aug 11, 2006

From the Indirect Procurement dashboard, the iExpenses tab, the procurement team and procurement managers can perform actions for iExpenses.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

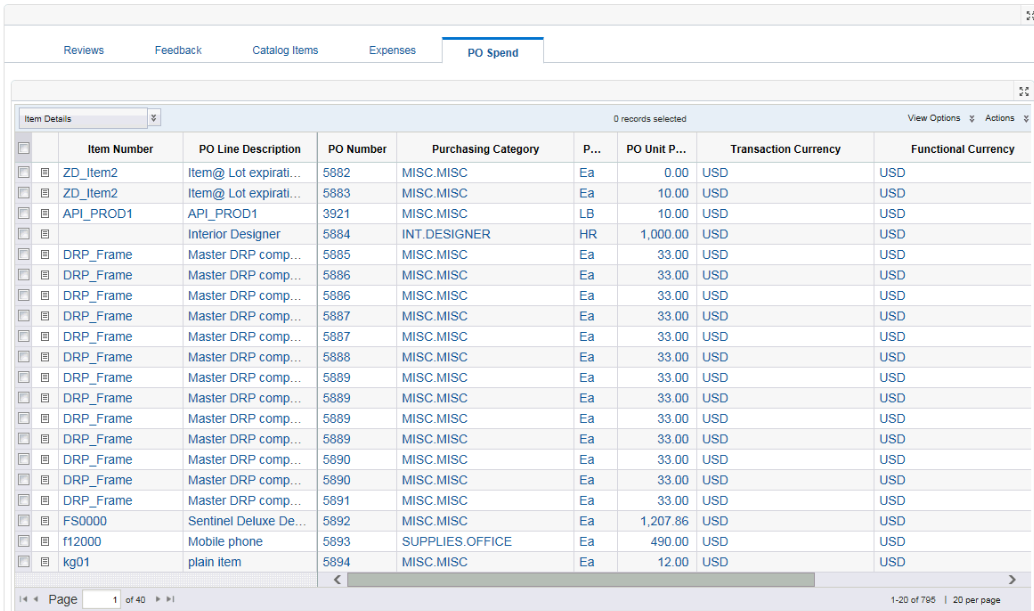
For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Performing Actions for PO Spend

From the Indirect Procurement dashboard, the PO Spend tab, the procurement team and procurement managers can perform actions for PO Spend.



Item Number	PO Line Description	PO Number	Purchasing Category	P...	PO Unit P...	Transaction Currency	Functional Currency
ZD_Item2	Item@ Lot expirati...	5882	MISC.MISC	Ea	0.00	USD	USD
ZD_Item2	Item@ Lot expirati...	5883	MISC.MISC	Ea	10.00	USD	USD
API_PROD1	API_PROD1	3921	MISC.MISC	LB	10.00	USD	USD
	Interior Designer	5884	INT.DESIGNER	HR	1,000.00	USD	USD
DRP_Frame	Master DRP comp...	5885	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5886	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5886	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5887	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5887	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5888	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5889	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5889	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5889	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5889	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5890	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5890	MISC.MISC	Ea	33.00	USD	USD
DRP_Frame	Master DRP comp...	5891	MISC.MISC	Ea	33.00	USD	USD
FS0000	Sentinel Deluxe De...	5892	MISC.MISC	Ea	1,207.86	USD	USD
f12000	Mobile phone	5893	SUPPLIES.OFFICE	Ea	490.00	USD	USD
kg01	plain item	5894	MISC.MISC	Ea	12.00	USD	USD

The following actions are available for PO spend:

- Manage Order Notes: This is a single-row action that takes you to the header-level Notes page. From that page you can perform the required action for the purchase order header. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

- Manage Line Notes: This is a single row action that takes you to the line-level Notes page. From that page you can perform the required action for the purchase order line. See: Using Notes in Oracle Procurement Command Center Plus, page 9-1.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

5

Performing Common Actions

This chapter discusses the common actions that you can perform from Oracle Procurement Command Center Plus.

This chapter covers the following topics:

- Comparing Procurement Documents
- Printing or Exporting Procurement Documents

Comparing Procurement Documents

When procurement teams or buyers search using the Procurement Operations or Indirect Procurement operations dashboard, they can select the Compare action from the search results, Actions list on the right side of the tab.

Procurement Operations Dashboard Search Results

From the Procurement Operations dashboard search results, buyers can compare two or more:

- Requisitions in terms such as supplier, item, line amount, deliver to location, and suggested supplier.
- Orders in terms such as the ordered amount, shipped quantity, need by date, and suppliers.
- Agreements in terms such as the amount released, buyer, supplier, and agreement change requests.
- Negotiations in terms such as the negotiation active offers count, buyer, current price, target price, and negotiation quantity.
- Deliverables in terms such as the deliverable type, party contact, supplier, due date, and status.

- Notes in terms such as the note type, requisition details, order details, and agreement information.

Indirect Procurement Dashboard Search Results

From the Indirect Procurement dashboard search results, buyers can compare:

- Reviews in terms such as the reviewer, review description, supplier, review rating and comments.
- Feedback to analyze the feedback description, supplier, and feedback comments.
- Catalog items to view details such as the catalog supplier, average item rating, average supplier rating, amount agreed, and amount consumed.
- Details of iExpenses such as the amount, transaction currency, merchant, and cost center.
- Item and spend details.

Strategic Sourcing Dashboard Search Results

From the Strategic Sourcing dashboard, buyers can compare:

- Objectives, initiatives, and tasks.
- Negotiations and offers.

Printing or Exporting Procurement Documents

When procurement teams or buyers search using the Procurement Operations or Indirect Procurement operations dashboard, they can select the following actions from the search results, Actions list available on the right side of the tab:

- Print: This option prints search results in the using text format or PDF (Adobe Portable Document Format).
- Export: This option exports the entire results of the search results. The results can be saved or viewed in a comma delimited file format.

6

Analyzing Items and Suppliers

This chapter describes the Item and Supplier Analysis pages in Oracle Procurement Command Center Plus and highlights the decisions that procurement managers and buyers can make using these pages.

This chapter covers the following topics:

- Using the Item Analysis Page
- Using the Supplier Analysis Page

Using the Item Analysis Page

This topic discusses the **Item Analysis** page, when you navigate to this page from Procurement Command Center.

Buyers can use the **Item Analysis** page to explore the history of items used in the organization including on-time delivery, quality, and item suitability. Items requested in the requisition can be compared to other item performance measures to ensure the best item fit for the procurement team or requesters. The Item Analysis page is centered upon items that have been ordered for procurement. It brings in historically segregated, structured, and unstructured data from purchasing document attachments about the item and makes it available to you in a way that enables quick decision making.

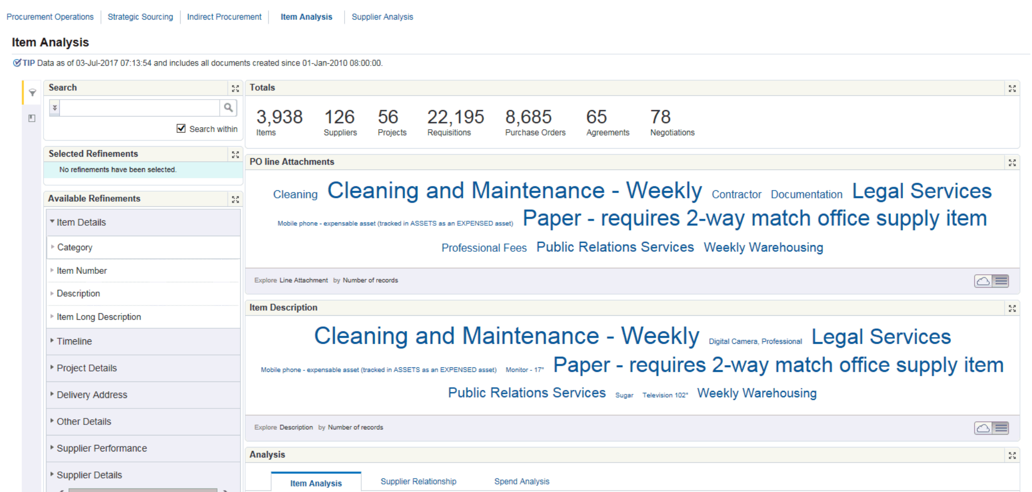
Item Analysis page provides additional information to the buyer and project manager when they need to analyze the items assigned to requisition lines. When they click on Analyze Item for a requisition, the application carries the context of the requisition line to the **Item Analysis** page and pre-filters the page with the item number and description. If the page is accessed directly from the menu, no automatic filters are applied. This page provides all the current and historical procurement information of items in one page.

Procurement managers or buyers can assess the risk of procuring an item by looking at past history. For example, if an item has had quality issues in the past, they can anticipate that they might probably encounter quality issues in the future. The Search functionality in this page enables the procurement team to find an item by entering keywords as textual content from attachments is also available for search. The consolidated information regarding items enables buyers to determine if they are buying the right item, if there are viable alternatives, determine most appropriate budget for the item, and determine the procurement strategy based on historical and future demand.

Procurement teams and procurement managers can directly access this page from the Item Analysis tab. Additionally, they can access the page by clicking on the Analyze Item from the Procurement Operations dashboard, Requisitions tab.

Using the **Item Analysis** page, procurement teams and procurement managers can:

- Align item selection to business needs using insights from procurement history.
- Quickly access procurement history of both inventory items and one-time items and services.
- Make an informed item choice by comparing procurement history and performance attributes for each item.



Heading Region

This region displays the date and time stamp of the last ETL update.

Search Region

The **Search** component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Partial record search is enabled for specific attributes. Attributes for partial record search include:

- PO Line Attachment
- PO Item Name
- PO Item Description
- Inventory Item Name
- Inventory Item Description
- Item Long Description
- Supplier Name
- ASL Supplier Name
- Negotiation Number
- Negotiation Item Description
- Agreement Number
- Agreement Item Description
- Requisition Number
- Requisition Item Description
- PO Number

Selected Refinements

The **Selected Refinements** component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Bookmarks

The **Bookmarks** component allows you to save a given navigation and component state and return to it at a later time.

Available Refinements

The **Available Refinements** component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Totals Region

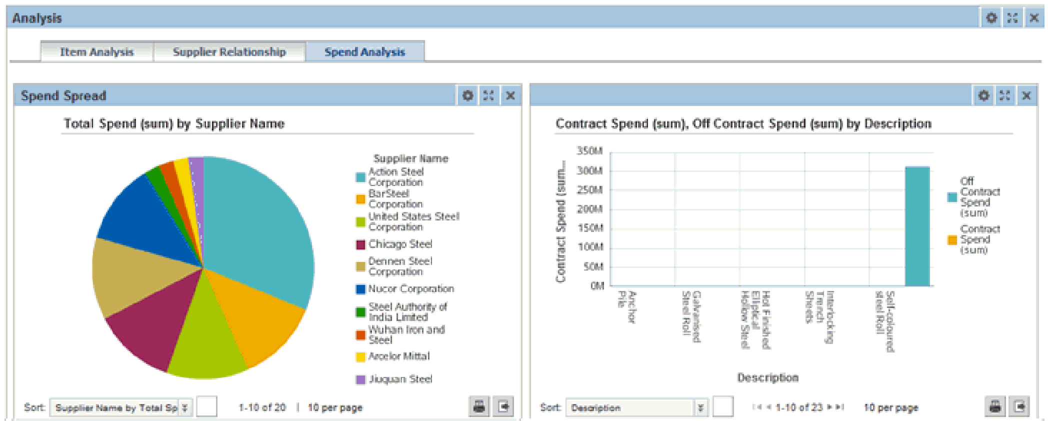
The **Totals** region displays the following metrics based on the filters applied on the page.

