

Oracle® Supplier Management
User's Guide
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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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- Do you need different information or graphics? If so, where, and in what format?
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Preface

Intended Audience

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

See Related Information Sources on page x 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 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.

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Related Information Sources

Related User's and Implementation Guides

- *Oracle Customer Data Librarian User Guide*
- *Oracle Customers Online User Guide*
- *Oracle iSupplier Portal Implementation Guide*
- *Oracle iSupplier Portal User's Guide*
- *Oracle Payables Implementation Guide*
- *Oracle Payables User's Guide*
- *Oracle Procurement Contracts Implementation and Administration Guide*
- *Oracle Purchasing Implementation Guide*
- *Oracle Sourcing Implementation and Administration Guide*
- *Oracle Supplier Management Implementation and Administration Guide*
- *Oracle Supplier Network User Guide*
- *Oracle Trading Architecture User Guide*
- *Oracle Trading Community Architecture Administration Guide*
- *Oracle Trading Community Architecture Technical Implementation Guide*
- *Oracle Trading Community Architecture User Guide*
- *Oracle Workflow Developer's Guide*
- *Oracle Workflow 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 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.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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.

Introduction to Oracle Supplier Management

This chapter covers the following topics:

- Supplier Lifecycle Management
- Supplier Hub

Supplier Lifecycle Management

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

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

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

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

Main features of Supplier Lifecycle Management include:

360 Degree Supplier View

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

Supplier Lifecycle Management provides a repository for storing information from disparate sources and then enabling a 360 degree view of the data to be provided to the key business users within the organization. Business users can access basic supplier information, such as address, contact, contact points, business/diversity classification, general classification, product and services category, banking details, supplier tasks, notes, and supplier party relationships. Additionally, they can review qualification and on-going evaluation details for the supplier, view key documents that have been included in the supplier's profile, and check the status of deliverables that the supplier is required to provide to maintain their status within the system.

Extended Supplier Profile

To understand the capabilities of suppliers in key product categories, Supplier Lifecycle Management utilizes User Defined Attribute technology. This technology allows administrators to add an unlimited range of attributes to the supplier definition and to group these into logical profile sections. Typically, this is the sort of information stored in paper-based systems that are maintained by different departments throughout an organization. In addition to the attribute name, administrators are able to add descriptive text to help explain the purpose of the attribute.

Fine-grained access control tools allow administrators to manage which users can have access to the individual attributes in the extended set of profile details. This is particularly important when sensitive information is stored in the profile and access needs to be restricted to appropriate users either internally or at the supplier.

Supplier Search

To assist administrators charged with managing the vendor master for their organizations, advanced search capabilities enable them to efficiently find and retrieve supplier records.

The advanced search allows administrators to use any of the standard and extended profile attributes as search criteria and view the results using multiple display formats. They can export the profile information retrieved from the search in spreadsheet format. Administrators and business users can personalize the advanced search criteria and display formats at their user level.

Supplier Profile Management (including Self-Service)

Most organizations maintain a team of administrators to deal with the flow of

administrative updates from trading partners containing changes to their company profile details. To make this process more efficient, Supplier Lifecycle Management extends existing iSupplier Portal functionality to allow supplier users to be given online access to maintain a wider range of their own profile details.

The supplier user can maintain standard company profile details such as address, contacts, business/diversity classifications, products and services category, and banking details. Internal administrators can review the changes that suppliers provide before approving the changes.

Suppliers are also able to access qualification and on-going compliance information that they are required to provide to the buying organization to maintain their status in the system.

Registration and On-Boarding of New Suppliers

To help manage the stream of inquiries that come from supplier prospects interested in doing business with the buying organization, many companies now use their corporate websites to have potential suppliers register their interest in establishing a business relationship. This allows the organization to get key information from the supplier that can be used to qualify whether they are a suitable trading partner. Supplier Lifecycle Management provides a supplier registration feature that can be configured by business unit to gather the data elements required to assess each prospective supplier request. The registration form can be configured to include Address, Contacts, Business Classification, Product and Services category, Banking detail and any of the Extended Supplier Profile attributes. The prospective supplier can also upload attachments as part of their registration packet.

To support sophisticated and conditional qualification procedures, administrators can also establish RFI documents that allow various profile and compliance information from the prospect to be captured using a questionnaire format.

In addition to the walk-up process, buyers can pre-register and send invitations to prospective suppliers, requesting them to provide additional details for pre-qualification and approval using the self-service capability.

To support complex or lengthy supplier registration, prospective suppliers can save their draft registration request at any time, and return to it at a later date. Once a prospective supplier has registered, their request is routed through an approval hierarchy for review.

Qualification Management

For many organizations, the processes for assessing new supplier relationships are cumbersome and inefficient. In an effort to ensure that "business gets done", companies often support multiple channels for receiving new supplier requests and then follow a very limited or haphazard procedure to review supplier credentials. Oftentimes, this is a poorly coordinated manual process that requires tasks to be sequenced and tracked across multiple departments as credit checks are carried out, customer references called,

quality standards reviewed and production facilities inspected.

Supplier Lifecycle Management leverages the Approval Management Engine to allow companies to generate customized approval flows for processing supplier requests and registrations. The details for each new supplier can be passed to multiple stakeholders across many departments within the buying organization.

Approvers are notified when they are required to review a request and can check graphically the overall approval status for a given request. As part of the approval routing, SLM includes the qualification information collected from the supplier as well as incremental feedback provided by business users assessing the request. This allows basic supplier profile and qualification details to be gathered, deliverables like Insurance certificates and Code of Conduct documents to be stored and Products and Services information to be recorded within the Qualification packet. The buying organization can apply business rules that will use the details in the request to customize the approval flow so that the appropriate approvers can look at the details.

Once a registration request has been approved or rejected, the supplier is automatically notified by email. Following approval, the qualification details provided by a supplier become part of their profile that can be updated at a later date.

Compliance and Profile Audits

Whilst there are regulatory requirements for some types of organization to keep key supplier profile elements up to date, this is also an important process for a lot of non-regulated organizations that are looking to meet Corporate Social Responsibility standards that they have set for themselves.

Supplier Lifecycle Management enables administrators to utilize the RFI tools to gather and manage supplier compliance and profile information that are required on an anniversary basis. They can define key compliance information that is required from suppliers and then store the feedback provided by the supplier into the supplier master profile record.

Performance Evaluation

Companies recognize that employees who interact with suppliers can provide insightful feedback on "soft" performance metrics for the supplier. Being able to canvas opinion from these key stakeholders and then use the information to help drive an overall assessment of a supplier's performance is a key part of any collaborative program intended to help improve supplier relationships.

Supplier Lifecycle Management enables administrators to generate internal RFI documents that can be sent to key personnel within the organization to evaluate and score specific aspects of a supplier's overall performance. This enables stakeholders in a diverse range of departments, such as Procurement, Finance, Supply Chain, Manufacturing, Quality, Design, and Legal to combine their opinions into a rating of how well the supplier is doing. The feedback gathered about the supplier is stored in the supplier profile allowing performance trends to be tracked and risk to be effectively

managed.

Supplier Notifications

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

Supplier Hub

Oracle Supplier Hub is a new application that provides a portfolio of Master Data Management tools to enable organizations to better manage their supplier master records. Built on the foundational technology used to support mastering of customer information, Supplier Hub will be used by both organizations that need to aggregate supplier data from a range of application systems and also by those running a single E-Business Suite instance.

It provides comprehensive functionality to manage supplier data: consolidating supplier information from disparate systems and business lines into one repository, cleaning and enriching data centrally, and providing the resulting "single point of truth" data as a service to consuming applications, enterprise business processes and decision support systems.

Deployment of Supplier Hub will enable organizations to have a consistent understanding of the trading partners that they use to procure the various goods and services required to support their business. This clarity is essential in order to be able to carry out effective analysis of spending patterns so that appropriate tactical and strategic decisions can be made about company procurement policies.

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

- **Standalone Mode - Separate E-Business Suite Instance**

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

- **Integrated Mode – Existing E-Business Suite Instance**

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

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

- **Mixed Mode**

This hybrid setup is essentially an extension of the Integrated Mode in that it allows customers to run the Hub as part of their existing E-Business Suite instance and at the same time, feed it with additional supplier records from other legacy systems for the purposes of mastering the details across all of those systems.

Main features of Supplier Hub include:

Supplier Master Profile

Supplier Hub allows an organization to gather all of the key details they store about their vendors from across all of their heterogeneous environments and store them in a central repository. Given the wide range of information that Purchasing and Payables departments need and wish to maintain, the Hub enables buyer organizations to store data across the following range of categories:

- **Supplier Identity**

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

- **Supplier Business Details**

These are the attributes that are typically required to be able to do business with the supplier and so provide the more granular details about a supplier's identity, such as location, contact and bank account information.

- **Supplier Profile Details**

These are the pieces of information that identify the characteristics of the supplier, and can range from things like the corporate structure of the supplier, names of C-level officers through to the goods and services they can provide, classifications that apply to them and 3rd party credit risk information.

- **Supplier Control Details**

These are the flags and settings that are used to manage the business relationship for order collaboration, receiving, invoicing and payment between the buying organization and the supplier.

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

Extended Supplier Profile

To better understand the capabilities of suppliers in key product categories, and to track subjective information about how that supplier is performing, buying organizations need to be able to store a wide range of additional details in their supplier master.

Typically, this is the sort of information that is gathered by different departments and stored using paper-based systems, preventing the organization from using the details to gain a better insight into a supplier's performance.

Supplier Hub utilizes User Defined Attribute technology that allows administrators to add an unlimited range of attributes to the supplier definition and to group these into logical Profile sections. In addition to the attribute name, administrators are able to add descriptive text to help explain the purpose of the attribute. The extended profile attributes allow disparate details to be imported from a variety of source systems or for the Hub to be used to capture and store this information centrally.

Fine-grained access control tools allow administrators to manage which users can have access to the individual attributes in the extended set of profile details. This is a key feature when sensitive information is stored in the profile and access need to be restricted to appropriate users either internally or at the supplier.

Enhanced Supplier Classification

It is becoming increasingly important to a large number of organizations to be able to track classification and diversity information across their supply base in order to ensure that spending patterns can be matched to Corporate Social Responsibility goals. To allow organizations to track a wide variety of classification and diversity information about their suppliers, the Hub enables administrators to define multiple classification schemas. This information can then be used when building reports to track spending patterns.

Supplier Hierarchy Management

A crucial part of supply base analysis is to understand the relationships that exist between the different suppliers that are doing business with different parts of the buying organization. This allows an organization to leverage aggregated spend information within the negotiation process with the supplier.

Supplier hierarchy management functionality within the Hub provides the ability to identify Parent and Child supplier company relationships across all of the supplier records that have been consolidated from the different systems within a company.

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

Data Import and Source System Management

Supplier Hub provides an Import Workbench to allow administrators to setup and control the process of consolidating supplier records from any spoke applications or systems running within the organization. The Import tools enable supplier Identity,

Business, and Profile Details from multiple spoke/source systems to be cross-referenced. Batch Management capabilities then allow the administrator to control the loading of the imported supplier data into the Hub repository. The initial release of the Hub will support backend concurrent program import for identity, address, contacts, and general classifications.

Data Quality Management

A critical element of an administrator's role in managing supplier data is in dealing with duplicate supplier records and establishing processes to prevent duplication in the first place.

The Data Quality Management (DQM) functionality incorporated into Supplier Hub provides features that allow an administrator to carry out systematic de-duplication and cleansing of supplier Identity, Business and Profile Details. The DQM tools have also been incorporated into the supplier creation flows that are supported by the Hub to prevent the setup of multiple records for the same supplier.

DQM provides tools to setup match rules and other data quality setups required for performing de-duplication tasks. It also provides tools for blending of the supplier records to harmonize the information about a single supplier that exists in multiple source systems. It provides tools for automatic identification of potential duplicate supplier records in the system in order that administrators and business users can take further data quality actions as required.

Data Enrichment using D&B Integration

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

Data Publication and Synchronization

One of the primary reasons for deploying Supplier Hub is to establish a single definition for each supplier and then to make sure that this representation is used across all of the systems operated across the organization.

The Supplier Data Publications feature set provides the capabilities to integrate Supplier Hub with other spoke systems. It provides the infrastructure to raise the necessary business events to trigger publication of updated supplier information and APIs that can be used by spoke systems to query and consume the updated supplier information. It also provides APIs for querying potential duplicate supplier records in the Hub and for processing the source system supplier information into the Hub.

Features Available from Both Supplier Lifecycle Management and Supplier Hub

Features available from both Supplier Lifecycle Management and Supplier Hub include:

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

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

Supplier Directory Services

This chapter covers the following topics:

- Overview of Supplier Directory Services
- Supplier Profile
- Searching for Suppliers
- Exporting Supplier Profile to Spreadsheet
- Notifying Suppliers

Overview of Supplier Directory Services

The Supplier Directory Services features enable buyers and administrators to query suppliers in their system, view a 360 degree view of their profiles, export search results to a spreadsheet, and notify suppliers.

Supplier Profile

Supplier Profile is composed of key supplier information required to maintain business relationship between buying organizations and their suppliers. Supplier profile includes details such as supplier identity information, addresses, contacts, contact points, business classifications, banking details, products and services category, supplier tasks, notes, and supplier party relationships. Administrators can define custom attributes to extend the profile and customize it based on their business domain. Suppliers can be given access to their profile online so the onus of maintaining the profile lies with the Supplier. Any changes by the supplier are subject to approval by the buying organization. This chapter discusses the supplier profile in detail. Oracle Supplier Lifecycle Management provides a number of customizable business processes such as Supplier Registration and Qualification Management, Supplier Compliance and Profile Audit, Item Supplier Qualification, and Supplier Performance Evaluation that use supplier profile and its extensions. These processes are discussed in further details in subsequent chapters.

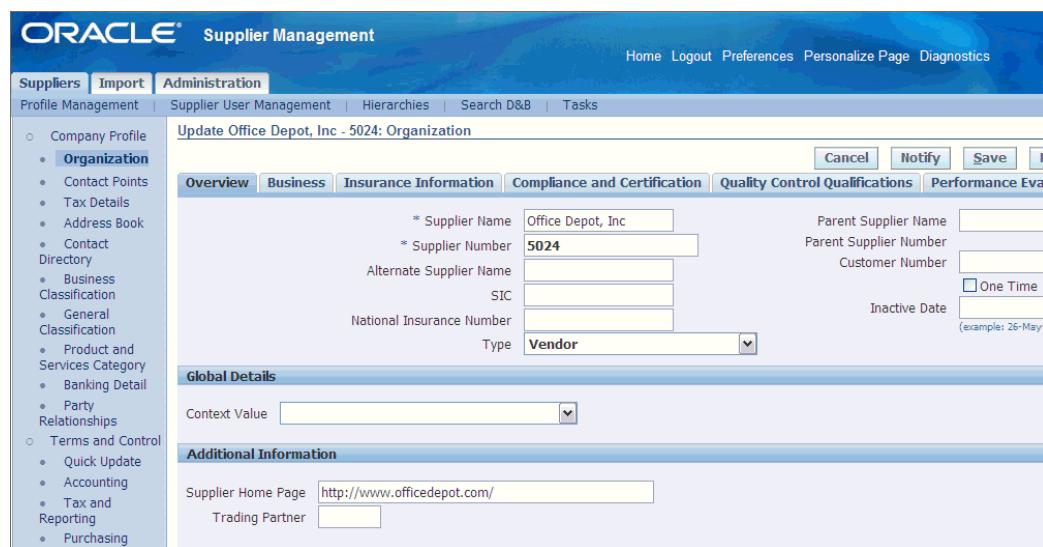
If you are an existing customer of Oracle Payables, Oracle Purchasing, or Oracle iSupplier Portal, then you are familiar with the basic supplier profile that comes with any of these products. Supplier Management extends this profile and gives the Supplier Management Administrator role based access control to a supplier's profile so they can restrict sensitive information from suppliers as well as internal users. For example, if you have created some custom attributes to gather supplier's performance metrics, the administrator can hide these metrics from your suppliers.