Metric Display Title	Description
Items	Total number of items represented in the current view
Suppliers	Number of suppliers who supplied the item in the past
Projects	Number of projects for which the item has been procured, or is being planned
Requisitions	Number of requisitions in which the item is referenced
Purchase Orders	Number of purchase orders in which the item is referenced
Agreements	Number of agreements in which the item is referenced
Negotiations	Number of negotiations in which the item is referenced

Tag Cloud Region

The tag cloud region is based on the item description and PO line level attachments. It takes into account the "White List" that you can input and alters the size of the item description based on the number of times it is referenced in a PO line. See: Setting Up Oracle Procurement Command Center Plus, page 2-6 for ways to modify the "White List".

Analysis Region



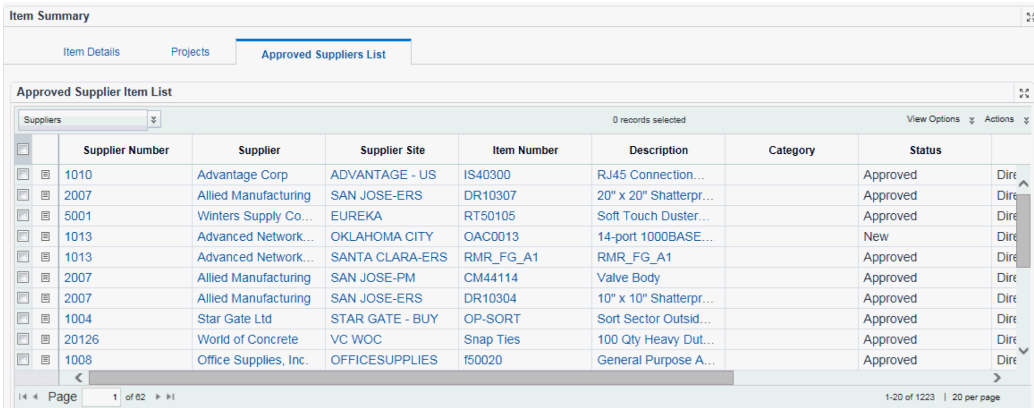
The **Analysis** region displays the following charts and graphs:

Tab	Chart Title	Details
Item Analysis	**Trend Analysis**	This is a line chart to analyze the total spend. Sort the chart using the following values: • Total Spend (sum): Total spend refers to the sum of Purchase Orders Line Amounts • Off Contract Spend (sum): Off Contract Spend refers to those Purchase Order lines which do not have BPA/ CPA reference • Lead Time (sum): Lead time comes from Agreement lines, and is converted to Days UOM Contract Spend (sum)

Tab	Chart Title	Details
Supplier Relationship	**Overall Supplier Performance**	This is a bubble chart to analyze the overall supplier performance. The X-axis values are Delivery Rating (average), Price Compliance (average), and Quality Rating (average). The Y-axis values are Delivery Rating (average), Price Compliance (average), and Quality Rating (average). The bubble size shows the Total Spend (sum). The application does not display this chart when there are multiple functional currencies.
Supplier Relationship	**Supplier Performance Over Time**	This is a line chart to asses supplier performance using the following values: • Price Compliance (average) • Quality Rating (average) • Delivery Rating (average) Each supplier is represented by a different color in this chart.

Tab	Chart Title	Details
Spend Analysis	**Spend Spread**	This is a pie chart that uses the following values: • Spend Spread – Category: View total spend data by Item Categories. This is the default Spend Analysis graph. • Spend Spread – Deliver to Location: View total spend by Deliver to Location on Purchase Order Shipments. • Spend Spread – Description: View total spend by Item description (comprises both Inventory items and description based items) • Spend Spread – Supplier: View total spend by supplier name.
Spend Analysis	**Off Contract Spend**	This is a stacked bar chart that sorts the chart using the following values: • Category by Contract Spend (sum) • Category by Off Contract Spend (sum) Total Spend refers to the sum of purchase order line amounts. Off Contract Spend refers to those Purchase Order lines which do not have BPA/ CPA reference.

Item Summary Region



The **Item Summary** region displays a summary of the item within the following tabs:

Item Details tab

The **Item Details** tab displays the following options:

- The Details option displays relevant details as captured in the Item Master. All the attributes are existing fields in Item Master definition. For non-inventory items, the application populates only Item Description, Category, and List Price columns.

- The Price and Spend option displays the currency, the unit price details, the total spend with and without BPA or CPA reference and the sum of contract and off contract spend.

- The Quantity Summary option displays the sum of currently available (available to reserve) quantities across inventory organizations accessible to the project manager and buyer, the sum of overdue quantities on purchase orders that are open for receiving overdue, the sum of net ordered quantity ((quantity ordered – quantity cancelled) – total delivered quantity) across all open purchase order lines, and the sum of ordered quantities across all approved requisitions that have not been placed on a purchase order yet.

- The Procurement Documents option displays negotiations, requisitions, agreements, and purchase orders applicable to the selected item.

- The Lead Time option displays the lead time details for the selected item.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare
- Compare with demand: You can use this action only if you have licensed and implemented Oracle Project Procurement Command Center Plus. For information about this action, see: *Oracle Project Procurement Command Center Plus Process Guide*.

Projects tab

The **Projects** tab displays the summary of the projects for which the item has been planned or ordered.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

Approved Suppliers List tab

The **Approved Suppliers List** tab displays the following options:

- The Suppliers option displays the approved suppliers for the selected item.
- The Actions option displays the action that you can perform for an item.

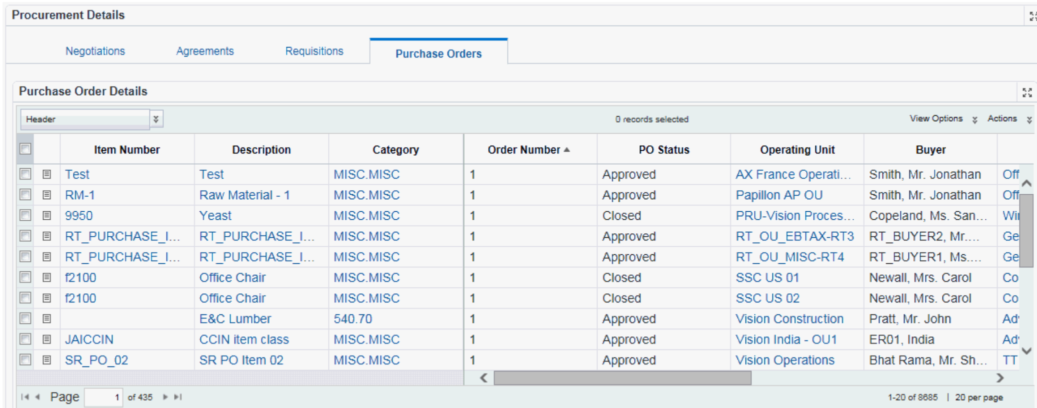
You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

Procurement Details Region



The **Procurement Details** region displays details of all purchasing documents where the item is referenced at least once in any of the following document lines:

Negotiations tab

The **Negotiations** tab displays the following options:

- The Header option displays information such as the category, the negotiation number, and the approval number.
- The Lines option displays details such as the line status, the line quantity, the negotiated quantity, and the award line amount.
- The Actions option enables you to view the negotiation.

You can perform the following actions using the Actions list available on the right side of the tab:

- Print
- Export
- Compare

Agreements tab

The **Agreements** tab displays the following options:

- The Header option displays information such as the agreement type, the agreement status, and the supplier details.
- The Lines option displays details such as the line status, the quantity details, and the line attachment.

- The Actions option enables you to view the agreement.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

Requisitions tab

The **Requisitions** tab displays the following options:

- The Header option displays information such as the requisition number, , and requisition status.
- The Lines option displays details such as the line status and the total spend.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

Purchase Orders tab

The **Purchase Orders** tab displays the following options:

- The Header option displays information such as the order number and the order status.
- The Lines option displays details such as the line status and the total spend.
- The Actions option enables you to view the purchase order.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Actions in Item Analysis

Procurement managers and buyers can perform the following action while analyzing the items:

Compare two or more items using the Compare action available on the right side of the Item Details table.

Using the Supplier Analysis Page

This topic discusses the **Supplier Analysis** page, when you navigate to this page from Procurement Command Center.

Supplier Analysis provides supplier history for goods or services used in your organization. Past performance, including on-time delivery, quality, and supplier capabilities can be evaluated or compared to the items requested in the requisition to ensure the best suppliers are selected. The Supplier Analysis page is based upon suppliers, bringing in data from multiple modules together in one page to help gain insight about the performance of the supplier, the relationship your organization has with the supplier, and how one supplier compares to others.

Historical procurement information provides insight into the on-time delivery, quality and price-compliance trends of the supplier, and also provides quick summary of the relationship your organization has had with the supplier. If you have installed Oracle Supplier Lifecycle Management or Oracle Supplier Hub and have configured user defined attributes for suppliers, then the powerful search and filtering features of Oracle Endeca make it easy to find the right supplier using all the extensive information you have collected about the supplier, such as insurance, environmental compliance, financial stability, or quality maturity information. You can be sure you are selecting the best suppliers when you use the analysis page to investigate each supplier's history. Buyers and project managers can also see the current status of a supplier, including which projects have orders, negotiations or any existing agreements with a supplier, how much has been spent or is committed to be spent with the supplier and how well the supplier has performed with regards to supplying the ordered items or services.

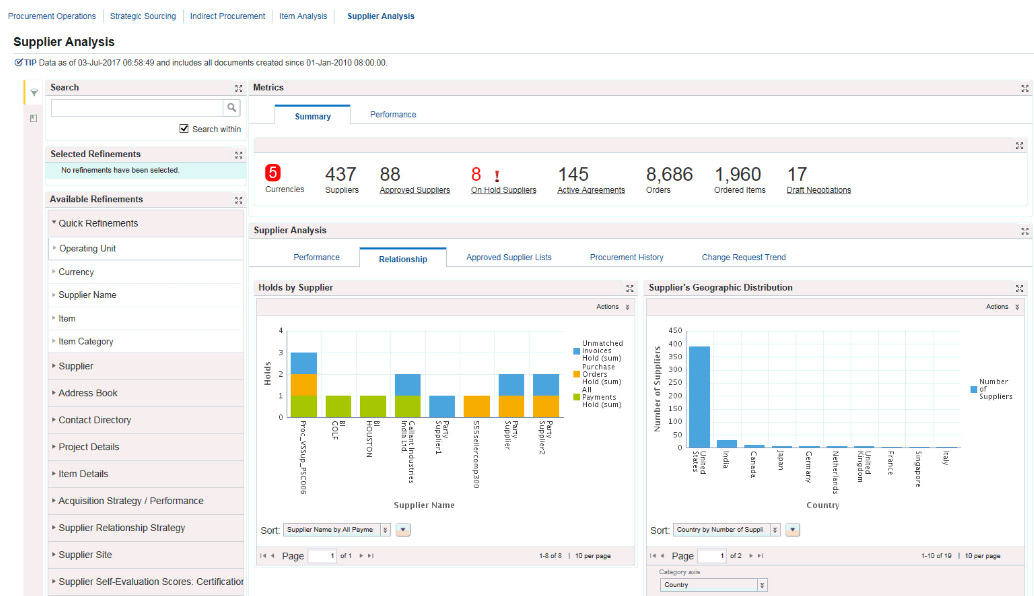
Procurement teams and managers can directly access this page from the **Supplier Analysis** tab. Additionally, they can access this page by clicking the **Analyze Supplier** link in the **Procurement Operations** dashboard, **Requisitions** tab.