Customers who are new to aforementioned Oracle Applications must follow references to those product manuals mentioned in this chapter along with the information provided to learn about supplier profile.

Supplier Profile Pages

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

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



The screenshot shows the Oracle Supplier Management interface. The top navigation bar includes links for Home, Logout, Preferences, Personalize Page, and Diagnostics. The main menu bar has tabs for Suppliers, Import, Administration, Profile Management, Supplier User Management, Hierarchies, Search D&B, and Tasks. A sub-menu for Profile Management is open, showing categories like Company Profile, Organization, and Terms and Control. The main content area is titled 'Update Office Depot, Inc - 5024: Organization'. It contains several input fields: * Supplier Name (Office Depot, Inc), * Supplier Number (5024), Alternate Supplier Name, SIC, National Insurance Number, and Type (Vendor). There are also fields for Parent Supplier Name, Parent Supplier Number, Customer Number, and Inactive Date (example: 26-May-). Below these are sections for Global Details (Context Value) and Additional Information (Supplier Home Page: http://www.officedepot.com/ and Trading Partner). A toolbar at the top right includes buttons for Cancel, Notify, Save, and Print.

The following pages are visible to suppliers as well as internal users:

- Organization
- Tax Details
- Address Book
- Contact Directory
- Business Classification
- Product and Services Category
- Banking Detail

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

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

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

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

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

General Classifications page is internal. Use the General Classification page to assign a classification to a supplier. See: Assigning Classifications, page 7-2.

Terms and Controls: These pages provide access to all of the attributes that are used to control the business relationship you have with the supplier. This includes account code references, internal tax setups, purchasing, receiving, invoicing, and payment options.

In addition, there is a Quick Update page that can be personalized to provide access to the most commonly used setup attributes for individual users or groups of users. The following pages are visible only to internal users:

- Terms and Control:
 - Quick Update – enables you to record key purchasing and payment setup information for your supplier sites. See: Key Setup Information in the *Oracle Payables User's Guide*.
 - Accounting – enables you to specify accounting default values. See: Accounting Information in the *Oracle Payables User's Guide*.
 - Tax and Reporting – use this page to record supplier tax information to enable three defaults during invoice entry, and to provide tax reporting information. See: Tax Reporting Information in the *Oracle Payables User's Guide*.
 - Purchasing – enables you to enter purchasing defaults for your suppliers.
 - Receiving – enables you to enter receiving defaults for your suppliers. See: Receiving Information in the *Oracle Payables User's Guide*.
 - Payment Details – See Payment method, Payment Attributes, Specifying Separate Remittance Advice in *Oracle Payables User's Guide*.
 - Payment Relationship – See Supporting Third Party Payment in *Oracle Payables User's Guide*.
 - Invoice Management – See: Control Information, Payment Information in the *Oracle Payables User's Guide*.

Others: The following pages are internal and significant in managing supplier profile using Oracle Supplier Management:

- Assessment
 - Qualification and Evaluation – enables you to search, view, and act on existing qualification and evaluation RFIs.
 - Surveys – Usage of user defined supplier profile attributes and RFI Questionnaires are recommended over iSurvey for extensible supplier profile management implementations. Surveys link is provided in the Supplier Management navigation menu for customers who have been using the iSurvey functionality through other products like iSupplier portal.
- Relationship Contracts: RFI Contract Clauses and Deliverables feature is part of Supplier Lifecycle Management license. However, for using contracts for any document other than RFI type, you should purchase an appropriate Oracle

Contracts product license. Any contracts and deliverables pertaining to a supplier are visible from that supplier's profile.

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

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

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

- Profile Access Control – enables you to view and update the roles attached to suppliers that provide them access to the user-defined attributes. See: Setting up Profile Access in *Oracle Supplier Management Implementation and Administration Guide*.
- Notes – enables you to view and create notes of several types. See: Setting up Tasks and Notes in *Oracle Supplier Management Implementation and Administration Guide*.
- Source Systems – enables you to maintain details of the source systems related to the supplier. See: Creating and Updating Source Systems in *Oracle Trading Community Architecture Administration Guide*.
- Transactions - You can extend your view of transactions in Oracle Supplier Management to include transaction data from applications that are not part of E-Business Suite applications to provide a complete view into all supplier business transactions in your organization. This is available only from the Supplier Data Librarian responsibility. See: Setting up Transaction Views in *Oracle Supplier Management Implementation and Administration Guide*.
- Publish Event History – enables you to track the publication history of supplier information.

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

quality control qualifications, and any other information that meets your business requirements.

ORACLE® Supplier Management

Suppliers Import Administration

Profile Management Supplier User Management Hierarchies Search D&B Tasks

Update Office Depot, Inc - 5024: Organization

Overview Compliance and Certification GE Policy & Business Details Business Reference Quality API_Business_Infomation In

Compliance Verification

Last Verified Date	Verification Due Date
20-Apr-2010 <input type="text"/>	20-Apr-2010 <input type="text"/>
(example: 20-Apr-2010)	(example: 20-Apr-2010)
<input type="text"/>	<input type="text"/>
(example: 20-Apr-2010)	(example: 20-Apr-2010)
Add Another Row	

ORACLE® Supplier Management

Suppliers Import Administration

Profile Management Supplier User Management Hierarchies Search D&B Tasks

Update Office Depot, Inc - 5024: Organization

Overview Compliance and Certification GE Policy & Business Details Business Reference Quality API_Business_Infomation In

Quality Control

Organization Quality Control	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> In-Progress
------------------------------	--------------------------------------	--------------------------	-----------------------------------

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

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

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

- Product and Service categories such as monitors, building materials, and electronic tubes.
- Supplier type such as component manufacturer, distributor, and contract manufacturer.
- Business classification such as women owned, small business, and minority owned.

- Custom classifications such as premium, gold, and platinum.
- Common: This association makes the user defined attribute applicable to all supplier parties.

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

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

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

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

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

Searching for Suppliers

Supplier search is available in the following modes:

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

Simple Search

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

Use the Supplier Management Administrator and Supplier Management User responsibilities.

To find a supplier using the Search region:

1. On the Suppliers home page, enter your search values into the appropriate search fields. You can enter complex criteria by entering information in several fields. Click the Show More Options link to access additional search fields if necessary.
2. Click Go. The search results appear in the table below the search fields. Use the Update button to access the details for the supplier.

The screenshot shows the Oracle Supplier Management interface. At the top, there's a navigation bar with links for Suppliers, Import, Administration, Profile Management, Supplier User Management, Hierarchies, Search D&B, and Tasks. Below this is a sub-navigation bar for Suppliers, with buttons for Notify All Suppliers, Register New Supplier, Enable As Supplier, Create Supplier, and Advanced Search. The main area is titled 'Search' and contains a message: 'At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.' There are several search fields: Supplier Name, Supplier Number, Taxpayer ID, Tax Registration Number, DUNS Number, Employee Number, Reporting Name, Payment Terms, Pay Group, Federal Reportable, Income Tax Type, and State Reportable. Below these are dropdowns for Alternate Supplier Name, Inactive Date From, One Time, Supplier Type, Parent Supplier Name, Parent Supplier Number, and Payment Priorities From. At the bottom of the search area are 'Go' and 'Clear' buttons. The 'Search Results' section is titled 'Search Results' and has columns for Select Supplier Name, Supplier Number, Parent Supplier Name, Taxpayer ID, Tax Registration Number, DUNS Number, and Employee Number. A message 'No search conducted.' is displayed. The bottom of the page includes a navigation bar with links for Suppliers, Import, Administration, Home, Logout, Preferences, Help, and Diagnostics, as well as links for About this Page and Privacy Statement. A copyright notice 'Copyright (c) 2006, Oracle. All rights reserved.' is also present.

Advanced Search

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

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

1. **Setting the Search Context:** There are three components on this page that contribute to the search. First is the Search Context. Here, select one of the classifications from Address Purpose, Business Classification, Country, General Classification, Products and Services Category, and Supplier Type. Then select a

value for that classification and click Go. This sets the context for the remaining two regions, Search Criteria and Display formats.

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

The screenshot shows the Oracle Supplier Management interface. The top navigation bar includes links for Home, Logout, Preferences, and Diagnostics. The main menu bar has tabs for Suppliers, Import, and Administration, with sub-links for Profile Management, Supplier User Management, Hierarchies, Search D&B, and Tasks. The current page is Suppliers > Advanced Search.

Search Context (Top Region):

- Classification Context: Products and Services Category (selected)
- Category: COMPUTER.MONITOR (selected)
- Classification Context (two dropdowns):
- Classification Context (two dropdowns):
- Go button

Search Criteria (Middle Region):

- Criteria: Compliance Criteria (selected)
- Go and Personalize buttons
- Tip: ^ Indicates indexed attribute.
- Supplier Party section (with dropdowns for Supplier Header, Child Labor Laws Compliance, Internal Audits, Health and Safety Compliance, Quality Process Certification, Environmental Certification, Business Specific Certifications, and Financial Controls and Compliance).
- Party Site section (with a note: Supplier Party Site Quality Control Systems:ISO 9001).

Display Formats (Bottom Region):

- Display Formats: Compliance Information (selected)
- Go and Personalize buttons
- Note: The search will show a maximum of 10 rows.
- Table structure for displaying search results:

Supplier Name	Supplier Number	Child Labor Laws Compliance	Internal Audits	Health and Safety Compliance	Quality Process Certification	Environmental Certification	Business Specific Certifications	Financial Controls and Compliance	ISO 9001

- Simple Search and Search buttons

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

Personal search criteria and display formats criteria created in this manner are only available to the user who created them. Administrators can create frequently used search criteria and display formats from the Administration tab, which become available to all users. When a user and administrator define a default search criteria

template for a particular search context, the user-defined search criteria template takes precedence. See: Setting up Advanced Search Criteria and Display Format in *Oracle Supplier Management Implementation and Administration Guide*.

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

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

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

Smart Search

Smart Search is a powerful search engine that finds suppliers that not only exactly match but are similar to your criteria. You can choose any search criteria from Supplier Party level attributes for the smart search (a strong advantage of smart search over simple search).

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

Use the Supplier Data Librarian and Supplier Data Librarian Super User responsibilities to access Smart Search.

To find a supplier using the Smart Search region:

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

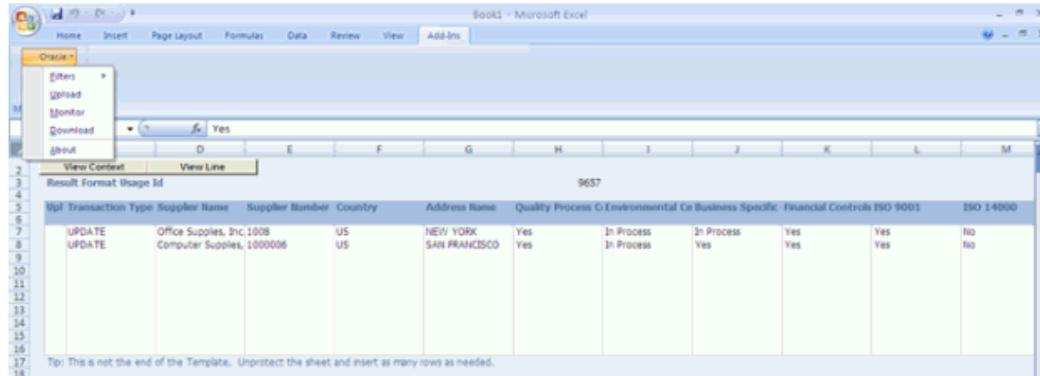
2. Click Go. The search results appear in the table below the search fields. Use the Update button to access the details for the supplier.

You can merge suppliers using the search results. Additionally, you can publish the supplier profile using the Publish button and generate the supplier profile report using the Generate Report button. See: Publishing Supplier Profile, page 12-2 and Generating Supplier Profile Report, page 12-5.

Exporting Supplier Profile to Spreadsheet

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

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



Supplier Name	Supplier Number	Country	Address Name	Quality Process	Environmental	Business Specific	Financial Controls ISO 9001	ISO 14000
Office Supplies, Inc.	1008	US	NEW YORK	Yes	In Process	In Process	Yes	No
Computer Supplies,	1000006	US	SAN FRANCISCO	Yes	In Process	In Process	Yes	No

Notifying Suppliers

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

To notify suppliers:

1. Click on Notify All Suppliers button to send a notification to all suppliers in the Supplier Master.
2. If you wish to notify a subset of suppliers, search for those suppliers using the Search region of the Suppliers page. Select the applicable suppliers and click Notify to open the Notifications page.
3. Enter subject and message to notify the selected supplier's contacts.
4. Select the applicable option in the Send To field. If you select All Contacts, then the application notifies all the contacts of the selected suppliers. If you select Contact Users Only, then the application sends the email and workflow notification to those contacts of suppliers that have system user accounts.

Suppliers Import Administration

Profile Management | Supplier User Management | Hierarchies | Search D&B

Suppliers: Profile Management >

Notification

Message Details

* Subject: Yearly Supplier Survey

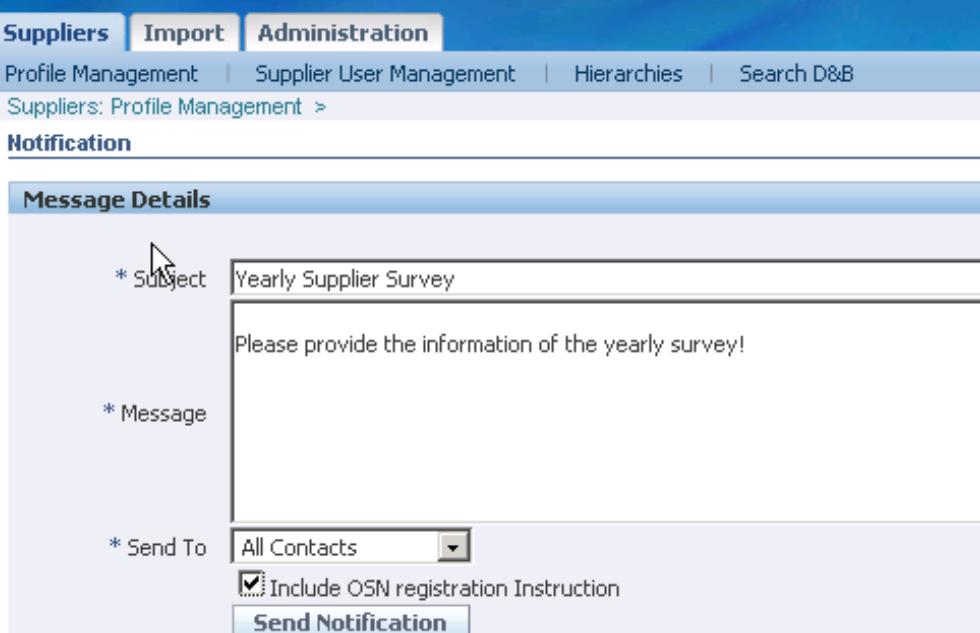
Please provide the information of the yearly survey!

* Message

* Send To: All Contacts

Include OSN registration Instruction

Send Notification



5. Optionally, select the Include OSN Registration Instruction, if you are notifying suppliers who have not yet registered on Oracle Supplier Network. See On-Boarding Suppliers on Oracle Supplier Network, page 3-16.

Managing Supplier Registration and Qualification

This chapter covers the following topics:

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

Overview of Supplier Registration and Qualification

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

Using Self-Service Supplier Registration

The Self-Service Supplier Registration feature allows buyer organizations to accept

unsolicited supplier registration requests from their company's web page. The web page redirects suppliers to a registration page where they can register by providing their primary company details.

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

Prospective Supplier Registration

* Indicates required field

Blank label for instruction text

Company Details

At least one tax id is required to be able to complete the registration request.

* Company Name

Tax Country 
Where provided, the tax country will be used to validate the format of the Tax Registration Number and/or Taxpayer ID.

Tax Registration Number

Taxpayer ID

DUNS Number

Contact Information

Blank label for instruction text

* Email

First Name

* Last Name

Phone Area Code

Phone Number

Phone Extension

Continue

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

Continue button leads the supplier to a more detailed registration form, which contains address book, contact directory, business classifications, products and services, custom attribute pages and attachments regions. Supplier can fill in all these regions and submit it by clicking Register or Save for Later. Save for later action presents a URL to the supplier, which must be saved for accessing the request later.

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

Note: The supplier has the option of saving the registration form for registering at a later date by clicking Save For Later button. Save For Later action also creates a Prospective Supplier Registration request, just like Register action. But the status of the request is set to 'Draft'.

If the request is in Draft status for very long, open the new supplier request and click on Notify to remind the supplier of pending registration. You may wish to expedite the process and Register the supplier yourself without waiting for the supplier to register. To do so, open the request and click on Register yourself.

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

Registering Suppliers

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

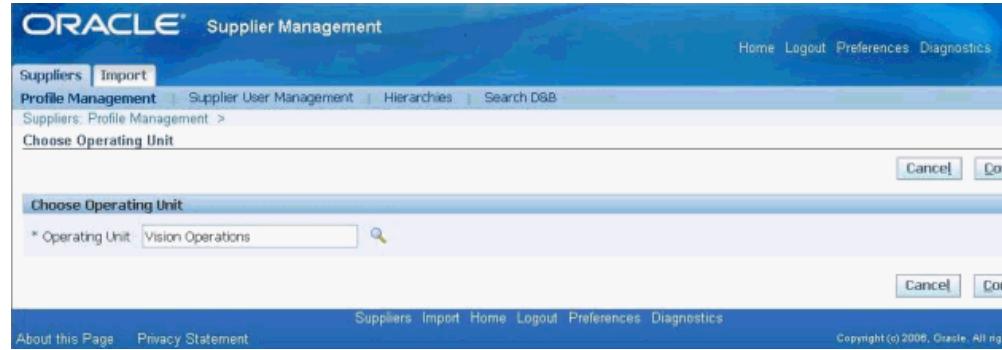
A buyer invitation is different from Self-Service Supplier Registration in that it is buyer initiated. A buyer may create a supplier invitation in one of the following ways:

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

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

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

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



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

3. Enter applicable information and click Register. The application sends a notification to the supplier with a URL that leads to the Registration form. The registration form contains Address Book, Contact Directory, Business Classifications, Products and Services, custom Attribute Pages and Attachments regions. Supplier can fill in all these regions and submit it by clicking Register.
4. Log in with Supplier Management User or Supplier Management Administrator responsibility and click on the Supplier Home menu. Click the New Supplier Requests link in the To Do List region. This link is not available from Supplier Data Librarian and Supplier Data Librarian Super User responsibilities. A new supplier request is created with Status as 'Supplier to Provide Details'. At this point, wait for the supplier to fill out the registration form and register.

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

5. After you or the supplier clicks the Register button, you can review the supplier request. This review process is termed Qualification Management. See Managing New Supplier Qualification, page 3-5.

Managing New Supplier Qualification

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

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

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

1. If the supplier already exists in the Supplier Master or exists only as a TCA party, then the application displays the supplier organization in the Possible Matching Organizations region.

Warning : Possible Matching Organizations

Option 1: Create New Organization

Create New Organization				
Name	TaxPayer Id	DUNS Number	Tax Reg Number	Tax Country
Office Supplies Inc	00028347	344736		

Option 2: Use Existing Organization

Select	Details	Name	TaxPayer Id	DUNS Number	Tax Reg Number	URL	Status	Supplier	Customer	Match (%)
<input checked="" type="radio"/>	Show	Office Supplies, Inc.	00028347	344736			Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100

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

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

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

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

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

Address Book

At least one entry is required.

Business Classifications

Classification	Applicable Minority Type	Certificate Number	Certifying Agency	Expiration Date
Hub Zone	<input type="checkbox"/>			
Minority Owned	<input type="checkbox"/>	<input type="button" value="▼"/>		
Service-disabled Veteran Owned	<input type="checkbox"/>			
Small Business	<input checked="" type="checkbox"/>	3072456	The State of California	01-Nov-2010 14:29:00
Veteran Owned	<input type="checkbox"/>			
Women Owned	<input type="checkbox"/>			

Products and Services

At least one entry is required.

Code	Products and Services	Delete
COMPUTER.PC	Computer Equipment.Desktop, Laptop Computers	<input type="button" value="Delete"/>
COMPUTER.MONITOR	Computer Equipment.Monitors	<input type="button" value="Delete"/>
COMPUTER.PERIPHERAL	Computer Equipment.Peripheral Devices	<input type="button" value="Delete"/>

Attribute Pages

Profile Attributes

Supplier Profile Attributes	Update
-----------------------------	--------

Pre-Qualification and Evaluation RFI

Title	Detail
CWS Supplier Registration and Qualification	<input type="button" value="Detail"/>
Computer World Supply Registration and Qualification	<input type="button" value="Detail"/>

Attachments

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
Insurance_Certificate	File	Insurance Certificate	To Buyer	GUEST	08-Nov-2009	One-Time	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Publish"/>

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

ORACLE® Supplier Management

Suppliers | Import | Administration

Profile Management | Supplier User Management | Hierarchies | Search D&B

Suppliers: Profile Management >

New Supplier Request

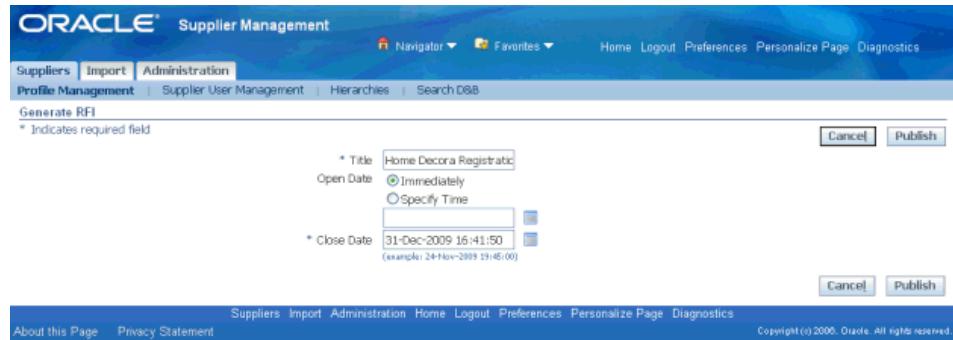
* Indicates required field

Cancel | Notify | Apply Template | Reject | Approve | Save | Check Current Suppliers

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

registration.

- Apply Template – Send a pre-configured questionnaire to the supplier. The questionnaire is actually a request for information (RFI) document.



You can add requirements to the RFI based on your business requirements for qualifying suppliers. You can also control the type of response the supplier provides. You may either predefine responses to each requirement or allow free text response, based on your choice. In case of predefined responses, you can attach an automatic score to each response. This way when the supplier selects one of the predefined values, a score is automatically assigned to that response. You must link the RFI template from the Registration Onboarding Configuration page and then publish it during the Supplier Registration process by clicking on 'Apply Template' from the registration request page. The apply template button takes the user to the publish RFI page.

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

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

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

The screenshot shows a comparison table between 'User Entered' data and 'D&B' data for the company 'Dell Computers'. The table has three columns: 'User Entered', 'D&B', and 'Single Source of truth'. The 'User Entered' column contains the data as entered by the user, including fields like Name, DUNS Number, Address, Postal Town, State/Province, Postal Code, Country, Primary Phone Number, and Last Update Date. The 'D&B' column contains the corresponding data from the D&B database. The 'Single Source of truth' column shows the final, unified data. The table includes rows for Name, Alternate Name, DUNS Number, Enquiry DUNS, Address, Postal Town, State/Province, Postal Code, Country, Primary Phone Number, and Last Update Date.

	User Entered	D&B	Single Source of truth
Name	Cell Computers	DELL U S A CORPORATION	Dell Computers
Alternate Name		Dell Computer	
DUNS Number	--	60 - 304 - 6210	60 - 304 - 6210
Enquiry DUNS	--	60 - 304 - 6210	60 - 304 - 6210
Address	2000 Round Rock	1 DELL WAY	2000 Round Rock
Postal Town	Austin	ROUND ROCK	Austin
State/Province	TX	TX	TX
Postal Code	78746	786527000	78746
Country	United States	United States	United States
Primary Phone Number		512 338-4400	512 338-4400
Last Update Date	08-Oct-2009	09-Dec-2009	09-Dec-2009

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

3. Click Apply Template to create a request for information. Provide the Close Date as future. Click Publish to publish the RFI. A notification with a link to the RFI is sent to supplier prospect to provide more detail. The prospect/new supplier request status is set to 'Supplier to Provide Details'. Supplier uses the link to create a response to the RFI.

Responding to an RFI

When the buyer publishes the RFI, Supplier Management sends a notification with a link to the RFI to the supplier prospect to provide more detail. The supplier uses the link to create a response to the RFI. See: *Managing New Supplier Qualification*, page 3-5

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

To respond to an RFI:

1. Use the Sourcing Supplier responsibility and navigate to the Sourcing Home page.
2. Select the open invitation in the Your Company's Open Invitation area.
3. From the Actions field, select Create Response.
4. On the Create Response page, enter response values for the requirements and lines. Since the purpose of an RFI is to obtain product and service related information for a negotiation line, most negotiation lines in an RFI have attributes defined. These

line attributes identify the questions the buyer has about a particular line.

5. Click Continue.
6. From the Review and Submit page, click View Supplier Profile Attributes.
7. Return to the Review and Submit page and submit the response.

Evaluating Suppliers

Once the RFI response is received, you can open the RFI and review responses. The RFI may be set up with internal as well as external requirements. Internal requirements are created to involve internal users from various departments to review the supplier request. See Set up RFI Template for Qualification Management in *Oracle Supplier Management Implementation and Administration Guide*.

To evaluate and approve supplier, follow these steps:

1. Since suppliers do not have user accounts yet, they can only respond by opening the RFI from the registration form URL from the Pre-Qualification and Evaluation RFI section. They must open the RFI and create a response. After receiving the supplier's response, open the RFI from the Pre-Qualification and Evaluation RFI section in the registration request.
2. If you have set up internal users, then notify all internal users. To notify RFI collaborators:
 1. Select Manage Collaboration team from the Action drop down and click Go.
 2. Select All or some collaborators and click Notify.
 3. Optionally create a Task with Target Date for each evaluator and click Apply. The task shows up in the Incomplete Tasks region on the evaluator's Negotiations home page.

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

3. Select Analyze by Response from the Action list and click Go to open the Analyze by Response page. Click on the supplier response number link to review supplier responses. If internal evaluators are involved, select all internal evaluator responses and click on Compare requirements to view a side-by-side display of all internal evaluator responses.
4. Close the RFI. Select Close RFI from the Action drop down on the RFI details page and click Go. Select a close date and click Apply. The application displays the RFI details page.

5. Select Analyze by Response from the Action list and click Go to open the Analyze by Response page. The score you see is applied based on automatic scoring and weights set up for requirements. See *Oracle Supplier Management Implementation and Administration Guide* for setting up RFI for registration. Optionally, provide score for any requirements setup with manual scoring.
6. Select Manage Scoring Teams in the Action dropdown. Click Lock Scoring to close further analysis and evaluation. The application brings you back to the RFI page.

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

7. If any requirements were created with knockout scores, select Apply Knockout Results from the Action list to apply knockout scores assigned during evaluation. Once you apply the knockout values, the response is removed from the shortlist. To view the short-listed suppliers based on evaluation scores, select Analyze by Response from the action dropdown.
8. Select Complete as the Action and click Submit. Complete action is significant in the qualification management process if the RFI requirements have been mapped with supplier profile attributes. You create mappings to save supplier and internal user responses into the supplier's profile. See 'Mapping RFI Requirements and Category Line Attributes' with Supplier Profile and 'Mapping RFI Item Lines with Item Supplier Profile attributes' in *Oracle Supplier Management Implementation and Administration Guide*.

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

Approving New Suppliers

After evaluating the supplier, next step is to approve or reject the supplier. By default all Supplier Management users in the buying organization have the authority to Approve or Reject Suppliers. To implement an Approval Hierarchy, see Setting up Supplier Approval in *Oracle Supplier Management Implementation and Administration Guide*.

You must have a valid Supplier Lifecycle Management license for approving supplier

users. See Guidelines for Purchasing Required Licenses in *Oracle Supplier Management Implementation and Administration Guide*.

Navigate to new supplier registration request, and approve or reject the prospective supplier registration. On approval, the application sends an invitation to Oracle Supplier Network to the supplier. See On-Boarding Suppliers on Oracle Supplier Network, page 3-16.

Reviewing RFI Synchronization with Supplier Profile

Once approved, the Supplier is created in the Supplier Master. Open the supplier profile from the main Supplier page. The profile captures all the data gathered during registration process. If you used a Registration and Pre-Qualification RFI template during registration, then notice how RFI responses from suppliers and internal users have been recorded in the custom Attribute pages as per the mappings set up in the RFI template. This profile is now available to you as well as to the supplier for self-service profile maintenance. If you wish to register more supplier users, see Registering Supplier Users, page 3-12. You can create more custom Attribute pages and gather additional information from suppliers by conducting a Supplier Profile Audit. See the Managing Supplier Profiles chapter for profile maintenance features of Oracle Supplier Lifecycle Management.

Registering Supplier Users

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

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

Inviting Supplier Users

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

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

The screenshot shows the Oracle Supplier Management interface. The top navigation bar includes links for Home, Logout, Preferences, Help, and Diagnostics. The main menu on the left has categories like Suppliers, Import, Profile Management, and Supplier User Management, with 'Invite Supplier User' selected. The central 'Supplier User Management' section has a sub-section 'Supplier User Management' with links for 'Hierarchies' and 'Search DBB'. The 'Invite a Supplier User' form contains fields for 'Supplier Name' (with a search icon), 'Supplier Number', 'User Information' (with 'Email Address' and a note that it will be used as the Username), and a 'Note' text area. Below this is a 'User Access' section with checkboxes for 'Select All' and 'Select None', and a list of 'Select Applications' including 'Sourcing', 'Internet Supplier Portal', and 'Collaborative Planning'. At the bottom are 'Cancel' and 'Invite' buttons.

2. Use this page to select the user's supplier company, provide supplier user contact details, and specify the user access to applicable Oracle applications.
3. Click Invite to send the user an email invitation to register. After the supplier user responds to your invitation to register, the application sends the user a notification containing system access information.

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

Registering Supplier Users

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

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

The screenshot shows the Oracle Supplier Management interface. The top navigation bar includes links for Home, Logout, Preferences, Help, and Diagnostics. The main menu on the left has options for Suppliers, Import, Profile Management, and Supplier User Management, with 'Supplier User Management' being the active tab. A sub-menu under Supplier User Management includes 'Invite Supplier User', 'Register Supplier User' (which is selected and highlighted in blue), and 'Approve and Manage Supplier User Profile'. The main content area is titled 'Register a Supplier User' and includes a note: '* Indicates required field'. It has fields for 'Supplier Name' (with a search icon) and 'Supplier Number'. Below this is a 'User Information' section with fields for 'Email', 'Username' (with a note: 'By default, the user's email address will be used as their Username for the system.'), 'Contact Title' (with a dropdown menu showing 'Mr'), 'First Name', 'Middle Name', 'Last Name', 'Job Title', 'Phone Area Code', 'Phone Number', 'Phone Extension', 'Fax Area Code', 'Fax Number', and a 'Note' field. A note at the bottom right of this section states: 'Note will be included in the registration notification to the supplier user'.

2. Provide applicable information and click Register. The user receives an email notification with the URL, user name, and system-generated password.
3. If you have multiple site definitions for your company, or if the supplier has multiple subsidiaries, then you can give the supplier user access to view the multiple site definitions.
4. Select Certification Reminders check box in the User Notification region to designate the user to receive business classification reminder notifications.