Using the **Supplier Analysis** page, procurement teams and procurement managers can:

- Find the right suppliers meeting organizational objectives and business needs.

- Use performance criteria and extended supplier profile to zero in on the best set of suppliers.

- Compare suppliers by current relationship and historical performance.
- View catalog review ratings from Oracle iProcurement.
- View supplier performance evaluation ratings from Oracle Supplier Lifecycle Management.



Heading Region

This region displays date and time stamp of the last ETL update.

Search Region

The **Search** component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Partial record search is enabled for specific attributes. Attributes for partial record search include:

- Supplier Name
- Alternate Supplier Name
- Supplier Address
- ASL Item Description

- PO Number
- PO Item Description
- Agreement Number
- Agreement Item Description
- Negotiation Number
- Negotiation Item Description

Selected Refinements

The **Selected Refinements** component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Bookmarks

The **Bookmarks** component allows you to save a given navigation and component state and return to it at a later time.

Available Refinements

The **Available Refinements** component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Metrics

Metrics are available in the following tabs:

- **Summary**
- **Performance**

Summary

The Summary region displays the following metrics based on the filters applied on the page.

Metric Display Title	Description
Currency	Select a currency to view currency-specific information. Some of the elements on this dashboard are dependent on currency.
Suppliers	Total number of unique suppliers in the result list based on filters applied
Approved Suppliers	Total number of suppliers who appear in the approved supplier list for at least one item or category
On Hold Suppliers	Total number of suppliers who have at least one active hold, such as Hold All Payments or Hold All Purchase Orders
Active Agreements	Number of blanket purchase agreements and complex purchase agreements in the current view that are active as of today
Orders	The total number of orders issued to all the selected suppliers
Ordered Items	The total number of unique items ordered from the selected list of suppliers
Draft Negotiations	Number of negotiations that are currently drafted in which the suppliers in the current view are invited to participate

Performance

The Performance region displays the following metrics based on the filters applied on the page.

Metric Display Title	Description
On Time Delivery	Percentage of shipments received on or before the need-by date plus the tolerance. The following default color key indicates the percentage of on time delivery: • Green: More than 95% • Yellow: Between 85% and 95% • Red: Less than 85%
Quality	Percentage of shipments without any quality rejections The following default color key indicates the percentage of shipments received without any quality rejections: • Green: More than 95% • Yellow: Between 85% and 95% • Red: Less than 85%
Price Compliance	The ratio of price demanded on invoice versus price agreed on the blanket agreement or the purchase order, expressed as a percentage. The following default color key indicates the percentage of price compliance: • Green: More than 95% • Yellow: Between 85% and 95% • Red: Less than 85%

Metric Display Title	Description
Item Rating	Average review rating for catalog items, as entered by requesters in iProcurement. The following default color key indicates the average item review rating: • Green: Above 4 • Yellow: Between 3 and 4 • Red: Below 3
Supplier Rating	Average review rating for catalog suppliers, as entered by requesters in iProcurement The following default color key indicates the average supplier review rating: • Green: Above 4 • Yellow: Between 3 and 4 • Red: Below 3
Performance Score	Average supplier performance evaluation score for suppliers in the current view The following default color key indicates the percentage performance score: • Green: More than 90% • Yellow: More than 75% • Red: Less than 75%

Metric Display Title	Description
Change Requests	Average number of supplier initiated change requests per purchase order in any status The following default color key indicates the average number of change requests: • Green: Less than 0.5 • Yellow: Between 0.1 and 0.5 • Red: More than 0.5

Supplier Analysis Region

This region displays the following charts and graphs:

Tab	Chart Title	Details
Performance	**Overall Supplier Performance**	This is a bubble chart that uses the following values: The X-axis values are On-time Delivery Rating (average), Quality Rating (average), Price Compliance Rating (average), Catalog Item Rating (average), Catalog Supplier Rating (average), and Performance Evaluation Score. The Y-axis values are Quality Rating (average), On-time Delivery Rating (average), Price Compliance Rating (average), Catalog Supplier Rating (average), Catalog Item Rating (average), and Performance Evaluation Score. The performance evaluation score is calculated by averaging out the score for all purchase orders and agreements in the visible data set. The bubble size represents the Total spend (sum). The chart does not display data when there are multiple functional currencies.

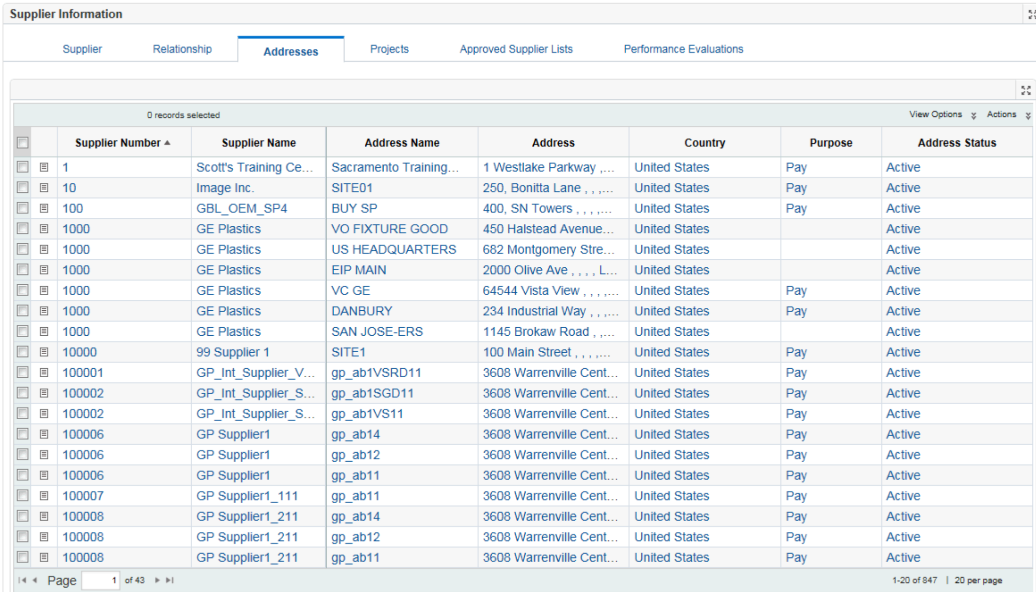
Tab	Chart Title	Details
Performance	**Supplier Performance Overtime**	This is a bubble chart that shows supplier performance over time using the following values: • On-time Delivery Rating • Price Compliance • Quality Rating • Performance Evaluation Score The performance evaluation score is calculated by averaging the scores for all purchase orders and agreements in the visible data set. The chart does not display data when there are multiple functional currencies.
Relationship	**Holds by Supplier**	This is a stacked bar chart that shows number of holds by hold type, by supplier.
Relationship	**Supplier's Geographic Distribution**	This is a stacked bar chart that shows number of holds by hold type, by supplier.
Approved Supplier Lists	**Approved and Local Suppliers**	This is a bar chart that shows total spend on the project split by approved versus unapproved suppliers (ASL) or by local versus non-local suppliers (supplier country versus task location) by period (year / month). Chart does not display data when there are multiple functional currencies.

Tab	Chart Title	Details
Approved Supplier Lists	**Product and Services**	This is a bar chart that shows number of suppliers by products and services category. For example, Computer Monitor is supplied by 5 suppliers. Industrial Metal is supplied by 3 suppliers.
Procurement History	**Spend by Supplier**	This is a stacked bar chart that shows contract versus off-contract spend by currency by supplier. Chart does not display data when there are multiple functional currencies.
Procurement History	**Spend Trend**	This is a line chart that shows contract versus non-contract spend by currency and need-by-date, each supplier is a line with a different color. Chart does not display data when there are multiple functional currencies.
Change Request Trend	**Change Request Trend**	This is a bar chart that shows number of change requests by year and supplier.

Quantitative aspects are measured from transaction data. The following are considered:

- Price Compliance: Variance between Agreement / PO Price versus Invoice Price
- Quality Rating: Average for the last one year
- Delivery Rating: Average for the last one year
- On-time delivery performance
- Quality performance: Inspection / delivery rejections

Supplier Information Region


Supplier Information

Supplier | Relationship | Addresses | Projects | Approved Supplier Lists | Performance Evaluations

0 records selected | View Options | Actions

Supplier Number	Supplier Name	Address Name	Address	Country	Purpose	Address Status
1	Scott's Training Ce...	Sacramento Training...	1 Westlake Parkway ,...	United States	Pay	Active
10	Image Inc.	SITE01	250, Bonitta Lane , , ,...	United States	Pay	Active
100	GBL_OEM_SP4	BUY SP	400, SN Towers , , , ,...	United States	Pay	Active
1000	GE Plastics	VO FIXTURE GOOD	450 Halstead Avenue...	United States		Active
1000	GE Plastics	US HEADQUARTERS	682 Montgomery Stre...	United States		Active
1000	GE Plastics	EIP MAIN	2000 Olive Ave , , , , L...	United States		Active
1000	GE Plastics	VC GE	64544 Vista View , , , ,...	United States	Pay	Active
1000	GE Plastics	DANBURY	234 Industrial Way , , ,...	United States	Pay	Active
1000	GE Plastics	SAN JOSE-ERS	1145 Brokaw Road , ,...	United States		Active
10000	99 Supplier 1	SITE1	100 Main Street , , , ,...	United States	Pay	Active
100001	GP_Int_Supplier_V...	gp_ab1VSRD11	3608 Warrenville Cent...	United States	Pay	Active
100002	GP_Int_Supplier_S...	gp_ab1SGD11	3608 Warrenville Cent...	United States	Pay	Active
100002	GP_Int_Supplier_S...	gp_ab1VS11	3608 Warrenville Cent...	United States	Pay	Active
100006	GP Supplier1	gp_ab14	3608 Warrenville Cent...	United States	Pay	Active
100006	GP Supplier1	gp_ab12	3608 Warrenville Cent...	United States	Pay	Active
100006	GP Supplier1	gp_ab11	3608 Warrenville Cent...	United States	Pay	Active
100007	GP Supplier1_111	gp_ab11	3608 Warrenville Cent...	United States	Pay	Active
100008	GP Supplier1_211	gp_ab14	3608 Warrenville Cent...	United States	Pay	Active
100008	GP Supplier1_211	gp_ab12	3608 Warrenville Cent...	United States	Pay	Active
100008	GP Supplier1_211	gp_ab11	3608 Warrenville Cent...	United States	Pay	Active

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The **Supplier Information** region presents the following tabs:

Supplier tab

The **Supplier** tab in this region provides an overview of the supplier and the performance details. Additionally, procurement managers and buyers can view the detailed information of the supplier.

- **View Supplier Details**: Click this link to navigate to the Supplier Details page and perform supplier related tasks.

- **View Supplier Performance**: Use the Performance option to view details about a supplier such as on-time delivery rating, price compliance rating, item review rating, and supplier review rating. The **Item Review Rating** and **Supplier Review Rating** columns show the average item and supplier ratings, respectively, for all catalog items supplied by a supplier.

- **Add as Sources of Supply**: You can use this action only if you have licensed and implemented Oracle Project Procurement Command Center Plus. For information about this action, see: *Oracle Project Procurement Command Center Plus Process Guide*.