Approving and Managing Supplier User Profile

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

1. Search for the user using the Supplier User Profile Management page.
2. Select the View icon for the applicable supplier user in the search results region to open the Manage User Profile page.
3. Update the user account as required and click Apply.

Supplier Registered Supplier Users

A supplier user with Supplier Profile and User Administrator responsibility can register more supplier users. This administrator can create new user accounts. Once the account

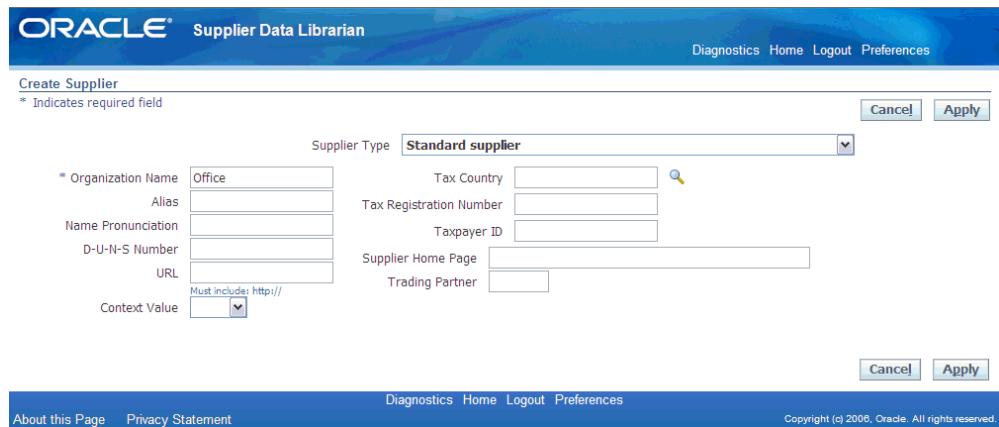
is created, the user receives a notification containing system access information.

Creating Suppliers

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

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

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



The screenshot shows the 'Create Supplier' page of the Oracle Supplier Data Librarian. The 'Supplier Type' dropdown is set to 'Standard supplier'. Other fields include 'Organization Name' (Office), 'Alias', 'Name Pronunciation', 'D-U-N-S Number', 'URL' (with a note 'Must include: http://'), 'Tax Country', 'Tax Registration Number', 'Taxpayer ID', 'Supplier Home Page', and 'Trading Partner'. The page has 'Diagnostics', 'Home', 'Logout', and 'Preferences' buttons at the top and bottom. A note at the bottom says 'Must include: http://'. The URL is 'http://www.oracle.com'.

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

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

ORACLE® Supplier Data Librarian

Diagnostics Home Logout Preferences

Warning: Possible Matching Organizations

[Cancel](#)

Create New Organization

Name	Tax Payer Id	D-U-N-S Number	Tax Reg Number	Country
Office				

Use Existing Organization

Select	Details	Name	Tax Payer Id	DUNS Number	Tax Reg Number	URL	Status	Supplier	Customer	Match (%)
<input type="radio"/>	<input type="checkbox"/>	Show	Mobile Office			www.mobileoffice.com	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Office Supplies, Inc.	433535353			Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Corporate Express Office Supply				Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Office Depot, Inc	124565875			Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Financial Aid Office				Active	<input type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Student Records Office				Active	<input type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Registrar's Office				Active	<input type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Bursar's Office	546454	343433	787656	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Baseball Office	865	344	97645	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
<input type="radio"/>	<input type="checkbox"/>	Show	Basketball Office				Active	<input type="checkbox"/>	<input type="checkbox"/>	100

[Use Existing Organization](#)

[Previous](#) [1-10](#) [Next 10](#) [\(2\)](#)

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

On-Boarding Suppliers on Oracle Supplier Network

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

The screenshot shows the Oracle iSupplier Portal interface. At the top, there is a blue header bar with the Oracle logo and the text "iSupplier Portal". Below the header is a navigation menu with links: Home, Orders, Shipments, Planning, Finance, Product, Intelligence, and Admin. The "Home" link is highlighted. Under the "Home" link, there is a sub-menu with a "Information" icon and the text "Information". Below this, a message states: "This notification does not require a response." A section titled "Yearly Supplier Survey" is shown, with a sub-section titled "From Stock, Pat". The message content includes:

From Stock, Pat
To EMURPHY
Sent 10-Dec-2009 00:32:15
ID 5474765

Please provide the information of the yearly survey!

You are invited to join Oracle Supplier Network (OSN).

OSN is a free online service where a growing number of suppliers and buyers trade and maintain important trading partner relationships. With OSN you can:

Interested in finding out more about OSN? Visit <http://www.oracle.com/applications/procurement/supplierNetwork.html>

To register on OSN, please create an account at <http://osn.oracle.com/>

Once you register, you can:

1. Find your trading partners and add them to your network
2. Invite users from your company to OSN and assign them responsibilities
3. Configure electronic document transactions supported by your organization

For more next steps, refer to the FAQ section on OSN.

[Return to Worklist](#)

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

Managing Supplier Profiles

This chapter covers the following topics:

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

Maintaining Supplier Profile (Supplier Self-Service)

Once supplier user accounts are created, supplier users have access to their profile online. They are responsible for adding new information and ensuring that existing information is up to date. Through profile management, suppliers can provide the buying organization with key details about their company, such as location and contact information, major business classifications, banking details, and category information about the goods and services that they provide. Additionally, suppliers can update tasks using the Supplier Profile, User and Task Manager responsibility. Allowing suppliers to enter and update this information eases the administrative burden for both buyers and suppliers.

Supplier can view the following pages of the profile:

- Organization
- Tax Details
- Address Book
- Contact Directory

- Business Classification
- Product and Services Category
- Banking Detail
- Tasks
- Any custom Attribute Pages made visible by the Buyer

Supplier Administration

General

Organization Name	Office Supplies, Inc.	DUNS Number	0000344736
Supplier Number	1008	Tax Registration Number	
Alias		Taxpayer ID	00028347
Parent Supplier Name		Country of Tax Registration	
Parent Supplier Number			

Attachments

Search

Note that the search is case insensitive

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
Insurance Certificate.pdf	File	Insurance Certificate Attachment	From Supplier	OPERATIONS	24-Dec-2009	One-Time			

Supplier Administration Home Logout Preferences Personalize Page

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

To approve a change request:

1. Navigate to the Supplier Home page. Click on any one of the change requests in the To-do list.

The screenshot shows a user interface for managing supplier profiles. At the top, there are buttons for 'Identify All Suppliers', 'Register New Supplier' (which is highlighted in blue), 'Create Supplier', and 'Advanced Search'. To the right, a 'To Do List' box contains links to various supplier requests, such as 'New Supplier Requests (33)', 'Prospective Supplier Registrations (24)', and 'Supplier Address Requests (3)'. Below these buttons is a search bar with placeholder text 'Type of supplier's name or number will improve the search results'. Underneath the search bar are three input fields: 'Tax Registration Number', 'DUNS Number', and 'Employee Number', each with a corresponding text input box. At the bottom of the interface is a navigation bar with icons for 'Home', 'Supplier Profile Management', 'Supplier Profile Change Requests', and 'Address Change Request'.

2. Select the appropriate change request and click on Approve or Reject. You may also update the change request. This allows you to modify the changes made by the supplier before approving them.

The screenshot shows the 'Address Change Request' form. At the top, it displays the current supplier information: 'Supplier Name: Boise Cascade', 'Supplier Number: 5030', and 'Address Notes'. To the right, it shows the 'Requested By: Dennis Murphy' and 'Request Date: 25-Nov-2009'. The main part of the form is a table comparing 'Current' and 'Proposed' address details. The 'Proposed' column contains dropdown menus for 'Country' (United States) and 'City/Town /Locality' (LA CRESCENTA). The 'Postal Code' field is also populated with '91287'. The table columns are 'Current' and 'Proposed'. The rows represent address components: 'Address Name', 'Country', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Address Line 4', 'City/Town /Locality', 'County', 'State/Region', 'Province', and 'Postal Code'. Buttons for 'Cancel', 'Reject', and 'Apply' are located at the top right of the form.

After you approve the changes, the application displays these changes in the supplier's profile.

Periodic Supplier Profile Audit

With Supplier Lifecycle Management, a buying organization can perform periodic compliance and profile audits to gather additional information from suppliers on a periodic basis. They can gather certifications, quality controls, cost effectiveness

measures, customer support services or any other information relevant to their business processes.

Once suppliers provide the requested information, the buying organization can set up an internal evaluation team to verify that the certifications are valid and in compliance with their corporate compliance policy. The evaluation team may include members from various departments such as operations, finance, legal etc. Evaluation team members can be requested to answer questions such as - Please comment on the supplier's response or – Have you verified that the supplier is ISO 9001 certified? Or they may be asked to evaluate the supplier's responses by scoring each response.

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

1. Create a Request for Information (RFI) document either by using the RFI template or Reusable Requirements list set up by the administrator. See: Implementing Supplier Compliance and Profile Audit in *Oracle Supplier Management Implementation and Administration Guide*. Creating the RFI is similar to creating a RFI template. See Setting up RFI Template for Qualification Management in the *Oracle Supplier Management Implementation and Administration Guide*.
2. Set the RFI Open and Close Dates. Once you have created the RFI, click on Review, and then Publish the RFI.
3. Await supplier's response to your audit questionnaire. A supplier accesses the RFI and responds to the audit questionnaire.
4. Review supplier response and score. See Evaluating Supplier in Managing New Supplier Qualification, page 3-5.
5. Review RFI synchronization with supplier profile.

Example – Supplier Compliance and Profile Audit

Consider an organization that wants to verify supplier's corporate compliance on an ongoing basis. For this they have created the following single-row user defined attribute in the Supplier Profile:

Attribute Group	Attributes (Data Type)	Data Level	Association Level
Quality Policy	<ul style="list-style-type: none"> • Quality Policy and Compliance (Char) • Periodic Quality Process Auditing (Char) • 4M Management (Char) 	Supplier Party	Common

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

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

Requirement Section	Requirement Type	Requirements (Response Type)
Quality Policy and Systems	Required	<ul style="list-style-type: none"> • Does your organization have well defined Quality Policy that is followed through quality procedures as per standards? • Is there a Quality process audit system in place like internal and external audits etc. on periodic basis. • Is there a 4M (Man, Method, Machine, and Material) management system well in place that informs customers about any 4M changes along with proper inspection?

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

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

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

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

Supplier Profile showing Quality Policy user defined attribute



The screenshot shows a 'Supplier Quality Control Policy' interface. At the top, there is a header bar with the title. Below it, there are two main sections: 'Quality Policy & Compliance' and '4M Management'. Each section contains a dropdown menu with a selected value and a detailed description below it.

Attribute	Value	Description
Quality Policy & Compliance	In Place, Followed	Based on existence and enforcement of Quality Policy
4M Management	In Place, Followed	Based on Man, Method, Machine and Material management system
Periodic Quality Process Auditing	In place Not Followed	Based on internal and external auditing of quality processes

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

- **Create collaboration team and internal requirements:** Create a collaboration team to involve internal users from different departments in your organization. Add requirements that are 'Internal' in the compliance and profile audit RFI. Internal requirements are only visible to internal users who are part of the collaboration team.
- **Save responses from internal team:** Responses from internal users can also be mapped to supplier profile user defined attributes. For example, The RFI may contain an internal requirement: Have you verified that the supplier follows quality controls. Response by the internal user must be mapped to the user-defined attributes. On completing the RFI, the internal user's response will be saved to the user-defined attribute and shown in the Supplier's profile.

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

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

Contract Terms

Select Focus Title	Non-Standard	Mandatory	Contract Expert	Select Alternate	Update	Delete
<input type="checkbox"/> <input checked="" type="checkbox"/> Contract Terms						
<input type="checkbox"/> <input checked="" type="checkbox"/> 1. Bidding Instructions						
<input type="checkbox"/> <input checked="" type="checkbox"/> 2. Bidder's Qualifications & Award						
<input type="checkbox"/> <input checked="" type="checkbox"/> 3. Contract Definitions						
<input type="checkbox"/> <input checked="" type="checkbox"/> 4. Deliverables						
<input type="checkbox"/> <input checked="" type="checkbox"/> 4.1. Negotiation Deliverables						
<input type="checkbox"/> <input checked="" type="checkbox"/> 4.2. Contractual Deliverables						

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

- **Create item line requirements:** Similar to adding requirements to RFI, you may add item lines to the RFI. Item lines are requirements with respect to a product or services category or an item. Supplier responds to these item line requirements in the same way as other requirements. Supplier responses can be mapped to product category or Item attributes in Oracle Product Information Management (PIM) product if you have PIM installed in the same instance as Supplier Lifecycle Management. See: Managing Supplier Material Qualification, page 4-12.

Enriching Supplier Profile

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

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

Managing Deliverables

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

Set up deliverables on supplier approval for validity tracking:

For approved suppliers, you can use deliverables to track validity of various documents and profile attributes. See: Add contracts and deliverables in Periodic Supplier Profile Audit, page 4-3.

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

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

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

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

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

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

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

Note: This does not delete attachments to deliverables as defined in the business document, and visible in the Deliverables tab of the Contract Terms page.

Steps:

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

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

3. You may perform any of the following operations:
 - Click the links on Deliverable Name or Document Number to see further details of the deliverable or document. When you choose to view deliverable details, you will be able to switch to update mode, in order to update the status of the deliverable.
 - Click the Update icon to update the status of the deliverable.

Managing Supplier Material Qualification

Supplier Material Qualification is the process of gathering products and services category and item related information from Suppliers through a request for information. Buyers generally use this process before a sourcing award event to shortlist qualified suppliers.

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

- Map category level requirements with user defined attributes in the Supplier profile.
- Approve Category Lines from RFI to automatically create them in Approved Suppliers List.
- Map item level requirements with Oracle Product Information Management Item attributes, which are also user defined.

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

Managing Supplier Tasks and Notes

Manage tasks, defined as the lowest units of work, that are related to the organization or person, using the Oracle Applications Framework tasks features from Oracle Common Application Calendar. Supplier Management enables you to view, create, update, and delete tasks from the supplier details page. Additionally, Supplier Management enables you to manage notes. See: Supplier Profile, page 2-1.

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

ORACLE® Supplier Management

Suppliers Import Administration
Profile Management | Supplier User Management | Hierarchies | Search D&B | Tasks

Tasks
* Indicates required field

Simple Search

Note that the search is case insensitive

Subject
Task Number

Advanced Search

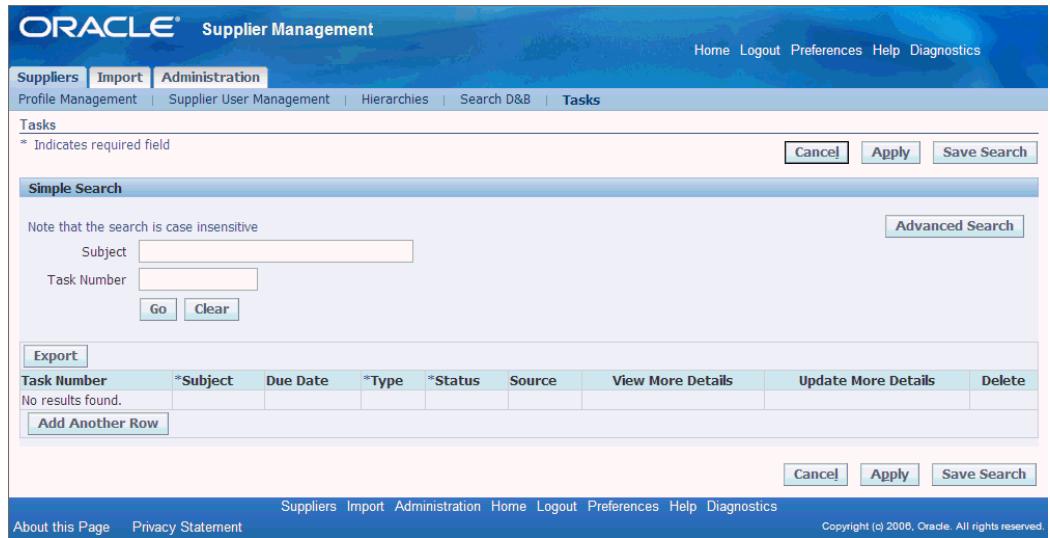
Export

Task Number	*Subject	Due Date	*Type	*Status	Source	View More Details	Update More Details	Delete
No results found.								
Add Another Row								

Cancel **Apply** **Save Search**

Suppliers Import Administration Home Logout Preferences Help Diagnostics

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Managing Supplier Performance

This chapter covers the following topics:

- Overview of Supplier Performance Management
- Evaluating Supplier Performance

Overview of Supplier Performance Management

Organizations are constantly seeking high performance from their suppliers so they can source a bigger fraction of their requirements from cost effective, responsive, well performing suppliers while reducing business with under-performers or retiring them completely. Supplier Lifecycle management provides a mechanism to evaluate supplier performance and gather key performance metrics such as supplier responsiveness, technical performance, quality control performance, and cost performance.

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

All the information gathered from internal evaluators is saved and can be made readily available in the supplier's profile. You can also hide supplier performance evaluations from suppliers and internal users by controlling profile access. Once you set up a template with evaluation metrics, you can use the same template on a periodic basis to evaluate one or more suppliers.

Evaluating Supplier Performance

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

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

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

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

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

2. Add existing suppliers to RFI. This does not notify the supplier as in case of a profile audit RFI, but creates an evaluation for each included supplier. Create an evaluation team with members from various departments to assign the task of evaluation. Publish the RFI. Select Open Date and Close Date
3. Evaluators receive a notification about the RFI. See Evaluating Suppliers in Managing New Supplier Qualification, page 3-5.

Label		Target Value	Office Supplies, Inc.	Office Supplies, Inc.
Supplier Site				
Supplier Contact				
Evaluator		Gerald, Steve	Casper, Sam	
Response		261.83	201.86	
Total Score	100	80	73.336	
Section: Supplier Responsiveness	16.66	16.66	13.328	
Timeliness		Outstanding	Very Good	
1. Unsatisfactory: Supplier fails to act, respond and/or communicate in a timely manner				
2. Fair: Supplier occasionally fails to act, respond and/or communicate in a timely manner				
3. Satisfactory: Supplier acts, responds and/or communicates in a timely manner				
4. Very Good: Supplier usually exceeds expectations in acting, responding and/or communicating in a timely manner				
5. Outstanding: Supplier consistently exceeds expectations in acting, responding and/or communicating in a timely manner				
Score	16.66	16.66	13.328	
How is the overall supplier responsiveness?		Outstanding	Very Good	
Score				
Section: Quality Performance	16.66	16.66	13.328	
Quality Management Policies / Practices / Processes		Outstanding	Very Good	
1. Unatisfactory: Supplier demonstrates no support for and compliance with Quality Management Policies and Practices				
2. Fair: Supplier demonstrates marginal support for and compliance with Quality Management Policies and Practices				
3. Satisfactory: Supplier meets the minimum required degree of support for and compliance with Quality Management Policies and Practices				

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

is not required for synchronization.

4. Classify suppliers based on performance evaluation score. See *Assigning Classifications*, page 7-2.

6

Notifications

This chapter covers the following topics:

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

Overview of Notifications

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

Subscribing to Notifications

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

Notification Subscription			
<input checked="" type="checkbox"/> TIP Selected notifications will be sent to users			
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>			
Buyer Notifications			
Notifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Negotiation Approval: Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Approval: Rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Collaboration Team Task Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Online Discussion Message Sent to Buyer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Response Submitted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Award Approval: Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Award Approval: Rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supplier Notifications			
Notifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Round to Excluded Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Online Discussion Message Sent to Supplier	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Cancellation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Early Close	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Extension	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Response Disqualification to Disqualified Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Response Disqualification to Other Invitees and Respondents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Award Decision	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

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

Administration: Registration: Notification Subscription Setup >
Add SPM Notification Subscriptions

Step One: Find Receivers				
Search Note that the search is case insensitive First Name <input type="text"/> Last Name <input type="text"/> Email Address <input type="text"/> Employee Number <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Clear"/>				
Select First Name	Last Name	Email Address	Employee Number	User Name
No search conducted.				
Step Two: Select Event Types				
<input type="checkbox"/> Select All <input type="checkbox"/> Select None Select Event Type <input type="checkbox"/> Supplier Address Change Request <input type="checkbox"/> Supplier Bank Account Change Request <input type="checkbox"/> Supplier Business Classification Change Request <input type="checkbox"/> Supplier Contact Change Request <input type="checkbox"/> Supplier Products and Services Change Request <input type="checkbox"/> Supplier Registration				
<input type="button" value="Cancel"/> <input type="button" value="Add More Subscriptions"/> <input type="button" value="Apply"/>				

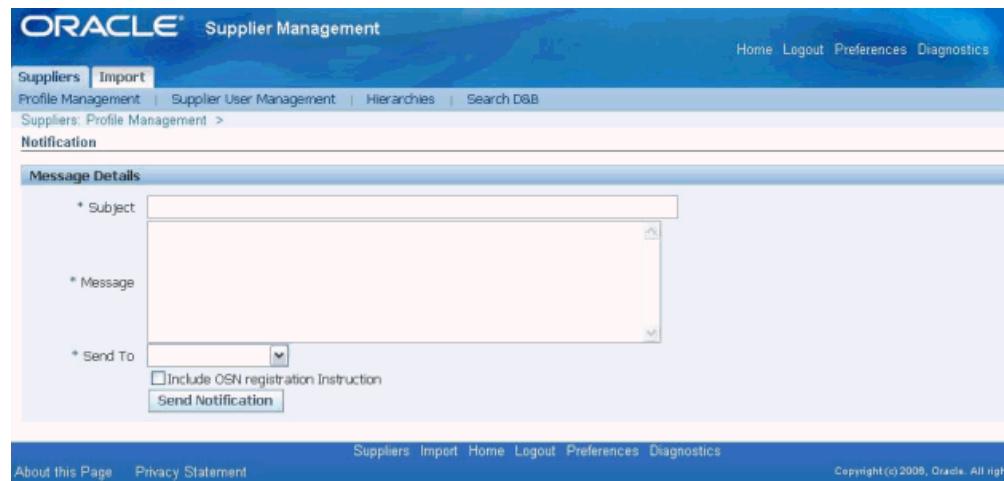
The administrative task of setting up these notifications for various users is covered in Setting up Notification Subscriptions in *Oracle Supplier Management Implementation and Administration Guide*.

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

Notifying Suppliers

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

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



The screenshot shows the Oracle Supplier Management interface. The top navigation bar includes links for Home, Logout, Preferences, and Diagnostics. Below the navigation, a breadcrumb trail shows the current location: Suppliers > Profile Management > Suppliers: Profile Management > Notification. The main content area is titled 'Message Details' and contains fields for 'Subject', 'Message', and 'Send To'. The 'Send To' field is a dropdown menu. Below these fields are two checkboxes: 'Include OSN registration Instruction' and 'Send Notification'. At the bottom of the page, there are links for About this Page, Privacy Statement, and a copyright notice: Copyright (c) 2008, Oracle. All rights reserved.

2. Enter subject and message to send email and workflow notification for the selected supplier's contacts.
3. Select the applicable option in the Send To field. If you select All Contacts, then the application notifies all the contacts of the selected suppliers. If you select Contact Users Only, then the application only notifies those contacts of selected suppliers that have system user accounts.
4. Optionally, select the Include OSN Registration Instruction, if you are notifying suppliers who have not yet registered on Oracle Supplier Network.

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

Notifying Internal Users

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

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

1. Select Manage Collaboration team from the Action drop down and click Go.
2. Select All or some collaborators and click Notify.
3. Optionally create a Task with Target Date for each evaluator. The task shows up in the Incomplete Tasks region on the evaluator's Negotiations home page.

System Notifications

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

- When a Supplier Management User or Sourcing Buyer invites a supplier user to register, an e-mail notification is sent to supplier user containing the URL for the registration page.
- When a Supplier Management User or Sourcing Buyer approves or rejects the registration request, a notification email is sent to supplier user indicating registration status. A user ID and system generated password is also sent in the notification.
- When a Buyer publishes a RFI, all participating suppliers are notified via a workflow notification.

Managing Supplier Classifications

This chapter covers the following topics:

- Supplier Classifications
- Assigning Classifications

Supplier Classifications

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

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

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

To manage classifications for the selected organization, you can:

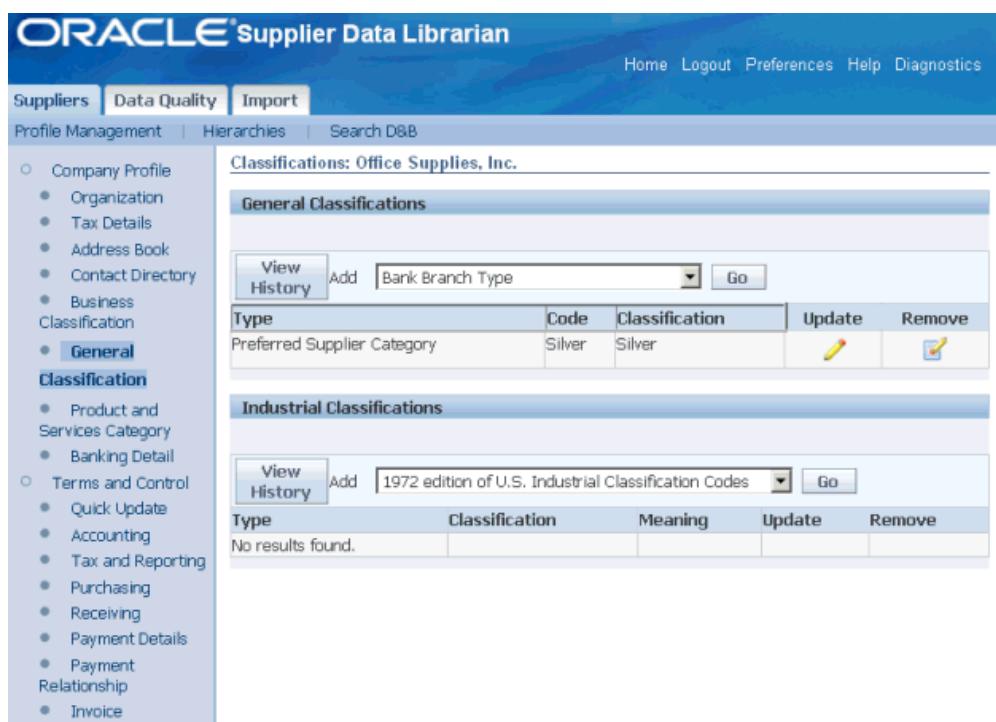
- **Assign:** Assign classifications of the selected category. See Assigning Classifications, page 7-2.
- **Update:** You can update only the classification's end date.
- **Remove:** Assign the classification an end date of today. The removed classification is immediately inactive.
- **View History:** View and optionally restore previously removed classifications so that they are again active classifications for the organization or person

Assigning Classifications

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

To manage supplier classifications:

1. Search for a supplier in the Search region on the Suppliers page.
2. Select the applicable supplier in the Search Results region and click the Update icon to open the Update page for the specific supplier.
3. Click General Classification link to open the Classifications page. Use this page to specify general and industrial classifications for the suppliers.



The screenshot shows the Oracle Supplier Data Librarian interface. The top navigation bar includes Home, Logout, Preferences, Help, and Diagnostics. The main menu has tabs for Suppliers, Data Quality, and Import. Below the menu are links for Profile Management, Hierarchies, and Search D&B. On the left, a sidebar menu under 'Classification' is expanded, showing sections for Company Profile, General, and various business categories like Product and Services Category, Banking Detail, Terms and Control, and Payment Relationship. The main content area is titled 'Classifications: Office Supplies, Inc.' and shows two sections: 'General Classifications' and 'Industrial Classifications'. The 'General Classifications' section has a table with columns for Type, Code, Classification, Update, and Remove. It shows one entry: Preferred Supplier Category, Silver, Silver, with edit and delete icons. The 'Industrial Classifications' section has a table with columns for Type, Classification, Meaning, Update, and Remove. It shows the message 'No results found.'

Managing Supplier Hierarchy

This chapter covers the following topics:

- Supplier Hierarchy

Supplier Hierarchy

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

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

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

ORACLE® Supplier Data Librarian

Home Logout Preferences Help Diagnostics

Suppliers Data Quality Import

Profile Management Hierarchies Search D&B

Hierarchies

Search

Party Name: Comp% Registry ID:

Hierarchy Type:

Create

Hierarchy Name	Party Name	Registry ID	View Hierarchy
Evelyn Dunbar - COLLECTIONS	Computer Service and Rentals	1006	

See Hierarchies Overview, Creating Hierarchies, Viewing and Updating Hierarchies in *Oracle Customers Online User Guide*. Supplier Data Librarian Super User can create relationship types from the Relationships sub tab in the Administration tab.

ORACLE® Supplier Data Librarian

Home Logout Preferences Help Diagnostics

Suppliers Data Quality Import Administration

Profile Extension Registration Classifications Party Relationships DQM Source Systems Adapters

Relationship Type

Use this page to search for or create relationship types.

Search

Enter the relationship type name into the search field below and press the Go button to initiate the search.

Relationship Type:

To view details about the relationship type click on the appropriate link in the Relationship Type column. To create a new relationship type press the Create button.

Relationship Type	Hierarchical	Circular Allowed	Created By	Creation Date
ALL	No	Yes	ORACLE	03-Jun-2001
Affiliation	No	Yes	ORACLE	03-Jun-2001
Agreement Signing	No	Yes	ORACLE	03-Jun-2001
Application Referee	No	Yes	ORACLE	17-Sep-2002
Association	No	Yes	ORACLE	03-Jun-2001
Bank Clearinghouse	No	Yes	ORACLE	17-Sep-2002
Bank and Branch	No	Yes	ORACLE	17-Sep-2002
Banking Contact	No	No	ORACLE	17-Sep-2002

See Relationships in *Oracle Trading Community Architecture Administration Guide*.

Managing Supplier Import and Source Systems

This chapter covers the following topics:

- Bulk Import
- Bulk Import Process
- Running Batch Load

Bulk Import

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

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

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

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

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

Bulk Import Process

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

1. Define Pre-requisites
2. Generate Batches
3. Load data into interface tables
4. Define Import
5. View and Update the Batch (Update works only if Pre-import only was run)
6. Purge Data from interface tables

Define Pre-requisites

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

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

Generating Batches

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

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

Loading Data into Interface Tables

Use the batch ID of the import batch to load supplier data into interface tables. See Loading Data into the Interface Tables in *Oracle Trading Architecture User Guide*. Please

note that File Load feature of TCA is not available in Supplier Hub.

Integrated supplier import program imports the data from several TCA and AP interface tables; therefore upload data into these interface tables. See: Defining Imports, page 9-8.

Importing using Spreadsheet

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

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

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

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

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

ORACLE® Supplier Data Librarian

Suppliers Data Quality Import Administration

Profile Management Hierarchies Search D&B Tasks Profile Management

Advanced Search

Smart Search Search

Search Context

Classification Context

Classification Context

Classification Context

Go

Search Criteria

Criteria Compliance Criteria Personalize

Select a Criteria Template and click 'Go'

TIP ^ Indicates indexed attribute.

Supplier Party

Supplier Header:Supplier Name starts with

Supplier Header:Supplier Number starts with

Supplier Compliance Information:Child Labor Laws Compliance is

Supplier Compliance Information:Internal Audits is

Supplier Compliance Information:Health and Safety Compliance is

Supplier Compliance Information:Quality Process Certification is

Party Site

Supplier Party Site Quality Control Systems:ISO 9001

5. Click on Export All button.

Display Formats

Display Formats Copy of Compliance Information Personalize

Select a Results Format and click 'Go'

The search will show a maximum of 10 rows.