- **Add to Negotiation**: This option is valid only when you create or update the RFQ flow. For a negotiation that is in Draft status, you can add suppliers to the negotiation from the Sourcing pages using the **Add Suppliers** button. This brings you to the **Supplier Analysis** page. Analyze the suppliers, select them, and then add them using the **Add to Negotiation** action. If you delete the negotiation line after creating it through the document builder, then the application removes the linkage of the negotiation line as a source of supply. During the award completion stage, the application updates the sources of supply when a particular negotiation line is awarded to a supplier (multiple suppliers).

You can perform the following actions using the Actions list available on the right side of the tab:

- Print
- Export
- Add to Document Builder. For information, see: Adding Items to the Document Builder in Procurement Command Center, page 8-2.

Relationship tab

The **Relationship** tab in this region displays active purchase orders, blanket purchase agreements, and negotiations. Additionally, it displays holds applied on active documents, total count of orders, total spend, number of negotiations in which a selected supplier participated, negotiations in which the selected supplier was awarded, average spend per year, receipt and use details.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

Addresses tab

The **Address** tab displays the address details of suppliers such as the supplier name, the address name, the address and the address status.

Projects tab

The **Projects** tab displays the projects for which the supplier is associated to a purchasing document.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

Approved Supplier Lists tab

The **Approved Supplier Lists** displays the ASL approval status, the item, the supplier category, and the manufacturer details of approved suppliers.

You can perform the following actions using the Actions list on the right side of the tab:

- Print
- Export
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1
- Printing or Exporting Procurement Documents, page 5-2

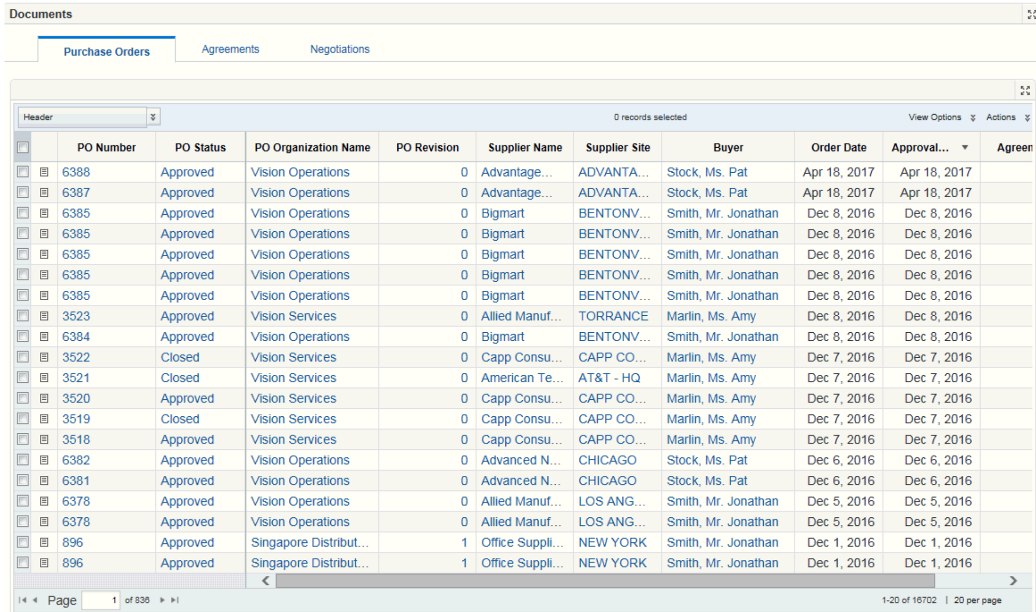
Performance Evaluations tab

The **Performance Evaluations** tab shows performance evaluations conducted for the chosen suppliers. For a performance evaluation, you can view details such as the evaluation number (RFI number), the supplier for which the evaluation was conducted, the sourcing document status, the evaluation date, the evaluation completion date, and the evaluation score. Click **View Evaluation** to navigate to the **Evaluation RFI** page in Oracle Supplier Management (SLM).

When calculating performance evaluation scores, the application considers Request for Information (RFI) documents that fulfill the following conditions:

- The RFIs created for supplier performance evaluation must be created with the predefined negotiation style Supplier Performance Evaluation and the RFI must be at the Completed status.
- The overall supplier score is available for the supplier in SLM. If the overall score is not completed for an evaluation, then the Supplier Analysis dashboard does not use that evaluation to calculate the overall scores.

Documents Region



The **Documents** region displays details of the following purchasing documents associated with the suppliers:

- Purchase Orders
- Agreements
- Negotiations (to which the suppliers have been invited)

Select **Actions** in the column list and view these purchasing documents from the respective subtabs.

You can perform the following actions using the Actions list on the right side of the respective tabs:

- **Purchase Orders** tab
  - Print
  - Export
  - Compare
  - Auto-create to this PO: This action is applicable only when you navigate to the Supplier Analysis page by clicking 'Analyze Suppliers' from a requisition line. If you try this action without having a requisition line in context, then the application displays an error.

- **Agreements** tab

  The **Agreements** tab in this region displays details such as the agreement number, the agreement status, the document type, whether an agreement is active, and the supplier details.

  - Print
  - Export
  - Compare
  - Compare with demand: You can use this action only if you have licensed and implemented Oracle Project Procurement Command Center Plus. For information about this action, see: *Oracle Project Procurement Command Center Plus Process Guide*.
  - Add to Document Builder: For information, see: Adding Items to the Document Builder in Procurement Command Center, page 8-2.

- **Negotiations** tab

  - Print
  - Export
  - Compare
  - Auto-create to this Negotiation: This action is applicable only when you navigate to the Supplier Analysis page by clicking 'Analyze Suppliers' from a requisition line. If you try this action without having a requisition line in context, then the application displays an error.

Actions in Supplier Analysis

Procurement managers and buyers can perform the following action while analyzing the suppliers:

- Compare two or more suppliers using the Compare action on the right side of the Supplier Details table. The comparison enables you to view the supplier performance in terms of on-time delivery rating, quality rating, price compliance rating, order count, total spend, blanket purchase agreements, negotiations awarded, and participated negotiations.
- Compare two or more agreements using the Compare action on the right side of the Agreements table.

7

Tracking Negotiation Activities

This chapter describes the Strategic Sourcing dashboard.

This chapter covers the following topics:

- Using the Strategic Sourcing Dashboard
- Understanding Strategic Sourcing Dashboard Calculations

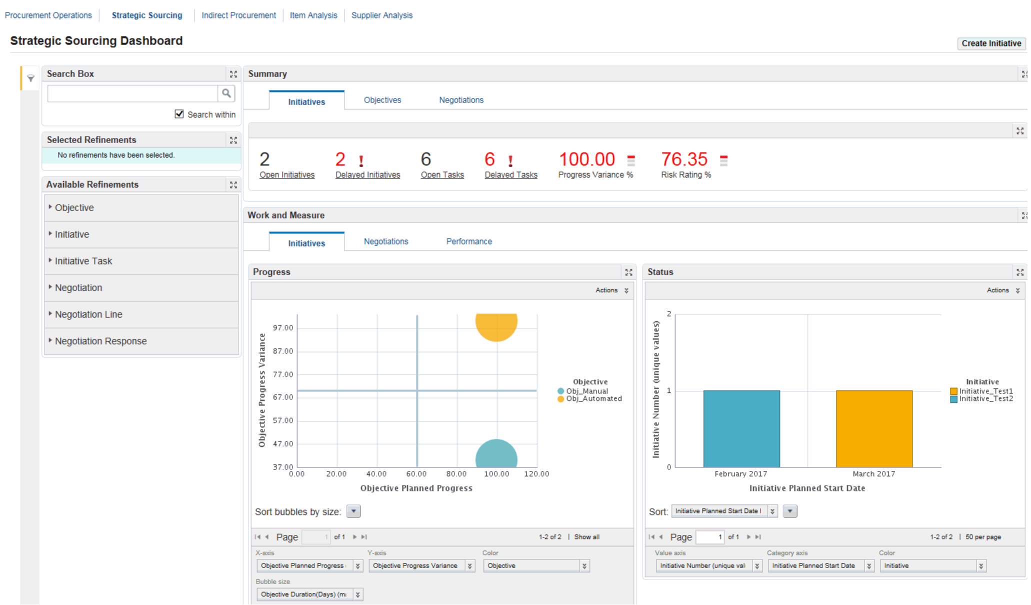
Using the Strategic Sourcing Dashboard

The **Strategic Sourcing Dashboard** enables buyers and procurement managers to view aggregate information from sourcing negotiations, initiatives, and objectives, which helps them to track and mitigate risks in achieving strategic objectives. They can track the status of strategic objectives and initiatives.

Using the Strategic Sourcing Dashboard, buyers and procurement managers can:

- Search across negotiations, responses, initiatives, and objectives. Drill down to the associated document, or navigate to other dashboards of the Procurement Command Center Plus in the context of a purchasing document.
- Identify risk index based on the significance and risk level of each open task on an initiative.
- Track negotiation cycle-times and savings achieved on each negotiation.
- Measure delay on a task, initiative, or objective by comparing planned progress versus actual progress that has been reported.

For information about initiatives, objectives, and tasks, refer to the *Oracle Sourcing User Guide*.



Header Region

This region displays the date and time stamp of the last ETL update.

Search Region

The **Search** component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Partial record search is enabled for specific attributes. Attributes for partial record search include:

- Objective Name
- Objective Description
- Initiative Name
- Initiative Description
- Task Name
- Task Description
- Negotiation Title

- Offer Supplier
- Negotiation Number

Selected Refinements

The **Selected Refinements** component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Bookmarks

The **Bookmarks** component allows you to save a given navigation and component state and return to it at a later time.

Available Refinements

The **Available Refinements** component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Summary Region

The following metrics tabs are available in the Strategic Sourcing Dashboard:

- **Initiatives**
- **Objectives**
- **Negotiations**

Initiatives

The **Initiatives** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

Metric Display Title	Description
Open Initiatives	Number of initiatives in the Draft, Planned, and On hold statuses
Delayed Initiatives	Number of initiatives that are still open beyond the planned end date

Metric Display Title	Description
Open Tasks	Number of tasks in the Draft, Planned, and On hold statuses
Delayed Tasks	Number of tasks that are still open beyond the planned end date
Progress Variance%	Weighted variance between planned progress percent and actual progress percent for all open initiatives The calculation of progress variance percent is: Sum (actual progress% - planned progress%) *planned days)/sum(planned days). The following default color key indicates the progress variance percent: • Green: Less than 5% • Yellow: Between 5% and 20% • Red: More than 20%
Risk Rating%	Weighted risk rating percent of all open initiatives The calculation of risk rating% is as follows: Sum(risk rating% of an initiative*number of days) /sum(number of days of all initiatives). The following default color key indicates the risk rating percent: • Green: Less than 50% • Yellow: Between 50% and 75% • Red: More than 75%

Objectives

The **Objectives** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

Metric Display Title	Description
Active	Number of objectives that are referred by an open initiative. This metric helps procurement managers to know the number of objectives that they track through open initiatives.
Progress Variance%	Variance between planned progress percent and actual progress percent for all open initiatives The calculation is as follows: Sum((actual progress% - planned progress %) *planned days)/sum(planned days) The following default color key indicates the progress variance percent: • Green: Less than 5% • Yellow: Between 5% and 20% • Yellow: Between 5% and 20%

Negotiations

The **Negotiations** tab displays the following metrics based on the filters applied on the page.