Select Supplier:

Select All Select None

Select Address Name	Supplier Name	Supplier Number	Child Labor Laws Compliance	Internal Audits	Health and Safety Compliance	Quality Process Certification	Environmental Certification	Business Specific Certifications	Financial Controls and Compliance	ISO 9001 Update
<input type="checkbox"/> IBY_SUPP_11 Address	IBY_SUPP_11	IBY_S_NUM_11								<input type="button" value="Edit"/>
<input type="checkbox"/> IBY_SUPP_02 Address	IBY_SUPP_02	IBY_S_NUM_02								<input type="button" value="Edit"/>
<input type="checkbox"/> IBY_SUPP_01 Address	IBY_SUPP_01	IBY_S_NUM_01								<input type="button" value="Edit"/>
<input type="checkbox"/>	IWB Office Supplier Dev	IWB_DNB_Dev								<input type="button" value="Edit"/>
<input type="checkbox"/> IWB_DNB_01_SIT	IWB Office Supplier Inc (upd).	IWB_DNB_01								<input type="button" value="Edit"/>
<input type="checkbox"/>	IWB Office Supplier Dev7	IWB_DNB_07								<input type="button" value="Edit"/>

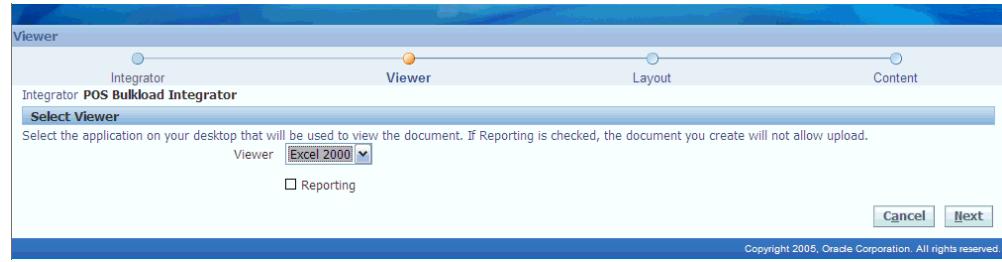
Smart Search Search

Suppliers Data Quality Import Administration Home Logout Preferences Diagnostics

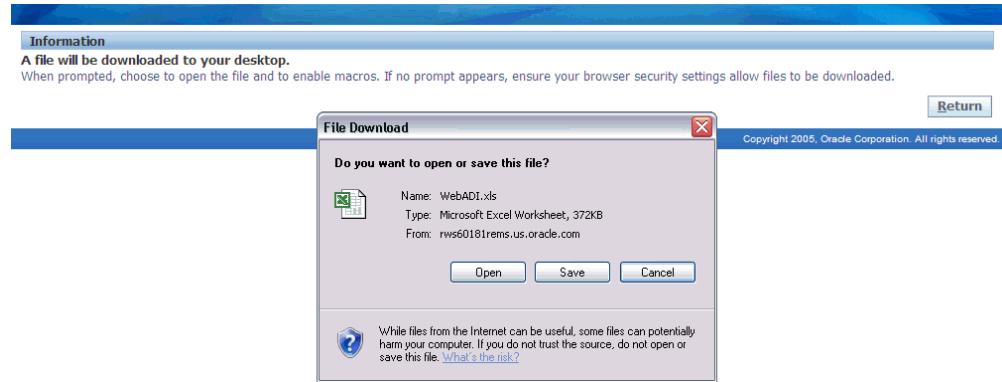
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Note: Before you perform this step, ensure to check the Trust access to Visual Basic Project if you are using MS Office XP, 2003, 2007. See: Setting up Spreadsheet Import in *Oracle Supplier Management Implementation and Administration Guide*.

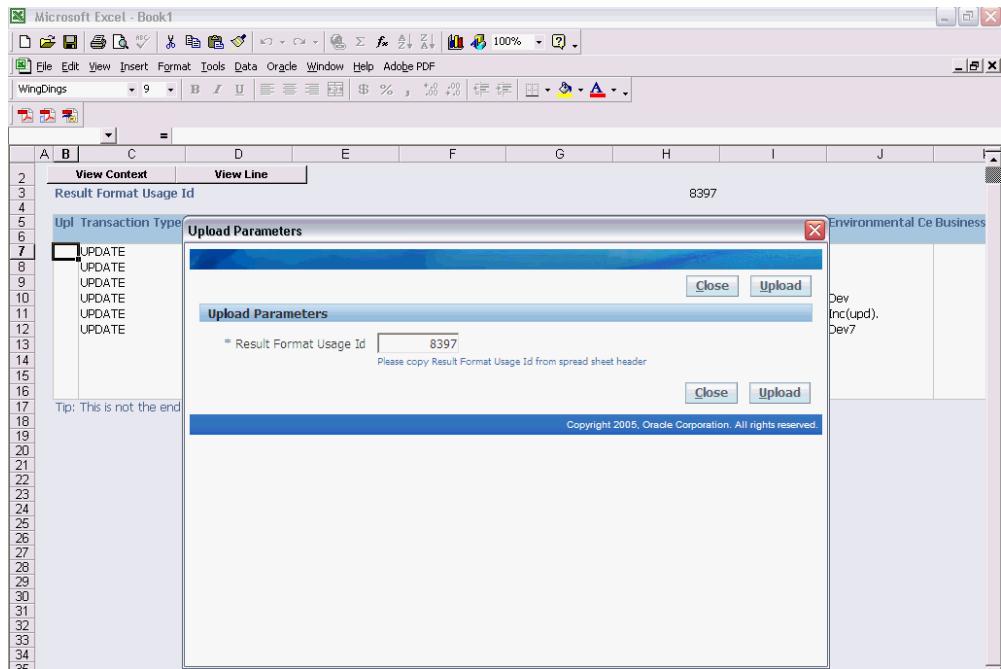
6. Select Excel version.



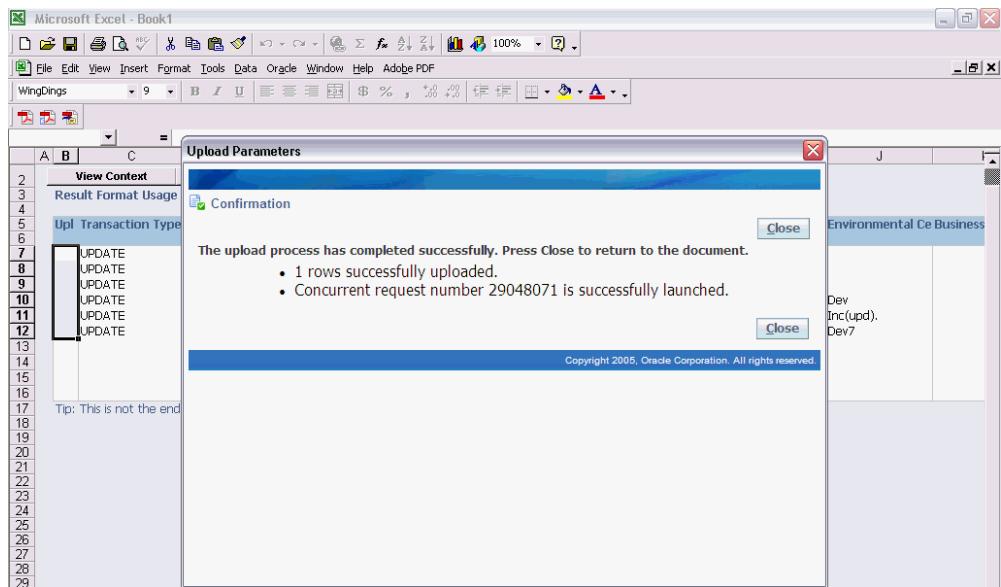
7. Save the exported excel file on your PC.



8. Open the saved excel file and click on Enable Macro.
9. Modify the record as required and save.
10. Click Add-Ins tab > Oracle > Upload or Oracle tab > Upload based on your MS Excel version to upload the modified excel file.
11. Click in the Result Format Usage ID field in the Upload Parameters window. The application displays the import batch ID in this field.



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



13. Navigate to Administration > Concurrent request > View request and search for the concurrent request ID. Click Refresh button till concurrent program gets completed with normal status.
14. Click Import and select the Batch number that you received after generating the

batch.

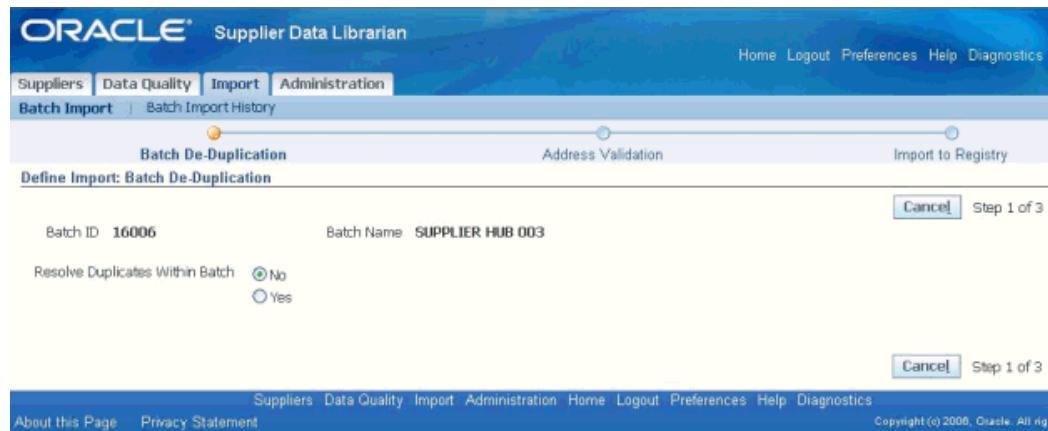
15. Click Activate Batch.
16. Select the batch and click Define import. Verify the batch gets submitted for the import and complete with normal status. Search for the supplier and notice the modifications that you had made and imported using the spreadsheet import format.

Activating the Batch

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

Defining Import

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



The screenshot shows the 'Define Import: Batch De-Duplication' page of the Oracle Supplier Data Librarian. The page has a header with the Oracle logo and navigation links for Suppliers, Data Quality, Import, Administration, and Batch Import. Below the header, there are tabs for Batch Import and Batch Import History. The main content area is titled 'Batch De-Duplication' and 'Define Import: Batch De-Duplication'. It contains fields for 'Batch ID' (16006) and 'Batch Name' (SUPPLIER HUB 003). A radio button group for 'Resolve Duplicates Within Batch' has 'No' selected. At the bottom, there are 'Cancel' and 'Step 1 of 3' buttons, and a footer with links for Suppliers, Data Quality, Import, Administration, Home, Logout, Preferences, Help, and Diagnostics, along with a copyright notice for Oracle.

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

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

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

The 'Integrated Supplier Import' concurrent program first runs 'Import Batch to TCA Registry' program, which imports all the party information like party, address, contact,

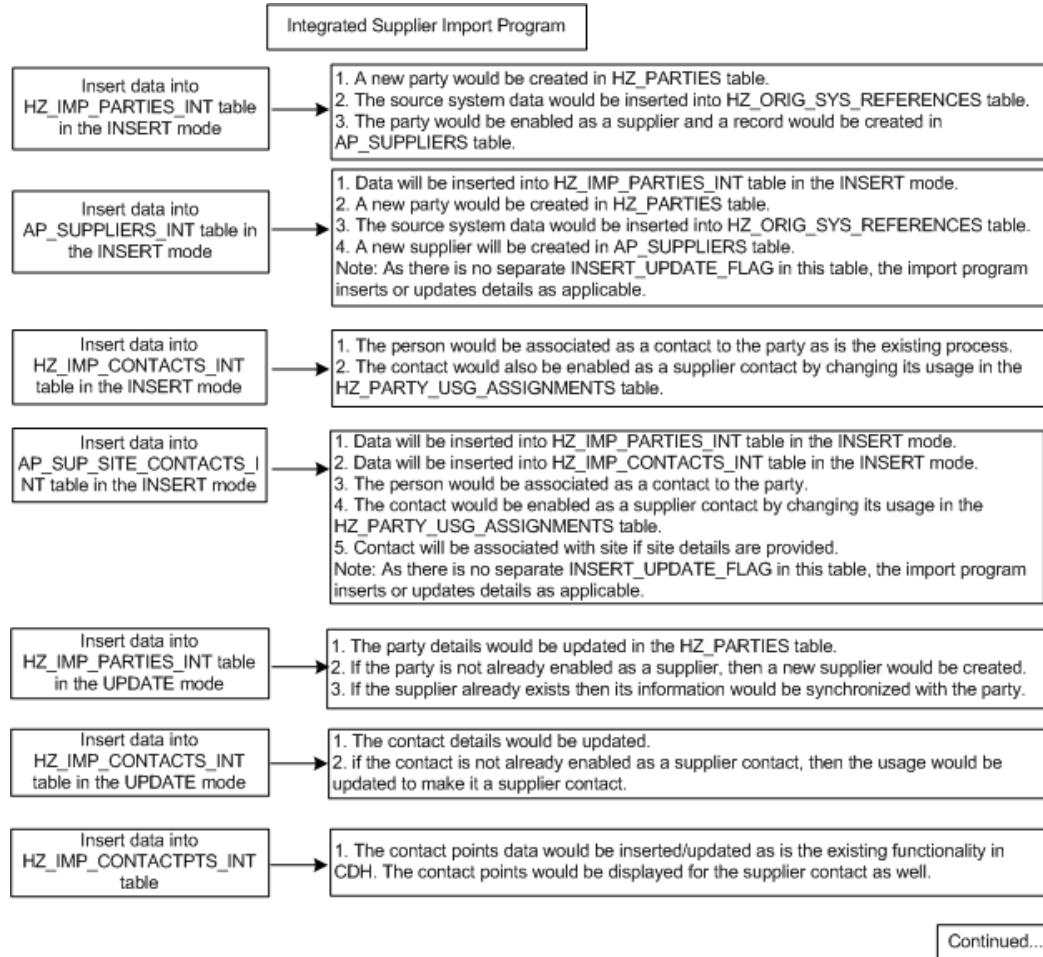
classification and relationships into the TCA registry. See Import Batch to TCA Registry, *Oracle Trading Architecture User Guide* for details on 'Import Batch to TCA Registry' program provided by TCA. When Party Import status is 'Completed', Integrated Supplier Import program automatically enables the imported party as a supplier in the Supplier Master.

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

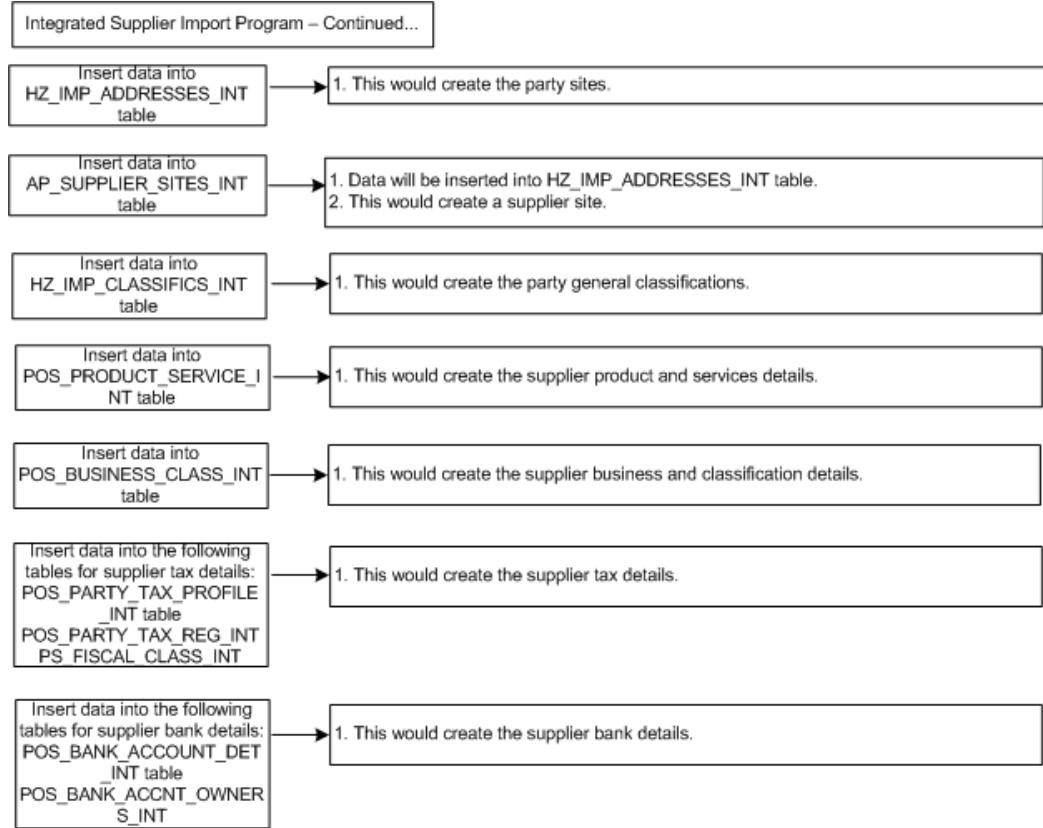
If the data is inserted into the HZ_PARTIES_INT table in the insert mode and the import program is executed, then a new party is created and it is enabled as a supplier. If the processing mode is update, then the corresponding party data is updated. If the party is already enabled as a supplier, then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

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

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



Continued...