If the value of a metric is zero, then the metric is automatically hidden.

Metric Display Title	Description
Currency	Select a currency to view currency-specific information. Some of the elements on this dashboard are dependent on currency.
Open	Number of open negotiations
About to Close	Negotiations about to close in the next 7 days

Metric Display Title	Description
Offers/Negotiation	Average number of offers received on all negotiations The following default color key indicates the number of offers received: • Green: More than 2 • Yellow: Between 1.5 and 2 • Red: Fewer than 1.5
Amendments	Average number of amendments or new rounds for each negotiation
Cycle Time	Average sourcing cycle, the time from negotiation creation to award confirmation
Targeted Savings	Sum of savings target established on all completed negotiations The calculation of targeted savings is as follows: Difference between current price and target price, multiplied by quantities and summed up.
Negotiated Savings	Sum of savings negotiated on all completed negotiations. The calculation of negotiated savings is as follows: Difference between average winning bid price and current price, multiplied by quantities and summed up.

Charts Region

This region displays the following charts and graphs:

Wherever the chart shows amount or price, the chart will render only when there is only one currency in the current view.

Tab	Chart Title	Details
Initiatives	**Progress**	This bubble chart shows the progress of active documents and offers drill-down. This chart does not consider completed and cancelled initiatives or tasks. The X-axis values are Objective Planned Progress, Initiative Planned Progress, and Task Planned Progress. The Y-axis values are Objective Progress Variance, Initiative Progress Variance, Task Progress Variance, Objective Risk Index, Initiative Risk Index, and Task Risk Index. Progress Variance is calculated as Actual progress% - Planned Progress%) When you click: • An objective balloon, the chart applies a filter on the objective and displays balloons for all initiatives linked to that objective. • An initiative balloon, the chart applies a filter on the initiative and all task owners in the initiative are shown. When you click an owner, the chart displays all of the owner's tasks.

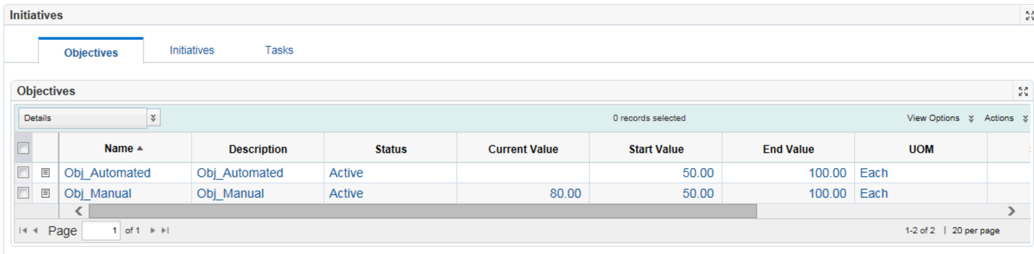
Tab	Chart Title	Details
Initiatives	**Status**	This stacked bar chart shows the status of the initiatives. You can drill down on a status. The X-axis is the initiative number or the count. The Category axis values are Initiative Owner (default), Sponsor, Initiative Status, Category, Initiative Planned Start Date, Initiative Planned End Date, and Initiative Actual Start Date. Each Initiative Status and Task Status is represented by a different color. The chart displays the following initiative or task statuses: • Draft • Planned • Active • On hold • Delayed • Completed • Cancelled

Tab	Chart Title	Details
Negotiations	**Status**	This stacked bar chart shows the number of negotiations by status. Each stack represents a negotiation status. The Category axis values are Buyer (Default), Initiative, Objective, Creation Date, and Type (RFI, RFQ ,Auction). The Y-axis values are Negotiation Number (count) and Negotiation Amount. The Negotiation Amount is displayed only when the currency is the same for all the records. A color code indicates the different negotiation statuses.
Negotiations	**Savings**	This bubble chart shows the negotiated value. Each bubble represents a category, buyer (default), negotiation, negotiation type, initiative or objective. The X-axis represents Targeted Savings, which is calculated as the sum of target-value*quantity. The Y-axis represents Negotiated Savings, which is calculated as the sum of winning-bid-price*winning-bid-quantity. The bubble size represents the value (targeted price*quantity) for that category, buyer, negotiation, or negotiation type. Click a category bubble to drill down to a negotiation.

Tab	Chart Title	Details
Performance	**Top Initiatives**	This simple bar chart displays the top 10 initiatives. The chart displays open initiatives, tasks, or objectives. The X-axis values are Initiative Number, Task Number, Objective Number, Initiative Owner, Task Owner, and Sponsor. The Y-axis values are: • Duration: If there are multiple initiatives or tasks, then the chart displays the average duration. • Risk Index: This value is calculated as the weighted average by initiative or task duration for multiple initiatives or tasks. • Risk Index: This value is calculated as the weighted average by initiative or task duration for multiple initiatives or tasks. • Age

Tab	Chart Title	Details
Performance	**Sourcing Cycle Times**	This is a stacked bar-chart, similar to the Procurement Cycle time chart in the Procurement Operations Dashboard. The X-axis shows the Duration. The Y-axis values are Buyer, Category (Aggregated at the line level), Outcome Document Type, and Negotiation Style (style name) Each horizontal bar represents the average cycle time for the negotiations in the current view. The cycle time is the time difference between when the negotiation was created to when the negotiation was completed. Stacks represent the cycle times for the following stages: • Drafting (Creation to Published) • Accepting bids (Published to Closed) • Bid Analysis (Closed to draft award created) • Awarding Decision (from draft award created to complete) • If a draft award is not created, then awarding the decision extends from Closed to Completed.

Initiatives Region



This region displays a summary of the item within the following tabs:

Objectives tab

The results list considers all the objectives in the application, even if some objectives are not linked to any initiative.

This tab displays the following options:

- The Details option displays information about objectives such as the status, the current value, the start and end dates, and whether the objectives is at the maintenance stage.

- The Performance option displays information about objectives such as the planned progress percent, the actual progress percent, the progress variance percent, and the risk index. Only tracked initiatives are considered for the count. You can gather information about whether an objective is linked to any initiative.

- Actions option: For an objective, click the Manage Objective action to navigate to the Manage Objective page in Oracle Sourcing.

You can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

Initiatives tab

The results list considers all initiatives including draft, cancelled, and completed initiatives.

This tab displays the following options:

- The Details option provides information about initiatives such as the status, owner, the sponsor, and the financial impact.

- The Additional Information displays information such as the tags, the initiative templates, and the initiative approach.

- The Performance option displays information about initiatives such as the planned progress percent, the actual progress percent, the progress variance percent, and the risk index. Only tracked initiatives are considered for the count. You can gather whether an objective is linked to any initiative.

- The Actions option provides the following links:

  - View Initiative: Click this link to navigate to the View Initiative page in Oracle Sourcing.

  - Copy: Use this link to copy and create a new initiative. The application takes you to the newly created initiative page in Oracle Sourcing.

Tasks tab

This tab displays the following options:

- The Details option displays the status, description, owner, negotiation, significance, and risk level of the tasks. You can view prerequisite tasks and the task numbers of the dependent tasks.

- The Performance option displays the planned start date, the duration, the planned end date, the reporting frequency, the actual start date, the planned progress percent, the actual progress percent, the progress variance, and the actual end date for tasks.

- The Actions option provides the **Manage Task** link to help you navigate to the **Manage Task** page in Oracle Sourcing and perform further actions related to the task.

From the **Objectives**, **Initiatives**, and **Tasks** tabs, you can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

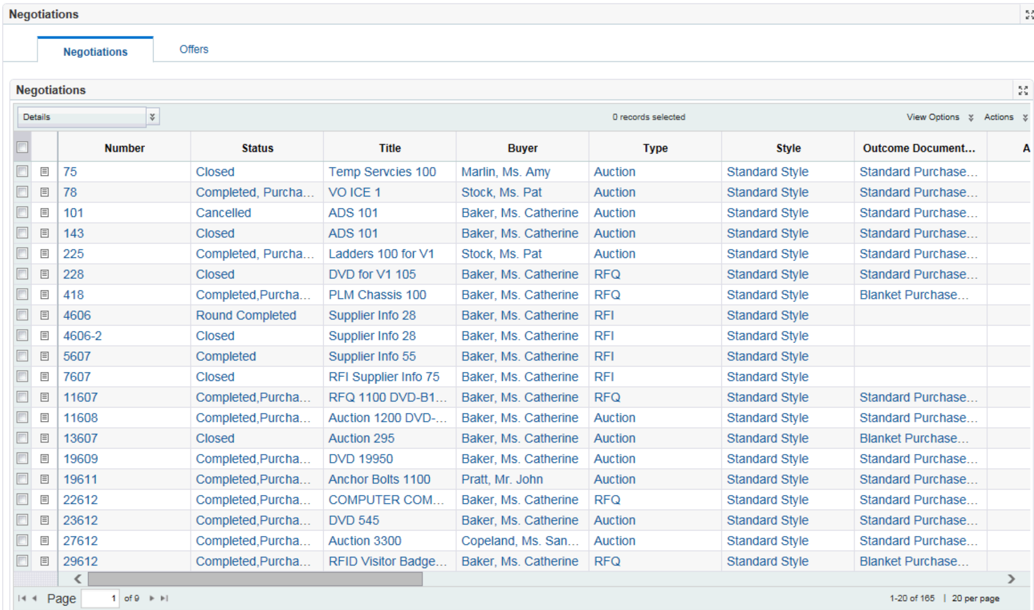
- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Negotiations Region



Number	Status	Title	Buyer	Type	Style	Outcome Document...	A
75	Closed	Temp Servcies 100	Marlin, Ms. Amy	Auction	Standard Style	Standard Purchase...	
78	Completed, Purcha...	VO ICE 1	Stock, Ms. Pat	Auction	Standard Style	Standard Purchase...	
101	Cancelled	ADS 101	Baker, Ms. Catherine	Auction	Standard Style	Standard Purchase...	
143	Closed	ADS 101	Baker, Ms. Catherine	Auction	Standard Style	Standard Purchase...	
225	Completed, Purcha...	Ladders 100 for V1	Stock, Ms. Pat	Auction	Standard Style	Standard Purchase...	
228	Closed	DVD for V1 105	Baker, Ms. Catherine	RFQ	Standard Style	Standard Purchase...	
418	Completed,Purcha...	PLM Chassis 100	Baker, Ms. Catherine	RFQ	Standard Style	Blanket Purchase...	
4606	Round Completed	Supplier Info 28	Baker, Ms. Catherine	RFI	Standard Style		
4606-2	Closed	Supplier Info 28	Baker, Ms. Catherine	RFI	Standard Style		
5607	Completed	Supplier Info 55	Baker, Ms. Catherine	RFI	Standard Style		
7607	Closed	RFI Supplier Info 75	Baker, Ms. Catherine	RFI	Standard Style		
11607	Completed,Purcha...	RFQ 1100 DVD-B1...	Baker, Ms. Catherine	RFQ	Standard Style	Standard Purchase...	
11608	Completed,Purcha...	Auction 1200 DVD-...	Baker, Ms. Catherine	Auction	Standard Style	Standard Purchase...	
13607	Closed	Auction 295	Baker, Ms. Catherine	Auction	Standard Style	Blanket Purchase...	
19609	Completed,Purcha...	DVD 19950	Baker, Ms. Catherine	Auction	Standard Style	Standard Purchase...	
19611	Completed,Purcha...	Anchor Bolts 1100	Pratt, Mr. John	Auction	Standard Style	Standard Purchase...	
22612	Completed,Purcha...	COMPUTER COM...	Baker, Ms. Catherine	RFQ	Standard Style	Standard Purchase...	
23612	Completed,Purcha...	DVD 545	Baker, Ms. Catherine	Auction	Standard Style	Standard Purchase...	
27612	Completed,Purcha...	Auction 3300	Copeland, Ms. San...	Auction	Standard Style	Standard Purchase...	
29612	Completed,Purcha...	RFID Visitor Badge...	Baker, Ms. Catherine	RFQ	Standard Style	Blanket Purchase...	

This region displays a summary of the item within the following tabs:

Negotiations tab

The results list considers all negotiations including RFIs, RFQs, and auctions. Only authorized users can view negotiations and the metrics are calculated based on the negotiations that an authorized user can access.

If an initiative is linked to a negotiation, and the negotiation has a private or hierarchy access level, and the logged in buyer does not have access to the negotiation, then the logged in user can access the initiative, but cannot view the negotiation.

This tab displays the following options:

- The Details option displays information such as the title, the buyer, the type, the style, the outcome document, the invited supplier, the active offers, and the best offer for the negotiation.

- The Details option displays information such as the title, the buyer, the type, the style, the outcome document, the invited supplier, the active offers, and the best offer for the negotiation.

- The Actions option provides the **View Negotiation** link that helps you to navigate to the **Auction** page in Oracle Sourcing.

Offers tab

The application applies security rules for offers. For example, offers for sealed negotiations will not be displayed until the offers are unsealed.

This tab displays the following options:

- The Details option displays information such as the supplier of the offer, the negotiation number, the supplier contact, the outcome document type, the outcome document number and the bid rank.

- The Lines option displays information such as the item number, description, category, item revision, bid price, promised date, and award quantity.

- The Actions option provides the **View Offer** link to help you navigate to the offer details for a negotiation in Oracle Sourcing.

From the **Negotiations** and **Tasks** tabs, you can perform the following actions using the Actions list on the right side of the tab:

- Print

- Export

- Compare

For more information, see:

- Comparing Procurement Documents, page 5-1

- Printing or Exporting Procurement Documents, page 5-2

Understanding Strategic Sourcing Dashboard Calculations

Oracle Sourcing enables buyers and procurement managers to organize their strategic procurement activities and sourcing activities into initiatives, using a set of tasks that is completed by a collaboration team. Each initiative is assigned one or more objectives. Initiative owners, sponsors, and the chief procurement officer (CPO) can track the initiative to see if it has achieved the targeted objectives. Procurement documents that are an outcome of the negotiation, or any related documents, can be linked to the initiative. The Strategic Sourcing Dashboard enables a chief procurement officer (CPO) to review what initiatives the procurement team is taking to achieve the goals set out for the organization. At a glance, the CPO gets an overview of the team's progress on overall objectives and on individual initiatives.

When the CPO uses the Strategic Sourcing Dashboard, the following insight is available:

- Progress on Tasks

- Progress on Objectives
- Risk Index

Using an example, this topic explains how the Strategic Sourcing Dashboard calculates dimensions, either rolled up at an initiative level or for the entire organization.

Example

The calculations for the Progress on Tasks, for theProgress on Objectives, and for the Risk Index dimensions use the following example:

Date: 01-Jun-2015

Objectives: This table lists the sample high-level objectives set by the CEO of a Procurement organization.

Objective	Start Date	End Date	Start Value	Current Value	Target Value
Reduce lead-time for IT equipment	1-Jan-15	31-Dec-15	32 Days	27 Days	20 Days
Rational IT equipment supply base	1-Jan-14	31-Dec-15	600 Suppliers	530 Suppliers	400 Suppliers

In this example, the initiative is IT Hardware Procurement, a project whose spend outlay is about 500,000.00 USD. The organization started this initiative on 1-Mar-2015 and it is slated to end on 30-Sep-2015.

Tasks: The following table describes the tasks set for the IT Hardware Procurement initiative.

Task	Task Owner	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Status	Actual Progress %	Critic-ality	Reported Risk Level
Market Analysis	Buyer	1-Mar-15	30-Apr-15	15-Mar-15	10-Apr-15	Completed	100%	10	High

Task	Task Owner	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Status	Actual Progress %	Criticality	Reported Risk Level
Legal Review	Lawyer	15-Mar-15	31-May-15	1-Apr-15		Delayed	80%	5	High
Detailed Specifications	IT Manager	1-May-15	31-May-15	15-May-15		Delayed	50%	30	Medium
Supplier Qualification	Supplier Manager	15-May-15	15-Jun-15	15-May-15		Active	40%	20	Low
Supplier Negotiation	Buyer	15-Jun-15	15-Aug-15			Planned		5	High
Sign Contracts	Contracts Manager	15-Aug-15	30-Sep-15			Planned		30	Very High

Assigning Objectives to the Initiative

The following two objectives are assigned to the IT Hardware Procurement initiative. An objective at the initiative level inherits the start and completion dates of the initiative.

Objective	Start Date	End-Date	Start Value	Target Value	Current Value	Final Value
Reduce lead-time for IT Equipment	1-Mar-15	30-Sep-15	28 Days	25 Days	27 Days	

Objective	Start Date	End-Date	Start Value	Target Value	Current Value	Final Value
Rational IT equipment supply-base	1-Mar-14	31-Sep-2015	550 Suppliers	500 Suppliers	530 Suppliers	

Measuring Progress on Tasks

Planned Progress = (Sysdate - Planned Start Date) / (Planned Completion Date - Planned Start Date) – Maximum set to 100%

Delay % = Planned Progress% - Actual Progress%

Task	Task Owner	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Status	Actual Progress%	Planned Progress	Delay
Market Analysis	Buyer	1-Mar-15	30-Apr-15	15-Mar-15	10-Apr-15	Completed	100%	100%	0
Legal Review	Lawyer	15-Mar-15	31-May-15	1-Apr-15		Delayed	80%	100%	20%
Detailed Specifications	IT Manager	1-May-15	31-May-15	15-May-15		Delayed	50%	100%	50%
Supplier Qualification	Supplier Manager	15-May-15	15-Jun-15	15-May-15		Active	40%	15 / 30 = 50%	10%

Task	Task Owner	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Status	Actual Progress%	Planned Progress	Delay
Supplier Negotiation	Buyer	15-Jun-15	15-Aug-15			Planned			
Sign Contracts	Contracts Manager	15-Aug-15	30-Sep-15			Planned			

The application estimates progress percent at the initiative-level as:

Planned Progress = Sum(Planned Task Progress * Task Duration) / Sum(Task Duration)

Actual Progress = Sum(Reported Task Progress * Task Duration) / Sum(Task Duration)

Task	Task Owner	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Status	Actual Progress %	Planned Progress	Delay	Task Duration	Planned Progress% *Duration	Actual Progress% * duration
Market Analysis	Buyer	1-Mar-15	30-Apr-15	15-Mar-15	10-Apr-15	Completed	100 %	100 %	0	60 days	60 days	60 days
Legal Review	Lawyer	15-Mar-15	31-May-15	1-Apr-15		Delayed	80%	100 %	20%	75 days	75 days	80% * 75 = 60 days
Detailed Specifications	IT Manager	1-May-15	31-May-15	15-May-15		Delayed	50%	100 %	50%	30 days	30 days	50% * 30 = 15 days

Task	Task Owner	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Status	Actual Progress %	Planned Progress	Delay	Task Duration	Planned Progress% *Duration	Actual Progress% * duration
Supplier Qualification	Supplier Manager	15-May-15	15-Jun-15	15-May-15		Active	40%	15 / 30 = 50%	10%	30 days	50% * 30 = 15 days	40% * 30 = 12 days
Supplier Negotiation	Buyer	15-Jun-15	15-Aug-15			Planned				60 days	0	0
Sign Contracts	Contracts Manager	15-Aug-15	30-Sep-15			Planned				45 days	0	0
									Total	300 days	180 days	147 days
										Initiative Level	180 / 300 = 60%	147 / 300 = 49%
											Initiative Delay	11%

Measuring Progress on Objectives

Based on the example, the application calculates progress at the objective level as:

Planned Progress = (Sysdate - Start Date) / (Target Date - Start Date)

Actual Progress = (Current Value - Start Value) / (Target Value - Start Value)

Note: The application uses the same logic to calculate progress at the objective level and at the initiative level.

Objective level

Objective	Start Date	End-Date	Start Value	Current Value	Target Value	Planned Progress	Actual Progress	Delay
Reduce lead-time for IT Equipment	1-Jan-15	31-Dec-15	32 Days	27 Days	20 Days	6 months / 12 months = 50%	27 - 32 / 20 - 32 = 5/12 = 41.6%	8.30%
Rational IT equipment supply-base	1-Jan-14	31-Dec-15	600 Suppliers	530 Suppliers	400 Suppliers	6 months / 24 months = 25%	530 - 600 / 400 - 600 = 70 / 200 = 35%	-10% (ahead)

Initiative level

Objective	Start Date	End-Date	Start Value	Target Value	Current Value	Planned Progress	Actual Progress	Delay %
Reduce lead-time for IT Equipment	1-Mar-15	30-Sep-15	28 Days	25 Days	27 Days	3 months / 7 months = 43%	27 - 28 / 25 - 28 = 1/3 = 33%	10%
Rational IT equipment supply-base	1-Mar-14	31-Sep-2015	550 Suppliers	500 Suppliers	530 Suppliers	3 months / 7 months = 43%	530 - 550 / 500 - 550 = 20 / 50 = 40%	3%

Objective	Start Date	End-Date	Start Value	Target Value	Current Value	Planned Progress	Actual Progress	Delay %
							Overall initiative level = Average	6.50%

Risk Index

In Oracle Sourcing, when creating a task in the Risk region, the owner of an initiative enters a risk level for the task and assigns a criticality value between 0-100. The criticality value indicates the relative importance of the task within the initiative.

The following table lists the risk level value that this example uses for calculations:

Meaning	Value
Low	0
Medium	30
High	70
Very High	100

Risk Index Calculation

Based on the criticality and risk level values, the application calculates risk index as:

Risk Index = Criticality * Risk Level

Task	Task Owner	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Status	Actual Progress %	Criticality	Reported Risk Level	Risk Level Value	Risk Index
Market Analysis	Buyer	1-Mar-15	30-Apr-15	15-Mar-15	10-Apr-15	Completed	100%	10	High	70	0 (task complete)
Legal Review	Lawyer	15-Mar-15	31-May-15	1-Apr-15		Delayed	80%	5	High	70	70*5 = 350
Detailed Specifications	IT Manager	1-May-15	31-May-15	15-May-15		Delayed	50%	30	Medium	30	30*30 = 900
Supplier Qualification	Supplier Manager	15-May-15	15-Jun-15	15-May-15		Active	40%	20	Low	0	0
Supplier Negotiation	Buyer	15-Jun-15	15-Aug-15			Planned		5	High	70	70*5 = 350
Sign Contracts	Contracts Manager	15-Aug-15	30-Sep-15			Planned		30	Very High	100	30*100 = 3000
							Totals	90			4600

Overall risk index for the initiative = 4600 / 90 = **51**%

When the risk index approaches 100%, the project is at a very high risk overall. If the risk index approaches 0, then the risk is minimal.