Understanding the Suppliers Open Interface Tables

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

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

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

- PARTY_ORIG_SYSTEM
- PARTY_ORIG_SYSTEM_REFERENCE
- SDH_BATCH_ID
- PARTY_ID

AP_SUPPLIER_SITES_INT - the following columns are available in this table for storing

batch id, party id, and original system references:

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

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

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

- ORG_CONTACT_ID

Mandatory Columns for Supplier Open Interface Tables

Mandatory columns for HZ_IMP_PARTIES_INT

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

Mandatory columns for AP_SUPPLIERS_INT

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

Mandatory columns for AP_SUPPLIER_SITES_INT

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

- PARTY_SITE_ORIG_SYSTEM
- PARTY_SITE_ORIG_SYS_REFERENCE
- SDH_BATCH_ID

Mandatory columns for HZ_IMP_ADDRESSES_INT

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

Mandatory columns for AP_SUP_SITE_CONTACT_INT

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

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

Mandatory columns for POS_PRODUCT_SERVICE_INT

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

Mandatory columns for POS_BANK_ACCOUNT_DET_INT - at Supplier Level

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

- ACCOUNT_NAME

Mandatory columns for POS_BANK_ACCOUNT_DET_INT - at Party Site Level

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

Mandatory columns for POS_BANK_ACCNT OWNERS_INT

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

- BANK_ACCT_OWNER_INTERFACE_ID

Viewing and Updating the Batch

To view or update import batch requests:

1. Search for the batch on the Batch Import page.
2. Select the batch in the search results region to review import results after the import process completes.
3. To view import errors, click the View Party Errors and View Supplier Errors buttons on the batch detail page.

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

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

A concurrent request is submitted for generating the error report for the batch.

Click the Refresh button, until the concurrent request gets completed and then click the Output icon to view the error report.

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

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

Purging Data from Interface Tables

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

You usually purge batches:

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

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

Running Batch Load

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

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

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

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

Additionally, see the following:

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

Managing Supplier Data Quality

This chapter covers the following topics:

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

Overview of Managing Supplier Data Quality

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

Data Quality Management is a data librarian function. Login with Super Data Librarian responsibility and navigate to the Data Quality tab to perform the following tasks. You must have a valid Supplier Hub license to manage data quality. See Guidelines for Purchasing Required Licenses in Oracle Supplier Management Implementation and Administration Guide.

Identifying Duplicates in New Supplier Request

Oracle Supplier Management enables you to prevent duplicate supplier creation in the system during new supplier registration. See *Managing New Supplier Qualification*, page 3-5.

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

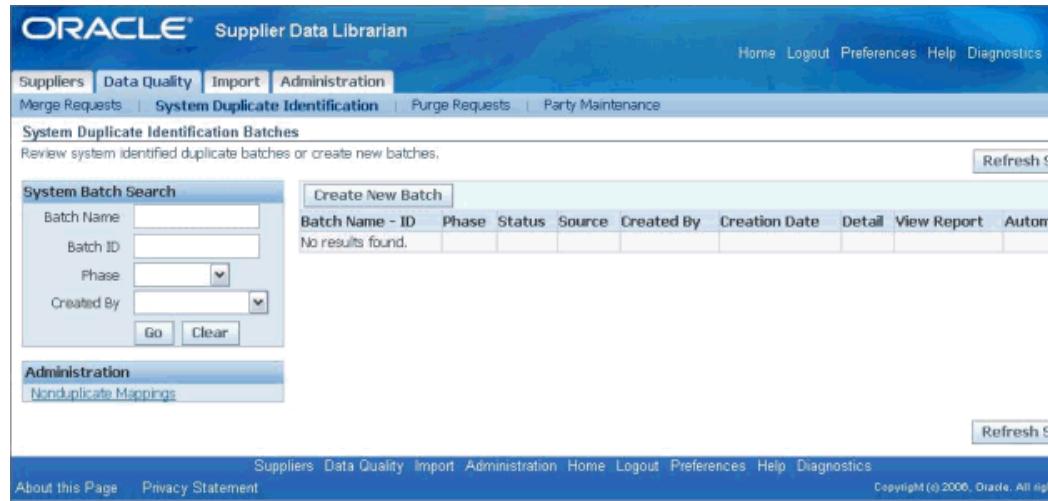
Identifying Duplicates During Supplier Creation

Oracle Supplier Management enables you to perform an online duplicate check during supplier creation. See *Creating Supplier* in *Managing New Supplier Qualification*, page 3-5.

Identifying System Duplicates

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

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



The screenshot shows the Oracle Supplier Data Librarian interface. The top navigation bar includes links for Suppliers, Data Quality, Import, Administration, Merge Requests, System Duplicate Identification (which is the active tab), Purge Requests, and Party Maintenance. The sub-navigation bar for the System Duplicate Identification tab includes links for System Batch Search, Create New Batch, and Administration. The main content area displays a 'System Batch Search' form with fields for Batch Name, Batch ID, Phase, and Created By, along with Go and Clear buttons. To the right is a 'Create New Batch' table with columns for Batch Name - ID, Phase, Status, Source, Created By, Creation Date, Detail, View Report, and Automate. A message 'No results found.' is displayed. Below the search form is an 'Administration' section with a 'Non-duplicate Mappings' link. The bottom of the page features a footer with links for Suppliers, Data Quality, Import, Administration, Home, Logout, Preferences, Help, and Diagnostics, as well as About this Page and Privacy Statement. A copyright notice for Oracle is also present.

Using Automerge

You can run Automerge as part of creating SDI batches to automatically merge definite

duplicates. This process bypasses manually creating, mapping, and submitting merge requests for obvious duplicates. Parties in the SDI batch that are not merged are included in a new batch, for manual review at a later time.

Creating Merge Request

You can create merge requests:

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

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

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

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

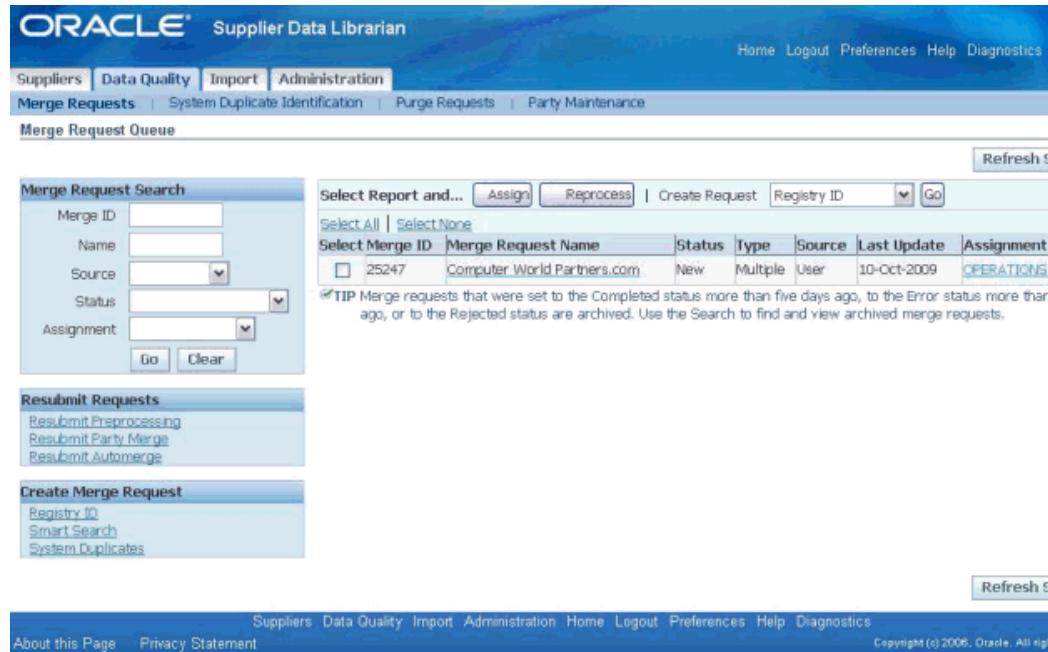
Before you submit the new request for creation with the System Duplicates or Registry ID method, you can still remove parties from multiple type requests. You do not delete the party from the TCA Registry, and the party is available to be included in other SDI batches, duplicate sets, or merge requests.

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

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

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

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



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

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

Merging Supplier Transactions

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

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

Example of Supplier Transaction Merge

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

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

Supplier 1 – Computer Supplies Inc.	Supplier 2 – Computer Supply Inc.	Supplier Master – Computer Supplies Inc.
Invoice	Invoice	Invoice
<ul style="list-style-type: none"> • Supplier site: CSICA <ul style="list-style-type: none"> • 10-3456 • 10-3574 • Supplier site: CSITN <ul style="list-style-type: none"> • 10-6785 • 10-9864 • 10-4355 • 10-4435 	<ul style="list-style-type: none"> • Supplier site: CSICA <ul style="list-style-type: none"> • 40-6754 • 40-4522 • 40-4523 • 40-9877 • 40-9222 • 40-5445 • 40-9983 • Supplier site: CSITX <ul style="list-style-type: none"> • 40-4522 • 40-4523 	<ul style="list-style-type: none"> • Supplier site: CSICA <ul style="list-style-type: none"> • 10-3456 • 10-3574 • 40-6754 • 40-4522 • 40-4523 • Supplier site: CSITN <ul style="list-style-type: none"> • 10-6785 • 10-9864 • 10-4355 • 10-4435 • Supplier site: CSITX <ul style="list-style-type: none"> • 40-9877 • 40-9222 • 40-5445 • 40-9983

Supplier 1 – Computer Supplies Inc.	Supplier 2 – Computer Supply Inc.	Supplier Master – Computer Supplies Inc.
<p>Purchase Order</p> <ul style="list-style-type: none"> • Supplier site: CSICA <ul style="list-style-type: none"> • 20-5686 • 20-4674 • Supplier site: CSITN <ul style="list-style-type: none"> • 20-7975 • 20-6864 	<p>Purchase Order</p> <ul style="list-style-type: none"> • Supplier site: CSICA <ul style="list-style-type: none"> • 60-7678 • 60-4436 • Supplier site: CSITX <ul style="list-style-type: none"> • 60-6332 • 60-6567 • 60-7863 • 60-9767 	<p>Purchase Order</p> <ul style="list-style-type: none"> • Supplier site: CSICA <ul style="list-style-type: none"> • 20-5686 • 20-4674 • 60-7678 • 60-4436 • 60-6332 • 60-6567 • Supplier site: CSITN <ul style="list-style-type: none"> • 20-7975 • 20-6864 • Supplier site: CSITX <ul style="list-style-type: none"> • 60-7863 • 60-9767

Merge Dictionary Overview

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

Managing Merge Request

Aside from reviewing merge requests, you can:

- Assign requests to specific users
- Unassign requests

- Reject requests

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

Mapping and Submitting Merge Request

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

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

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

Default Rules for Merging Extended Supplier Profile Attributes

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

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

- If a valid UDA attribute group for the supplier does not have any value for the entire attribute group, then the value is copied fully from the source to target supplier for the entire attribute group. However, if there are some attribute values already defined for an attribute group in the target supplier, then in that case only the attribute values that are empty for the attribute group in the target supplier are populated with the source supplier record attribute value.
- When there are more than one source supplier records to be merged with a target supplier record for a given attribute group, then for the attribute value copying order, the source supplier UDA record for a given attribute group that is created latest is used to populate the target supplier UDA record for the same attribute group first. This is overlaid with the next latest supplier UDA record for the same attribute group in the merge source supplier list as the overlaying is done based on creation date of an attribute group in the descending order for all the source supplier records for a given attribute group.
- In case of multi row attribute group, if the attribute group key information is matched then, the merge process applies the first two rules; else, it creates a new row.
- In case of party site level UDA, if the source supplier party site is moved as a new party site for the target supplier from party merge, then the UDA information is

transferred based on the above mentioned rules.

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

Example of Supplier Party Merge

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

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

Supplier 1 – Computer Supplies Inc. (target)	Supplier 2 – Computer Supply Inc. (source)	Supplier Master – Computer Supplies Inc.
Party Profile <ul style="list-style-type: none">Registry ID: 1006Party Source System: PSFTDUNS Number:Organization Name: Computer Supplies Inc.Tax Payer ID: 3463465Tax Registration Number: AEF-12684	Party Profile <ul style="list-style-type: none">Registry ID: 1142Party Source System: JDEDUNS Number: 02-274-0997Organization Name: Computer Supply Inc.Tax Payer ID:Tax Registration Number:	Party Profile <ul style="list-style-type: none">Registry ID: 1006Party Source System: PSFT, JDEDUNS Number: 02-274-0997Organization Name: Computer Supplies Inc.Tax Payer ID: 3463465Tax Registration Number: AEF-12684

Supplier 1 – Computer Supplies Inc. (target)	Supplier 2 – Computer Supply Inc. (source)	Supplier Master – Computer Supplies Inc.
Address	Address	Address
<ul style="list-style-type: none"> • Party Site 1: 3OP <ul style="list-style-type: none"> • Address: 300 Oracle Parkway, Redwood City, CA 94065, US • Site Usage: Pay • Party Site 2: 3SHD <ul style="list-style-type: none"> • Address: 301 Summit Hill Drive, Chattanooga, TN 37401US • Site Usage: RFQ Only 	<ul style="list-style-type: none"> • Party Site 1: 3OP <ul style="list-style-type: none"> • Address: 300 Oracle Parkway, Redwood City, CA 94065, US • Site Usage: Purchasing 	<ul style="list-style-type: none"> • Party Site 1: 3OP <ul style="list-style-type: none"> • Address: 300 Oracle Parkway, Redwood City, CA 94065, US • Site Usage: Pay • Party Site 2: 3SHD <ul style="list-style-type: none"> • Address: 301 Summit Hill Drive, Chattanooga, TN 37401US • Site Usage: RFQ Only
Contact	Contact	Contact:
<ul style="list-style-type: none"> • Contact (For Party Site 1): Joe • Contact (For Party Site 2): Bryan 	<ul style="list-style-type: none"> • Contact (For Party Site 1): Morris • Contact (For Party Site 2): Allec 	<ul style="list-style-type: none"> • Contact (For Party Site 1): Joe, Morris • Contact (For Party Site 2): Bryan • Contact (For Party Site 3): Allec
General Classifications	General Classifications	General Classifications
<ul style="list-style-type: none"> • Preferred Supplier Category: Gold 	<ul style="list-style-type: none"> • Supplier Business Type: Americas 	<ul style="list-style-type: none"> • Supplier Business Type: Americas • Preferred Supplier Category: Gold