Initiative Summary

The following table provides the key reporting values for each initiative:

Initiative	Spend Outlay / Financial Impact	Task Progress	Objective Progress	Risk Index
IT Hardware Procurement	500,000.00 USD	11% delay	6.5% delay	51%

Summary at the Operating Unit Level or Across Operating Units Using the Same Functional Currency

The following table summarizes the progress of initiatives that use the same functional currency. This summary uses weighted averages and assumes spend outlay as the weight.

Initiative	Spend Outlay / Financial Impact	Task Progress	Objective Progress	Risk Index
IT Hardware Procurement	500,000.00 USD	11% delay	6.5% delay	51%
Procurement of Communication Equipment	300,000.00 USD	2% ahead of schedule	10% delay	21%
Finding new supply-base in Korea	1,000,000.00 uSD	5% delay	2% ahead of schedule	34%
Overall (Weighted Averages)	1,800,000.00 USD	11*.5 - 2*.3 + 5*1 / 1.8 = **7.7% delay**	6.5*.5 + 10*.3 - 2*1 / 1.8 = **5.1% delay**	.5*51 + .3*21 + 1*34 / 1.8 = **50.7%**

Important: The application does not use cancelled tasks in any calculation. Only tracked objectives are considered for calculations. Additionally, tasks placed on hold are considered for all calculations.

8

Using the Document Builder

This chapter discusses the Document Builder feature in Oracle Procurement Command Center Plus.

This chapter covers the following topics:

- Overview of Document Builder in Oracle Procurement Command Center Plus
- Adding Items to the Document Builder in Oracle Procurement Command Center Plus
- Creating a RFQ Using the Document Builder
- Creating a Purchase Order Using the Document Builder

Overview of Document Builder in Oracle Procurement Command Center Plus

The Document Builder is a tool that procurement team, procurement managers, and buyers can use to add purchasing documents, match documents, and complete them.

Accessing Document Builder

In Oracle Procurement Command Center Plus, the Document Builder tool is available as an icon on top of the following pages:

- Procurement Operations
- Indirect Procurement
- Item Analysis
- Supplier Analysis

Creating Procurement Documents

Using Document Builder, you can:

- Create RFQs

  See: Creating a RFQ Using the Document Builder, page 8-3

- Create purchase orders

  See: Creating a Purchase Order Using the Document Builder, page 8-5

You cannot use the Document Builder if it is empty. You must add suppliers or requisition lines to the Document Builder. See: Adding Items to the Document Builder in Oracle Procurement Command Center Plus, page 8-2

Adding Items to the Document Builder in Oracle Procurement Command Center Plus

For an overview of the Document Builder, see: Overview of Document Builder in Oracle Procurement Command Center Plus, page 8-1

Procurement teams and buyers can add the following items to the document builder:

- Adding Requisitions:

  You can add multiple requisitions to the document builder through a table-level action on the Procurement Operations dashboard. If the requisition is sourced to an agreement, or a suggested supplier or multiple suggested suppliers, then suppliers are also added to the Document Builder along with the requisitions.

  Navigation: Procurement Operations page > Procurement Documents region > Requisitions tab. This tab provides the Add to Document Builder action, which is a multiple row action that adds selected requisitions to the Document Builder. When you perform this action, the application displays a confirmation message.

- Adding Suppliers:

  You can add multiple suppliers to the document builder from the Supplier Analysis page through table level action.

  Navigation: Supplier Analysis page > Supplier Information tab > Supplier tab. This tab provides the Add to Document Builder action, which is a multiple row action that adds selected requisition lines and suppliers to the document builder.

- Adding Agreements:

  You add multiple agreements (contract purchase agreements and blanket purchase agreements) to the document builder from the Supplier Analysis page through table level actions. When an agreement is added, it automatically brings in suppliers along.

Navigation: Supplier Analysis page > Documents Region > Agreements tab. This tab provides the Add to Document Builder action, which is multiple row action that adds agreements and suppliers to document builder.

You can also add to the document builder using the following business flow:

1. In the Procurement Operations dashboard, Requisitions tab, select the Lines option in the Actions column set drop down.

2. Select a requisition line which is In Pool status and then choose the Analyze Supplier row level action. The Supplier Analysis page appears.

3. You can find a set of agreements that match up with the requisition line. You can apply a few filters, select the matching agreement lines, and compare them with the requisition using the Compare with Source Line option in the Agreements tab.

4. Compare the price and need-by-date on the requisition line with the price and lead-time on agreement and pick an agreement to go with, and add that to the document builder.

5. View the requisition line, agreement, and supplier added to the document builder by clicking the Document Builder icon.

See:

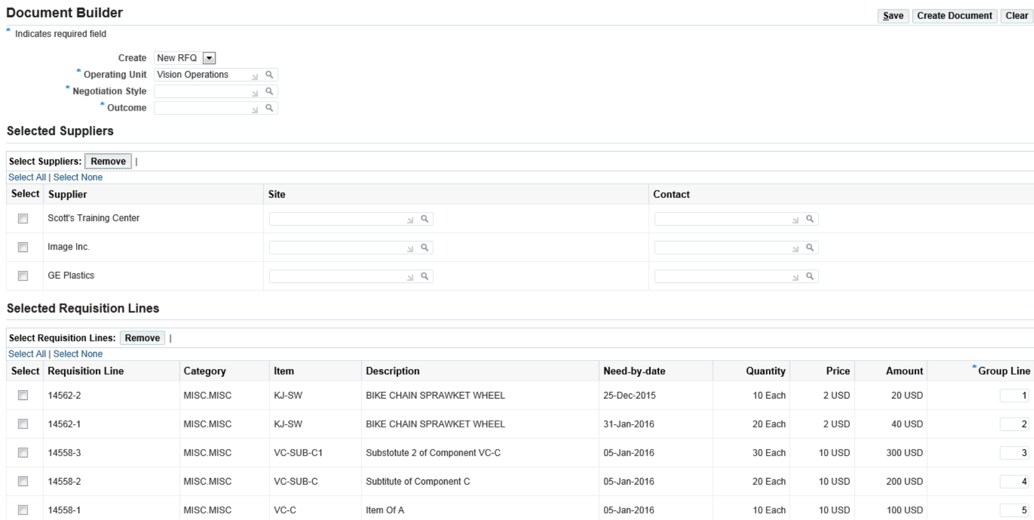
- Creating a RFQ Using the Document Builder, page 8-3

- Creating a Purchase Order Using the Document Builder, page 8-5

Creating a RFQ Using the Document Builder

After adding requisition lines and suppliers, procurement managers and buyers can create RFQs using the Document Builder. See: Adding Items to the Document Builder in Oracle Procurement Command Center Plus, page 8-2.

To create a RFQ:



1. Click the Document Builder link available at the top of any of the Oracle Procurement Command Center Plus pages.

2. In the Document Builder, select New RFQ.

   The application displays the operating unit that is set in the MO: Default Operating Unit profile. All negotiation styles enabled for RFQ are available for you to select. The outcome documents can be of any style linked to the blanket or contract purchase agreement document type. The Supplier Site and Contact list of values are similar to the values in the Sourcing Supplier tab.

3. In the Selected Suppliers region, you can view suppliers and supplier sites added to the document builder. If required, you can delete any supplier.

4. In the Selected Requisition Lines region, you can view the requisition lines added to the document builder. This region appears when requisitions are added to the document builder. The application defaults Group Line Number using the document builder grouping rules. You can ungroup the grouped lines, or attempt to group lines that the auto-grouping logic of document builder did not pick up. Manual grouping of lines is subject to validations existing in the document builder.

5. Click Create Document. The application takes you to the Create RFQ page in Oracle Sourcing.

6. Enter the following details in the Create RFQ page to complete the RFQ. For more information, see: *Oracle Sourcing User guide*.

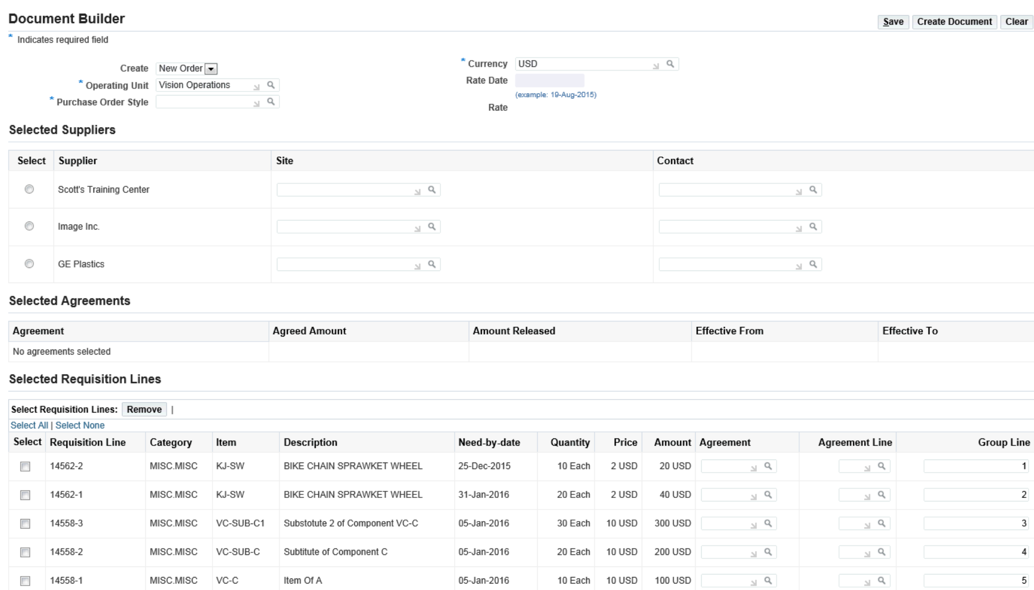
   - Header

- Lines
- Controls
- Contract Terms
- Suppliers

Creating a Purchase Order Using the Document Builder

After adding requisition lines and suppliers, procurement managers and buyers can create purchase orders using the Document Builder. See: Adding Items to the Document Builder in Oracle Procurement Command Center Plus, page 8-2.

To create a purchase order:



1. Click the Document Builder link available at the top of any of the Oracle Procurement Command Center Plus pages.

2. In the Document Builder, select New Order.

   The application displays the operating unit that is set in the MO: Default Operating Unit profile.

3. In the Selected Suppliers region, you can view suppliers and supplier sites added to the document builder. If required, you can delete any supplier. When you select a different supplier and have added agreements belonging to this supplier to the

document builder, the application perform auto-matching.

4. In the Selected Agreements region, you can view the agreements belonging to the selected supplier. To view the agreements, select a supplier using the radio button.

5. In the Selected Requisition Lines region, you can view the requisition lines added to the document builder. This region appears when requisitions are added to the document builder. The application defaults Group Line Number using the document builder grouping rules. You can ungroup the grouped lines, or attempt to group lines that the auto-grouping logic of document builder did not pick up. Manual grouping of lines is subject to validations existing in the document builder.

6. Click Create Document. The application takes you to the Update document page in Oracle Purchasing.

7. Complete the required fields and click Submit to create the purchasing document. For more information, see: *Oracle Purchasing User's Guide*.

9

Using Procurement Notes

This chapter discusses the Notes feature in Oracle Procurement Command Center Plus.

This chapter covers the following topics:

- Using Notes in Oracle Procurement Command Center Plus
- Using the Notes Page

Using Notes in Oracle Procurement Command Center Plus

Notes enable collaboration and help organize the workload within the procurement team . For example, a certain requisition in the pool might require a series of tasks such as estimating overall demand, performing market research, checking price or availability, and evaluating viable alternatives. Buyers may specialize in one of those areas. Notes enable a buyer to assign tasks to others in the procurement team with a target completion date, to create visibility into ownership, and to track tasks to completion. The buyer can track differences between forecasted completion dates and planned completion dates. Any difference between the forecasted and planned dates may constitute a delay, and this information provides an early warning to the buyer about delay in the delivery of the item or service.