Supplier 1 – Computer Supplies Inc. (target)	Supplier 2 – Computer Supply Inc. (source)	Supplier Master – Computer Supplies Inc.
Contact Points	Contact Points	Contact Points
<ul style="list-style-type: none"> • Email: joe.smith@csi.com 	<ul style="list-style-type: none"> • Phone: 415-289-3762 	<ul style="list-style-type: none"> • Email: joe.smith@csi.com
<ul style="list-style-type: none"> • Phone: 415-289-3762 		
Party Relationships	Party Relationships	Party Relationships
<ul style="list-style-type: none"> • Subsidiary Of: CompUSA 	<ul style="list-style-type: none"> • Employer Of: Joe Smith 	<ul style="list-style-type: none"> • Subsidiary Of: CompUSA
		<ul style="list-style-type: none"> • Employer Of: Joe Smith
Supplier Profile	Supplier Profile	Supplier Profile
<ul style="list-style-type: none"> • Supplier Number: 3427 	<ul style="list-style-type: none"> • Supplier Number: 3456 	<ul style="list-style-type: none"> • Supplier Number: 3427
<ul style="list-style-type: none"> • NIC: TX24535 	<ul style="list-style-type: none"> • NIC: TX24535 	<ul style="list-style-type: none"> • NIC: TX24535
<ul style="list-style-type: none"> • Customer Number: 7785678 	<ul style="list-style-type: none"> • Customer Number: 9678678 	<ul style="list-style-type: none"> • Customer Number: 7785678
Supplier Site	Supplier Site	Supplier Site
<ul style="list-style-type: none"> • Supplier Site 1 <ul style="list-style-type: none"> • Name: CSICA • OU: Vision SFO 	<ul style="list-style-type: none"> • Supplier Site 1 Name: CSICA • OU: Vision SFO 	<ul style="list-style-type: none"> • Supplier Site 1 <ul style="list-style-type: none"> • Name: CSICA • OU: Vision SFO
<ul style="list-style-type: none"> • Supplier Site 2 <ul style="list-style-type: none"> • Name: CSITN • OU: Vision LA 		<ul style="list-style-type: none"> • Supplier Site 2 <ul style="list-style-type: none"> • Name: CSITN • OU: Vision LA

Supplier 1 – Computer Supplies Inc. (target)	Supplier 2 – Computer Supply Inc. (source)	Supplier Master – Computer Supplies Inc.
Bank Details	Bank Details	Bank Details
<ul style="list-style-type: none"> • Account Number 1: 224-125-09 • Account Number 2: 224-456-09 	<ul style="list-style-type: none"> • Account Number 1: 223-137-09 • Account Number 2: 211-443-77 	<ul style="list-style-type: none"> • Account Number 1: 224-125-09 • Account Number 2: 224-456-09 • Account Number 3: 223-137-09 • Account Number 4: 211-443-77
Supplier – Business Classification	Supplier – Business Classification	Supplier – Business Classification
<ul style="list-style-type: none"> • Minority Owned 	<ul style="list-style-type: none"> • Small Business 	<ul style="list-style-type: none"> • Minority Owned • Small Business
Supplier – Product and Services	Supplier – Product and Services	Supplier – Product and Services
<ul style="list-style-type: none"> • Monitor 	<ul style="list-style-type: none"> • Keyboard 	<ul style="list-style-type: none"> • Monitor • Keyboard

Supplier 1 – Computer Supplies Inc. (target)	Supplier 2 – Computer Supply Inc. (source)	Supplier Master – Computer Supplies Inc.
<p>Supplier Level UDA</p> <ul style="list-style-type: none"> Single row: Supplier Insurance Policy Detail Insurance Company: AIG Contact Phone: 7462983489 Experience Modification Rate: 0.3 Contact Name: Jenna Smith Policy Number: 000021763821 Multi row: Supplier Business References Reference Name <ul style="list-style-type: none"> 1. Sales Reference 2. Customer Ref Contact Name <ul style="list-style-type: none"> 1. Jim Hills 2. Steve Swank Contact Phone <ul style="list-style-type: none"> 1. 9872653789 2. 6279872651 Contact Email 	<p>Supplier Level UDA</p> <ul style="list-style-type: none"> Single row: Supplier Insurance Policy Detail Insurance Company: AIG Contact Phone: 7462983480 Contact Name: Jake Murphy Multi row: Supplier Business References Reference Name <ul style="list-style-type: none"> 1. Sales Reference Contact Name <ul style="list-style-type: none"> 1. Jim Hills Contact Phone <ul style="list-style-type: none"> 1. 9872653789 Contact Email <ul style="list-style-type: none"> 1. jim@vodafone.com 	<p>Supplier Level UDA</p> <ul style="list-style-type: none"> Single row: Supplier Insurance Policy Detail Insurance Company: AIG Contact Phone: 7462983489 Experience Modification Rate: 0.3 Contact Name: Jenna Smith Policy Number: 000021763821 Multi row: Supplier Business References Reference Name <ul style="list-style-type: none"> 1. Sales Reference 2. Customer Ref Contact Name <ul style="list-style-type: none"> 1. Jim Hills 2. Steve Swank Contact Phone <ul style="list-style-type: none"> 1. 9872653789 2. 6279872651 Contact Email

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

Supplier 1 – Computer Supplies Inc. (target)	Supplier 2 – Computer Supply Inc. (source)	Supplier Master – Computer Supplies Inc.
<p>Supplier Site Level UDA</p> <ul style="list-style-type: none"> • Single row: Supplier Site Logistics Information • Address Name: LOS ANGELES • Standard Delivery Time Guarantee: 5 days • Freight Forward Detail: 3PL • Transport Insurance Type: Included 	<p>Supplier Site Level UDA</p> <ul style="list-style-type: none"> • Single row: Supplier Site Logistics Information • Address Name: LOS ANGELES • Standard Delivery Time Guarantee: 5 days • Freight Forward Detail: 3PL • Transport Insurance Type: Included 	<p>Supplier Site Level UDA</p> <ul style="list-style-type: none"> • Single row: Supplier Site Logistics Information • Address Name: LOS ANGELES • Standard Delivery Time Guarantee: 5 days • Freight Forward Detail: 3PL • Transport Insurance Type: Included

Enabling Existing Party as Supplier

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

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

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

supplier.

The top screenshot shows the 'Smart Search' page of the Oracle Supplier Data Librarian. It features a search form with fields for Name, Registry ID, SIC Code, Address, City, State, Country Code, Status, and Party Type (Organization). The bottom screenshot shows the 'Enable Existing Organization As Supplier' page, which includes a search form and a search result table. The search result table has columns for Select, Details Name, Tax Payer Id, DUNS Number, Tax Reg Number, Address, Country, Status, Supplier, Customer, and Match (%). The table displays a single row with the message 'No search conducted.'

To enable an existing party as supplier:

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

You need to enable the supplier contact for this organization.

To enable the supplier contact for the existing party:

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

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

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

Purging Suppliers

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

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

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

The screenshot shows the Oracle Supplier Data Librarian interface. The top navigation bar includes links for Suppliers, Data Quality, Import, Administration, Home, Logout, Preferences, Help, and Diagnostics. Below this, a sub-navigation bar shows Merge Requests, System Duplicate Identification, Purge Requests (which is selected and highlighted in blue), and Party Maintenance. The main content area is titled 'Purge Requests' and contains a sub-header: 'Purge requests contain one or more parties to purge. Create, manage, and submit requests to purge batches of parties'. A 'Search' section with a dropdown and a 'Go' button is present. The main table displays a list of purge requests with the following columns: Select Purge Request, Request ID for Identification, Request ID for Purge, Status, Purge Candidates, Marked for Purge, Creation Date, and Purge Date. The table shows 10 entries, all of which are marked as 'Purge Complete'. The last row of the table is labeled 'Purge Requests Summary'.

Select Purge Request	Request ID for Identification	Request ID for Purge	Status	Purge Candidates	Marked for Purge	Creation Date	Purge Date
HR. Contact Purge - 27200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 26200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 25200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 24200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 23200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 22200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 21200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 20200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
HR. Contact Purge - 19200			Purge Complete	1	1	07-Feb-2008	07-Feb-2008
Purge Requests Summary							

ORACLE® Supplier Data Librarian

Suppliers Data Quality Import Administration

Merge Requests System Duplicate Identification Purge Requests Party Maintenance

Data Quality: Purge Requests: Purge Requests > Create Purge Request

Create a purge request that contains parties to purge from the TCA Registry, and optionally specify criteria that the parties must match. The included purge candidates must also have no transaction history.

* Indicates required field

* Purge Request Name:

Select Parties to Purge by: Party attributes Registry ID

Select Parties to Purge by Party Attributes

Party Type: <input type="text"/>	Party Status: <input type="text"/>
Country: <input type="text"/>	Classification: <input type="text"/>
From Creation Date: <input type="text"/> (example: dd-MMM-yyyy)	To Creation Date: <input type="text"/>
From Last Update Date: <input type="text"/>	To Last Update Date: <input type="text"/>

Suppliers Data Quality Import Administration Home Logout Preferences Help Diagnostics

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

Maintaining Parties

Party maintenance lets you:

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

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

ORACLE® Supplier Data Librarian

Suppliers Data Quality Import Administration

Merge Requests | System Duplicate Identification | Purge Requests | **Party Maintenance**

Organization **Organization Party Maintenance**

Person

Search

Name	Registry ID
D-U-N-S Number	Web Site
Account Number	Taxpayer ID
Country	Certification Level
Certification Reason	Status
Internal Indicator	

Go Clear

Party Name	Registry ID	Address	Country	Match Percentage	Certification Level	Certification Reason	Internal Indicator
No results found.							

Revert

Suppliers Data Quality Import Administration Home Logout Preferences Help Diagnostics

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Managing Supplier D&B Enrichment

This chapter covers the following topics:

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

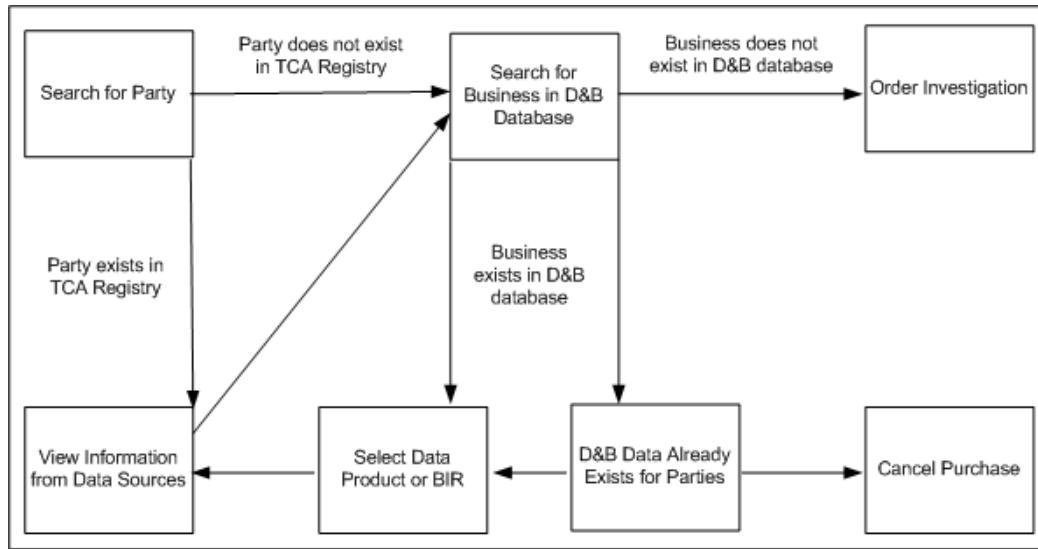
Overview of Supplier D&B Enrichment

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

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

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

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



Searching for Suppliers in D&B

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

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

To search D&B for supplier data:

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

The screenshot shows the Oracle Supplier Data Librarian interface. At the top, there are navigation links: Home, Logout, Preferences, Help, and Diagnostics. Below that, there are tabs: Suppliers, Data Quality, Import, Administration, Profile Management, Hierarchies, and Search D&B. The main content area is titled 'D&B Search and Results'. It has a 'Select Country' section with a dropdown for 'Country' (United States) and a dropdown for 'Reason'. Below that is a 'Search By' section with two radio button options: 'Company Name and Location' (selected) and 'Unique Identifiers'. Under 'Company Name and Location', there are fields for 'Company Name' (with a placeholder '31-634-2070'), 'Address', 'State/Province', 'Postal Town', and 'Postal Code'. Under 'Unique Identifiers', there are fields for 'DUNS Number' (31-634-2070), 'Phone Number', 'Local Business ID', and a 'Go' button. A message at the bottom says 'No company matched your search criteria. You can change your search criteria or click the Order Investigation button to order an investigation from D & B.' Below this is a 'Order Investigation' button. At the bottom, there is a table with columns: Select DUNS Number, Name, Address, Town, Postal, State/Province, Postal Code, Country, HQ or Branch. The table shows 'No results'.

2. Click Go. The application searches the D&B database and presents the details in the Search Results region.
3. Review the supplier data from D&B.

Enriching New and Approved Suppliers

You can enrich data for a new supplier during supplier registration. See *Managing New Supplier Qualification*, page 3-5. This mitigates the risk of approving suppliers going out of business, suppliers on any type of debarment list or involved in fraudulent, bribery or money laundering activities.

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

Publishing and Synchronizing Supplier Data

This chapter covers the following topics:

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

Overview of Supplier Data Publication and Synchronization

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

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

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

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

Business Events

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

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

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

Exporting Search Results to Excel

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

Publishing Supplier Profile

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

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

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

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

To publish supplier information using the Publish button:

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

Select Supplier Name	Supplier Number	Parent Supplier Name	Taxpayer ID	Tax Registration Number	DUHS Number	Employee Number	Update
<input type="checkbox"/> Student Records Office	115						
<input type="checkbox"/> Training Office	41						
<input type="checkbox"/> Accounts Payable Office	40						
<input type="checkbox"/> Bursar's Office	39		546454	787656	000343433		
<input type="checkbox"/> Registrar's Office	125						

To publish supplier information using the concurrent program:

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

The screenshot shows the Oracle Supplier Data Librarian interface. The top navigation bar includes links for Home, Logout, Preferences, Help, and Diagnostics. The main menu has tabs for Suppliers, Data Quality, Import, Administration, and a dropdown for Profile Extension, Registration, Classifications, Party Relationships, DQM, Source Systems, Adapters, Phones, Geography Hierarchy, Security, and Concurrent. On the left, a sidebar shows 'Request Submission' and 'View Requests'. The main content area is titled 'Schedule Request: Name' with a note that 'Name' is a required field. It includes fields for Program Name (set to 'POS Supplier Publish Job'), Request Name, and Language Settings. The Language Settings table shows 'American English' selected. Buttons for 'Manage Schedule', 'Cancel', 'Submit', and 'Next' are at the bottom.

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

3. Select the applicable parameters.

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

Tracking Publication History

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

To track publication history:

1. Search Supplier, click on Update Pen icon and Go to Publish Event History side navigation link.
2. Enter search criteria based on Publication Date From and Publication Date To and click on Go button or enter published by and click Go.



Generating Supplier Profile Report

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

To generate the supplier profile report using BI Publisher:

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

1. Search Supplier and click Update icon.
2. Click the Generate Report button.

ORACLE® Supplier Data Librarian

Suppliers Data Quality Import Administration

Profile Management Hierarchies Search D&B Tasks

Home Logout Preferences Diagnostics

Smart Search

Notify All Suppliers Register New Supplier Enable As Supplier Create Supplier Advanced Search

Oracle Smart Search

Name: office% Address:
E-Mail Address: Contact Name:
Status: Party Type: Organization
Go

Search Result

Select Supplier: Notify Publish Supplier Generate Report

Previous 1-10 Next 10

Select All | Select None

Select Supplier Name	Supplier Number	Parent Supplier Name	Taxpayer ID	Tax Registration Number	DUNS Number	Employee Number	Update
<input type="checkbox"/> Student Records Office	115						
<input type="checkbox"/> Training Office	41						
<input type="checkbox"/> Accounts Payable Office	40						
<input type="checkbox"/> Bursar's Office	39		546454	787656	000343433		
<input type="checkbox"/> Registrar's Office	125						

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