Note Types – Typical Use Case

- Procurement team members must be aware of what requisitions are being worked on and what requisitions have not been looked at. They also need to know what actions are pending before decisions are taken regarding requisitions. Using Notes, buyers can gather the required details and perform any background activity on requisitions.

- For certain orders or sometimes order lines, especially in the engineering and construction industries, a checklist of tasks has to be completed to ensure that the need-by date is met. The buyers who manage these checklists and complete these actions are typically called expeditors. Some of the activities are: get customs clearance, arrange logistics, and clear warehouse floor space. Using Notes, the expeditor can know what tasks are due, when they are due, and how many are assigned to the expeditor.

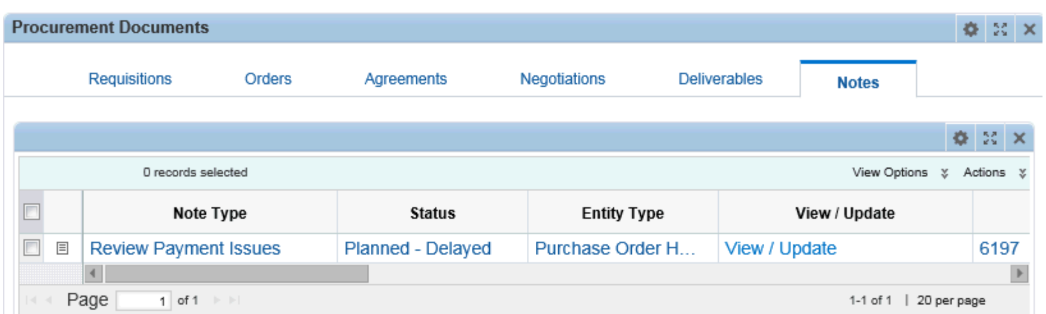
- For certain agreements, a series of actions are to be taken before a decision on whether to terminate an agreement, or to extend, or to renegotiate an agreement are taken. The tasks can be distributed between different buyers in the system. Buyers need to know who is looking into the termination or extension decision, and who is working on a particular note.

Note Types in Oracle Procurement Command Center Plus

To help procurement teams gather the required information for their business, Notes are linked to the following document types:

- Requisition line
- Order
- Order line
- Agreement
- Agreement line
- Review
- Feedback

To identify a note type, Procurement team members and buyers can click the Notes tab in the Procurement Documents region of the Procurement Operations dashboard.



Predefined Note Types

Oracle Procurement Command Center Plus delivers the following predefined note types. You can make changes to the note types by modifying the corresponding lookup values. For more information, see: Setting Up Oracle Procurement Command Center

Plus, page 2-6.

- Reviews / Feedback items
  - Contact Reviewer
  - Contact Manager/Department Head
  - Contact Supplier
  - Arrange for Return/Replacement
  - Revise Catalog
- Agreement Line
  - Contact Supplier
  - Review Future Demand
  - Set/Extend Termination date
  - Review Supplier Performance
- Agreement Header
  - Contact Supplier
  - Review Future Demand
  - Extend Termination Date
  - Initiate Termination
  - Review Supplier Performance
  - Revise Catalog Content
- Purchase Order
  - Contact Supplier
  - Review Delivery Issues
  - Review Quality Issues
  - Review Payment Issues
  - Initiate Cancellation

    - Process Changes
    - Contact Requesters
- Purchase Order Line
    - Re-confirm Expected Receipt Date
    - Follow up with Supplier
    - Arrange Logistics
    - Complete Customs Formalities
    - Review Inspection Issues
    - Arrange for Return/Replacement
    - Contact Requester
    - Find Another Supplier
    - Initiate Cancellation
- Requisition Line
    - Contact Requester
    - Gather Detailed Requirements
    - Estimate Overall Demand
    - Perform Market Research
    - Check Price/Availability
    - Look for Alternatives
    - Draft Statement of Work
    - Hold for More Demand

Notes Metrics

The Procurement Operations Dashboard, Summary region displays the number of open notes.

See: Analyzing Procurement Operations, page 3-1.

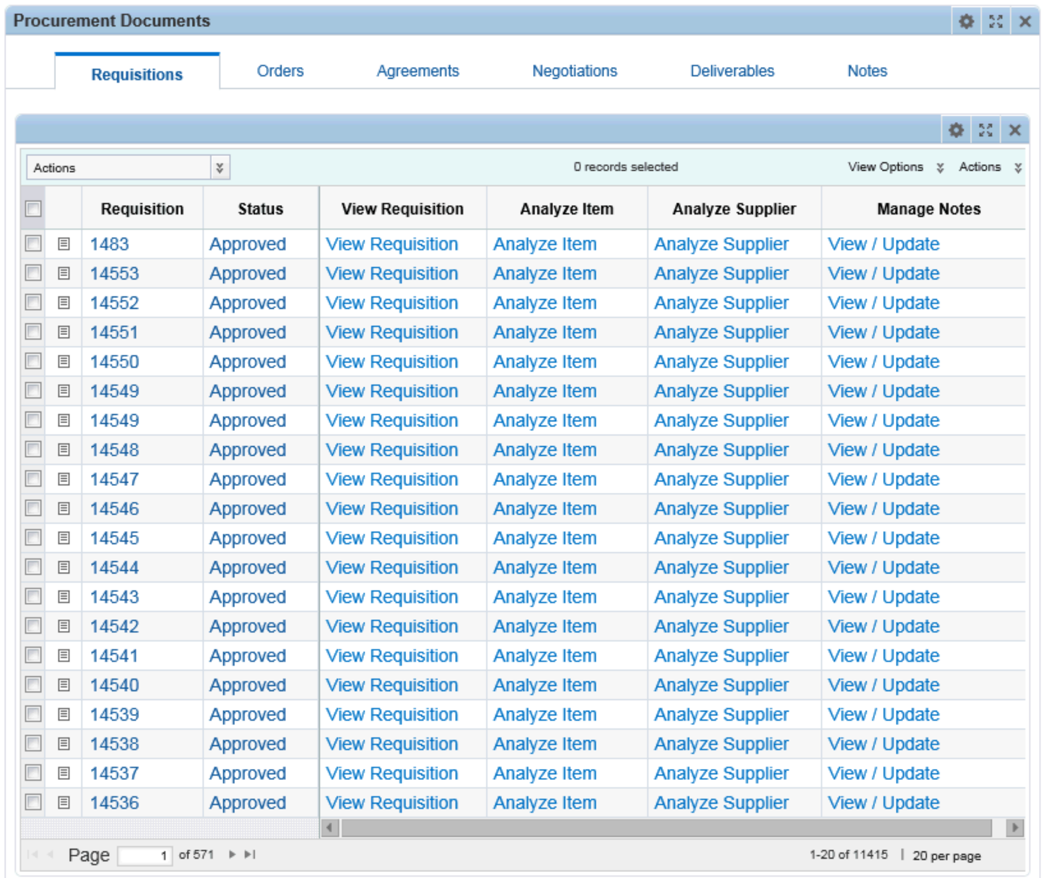
Notes Charts

The Procurement Operations Dashboard, Work and Measure Region, Notes & Deliverables tab display the charts for notes.

See: Analyzing Procurement Operations, page 3-1.

Managing Notes

To perform tasks related to notes, click the View/Update link for the relevant notes.



Requisition	Status	View Requisition	Analyze Item	Analyze Supplier	Manage Notes
1483	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14553	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14552	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14551	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14550	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14549	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14549	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14548	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14547	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14546	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14545	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14544	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14543	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14542	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14541	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14540	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14539	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14538	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14537	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update
14536	Approved	View Requisition	Analyze Item	Analyze Supplier	View / Update

When you click the View/Update link, the Notes page appears. Use this page to complete the task related to the note. See: Using the Notes Page, page 9-5.

Using the Notes Page

For an overview of Notes, see: Using Notes in Oracle Procurement Command Center Plus, page 9-1

The Notes page appears, when you click the following links in Oracle Procurement Command Center Plus.

Procurement Operations Dashboard, Procurement Documents region:

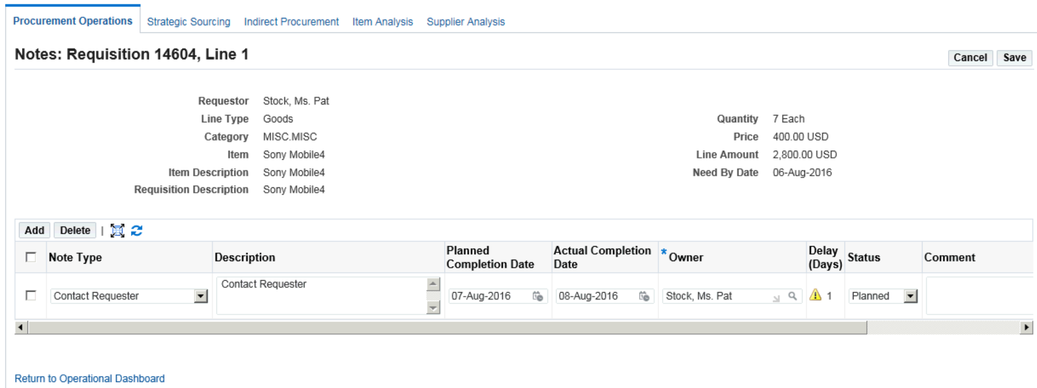
- Requisitions tab, Actions option in the column list: View/Update link in the Manage Notes column
- Orders tab, Actions option in the column list:
    - Manage Order Notes link in the Manage Order Notes column
    - Manage Line Notes in the Manage Line Notes column
- Agreements tab, Actions option in the column list:
    - Manage Order Notes link in the Manage Order Notes column
    - Manage Line Notes in the Manage Line Notes column
- Deliverables tab, Actions option in the column list:

  Manage Deliverable in the Manage Deliverable column

Indirect Procurement Dashboard:

- Reviews tab, Actions option in the column list: View/Update link in the Manage Notes column
- Feedback tab, Actions option in the column list: View/Update link in the Manage Notes column
- Catalog Items tab, Actions option in the column list.
    - Manage Order Notes: Click this link to navigate to the header-level Notes page. From that page you can perform the required action for the purchase order header.
    - Manage Line Notes: Click this link to navigate to the line-level Notes page. From that page you can perform the required action for the purchase order line.

The note type in the Notes page depends on the context of the note and the document. For example, if you click the View/Update link in the Requisitions tab, the Notes: Requisition page appears. From that page you can add the action type that you want the procurement team to review for the requisition.


Procurement Operations
Strategic Sourcing
Indirect Procurement
Item Analysis
Supplier Analysis
Notes: Requisition 14604, Line 1
Cancel
Save
Requestor Stock, Ms. Pat
Line Type Goods
Category MISC.MISC
Item Sony Mobile4
Item Description Sony Mobile4
Requisition Description Sony Mobile4
Quantity 7 Each
Price 400.00 USD
Line Amount 2,800.00 USD
Need By Date 06-Aug-2016
Add
Delete
Note Type
Description
Planned Completion Date
Actual Completion Date
* Owner
Delay (Days)
Status
Comment
Contact Requester
Contact Requester
07-Aug-2016
08-Aug-2016
Stock, Ms. Pat
1
Planned
Return to Operational Dashboard

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